



Introduction to UT Market For Shoppers

Contents

- ROLES AND AUTHORIZATIONS 3**
- THE UT MARKET HOME PAGE 4**
- THE USER PROFILE..... 8**
- UT MARKET SEARCH 9**
- HOSTED SUPPLIERS 10**
- PUNCH-OUT SUPPLIERS 11**
- COMMUNICATING WITH SHOPPERS/BUYERS 12**
- FAVORITES 12**
- MULTIPLE SUPPLIERS PER CART 13**
- FINAL REVIEW 14**
- CREATING RECEIPTS 16**
- RESOURCES AND TRAINING 16**

Welcome to UT Market

UT Market, a subsystem of the Financial Resource Management System (FRMS), is an electronic procurement system that enables shoppers to browse for products across multiple suppliers, select items for purchase by placing them into virtual shopping carts, and assign the carts to authorized departmental buyers.

This manual explains the main features of the system and provides a general overview of how to use UT Market. Additional training materials and information are available online and are listed at the end of this handout.

To visit the UT Market home page, begin on the FRMS eCommerce tab: <https://utdirect.utexas.edu/apps/frms/utmarket/ecommerce/>

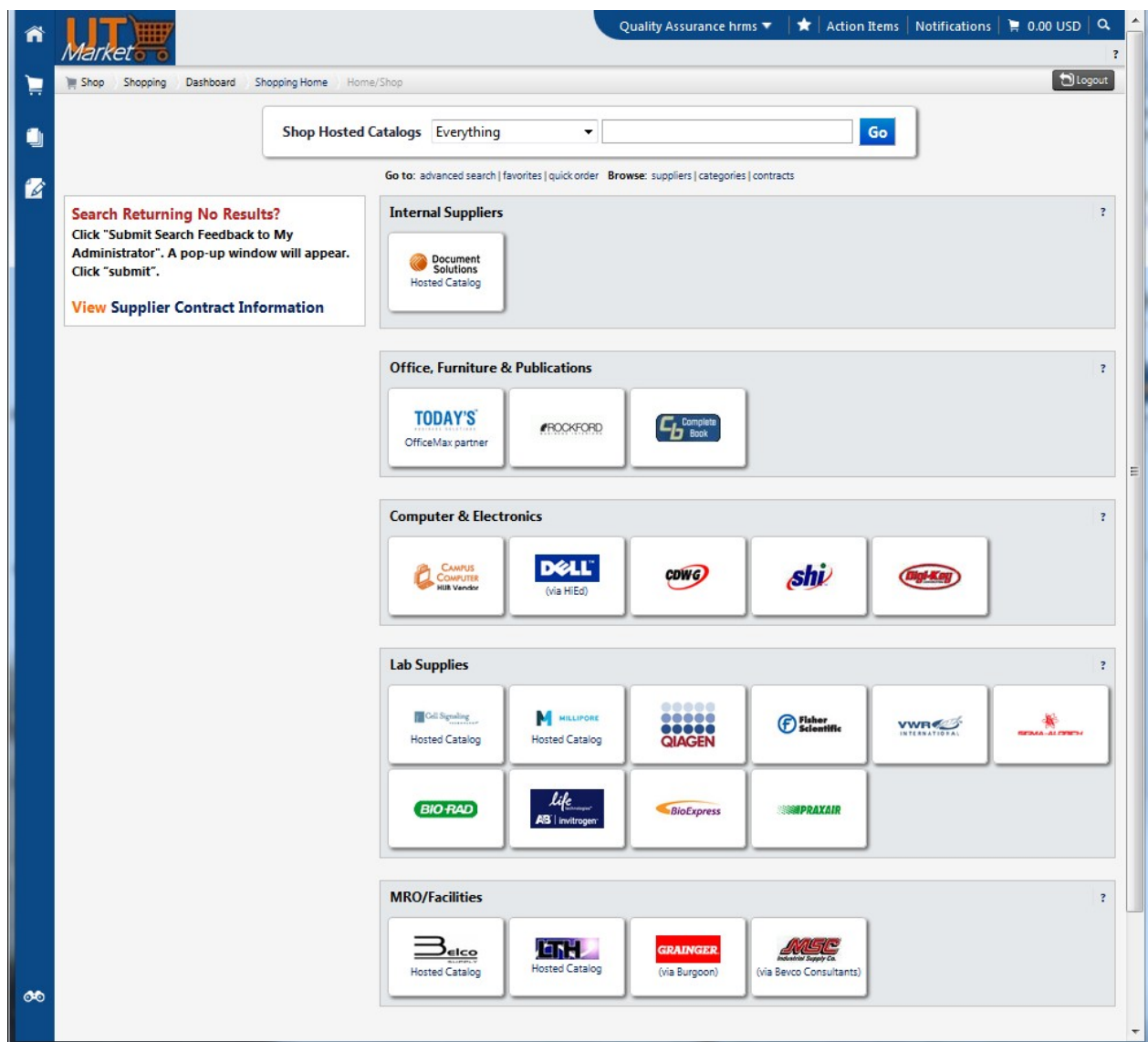
Roles and Authorizations

- Users may have one or more of these roles in UT Market:
 - **Shopper**
 - **Buyer**
 - **Receiver**
 - **Approver**
- All current employees have access to UT Market and can browse product catalogs, put items into electronic shopping carts, and assign shopping carts to other users. Users who have the **shopper** role are limited to these actions and must assign carts to departmental buyers in order for them to become requisitions.
- Users with the **buyer** role are authorized to check out carts in UT Market and turn them into electronic requisition documents in FRMS Procurement. To be given the buyer role, users must:
 - Attend DE 612: FRMS - Introduction to UT Market for Buyers; and
 - Be on a desk that has Update (U) or Super (S) command authorization for the PBU command in Electronic Office Management (EOM):
https://utdirect.utexas.edu/ew/eom_main.WBX.
- **Receivers** of UT Market orders are authorized for Update (U) or Super (S) command authorization for the PD2 command in EOM. Departmental receipts are entered in FRMS Procurement.

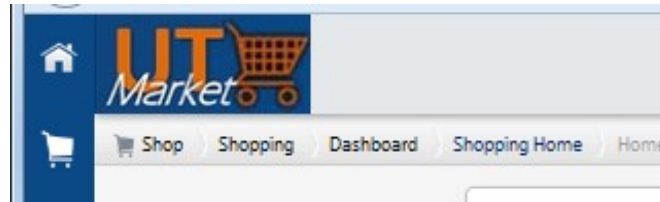
- **Approvers** are users to whom UT Market requisitions route before they are final approved. No special authorization are required to approve UT Market requisitions, however, as with other electronic documents, an approver must be on a desk in the document routing path.

To visit the UT Market home page, begin on the FRMS eCommerce tab: <https://utdirect.utexas.edu/apps/frms/utmarket/ecommerce/>

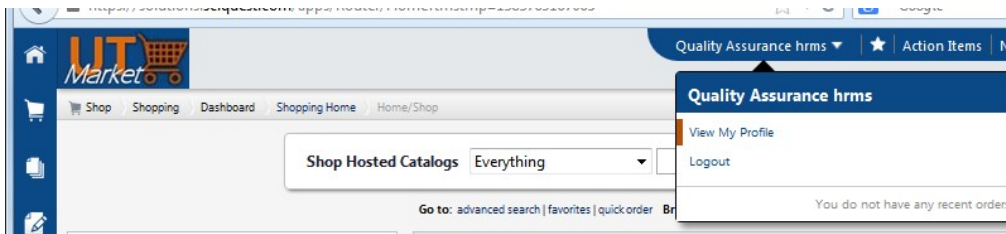
The UT Market Home Page



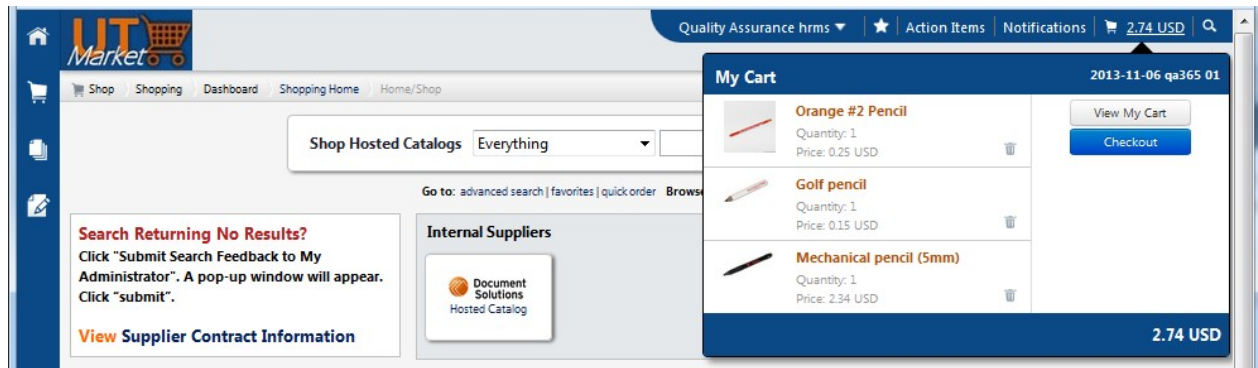
UT Market Home Page



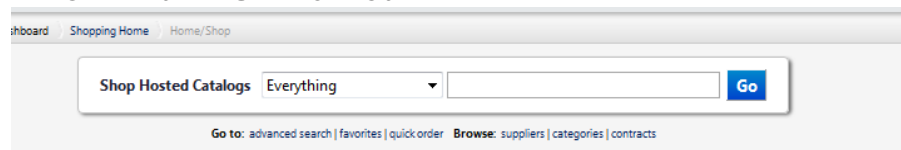
- The UT Market logo in the top left-hand corner of the page goes back to the home page from any page within UT Market.



- The **View My Profile** link allows users to modify personal settings, including how to set preferred (default) assignees.
- The **Logout** link goes back to the FRMS eCommerce page.





- The active cart details box in the top right-hand corner of the page lists details of the user's active shopping cart.
- The Quick Search feature is also available in the top right-hand corner of the page and allows variety of searches to be performed from within UT Market.



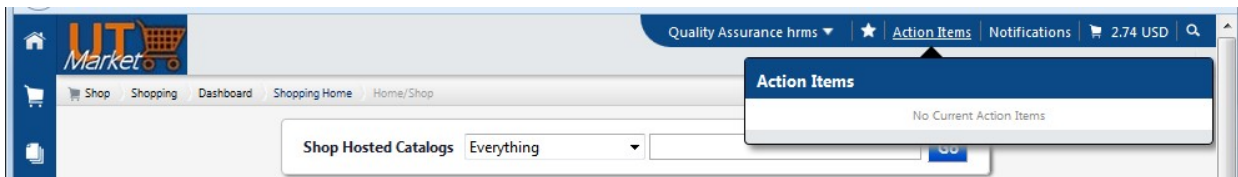
- The navigation icons     are located down the left side of the page and allow users to navigate to different areas of UT

Market (e.g., home, shop, orders and documents, and catalogs and contracts). **Note:** The icons vary depending on the UT Market role.

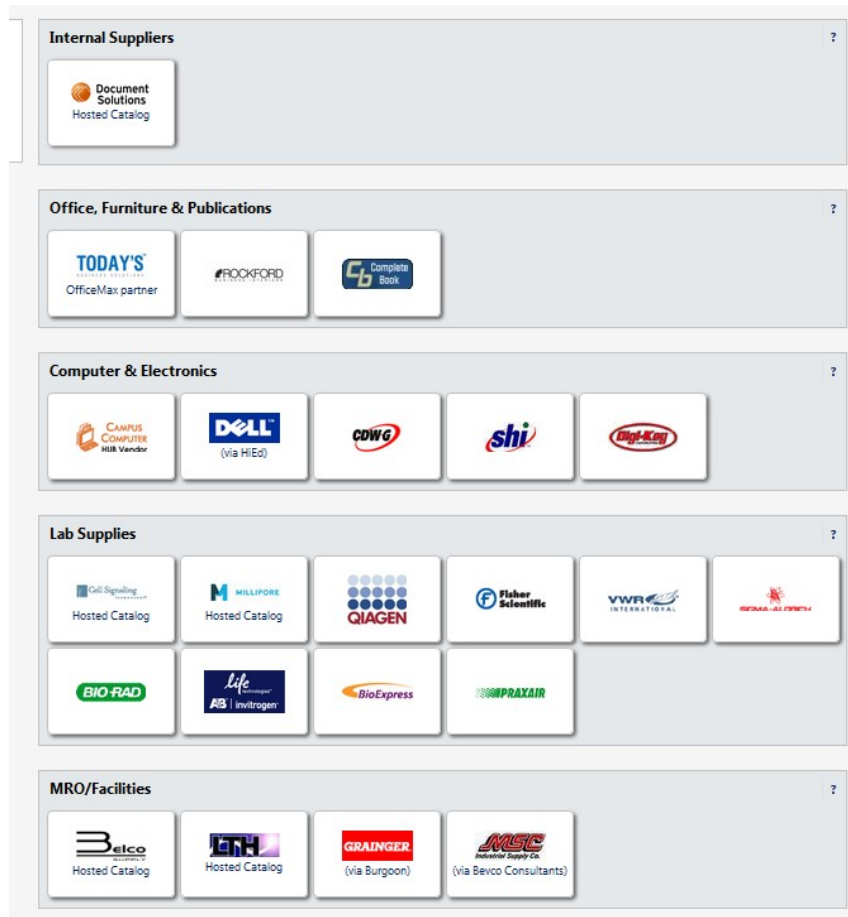
- From the **Shop**  icon, users can search by specific criteria (e.g., keyword, catalog number, or Cas number). To use the advanced search feature to narrow a search, click the  icon.



- A News and Announcements section is available on the left side of the screen.



- The Action Items link displays items requiring the user's attention, including active carts.



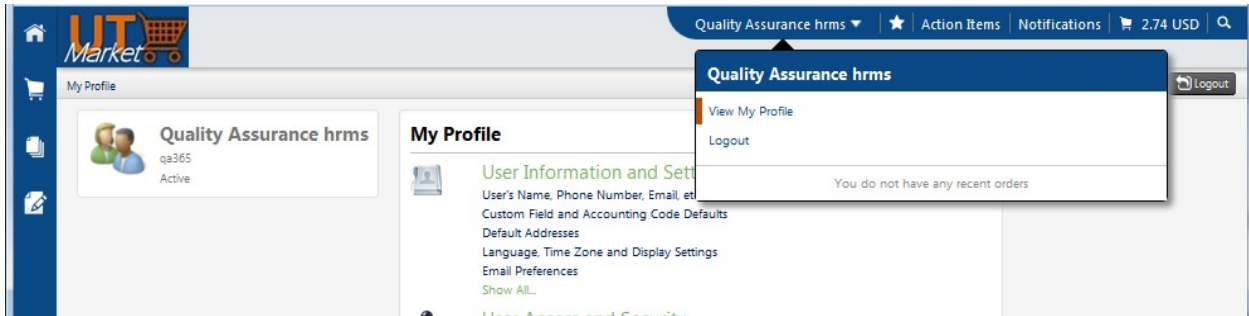
- UT Market's suppliers are displayed in the central portion of the screen.
- Suppliers will be discussed more fully in a following section.

In various sections of the home page and elsewhere, question mark icons are available:

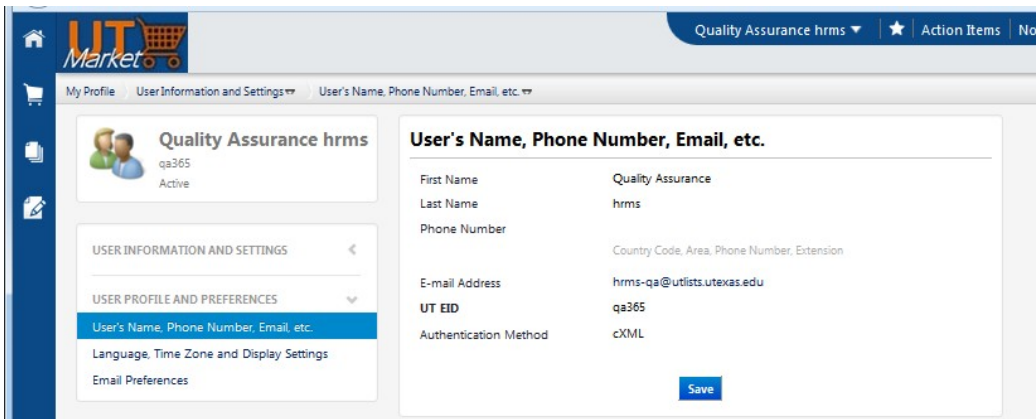


- Click the question mark icon to open a pop-up window with helpful information specific to that particular section of UT Market.

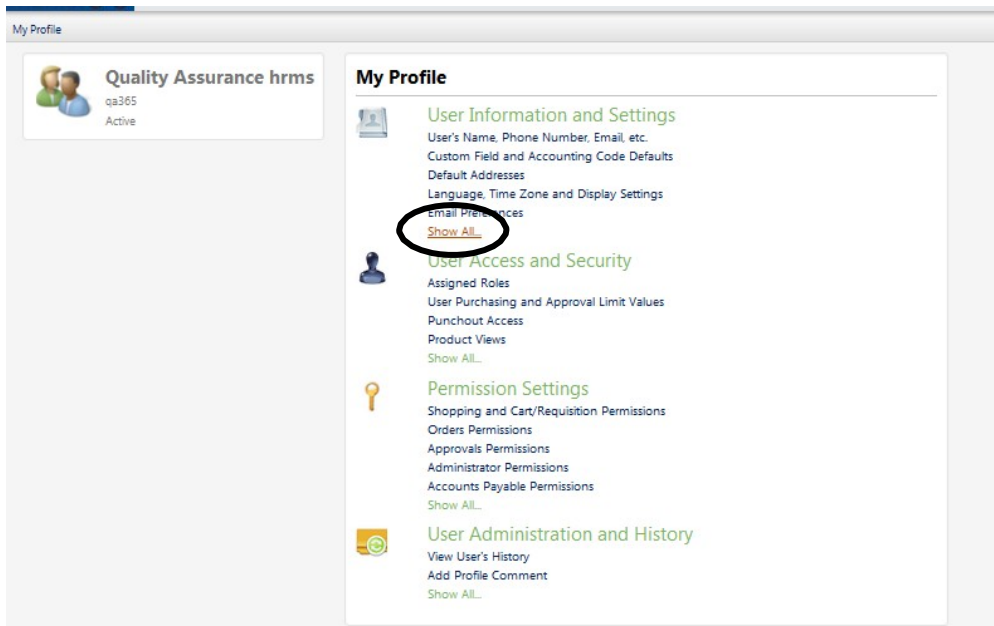
The User Profile



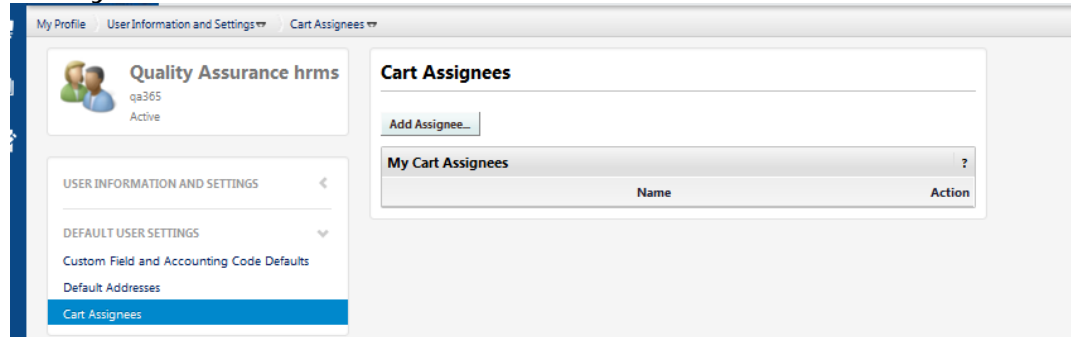
- The user profile can be accessed by clicking on the user's name.



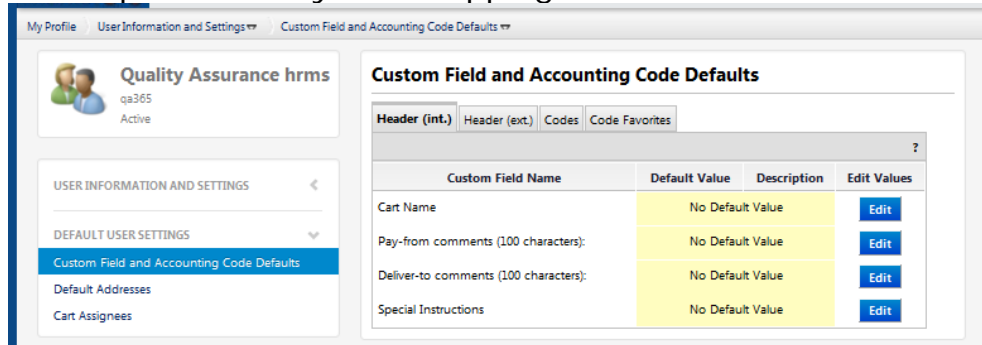
- Click **View My Profile** to display information such as the user's name, phone number, e-mail address, and UT EID.



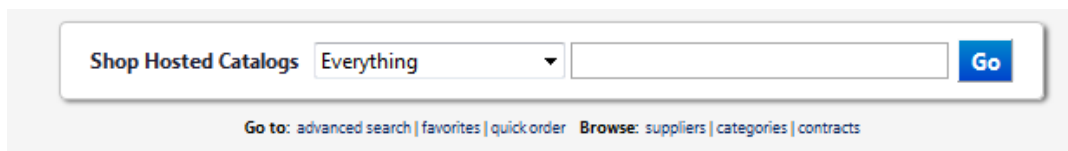
- The profile feature is also used to set a preferred or default assignee for created carts. The profile feature is useful when assigning carts to buyers.



- The profile feature is also used to set many other default values such as cart name or comments, reducing the amount of data entry required for any one shopping cart.



UT Market Search



- On the UT Market home page, the **Shop Hosted Catalogs** field allows users to search for any items available in UT Market by keyword and/or category.
- **Note:** Only hosted suppliers provide full catalogs within UT Market. Some punch-out suppliers do provide a subset of their catalogs in UT Market, but it is limited, so users may not always find specific items by using the **Shop Hosted Catalogs** field.
- The **categories** link below the **Shop Hosted Catalogs** field allows users to search by specific categories and subcategories.

Advanced Search [simple search...](#)

Find Results That Have:

All of These Words Supplier

Part Number (SKU) Manufacturer Name

Other Options

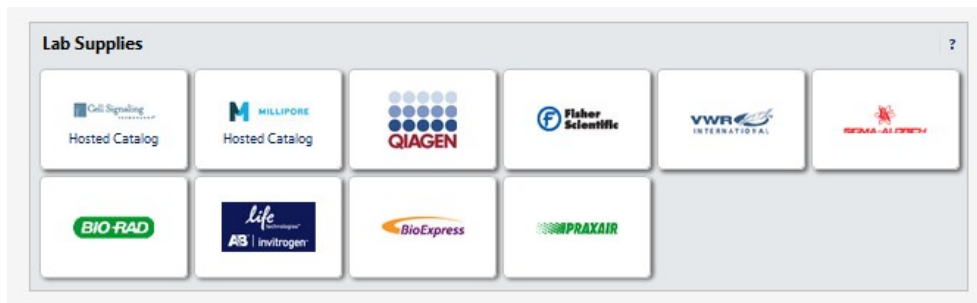
Exact Phrase Exclude Words

Any of These Words

Hide Advanced Search on search results

- Click **advanced search** to expand the box of available search criteria.
- Use the advanced search to narrow search results. The results will not include those items only available through punch-out suppliers.

Hosted Suppliers



- UT Market's hosted suppliers are labeled "Hosted Catalog" within each category of items.
- Hosted suppliers are those whose catalog of items resides entirely on the UT Market website and whose items can be shopped from within UT Market.
- To make shopping quick and easy, place hosted supplier items in a favorites folder and from there directly into a shopping cart, preventing the need to search for items repeatedly.
- Refer to the appendix for detailed information about each UT Market supplier and the services they provide.

Punch-out Suppliers



- To visit a punch-out supplier's website and catalog, click the appropriate link to leave UT Market and go to the supplier's website.
- Each supplier's website is unique: how the site is organized, how features are named, and how the shopper is identified.
- Each supplier's website has a **Cancel Punch-out** button in the top right-hand corner of the screen that goes back to UT Market. **Note:** Clicking this button will delete a shopping cart and return to UT Market.
- For users that purchase the same items from a supplier on a regular basis, consider using the favorites feature. This feature's name will vary depending on the supplier. For example, instead of **favorites**, some suppliers may use the term **Shopping List**.
- Add items to a cart directly from favorites or search the catalog and click **Add to Cart**.
- After shopping, check the cart out. Click **Check Out**. **Note:** Suppliers use different terminology for this action.
- Then follow the on-screen instructions to return a cart to UT Market.
- See the appendix for detailed information about each UT Market supplier and the services they provide.

Communicating with Shoppers/Buyers

The screenshot shows the 'Shopping Cart' interface. At the top left is a shopping cart icon and the text 'Shopping Cart'. On the top right are buttons for 'Back to FRMS' and 'Assign Cart'. Below these is a 'Save' button. A link says 'Need to review your request details? Click here.' The main form has several fields: 'Cart Name' with the value '2011-01-18 whitesd 01', 'Pay-from comments (100 characters):' with the value 'use professor's 26 account', and 'Deliver-to comments (100 characters):' with the value 'deliver to main office'. The 'Instructions for buyer:' field is empty and has an 'Add notes...' link next to it.

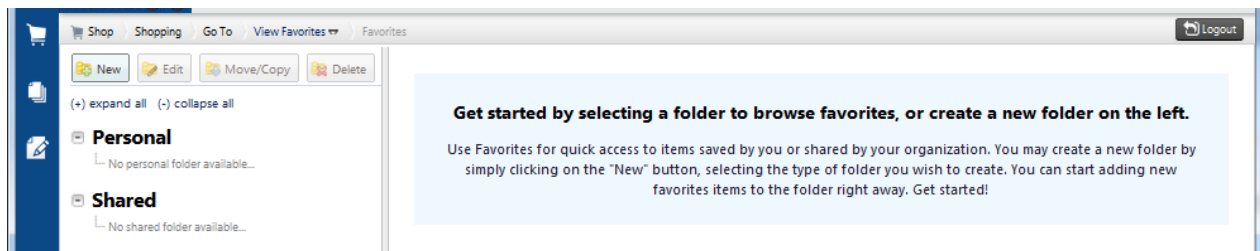
- After returning to UT Market, the **Shopping Cart** page displays a section for comments and notes.
- The **Cart Name** defaults to a system value. Type a different value or set a new default in the profile if preferred, however it is not required.
- How these fields are used and what default values are entered will vary by department.
- The **Pay-from comments** and **Deliver-to comments** fields are free-form and allow up to 100 characters.

This screenshot shows the 'Instructions for buyer:' label and the 'Add notes...' link. The text area below is empty.


This screenshot shows the 'Instructions for buyer:' label and a text box containing the note: 'If this exact item is not in stock, no need to place the order.' Below the text box are 'expand | clear' buttons.

- Click **Add notes** to open a text box to type notes to the buyer. Click **expand** to enlarge the box and add more notes or click **clear** to delete the contents.
- After shopping, click **Review and Check Out**, or click **Assign Cart** to assign the cart to a buyer.

Favorites





- Favorites can be accessed from the **Shop** icon  or the **favorites** link below the **Shop Hosted Catalogs** field.

- The Personal folder is used for items that are purchased from hosted suppliers. It can make shopping for frequently-purchased items easy and fast.
- **Note:** Favorites are only available for products found through the hosted catalogs. This applies to items that can be found using the search tool from the **Shop** icon .
- To add a favorite item to the shopping cart, type the quantity and click **Add to Cart**.


Multiple Suppliers Per Cart

Supplier / Line Item Details

Hide line details For selected line items [Add To Favorites](#) 


Belco Supply  [more info...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
PAPER TOWEL DISP. C-FOLD/MULTI, LOCK more info...	BOB262	EA	69.82	1 EA	69.82 USD
Manufacturer Name	BOBRICK				
Manufacturer Part Number	BOB262				
UNSPSC	47-13-17-01				
more info...					
Supplier subtotal					69.82 USD

Office Depot  [more info...](#)

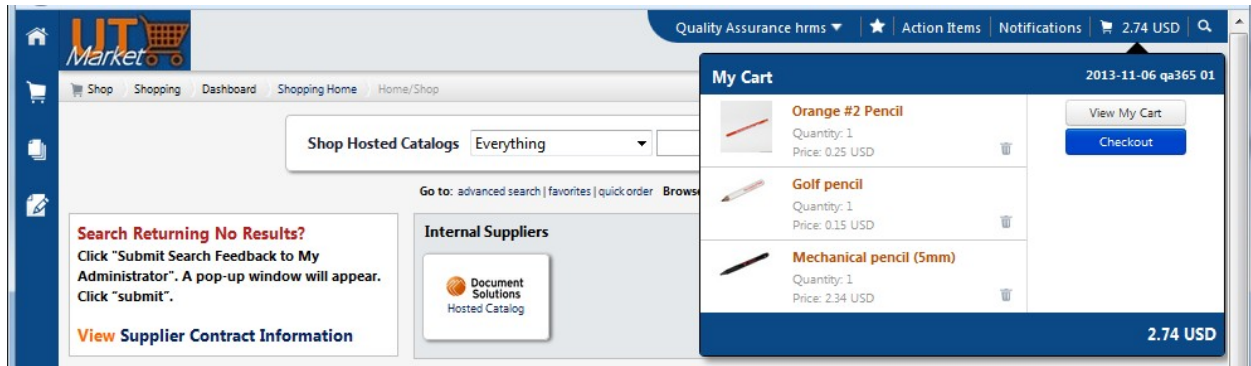
The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)
 Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 12/9/2010 2:39:01 PM

Line(s): 2

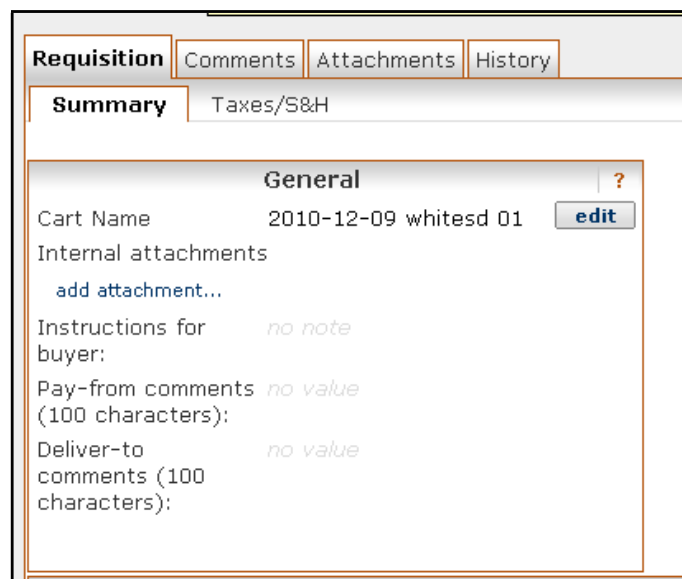
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Paper Mate(R) Sharpwriter Mechanical Pencils, 0.7 mm, Yellow Barrel, Pack Of 12  more info...	181529	DZ	3.00	1 DZ	3.00 USD
Manufacturer Part Number	30301				
Supplier Part Auxiliary ID	181529				
more info...					
Supplier subtotal					3.00 USD

- Items from more than one supplier can be placed in the same cart.
- Items from different suppliers will be grouped by supplier.
- Separate requisitions will be created for each supplier, but any number of items from any number of different suppliers can be added to one cart.

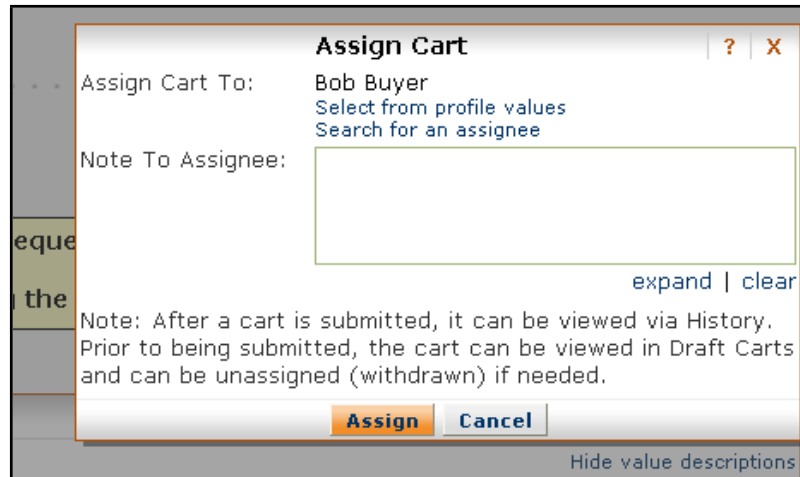
Final Review



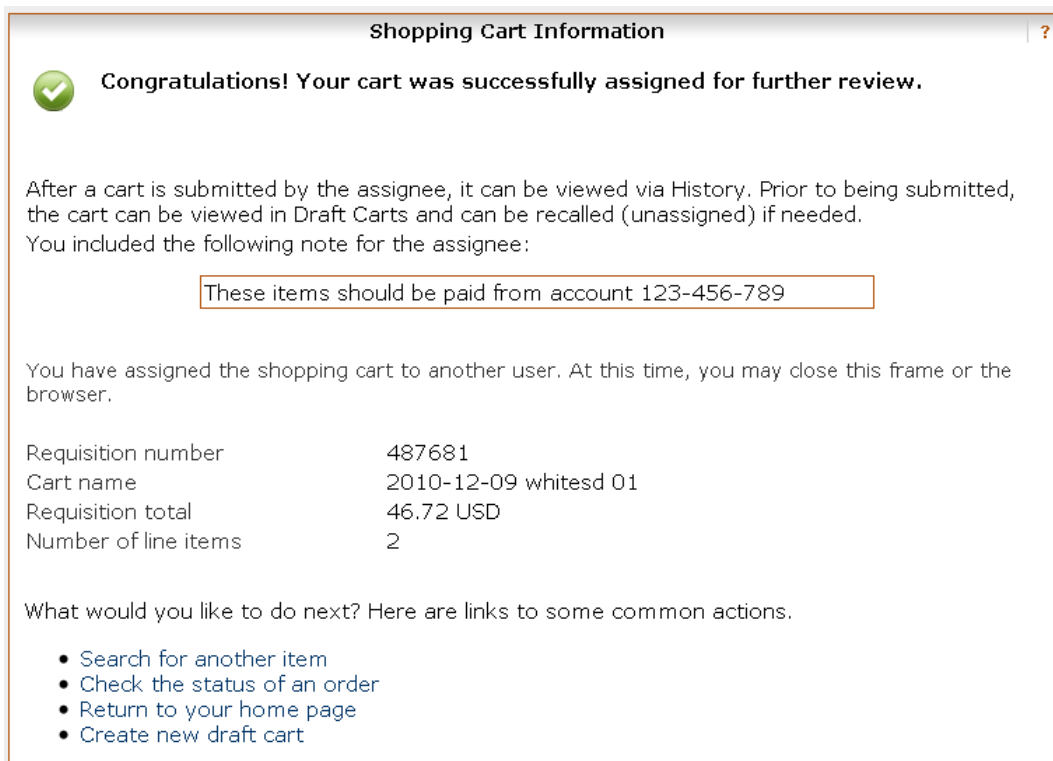
- Click **Checkout** from the Shopping Cart.
- In the Final Review Section, more information can be added about items in the cart.



- Click the **Comments** tab to add comments or view previously added comments.
- Click the **Attachments** tab to attach supporting documentation or other files.
- Click the **History** tab to view the history of additions and changes to this cart.
- From the **Requisition** tab and then **Summary** subtab, click the **edit** button to edit any of the previously entered instructions or comments, then click either **Save** or **Cancel**.



- Finally, click **Assign Cart**.
- In the Assign Cart window, the preferred assignee will be selected by default but can be changed by clicking **Select from profile values** or **Search for an assignee**.
- Notes to the assignee can also be added.
- Assign the cart to the department's designated or preferred buyer.
- Click **Assign** to assign the cart to the buyer.



- Once the cart is successfully assigned, the Congratulations screen appears displaying useful information about the cart including any notes.

Creating Receipts

- The receipt of a product is documented electronically in [FRMS](#).
- Departments are responsible for creating receipts delivered directly to their offices. Receipts for items delivered to Central Receiving are created by Central Receiving personnel.
- For desktop delivery, departments must enter the receipt within 72 hours of the delivery. If shipments for a purchase order are split over multiple days, an electronic receipt should be entered for each partial shipment.
- The individual (receiver) receiving the shipment must be different than the buyer.
- The receiver is responsible for signing and dating all invoices and/or packing slips. If the receiver verifies a shipment via email, a digital certificate must be attached to the email.
- Packing slips and other support documentation received as a hardcopy must be submitted to the Image Retrieval System to be imaged or retained in the department in accordance with all applicable retention codes.

Resources and Training

- Training Materials:
 - Training Videos:
<http://www.utexas.edu/business/erp/frms/videos.html>
 - UT Market – Introduction and Navigation
 - UT Market – The User Profile
 - UT Market – Favorites
 - UT Market – Search
 - UT Market – Receiving
 - Creating Requisitions in FRMS
 - Handouts, and other materials:
<http://www.utexas.edu/business/erp/frms/training.html>
- Answers to frequently asked questions are available in askUS:
<https://austin-utexas.custhelp.com>
- Contact the Office of the Controller Help Line at 512-471-8802