## Request Access to become a myFIUmarket Shopper

The ability to access the myFIUmarket to shop through available supplier catalogs and assign carts is available through **Access Role 002A**.

Shoppers may request this role within the <u>PantherSoft Financials</u> system by completing an Access Request Form following the instructions below.

This form is located through the NavBar with the following navigation:

## Main Menu > Access Request System > Access Request.

1. Click on Add a New Value tab.

< Employee Self Service	Access Request		<b>≙</b> ্ ~ ≡
Access Request		NavBar	0
		1.	Main Menu
Enter any information you have ano click Search. Leave helds blank for a list of all values.		Ø	Access Request System
Find an Existing Value Add a New Value		Recent Places	Access Request
▼ Search Criteria			5
			Approve Transactions
Search by: Request ID is begins with		My Favorites	
Limit the number of results to (up to 300): 300			
Search Advanced Search		Navigator	

2. Enter a Panther ID in the Empl ID field, then click Add.

Access R	equest		
<u>F</u> ind an I	Existing Value	Add a New Value	
Request ID	NEXT		
Empl ID	1234567	Q	
Add			

- 3. On the Access Request Form, complete the following:
  - a. Enter a business reason in the **Description** field.
  - b. Select Access Role 002A
  - **c.** Use the Lookup Glass to identify the shopper's **Location**. This is an alphanumeric code that represents the building and room number of the location.

When the form is complete, click **Submit.** 

ess Reque	est	
uort ID:	EVT	Poquest Status - Not Submitted
arintian: A		, and a second
	and the second	
	and Abarton a	
Access Group:	CM Community Ro	les
Select		
		1 of 9 🗸
Access Po	la Rola Description	Access Description
001	Inquiry and Reporting	Inquiry access to supplier, voucher, requisition, purchase order, general
	i i pring	ledger, asset, grants and budget data. This role can also run queries, nVisior reports and create budget transfers.
002	Requester / Super Receiver	This role gives the user the ability to create requisitions and create receipts
L	Requester / Opper NedelVEr	for any requisitions /purchase orders. If you are an expense manager approving transactions in PeopleSoft, you must select this role.
		This role aircos the user the ability to preate requisitions and preate requisit
002A	Requester / Casual Receiver	only for their own requisitions/purchase orders.
Enter /	Additional Information for this Ac	cess Role
15		1-1 of 1 🗸
С	Logation	
	Location	
	1 0023000410	٩
	1 0023000410	٩
007	0023000410 Budget Transfer Approver	Approve or post budget transfers entered by the Budget Managers for the Departments selected.
007	1         0023000410           Budget Transfer Approver           Student Assistance / Grants & External Award Mgmt	Approve or post budget transfers entered by the Budget Managers for the Departments selected. Process grants and external awards to students.
007	1     0023000410       Budget Transfer Approver       Student Assistance / Grants & External Award Mgmt       Payroll Detail Report / Payroll Transfer	Approve or post budget transfers entered by the Budget Managers for the Departments selected.         Process grants and external awards to students.         Run payroll detail report and initiate payroll expense transfers.
007 012 015 017	1       0023000410         Budget Transfer Approver         Student Assistance / Grants & External Award Mgmt         Payroll Detail Report / Payroll Transfer         Smart Billing Bill Creator	Approve or post budget transfers entered by the Budget Managers for the Departments selected.         Process grants and external awards to students.         Run payroll detail report and initiate payroll expense transfers.         Create and update bills for Departments selected.
007 012 015 017 018	1     0023000410       Budget Transfer Approver       Student Assistance / Grants & External Award Mgmt       Payroll Detail Report / Payroll Transfer       Smart Billing Bill Creator       Smart Billing Item Creator	Q         Approve or post budget transfers entered by the Budget Managers for the Departments selected.         Process grants and external awards to students.         Run payroll detail report and initiate payroll expense transfers.         Create and update bills for Departments selected.         Create and update billing items for Departments selected.
007 012 015 017 018 019	1       0023000410         Budget Transfer Approver         Student Assistance / Grants &         External Award Mgmt         Payroll Detail Report / Payroll         Transfer         Smart Billing Bill Creator         Smart Billing Item Creator         Smart Billing Fund 350	Q         Approve or post budget transfers entered by the Budget Managers for the Departments selected.         Process grants and external awards to students.         Run payroll detail report and initiate payroll expense transfers.         Create and update bills for Departments selected.         Create and update billing items for Departments selected.         Access for fund 350. Must have SM_DC_IBILLING_ITEM role prior to requesting this access.
007 012 015 017 018 019	1       0023000410         Budget Transfer Approver         Student Assistance / Grants & External Award Mgmt         Payroll Detail Report / Payroll Transfer         Smart Billing Bill Creator         Smart Billing Item Creator         Smart Billing Fund 350	Approve or post budget transfers entered by the Budget Managers for the Departments selected.         Process grants and external awards to students.         Run payroll detail report and initiate payroll expense transfers.         Create and update bills for Departments selected.         Create and update billing items for Departments selected.         Access for fund 350. Must have SM_DC_IBILLING_ITEM role prior to requesting this access.

**NOTE:** All Access Requests are routed to the employee's HR supervisor for approval. After approval it routes to Financial Systems and Support Services for implementation.

## Shopping with myFIUmarket Suppliers and Assigning Carts

The myFIUmarket provides direct access to pre-authorized supplier catalogs in a simple-to-use interface.

Shopping for items in these catalogs is a two-step process that involves:

- 1. Shopping for and adding items to a supplier's catalog cart.
- 2. Checking out supplier catalog carts to add items to a myFIUmarket cart.

Shoppers can then assign the myFIUmarket cart to a requester for further processing via a requisition.

The following are instructions on how to shop these catalogs and assign carts to a requester.

1. Click the **Procurement Center** tile on the **Employee Self Service** homepage within PantherSoft Financials.



2. Click the **Requisition** tile.



## 3. Click the <u>myFIUmarket</u> link.

< Procurement Center	Requisition
Create Requisition ⑦	
Welcome Panther, Roary	An A My Preferences      Requisition Settings     A United      Checkout     Checkout
Request Options	Search All Y Advanced Search Advanced Search
Enter search criteria or select from the menu on the right to begin creating your requisition.	Web Special Requests Browco Supplier Websites Create a non-catalog request

4. Select the desired **Catalog** that contains the items required.

< Procurement	nt Center	Requisition	A Q	↓ ~ ≡
n Home	myFIUma	Roary Panther 🔻 🖈 🗮 🔺 🕷	0.00 USD Search	(Alt+Q) Q ^
📜 Shop	) Shop $>$ Shopping $>$ Shopping H	Home 🔻 🖒 Configure		
Documents	Config	jure		
📝 Contracts	📜 Sh	nop	Ø ?	
L Reporting		Search         Everything         Product Keywords, Description, Supplier, Manufacturer         Q           Shortcuts         Browse         Advanced Search         Advanced Search           Favorites         Quick Order         Suppliers         Categories         Contracts		
	Organiz	ization Message C ? Showcases	S ?	
		Welcome to myFIUmarket!	?	
		IMPORTANT NOTICES		
	Total C	Contract Manager	?	
	if the Co departm attaching the Offici	Intracts for a value under 5/5,000 (total value including renewais) me entris solely responsible for all review and revision of the Contract and for g the appropriate Supplemental Addendum, if applicable, which can be found on as of the General Counsel's (OGC's) website.	(C) Fisher Scientific	
Menu Search (Alt+M)	Purchas \$75,000 being pu Contract (total unit	sing Sendress and OGC will NOT review any Contract with a value less than as to form and legality unless specifically required based on the type of goods urchased and/or sendress being obtained, or at the specific request of the fs authorized FIU signatory. If the Contract is for a value greater than \$75,000		

**NOTE:** The general search bar at the top of the screen can be used to shop for and search for specific items within ALL vendor catalogs, however it is recommended to navigate directly into a supplier's punchout catalog to select items.

5. Each myFIUmarket Catalog provides shoppers with 20 minutes to add items to the catalog's cart which can then be checked out to a myFIUmarket cart.

If this timer runs out, all catalog shopping data will be lost. For additional time to continue shopping, click the **Reset Session** button.

< Procurement Center		Requisition					â	Q	~	≡
myFIUmarket PunchOut			Your JAGGAER	Session will expi	e in: 19:55 et Session			Cano	cel Puncl	nOut
		,		Ac	count 90644710	Hi, NONE	E SENT	Logout		Ŷ
Office	Taking care of business	Order By Item   My Lists	8		0	:=	Ъ	0 Items		

**NOTE:** To leave the catalog at any time, click the **Cancel Punchout** button. All items in the supplier's catalog cart will be lost.

6. Use the search or navigational functions within each catalog to search for items. Please note that different vendors/catalogs may have different capabilities.

< Procurement Center						Requisi	tion					1	<b>`</b> (	4	~	≡
myFIUmarket PunchOut								Your JAC	GAER Sessi	on will expire in: Reset S	19:39 ession				Cancel Pur	nchOut
Office	Taking car	re of business rch by Keyw	vord or Item	n#		Orde	r By Item   My Lists	A My Account -	Orders -	Account 906447	10 HI, NOP		Logout 0 Items \$0			í
Office Supplies	Paper	Ink & Toner	Breakroom	Cleaning	Technology	Furniture	School Supplies	Print & Copy		MY	OFFICE DI	EPOT 🗸				
			-				Save B	Big seating		Proprietary	Hi, Nor Logout Account	ne Sent				
			5		- /		Shop Now			Cart 🙀	D		0			
										You do not h Items	Viewed	ntly Viewe	ed .			
										Order By	Item		•			
				•	) • • •											

7. After finding a specific item to buy, confirm or update quantity, then click Add To Cart button.



- 8. After adding something to a catalog cart shoppers can either:
  - a. Click the <u>Continue Shopping</u> link to continue adding more items.
  - b. Click the Shopping Cart button to review all items in the catalog cart.
  - c. Click the **Check Out** button to move items to a myFIUmarket cart.

myFIUmarket PunchOut					Your JAG	GAER Session will expire in: 1 Reset Sess	3:19 ion	Cancel PunchOut
Office	Taking care of business		Orc	ler By Item   My Lists	8	Account	Logout	^
DEPOI	Search by Keyword	or Item#		QQ	My Account +	Orders • Quick Order •	My Lists - Cart - \$7.96	
Office Supplies	Paper Ink & Toner Brea	kroom Cleaning T	Technology Furniture	School Supplies	Print & Copy	му о	FFICE DEPOT .	
	Home / Find Your Product						_	
	The item listed below	v was added to your	shopping cart.			Customers who		
	Description			Ya Pr	ur <u>Qty.</u> ice/unit	bought this item also bought		
	BIC® Round 1 Pack Of 60 Pe Item # 664011 • -Best value	tic Ballpoint Pens, Medium I ns ntered Item # 664011	Point, 1.0 mm, Translucent	Barrel, Black Ink, \$3.	<b>98</b> /box 2	THE SO		
	Continue Shopping			SHOPPING (	CHECK OUT	* * * * 122 reviews BIC® Round Stic® Ballpoint Pens, Medium Point, 1.0		

9. Once checked out to a myFIUmarket cart, **Assign Cart** to a requester by clicking the **Assign Cart** button.

< Home	Requis	ltion	<b>ନ</b> ସ୍	↓ ~ ≡
🖬 Home	myFIUmarket		🛨 🗭 🌲 🎘 7.96 USD 🔤	arch (Alt+Q) Q
📜 Shop	The Shop > My Cars and Olders > Open My Active Shopping Cart ♥ > Cart - 2416761 - Draft Cart			
Documents	Shopping Cart Shopper Maria Alvarez	🙂 Continue	Shopping 2 Item(s)	) for a total of 7.96 uso
Contracts	Name this cart: 2018-10-05 1075172 04		Proceed to Checkout	or Assign Cart
<b>II.</b> Reporting	Have you made changes? Update	🚔   🌝 Help Empty Cart 🛛 Create New Ca	et Perform an action on (0 items selec	cted)
	OFFICE DEPOT INC mon into.			
	The item(s) in this group was retrieved from the supplier's website. What does this mean?			
	You can no longer access this item(s) on the supplier's website. What does this mean? Line(s): 1			
	Product Description		Unit Price	Quantity Total
	BIC(R) Round Stic Ballpoint Pens, Medium Point, 1.0 mm, Translucent Barrel, Black Ink, Part Number 654011 Part Number 65401 Part Number 6540	Pack Of 60 Pens	2,98 BX Update	2 7.96 🗆
	NGP Code 62080		More Actions +	
			Supplie	er subtotal 7.96 USD

10. A pop-up window will appear. Click <u>Search for an Assignee</u> link to choose the requester the cart will be assigned to.

Assign Cart		×
Selected Assignee: Assign Cart To: Note To Assignee:	- Search for an assignee	
		Assign Close

11. Click the select link next to the requester's name.

New Search				
Name 🔺	User Name	Email 🗠	Phone	Action
Panther, Roary	111111	rpanther@fiu.edu		[select]

12. Click Assign to send the cart to the requester.

Assign Cart		×
Selected Assignee: Assign Cart To: Add to Profile Note To Assignee:	Roary Panther Search for an assignee ☑ Add to Profile	
	Assign Clo	se

13. The cart is now assigned to the requester.

After the cart is assigned, ONLY the requester can now modify the cart.

Cart Assig	ned
Next Steps You can view the c Search for ar Check the st Return to yo Create new c	art in your draft carts list and can unassign it, if needed, until submitted by the assignee. After a cart is submitted by the assignee, you can view it via the Document Search page nother item atus of an order <u>ur home page</u> jaft cart
Cart Summary	
Cart number	2416761

Requesters receive an email with a link to their assigned carts similar to what is below.



**NOTE:** If additional items need to be added to the assigned cart, shoppers may unassign the cart via the **Cart** icon on the left-hand side of the myFIUmarket screen and select **Shop** > **My Carts and Orders** > **View Carts**. Selecting the "Unassign" **Action** will revert the cart back to the shopper.