



**Portland State University (PSU)  
ePSU Marketplace Procedure and Guidelines**

1. **Purpose:** This document sets out the procedure and guidelines for the use of **ePSU Marketplace** by authorized PSU personnel. Following the procedure and guidelines outlined below will enable users to have a successful experience using **ePSU Marketplace** as well as know where to find assistance if needed.

2. **Definitions:**

**Access Request and Agreement Form:** The electronic form submitted to Contracting and Procurement Services (CAPS) by which a Budget Authority approves a PSU employee's access to **ePSU Marketplace** as an Authorized User. In the form, the Budget Authority specifies and authorizes the Expenditure Authority to be granted to the Authorized User. The form must indicate the preferred Ship to Address for the user's purchases. The Authorized User and their Budget Authority must sign the form if the purpose is to authorize a new user or reactive a user. Forms that are submitted to modify a user's personal information or to deactivate a user account do NOT require the signature of a Budget Authority. The completed Access Request and Agreement Form must be submitted to CAPS at [eprocare@pdx.edu](mailto:eprocare@pdx.edu). The form can be found at <https://www.pdx.edu/purchasing-contracting/epsu-marketplace>.

**Authorized User:** An approved individual granted access and authorization by the appropriate Budget Authority and CAPS to use **ePSU Marketplace**. Authorized Users are granted Expenditure Authority within ePSU Marketplace based on the authority designated on the Access Request and Agreement Form. Authorized Users must be employed by PSU and use their **ePSU Marketplace** account for business purposes only. Employees who are also authorized pCard Users may be granted the General User level of Expenditure Authority (as defined below). All other users should be granted the Transfer Cart User level of Expenditure Authority (as defined below). Graduate Assistants and Student Employees shall only be granted the Transfer Cart User level of Expenditure Authority. Temporary employees and contractors are prohibited from being Authorized Users.

**Bill to Address:** Portland State University, 1600 SW 4th Avenue, Suite 260, Portland, Oregon 97201

**Budget Authority:** The individual who is responsible for the budget of a department, college, or school at PSU. The Budget Authority (1) determines which PSU employees shall be Authorized Users and the expenditure authority granted to each of their Authorized Users, and (2) reviews **ePSU Marketplace** purchases as a part of their Monthly Review of pCard charges.

**CAPS:** Contracting and Procurement Services.

**Effective Date:** The Effective Date of this document is January 1, 2015.

**ePSU Marketplace:** PSU's electronic procurement system. As of Effective Date, **ePSU Marketplace** uses an ESM Solutions electronic procurement system. If PSU replaces that system with a different electronic procurement system, this document shall continue to apply to the use of such a system until this document is amended or replaced by a new procedure and guidelines document.

**Expenditure Authority:** The dollar value an Authorized User is approved to spend and the associated Budget Authority approval required for such spending. There are two levels of expenditure authority within the ePSU Marketplace that may be granted.

**General User.** Expenditure Authorization as provided in PSU pCard policy. Users granted this authority must be ***separately authorized to use the PSU pCard*** (as defined below). Expenditures limits are based on the Single Purchase Limit and Monthly Credit Limit of the pCard being used to complete/process the ePSU Marketplace purchase. The pCard Program Administrator establishes these pCard limits and generally sets the Single Purchase Limit at \$5000. If at any time, these limits need to be adjusted, a pCard Account Maintenance form needs to be completed, signed by the Budget Authority, and submitted to the pCard Team for approval and processing. The pCard Account Maintenance form can be found at <https://pdx.edu/financial-services/procurement-cards#resources>.

**Transfer Cart User. All expenditures require approval.** Graduate assistants and student employees shall only be approved for this level of Expenditure Authority. Users granted this expenditure authority must have their purchases approved within **ePSU Marketplace**, regardless of dollar value. These users must transfer their cart within **ePSU Marketplace** to the approver that was designated on their **Access Request and Agreement Form**. The **ePSU Marketplace** user providing approval must be given access and granted expenditure authority as a General User (as defined above). If a Transfer Cart User needs the ability to transfer their cart to any authorized pCard user with authorization to approve expenditures within ePSU Marketplace, please contact [eprocure@pdx.edu](mailto:eprocure@pdx.edu).

**Grant and Sponsored Project Funded Purchase Authority.** Authorized Users purchasing goods with Grant or Sponsored Project funding must obtain all applicable Sponsored Projects Administration and/or Departmental Research Administrator approvals.

**Inspection and Acceptance:** Users should inspect all products upon receipt and immediately notify the Supplier of any damage or other discrepancies in the order which prevent acceptance of the products.

**pCard:** PSU procurement cards are issued to departments within the University to provide authorized personnel with a cost-effective and convenient method of procuring small dollar purchases of regularly consumed supplies and materials, generally less than \$5,000 in value. To complete/approve purchases within **ePSU Marketplace**, the Authorized User must be a General User **within ePSU Marketplace** and must be separately authorized to use a PSU pCard. **pCard information must not be saved within the ePSU Marketplace.** The use of a pCard is at all times subject to the PSU pCard policy. The PSU pCard policy can be found at <https://portlandstate.atlassian.net/wiki/spaces/~655483049/pages/992542831/404+Procurement+Card>.

**Ship to Address:** Multiple addresses to which products can be shipped are established within **ePSU Marketplace**. A Ship to Address must be PSU affiliated and not an individual user's residential addresses. ***The Authorized User should include their preferred Ship to Address on the Access Request and Agreement form.*** At the time the Authorized User is granted access to **ePSU Marketplace**, their preferred Ship to Address will be associated with their account. If a user needs to add or update a Ship to Address, they should contact [eprocure@pdx.edu](mailto:eprocure@pdx.edu).

**Suppliers:** Entities who have been approved by CAPS for inclusion in **ePSU Marketplace**. PunchOut Catalogs for all approved Suppliers are available in **ePSU Marketplace**. Authorized Users are granted access to all available Supplier PunchOut Catalogs. Suppliers may be added or removed by CAPS at its discretion based on the needs of the University. When possible, advance notice will be given to Authorized Users anytime a Supplier is scheduled for removal.

- 3. Program Description:** **ePSU Marketplace** is an intuitive online ordering application that aims to give users an experience very similar to shopping online with other retailers. Users choose from a selection of searchable Supplier PunchOut catalogs for supplies and materials to be purchased. Selections are held in a shopping cart until the user is ready to checkout.

At each point in the process, **ePSU Marketplace** tracks and manages the next step based on the unique circumstances of that order. When a user has finished shopping, they go to their shopping cart, check their order, fill in the pCard information and submit their order(s). Purchase orders from the Banner system are not used in **ePSU Marketplace**. Users will receive an order summary from **ePSU Marketplace** and an order confirmation from the Supplier(s). Both documents should be retained as required documentation. The products purchased will be shipped to the Authorized User's designated Ship to Address.

- 4. Account Authorization:** In order to access and order through **ePSU Marketplace**, users must be authorized by their Budget Authority and set up in the system by a system administrator in CAPS. A completed Access Request and Agreement Form must be submitted to CAPS at [eprocare@pdx.edu](mailto:eprocare@pdx.edu) to gain access and authorization to ePSU Marketplace.

For initial account authorization, the form must be signed by both the Budget Authority and the user. By signing the Access Request and Agreement form, the user acknowledges and agrees to comply with the terms of this Procedure and Guidelines document and the terms of the pCard policy.

The Access Request and Agreement Form may also be used to request (a) reactivation of a prior Authorized User Account; (b) modification to a current Authorized User Account; and (c) termination of an existing Authorized User Account. To reactivate an account, both the Budget Authority and the user must sign the form. No Budget Authority signature is required to modify or terminate the account. In instances where there is an emergency need to terminate an Authorized User Account, an email may be submitted to CAPS at [eprocare@pdx.edu](mailto:eprocare@pdx.edu) in lieu of the Access Request and Agreement Form.

- 5. Training:** Training resources are available on the ePSU Marketplace website. Links to resources are included in the email that notifies a user that they have been authorized to use the system. In addition, CAPS may offer periodic group training sessions; contact CAPS at [eprocare@pdx.edu](mailto:eprocare@pdx.edu) for information regarding these training sessions.

- 6. Using the System:**

**Supported Browsers:** Microsoft, Chrome, Firefox, and Safari are all supported browsers for the system.

**Passwords:** **ePSU Marketplace** utilizes the Portland State University Single Sign-On (SSO) system. The SSO system enables users to use their ODIN username and password to access multiple University resources. Authorized Users are responsible for maintaining the security of their passwords. Authorized Users **must not share passwords** with any other person, including other Authorized Users.

7. **Review of Expenditures:** Each Budget Authority is responsible for (1) ensuring that only Authorized Users use **ePSU Marketplace** and (2) for reviewing **ePSU Marketplace** purchases as a part of their Monthly Review of pCard charges.
8. **Documentation:** Authorized Users are responsible for maintaining documentation to support all purchases made through **ePSU Marketplace**. The required documentation for purchases through **ePSU Marketplace** is the same as for other online purchases, as outlined in the pCard policy. Authorized Users should print the **ePSU Marketplace** order summary and the Supplier's order confirmation as documentation. Depending on the products purchased, additional documentation may be required. The business purpose of each purchase must also be documented.
9. **Misuse of ePSU Marketplace Account:** PSU reserves the right to revoke a user's **ePSU Marketplace** privileges for misuse of an **ePSU Marketplace** account. Individuals determined to have made unauthorized purchases using **ePSU Marketplace** may be held liable to the University for the total amount of their unauthorized purchases. Misuse of an **ePSU Marketplace** account may result in disciplinary action up to and including termination of employment.
10. **Contact CAPS:** Email questions to [eprocare@pdx.edu](mailto:eprocare@pdx.edu) or call CAPS directly at 5-3441.