

**PSFIN v9.2 ePro/GeorgiaFIRST Marketplace
End-User Train-the-Trainer
Participant Guide**

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GeorgiaFIRST Financials

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Introduction

This PSFIN ePro/GeorgiaFIRST Marketplace End-User Train-the-Trainer Participant Guide is designed to help you learn how to best train your institutional end-users for using the ePro module and the GeorgiaFIRST Marketplace after the upgrade to PSFIN v9.2.

Before this Train-the-Trainer training, all participants should view the PSFIN v9Upgrade ePro video that can be accessed [here](#). The purpose of the video is to prepare you on the basics of the ePro module and the GeorgiaFIRST Marketplace, as well as highlight some of those aspects of the module that are changing. This video is only 17 minutes long, but it will prepare you for this training.

This PSFIN ePro End-User Train-the-Trainer class consists of five lessons.

- Lesson 1: ePro and the GeorgiaFIRST Marketplace Overview
- Lesson 2: Training Shoppers to Use the GeorgiaFIRST Marketplace
- Lesson 3: Training Requesters
- Lesson 4: Workflow and ePro Approvers
- Lesson 5: Helpful Hints for Training End-Users

There will also be plenty of time at the conclusion of the training for questions and answers.

Lesson 1: ePro and the GeorgiaFIRST Marketplace Overview

This lesson provides a thorough overview of the ePro module and the GeorgiaFIRST Marketplace.

What are eProcurement and the GeorgiaFIRST Marketplace?

eProcurement (ePro) is a module in PeopleSoft Financials that has a primary function of creating electronic requisitions and routing them for approval. In this PSFIN module, ePro is used to create requisitions for goods and services. A requisition is simply an official request to purchase goods and services.

Previously, you may have used paper requisitions, or some other form, to request an item to be purchased. That hardcopy requisition then had to be routed for approval signatures, and then sent to the Purchasing Office. The Purchasing Office then rekeyed the information into the system to create a Purchase Order to send to the vendor.

With ePro, much of this process is completely automated. A requisition is created within ePro and then electronically routed for approval. The approval chain is dependent on the Chartstring charged and item type, among other things. Finally, after the last electronic approval is made, the requisition can be copied into, or sourced into an official Purchase Order that is dispatched to a vendor.

The GeorgiaFIRST Marketplace takes the use of ePro to another level. The GeorgiaFIRST Marketplace is an online shopping site that is accessed from PeopleSoft Financials. Through this online shopping site, users can shop online for contract items from a variety of state and institution approved suppliers. Users can select items by placing them in an online shopping cart. They assign these shopping carts to a designated requester when ready. The requester then turns their shopping cart into an ePro requisition.

Benefits of ePro and the GeorgiaFIRST Marketplace

With this new system of online shopping and electronic requisitioning, you will see some immediate benefits, including:

- Reduction in paper forms routing through different offices
- Online browsing and shopping for items
- Comparison shopping
- You only need one login to shop from multiple vendors
- You can request goods from multiple vendors through one shopping cart
- All items in the GeorgiaFIRST Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as “favorites” in the GeorgiaFIRST Marketplace

Types of Roles Involved

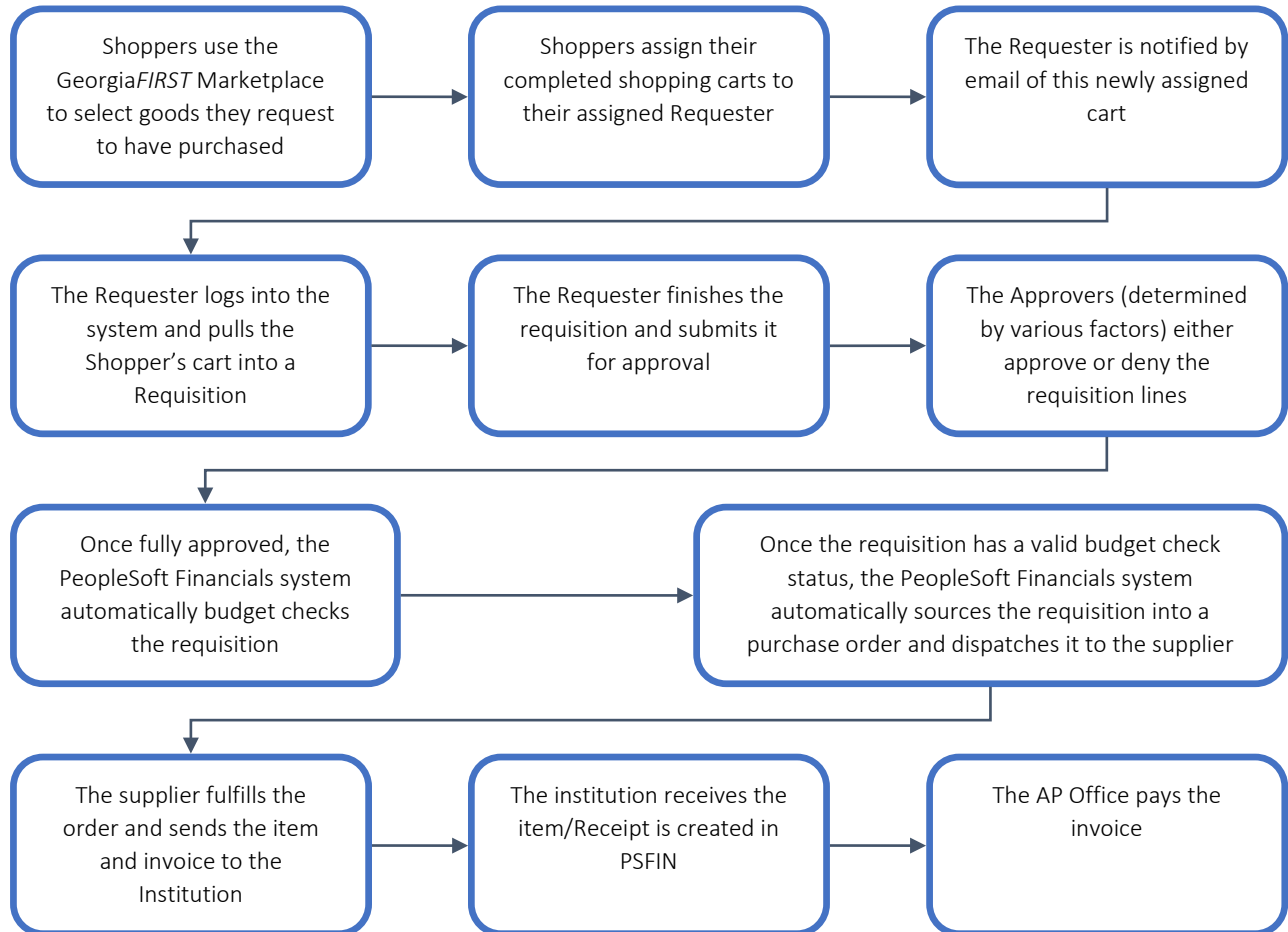
In order for the ePro and GeorgiaFIRST Marketplace functionality to work properly, users are set up with specific roles and responsibilities. They include:

- Shoppers: These users are the ones who select items in the GeorgiaFIRST Marketplace and place them into shopping carts to be assigned to their Requester
- Requesters: These users take the shopping carts created by Shoppers and turn them into ePro Requisitions. Requesters can also build their own shopping carts, just like Shoppers.
- Approvers: These users are set up to approve ePro Requisitions.
- Buyers: These users are responsible for ensuring approved requisitions are sourced into a Purchase Order and dispatched to the supplier.
- AP Personnel: The AP Office processes the resulting invoice from the supplier.
- ePro Administrator: This user monitors the approval workflow, to make sure requisitions are worked in a timely fashion
- Local Security Administrator: This user is responsible for setting up all users in their appropriate roles

The end-users you will need to train may include Shoppers, Requesters, and ePro Approvers.

Process Flow

Now that you know all of the roles involved, below is the process flow beginning with Shoppers and ending with the Accounts Payable office.



Types of Requisitions

There are two types of requisitions: Marketplace Requisitions and Special Request Requisitions

- Marketplace Requisitions: ePro Requisitions created from contract/catalog items selected from the GeorgiaFIRST Marketplace
- Special Request Requisitions: ePro Requisitions created from non-contract/catalog items; item information is manually inputted into the Requisition

Types of GeorgiaFIRST Marketplace Catalogs

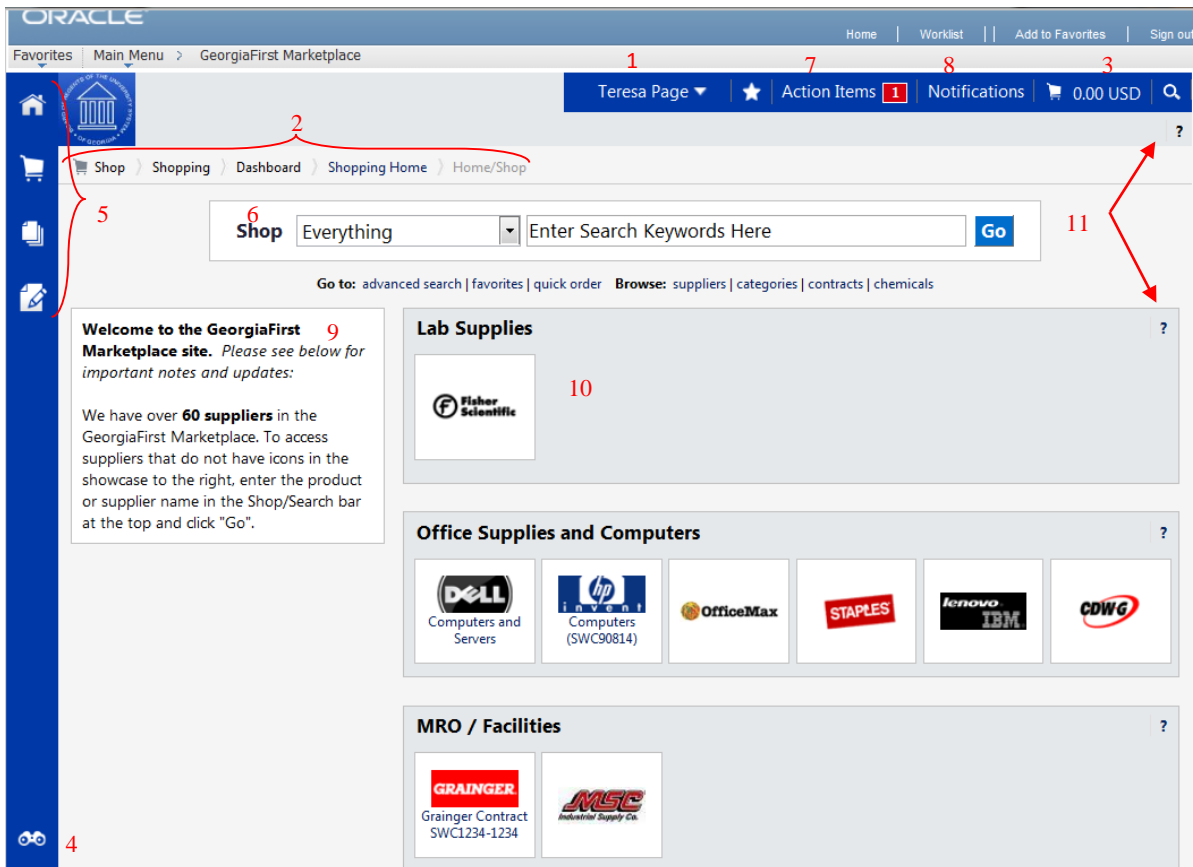
Within the GeorgiaFIRST Marketplace are different types of catalogs. You will find Hosted Catalogs, Punch-Out Catalogs, and Self-Managed Catalogs.

- Hosted Catalogs:
 - Online version of a vendor's printed catalog
- Punch-Out Catalogs:
 - Integrated external links to a vendor's web-based catalog dedicated to contract items/pricing
 - Examples include Dell, Lenovo, Staples, etc.
 - When accessing a Punch-Out catalog, you are actually entering the vendor's own website created just for USG using State of Georgia contract pricing
- Self-Managed Catalogs:
 - Similar to Hosted catalogs, except items and pricing are managed by institutions, USO – ITS, and the System Administrator
 - Not managed by SciQuest

GeorgiaFIRST Marketplace Layout

How an end-user accesses the GeorgiaFIRST Marketplace depends on their role. ePro Shoppers access the marketplace through the Self-Service link in the menu. ePro Requesters access the marketplace through the ePro module. This is covered in more depth later in this training.

Once in the GeorgiaFIRST Marketplace, the layout is the same for all end-users.



1. **User Information:** Your user name and a link to your user profile
2. **Navigation Breadcrumbs and Screen Title:** Indicates the title of the current page
3. **Cart Summary:** Displays a summary of your shopping cart. Included is the cart name, the number of items in the cart, and the total cart amount. You can click on this shortcut to go directly to the cart page to review, updated, and process your shopping cart.
4. **Quick Search:** Allows for a variety of searches to be executed anywhere in the marketplace
5. **Navigation Icons:** By clicking on one of these primary navigation icons the screen refreshes to display any potential sub-links for the topics of functions covered in that particular part of the Marketplace. The links that you see are dependent on your permissions.
 - a. Home: Returns you to the Home page from any other part of the application

- b. Shopping Cart: Used for shopping and provides quick access to other parts of the application. You can also view and modify the current shopping cart, create new carts, delete existing carts, and prepare the active cart for processing.
 - c. Orders & Documents: Allows you to search for documents you have created
 - d. Catalogs and Contracts: Contains a repository of various documents within the application
6. **Shop at the Top/Shop Quick Search:** Access simple and advanced search from this feature; primary area to perform item searches
 7. **Action Items:** Items that require some sort of action by the logged in user; Number of action items will be displayed in red to the right of the Action Item menu
 8. **Notifications:** Certain action items will trigger Notification messages informing the user that action is needed. Notifications are clickable and take you to the appropriate area of the application so that the action can be performed. The number of notifications will be displayed in red to the right of the Notifications menu.
 9. **Organization Message:** Tool that System Administrators use to communicate with the GeorgiaFIRST Marketplace community; Message box is available to all users and is a common way to communicate important upcoming dates, information about new suppliers, links to training and more.
 10. **Punch-Out:** A “punch-out” supplier is a site maintained by the actual suppliers. Catalogs in punch-out sites can still be customized for an individual institution. Punch-out suppliers can be accessed from this area of the home page.
 11. **Online Help:** Access online help by clicking on the question mark anywhere in the application or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when you mouse over the text. Much of the text in the application can be selected and a secondary Help window displays.

Contract Types

There are six types of contracts in the GeorgiaFIRST Marketplace. The contract type is automatically mapped to a Purchase Order Type in PeopleSoft Financials.

| Contract Type | Custom Catalog Attribute | Order of Precedence | Purchase Order Type | Contract Number |
|------------------------------------|----------------------------|---------------------|---------------------|--------------------------|
| Intergovernmental Agreement | Intergovernmental | 0 | IGA | Goes to the PO Line Item |
| Mandatory State Contract | Mandatory State Contract | 1 | SWCM | Goes to the PO Line Item |
| Agency Contract | Agency Contract | 2 | AC | Goes to the PO Line Item |
| Statutory Mandatory | Statutory Mandatory | 3 | MAN | Goes to the PO Line Item |
| Convenience State Contract | Convenience State Contract | 4a | SWCC | Goes to the PO Line Item |
| Statutory Preferred | Statutory Preferred | 4b | PRF | Goes to the PO Line Item |

If a single Purchase Order includes two contract types, the Purchase Order type is sent to “MUL” for multiple.

Lesson 2: Training Shoppers to Use the GeorgiaFIRST Marketplace

As mentioned earlier, Shoppers are those end-users who search and shop for items in the GeorgiaFIRST Marketplace. In this lesson, we are concentrating on how shoppers access the marketplace, how they search for and select items they wish to have purchased, and how they assign carts to Requesters.

Accessing the GeorgiaFIRST Marketplace as a Shopper

Shoppers access the GeorgiaFIRST Marketplace primarily through PSFIN Self-Service. If a Shopper has additional PeopleSoft Financials roles, they may access the marketplace through PSFIN Core. Either way, Shoppers access the GeorgiaFIRST Marketplace through the menu link. Shoppers are the only end-users who access the GeorgiaFIRST Marketplace this way.

Remind your Shoppers of the following:

- They should save their PSFIN URL as a favorite or desktop shortcut
- Pop-ups should be disabled
- If a Shopper tries to log in five times or more unsuccessfully, the system locks them out
- User IDs and passwords are case sensitive
- System logs a user out if there has been 60 minutes of inactivity

Leaving the GeorgiaFIRST Marketplace

Instruct your Shoppers that when they are finished working in the GeorgiaFIRST Marketplace and need to go somewhere else in PeopleSoft, they can simply select the appropriate link/menu item. When they are ready to leave the marketplace and close PeopleSoft, Shoppers should select the Sign Out link in the top right corner.

Shopper's User Profile in the GeorgiaFIRST Marketplace

The User Profile in the GeorgiaFIRST Marketplace includes identification, purchasing abilities, and site accessibility. Almost all items in the profile are read-only. For those items that are editable, you want to be very careful before making any changes to your user profile. Changing settings may have a direct impact on receiving notifications, access to certain catalogs, and access to view contracts.

When Shoppers enters the GeorgiaFIRST Marketplace for the first time, the color scheme displayed may not match your institution's logo. Shoppers can change this setting if they wish.

Specifying Default Requester

Shoppers should set up their default requesters. This is necessary because when a Shopper has selected items they wish to have purchased, they must assign their cart to a Requester. Institutions should inform Shoppers who their default requester is, as well as a back-up requester. The Shopper should use the back-up requester whenever the default requester is unavailable.

Before a Shopper can specify a default requester or assign a requisition to any requester, that requester must have logged into PeopleSoft and entered the GeorgiaFIRST Marketplace at least once. The first time a Requester logs into PeopleSoft and enters the Marketplace, all of their critical information is passed over to the Marketplace, which allows Shoppers to select them as a Requester.

Institutions have the ability to set up default requesters for Shoppers. If they have not, Shoppers can do this on their own through their User Profile.

[Accessing the GeorgiaFIRST Marketplace as a Shopper](#)

1. Log into PeopleSoft Financials with User ID and Password
2. Select **GeorgiaFIRST Marketplace** link in menu

[Access User Profile and Update Color Theme to Match School Logo in the GeorgiaFIRST Marketplace](#)

1. In the GeorgiaFIRST Marketplace, select your **Name** in the banner at the top of the page.
2. Under the **User Information and Settings** section, select the **Language, Time Zone and Display Settings** link.
3. Select your institution in the **Color Theme** drop down list.
4. Click the **Save** button.

[Specify Default Requester](#)

1. Within the GeorgiaFIRST Marketplace, select the **down arrow** next to your name
2. Select **View My Profile**
3. In the **User Information and Settings** section, select the **Show All** link
4. Select the **Cart Assignees** link
5. Click the **Add Assignees** button
6. Confirm that your **Business Unit** appears in the Business Unit box
7. (Optional) In the **Department** drop down list, select your department.
8. Click the **Search** button.
9. Select your **Requester** by clicking the name
10. Repeat steps 4 – 9 to add additional requesters
11. To specify your **Default Requester**, select the **Set as Preferred** button
12. Your default Requester should appear in bold

[Shopper Chartfield Defaults](#)

As a shopper, you have a set of default Chartfields that will be charged when you request goods through the GeorgiaFIRST Marketplace. In other words, you have a defined default account code that is charged for the items that you request. This way, if you are a shopper for the Biology Department, the Biology Department is charged.

Your institution set these up for you in the PeopleSoft system when they added you as a Shopper. By doing this, you do not need to input your Chartfields each time you create a shopping cart. They are already tied into your Requester ID. (Every Shopper has a Requester ID in PeopleSoft where certain default information is stored.)

The Chartfields tied into your Requester ID are:

- Fund Code
- Department
- Program Code
- Class Field
- Project (if applicable)

The Account Code that will be charged will default based on the item. Each item in the GeorgiaFIRST Marketplace belongs to an NIGP code (or product category). For example, pencils belong to one category, while office furniture belongs to another. Therefore when you request office supplies through the GeorgiaFIRST Marketplace, the correct Account Code is charged.

When you assign your shopping cart to your Requester, you will have the ability to indicate if your default Chartfields should not be used for a specific item. When you are doing your final review of your Shopping Cart, you will have the ability to enter comments that are attached to your shopping cart. If you need to specify that a different Chartfield or set of Chartfields needs to be charged for an item, you do that within those comments.

Recommendation: Keep all items in one shopping cart assigned to one set of Chartfields. Comments are added per shopping cart and not per line.

When you have assigned your shopping cart to your Requester, the system automatically emails that Requester with a notification. In addition, whenever a Requester enters the GeorgiaFIRST Marketplace, they will be able to see any shopping carts assigned to them. Any comments that you apply to a Shopping Cart will be sent along with the email notification to the Requester.

Searching for Items in the GeorgiaFIRST Marketplace

There are many ways that you can search or browse for items in the GeorgiaFIRST Marketplace.

Simple Search

A Simple Search is similar to a “Google” search, where you enter a word, phrase, or keyword into a single text box for searching. By using a simple search, you can get results from hosted catalogs, self-managed catalogs, and contracts. Simple Search displays when you enter the GeorgiaFIRST Marketplace. With Simple search, you can search through everything or you can search by product category. By default, the search occurs across all categories. All of the words that you enter in the keyword textbox must be found in the items displaying in the product search results.

One way to narrow down search results is to search in a particular product category. Searching by category helps reduce the number of products from appearing in the search results by filtering out those not in the selected category. Available categories may vary by institution depending on the suppliers and items enabled. We recommend that when searching for an item, you first search by product category. If you do not find what you are looking for, then search “Everything.”

Once your search results are retrieved, you can use the filter options to further refine your results. Primarily, you can use the filter options for “Custom Attributes” to see those items on a state contract, agency contract, etc.

Advanced Search

The Advanced Search feature allows you to enter additional criteria to generate more specific search results than with Simple Search. The search criteria available depends on the product category selected and includes custom catalog attributes to identify contract type. By default, once you open the Advanced Search function after entering the GeorgiaFIRST Marketplace, it will remain open for subsequent searches during the remainder of the shopping session.

When using Advanced Search, proper usage of the search criteria fields makes a significant difference in terms of the quality of search results. Users should take the time to understand how each of the fields work. Keep in mind the search criteria fields available in Advanced Search are dependent on the product category selected.

| Search Criteria Field | Description |
|---------------------------|--|
| All of These Words | Only products containing all of the words entered are returned |
| Part Number (SKU) | For the catalog number of SKU; may be the distributor’s SKU or the manufacturer’s SKU; for best results enter the entire SKU |
| CAS No. | Available for Lab Supplies category only; can be entered in any format |
| Product Class | Available for Lab Supplies category only; provides a more detailed categorical search |
| Product Size | Available for Lab Supplies category only; enter units for product size and select the dimension of the units from the pull-down menu |
| Supplier Name | When Supplier Name field is used as part of search criteria, only the supplier name is searched |
| Manufacturer Name | Use to find products from a specific manufacturer; search results will include products from all suppliers who have identified the manufacturer in the product information provided to the GeorgiaFIRST Marketplace. |
| Exact Phrase | Very useful if you know exactly how a supplier presents information; products containing the exact words in the ordered entered are returned |
| Exclude Words | Products including any of the words entered in this field are excluded from Search Results. When using the “exclude” function, another search field must also be used. |
| Any of These Words | Search results will include products containing any of the words entered in |

| Search Criterial Field | Description |
|------------------------|-------------|
| | the field |

You can also narrow down your results by using the Custom Attributes. They include:

- Mandatory State Contract
- Agency Contract
- Statutory Mandatory
- Convenience State Contract
- Statutory Preferred

When executing your search, select the “Hide Advanced Search on search results” checkbox if you would like the advanced search box to collapse and show the Simple Search after displaying results. To go back to using Simple Search, select the “simple search...” link.

Filtering Search Results

Users can filter search results by Custom Attribute (contract type), Product Flag, Supplier, Category, Packaging UOM, Result Type, and Manufacturer Name. To the left of the Search results are the filter options for applying a single filter. To apply multiple filters, users should select the “add filter” icon, which is depicted as a funnel with a green plus sign. Through this icon, users can choose more than one filter option. After selecting items, they choose the Filter button.

To remove a filter, users click the “remove selected filter” icon, which is the funnel with the red minus sign.

Searching from the Purchasing Showcase

The Purchasing Showcase is an area where specific suppliers are highlighted. Suppliers listed in the Purchasing Showcase may or may not have an icon attached to their name. Additionally, suppliers can have a caption indicating what the supplier offers or what special discounts they have or the contract number.

Browsing by Supplier

The “Browse by Supplier” functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (product category), a single click takes you to all of the products provided by that supplier in that selected category. This functionality is different than selecting a specific supplier from the Showcase or through Punch-outs.

Browsing by Category

The “Browse by Category” functionality is similar to the “Browse by Supplier” functionality. The main difference is instead of viewing one supplier’s table of contents, all supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section.

Browse by Category provides a quick way to locate all items, across all suppliers, in a certain category.

Using Product Comparison

Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each. Products found across multiple pages of search results can now be compared to one another. Keep in mind that the product comparison feature can only be used to evaluate hosted catalog items. Items from punch-out suppliers do not display in the search results, and therefore cannot be part of the side-by-side comparison.

Searching from Punch-Out Suppliers

In addition to searching supplier-hosted catalogs that are loaded into the GeorgiaFIRST Marketplace, you can also search for items via punch-out suppliers. When accessing a punch-out supplier via the GeorgiaFIRST Marketplace, you are automatically authenticated to the supplier, so the supplier’s website knows which organization you are from. This enables the supplier to show the appropriate products and pricing.

Perform a Simple Search

1. From the GeorgiaFIRST Marketplace **Home** page, select the **Shop** drop down list and select the appropriate **Product Category** (optional)
2. Enter one or more keywords
3. Click the **Go** button (or press the ENTER key)

Perform an Advanced Search

1. On the GeorgiaFIRST Marketplace **home/shop** page, select the **advanced search** link.
2. Select a **Product Category** in the Advanced Search drop down list.
3. In the **Find Results That Have:** section, use one or more of the following options:
 - a. All of These Words
 - b. Supplier
 - c. Part Number (SKU)
 - d. Manufacturer Name
 - e. CAS No. (Laboratory Supplies Category only)
 - f. Product Class (Laboratory Supplies Category only)
 - g. Product Size (Laboratory Supplies Category only)
4. In the **Other Options:** section, use these additional fields as necessary:
 - a. Exact Phrase

- b. Exclude Words
 - c. Any of the Words
5. To search for items for a particular contract type, select the checkbox next to the appropriate **custom attribute/contract type**.
 - a. For example, initially perform the search with **Mandatory State Contract** selected. If the search does not return the required item, repeat the search with **Agency Contract** selected.
6. Click the **Search** button

Search from a Showcase Supplier

1. From the GeorgiaFIRST Marketplace **home** page, click on the **Supplier** name or icon in the Showcased Suppliers section; A pop-up displays that indicates how you can shop from the supplier
2. Enter keywords in the Search field and click the **Search** button
3. Search results appear and are formatted just how Simple Search and Advanced Search displays
4. Narrow down results by using filter options, re-sorting the results or adding additional keywords

Browse by Supplier

1. From the GeorgiaFIRST Marketplace **home/shop** page, select the **Browse: Suppliers** link.
 - a. By default, all suppliers display. Suppliers are listed in alphabetical order with preference suppliers displaying first.
2. To search for a specific supplier, click on the **Expand** icon (+) to the left of "Click to expand Search for Supplier Filter."
3. To view all suppliers click the **Search** button.
4. To search by supplier name or supplier information, enter the appropriate information in the Supplier Name field. The supplier search allows for a "contains" name search.
5. From the **Supplier Type** drop down list, select to view **Hosted Catalog Suppliers**.
6. Click the **Search** button.
7. Select the supplier from the results by selecting the **Supplier Name**. The supplier information and categories display.
8. From the supplier category page, select the desired product category by clicking on its name or the **Expand** icon (+) next to its name.
9. Continue drilling down into the categories until you locate the sub-category that you would like to view.
10. Final sub-categories (with items) are indicated with the word "view" next to it. Click the **View** button to view the items for the supplier in that particular category. You will be taken to the **Search Results** page, which is formatted like all other Search Results pages.

[Browse by Category](#)

1. From the GeorgiaFIRST Marketplace **home/shop** page, select the **Browse: categories** link.
2. A full list of available categories, across all hosted catalogs is presented. This represents your full table of contents.
3. Use the **expand (+)** and **collapse (-)** buttons to drill down to the category of your choice.
4. Final sub-categories (with items) are indicated with the word “view” next to it. Click the **view** button/link to view the items in that particular category. You will be taken to the Search Results page.
5. On the **Search Results** page, all items in the selected category are displayed from all suppliers. Use the **filter** results to narrow your search results down even further.

[Compare Products Side-by-Side](#)

1. From the GeorgiaFIRST Marketplace **home/shop** page, search for an item using your preferred search method.
2. From the search results, click the **compare** hyperlink for each item you want to include in the comparison. To remove an item from comparison, while on the **Search Results** page, select the **remove** hyperlink.
3. Note: Items across multiple pages can be selected. Once one or more items are selected, the **Compare Selected** button will activate.
4. Continue to select items for comparison. Once all items are selected, click the **Compare Selected** button at the top of the search results.
5. The **Product Comparison** page lists all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute.
6. To remove a product from the Product Comparison page:
 - a. Click the **check box** at the top of the product
 - b. Select the **Remove** action from drop down list
 - c. Click the **Go** button
7. Click on the **supplier** hyperlink for an item for more information about that supplier. Here you can see supplier and contract information.
8. Click the **more information URL** to view a detailed product description.
9. Click the **Add to Cart** icon to add the item directly to your shopping cart.
10. Click the **Back to Search Results** button to go back to your original search results and cancel the product comparison. From here, additional products can be selected for comparison.

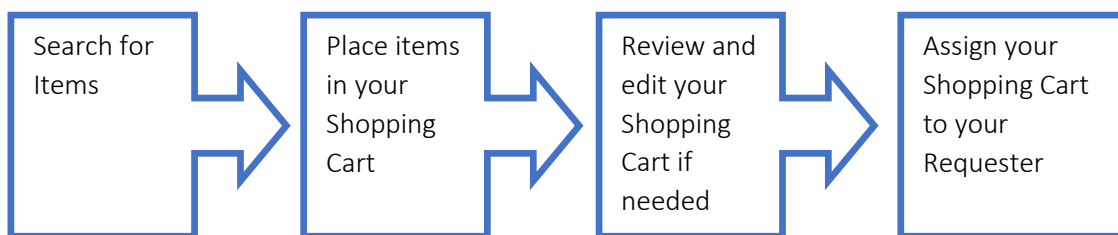
Search from Punch-Out Suppliers

1. From the GeorgiaFIRST Marketplace **home/shop** page, click on the **Punch-Out supplier** from the Punch-Out section.
2. The system will redirect you to that supplier's web-page.
3. If you decide that you did not want to search from the punch-out supplier, select the **Cancel Punch-out** button in the upper right corner of the screen. This will take you back to the GeorgiaFIRST Marketplace.
4. Search for your items through the Punch-out supplier's website. The specific steps for searching and selecting items will be different for each punch-out supplier.
5. Select your items using the punch-out supplier's tools (i.e., "Add to Cart," "Add Item," etc.).
6. After selecting your items, proceed to the punch-out supplier's checkout. Check out of the punch out site. Checking out will be different for each supplier. For example, in the Dell punch-out site, when you are ready to pull your selected items into your GeorgiaFIRST Marketplace shopping cart, you select the "**Create Order Requisition**" button within the Dell punch-out site, and then choose "**Submit Order Requisition**". This action places the items you selected into your GeorgiaFIRST Marketplace shopping cart. An order is NOT placed with the supplier when checking out of a punch-out site.
7. After checking out of the punch-out supplier's website, you are returned to the GeorgiaFIRST Marketplace where you can add additional products to your shopping cart from other punch out vendors, as well as hosted catalog vendors.

Shopping for Items in the GeorgiaFIRST Marketplace

Now that you know how to search for items, you are ready to begin building your shopping cart in the GeorgiaFIRST Marketplace.

The process you will follow is the following:



Active vs. Draft Cart

Before we begin adding items to our shopping cart, let's discuss Active and Draft Carts. These are the two types of carts that you can have in the GeorgiaFIRST Marketplace. An Active Cart is the shopping cart you are currently working with or editing. A Draft Cart is a cart that you have created, but are not currently working with.

If you have started creating a cart, you can locate it within the **Shopping Cart** icon, then **My Carts and Orders** link, then **Open My Active Shopping Cart** link. You can locate all of your carts under the My Carts and Orders link, and then under the “View Draft Shopping Carts” sub-link. Even your active cart will be listed here. The current active cart will have a colored background with its shopping cart icon.

You can create new carts whenever necessary. Additionally, draft carts can be created for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later. Initially, we will only work with one cart. Later in this chapter, we will talk about working with additional draft carts. Remember, your active cart is the shopping cart you are actively working with by adding items and assigning to a requester.

[Adding an Item to a Cart](#)

Shopping carts represent items selected that you wish to purchase. Shopping carts contain line items that represent items, or products being requested through the GeorgiaFIRST Marketplace. There are multiple ways to add an item to your shopping cart depending on where you are in the Marketplace. You can add items to your shopping cart from the search results page, product description pop-up, product comparison, etc.

[Add Item to Shopping Cart from Product Search Results Page](#)

1. From the GeorgiaFIRST Marketplace **home/shop** page, **search** for the item using your preferred search method.
2. From the search results, locate the item you wish to add.
3. For that item, enter the **quantity** you wish to request.
4. Select that item’s **Add to Cart** button.

[Add Item to Shopping Cart from Product Description Pop-Up](#)

1. From the GeorgiaFIRST Marketplace **home/shop** page, **search** for the item using your preferred search method.
2. Click on an item’s product description (item description hyperlink) to open its **Product Details** Pop-Up.
3. Enter the desired **Quantity**.
4. In the drop down list, select **Add to Active Cart** and click the **Go** button.
5. Click the **Close** button after receiving the “Added Successfully” message.

[Add Item to Shopping Cart from Product Comparison](#)

1. After searching for items and selecting items for comparison, open the Product Comparison page by selecting the **Compare Items** button.
2. From here, you can add items to your shopping cart in one of two ways:
 - a. Enter the **Quantity** and click the **shopping cart** icon, or
 - b. Place a **check** in the desired items Select checkboxes, and choose **Add to Active Cart** in the **Action** drop down list.

[Add Items from Punch-Out Supplier](#)

1. From the GeorgiaFIRST Marketplace home/shop page, select the **Punch-Out supplier** by clicking on its name or icon in the **Punch-out** section.
2. The Marketplace redirects you to the supplier's punch-out site.
3. Search for products and add products to the cart in the supplier's punch-out (this process varies from punch-out to punch-out).
4. Use the supplier's mechanism to return products to the GeorgiaFIRST Marketplace (this process again varies from punch-out to punch-out).
5. Upon returning to the **GeorgiaFIRST Marketplace**, the selected items will be in the active shopping cart and you will be on the Shopping Cart page.

[Shopping Cart Page](#)

From anywhere in the Marketplace, when you are ready to review your shopping cart, you can select the cart summary link in the upper right corner of the screen. You should see your active cart name (by default, this is your user name, the date, and sequential order number for the day), the number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where the cart details can be reviewed and updated.

[Shopping Cart Name](#)

Once you begin adding items to your shopping cart, the system gives your shopping cart a default name. This default name is a combination of your user name, the date, and the sequential order number for that date. For example, a shopper with the user name of MJones, creates her first cart of the day on March 11, 2015. This cart is given a default name of "2015-03-11 MJones 01." If this user creates another cart on March 11th, then the second cart is named "2015-03-11 MJones 02."

You can easily rename your cart though. To do so, simply retrieve your Shopping Cart.

[Removing Items from Shopping Cart](#)

You can remove items from a shopping cart either individually or all at once. GeorgiaFIRST Marketplace allows the removal of items from the cart, regardless if the item is from a punch-out supplier or hosted catalog item.

[Updating the Quantity of Items in a Cart](#)

Once you have added items to your shopping cart, you may find it necessary to change the quantity requested. You can update the quantity when adding an item to your shopping cart or after the item has been added to your shopping cart.

[Selecting the Applicable Contract for an Item](#)

Some items that you select may be listed on multiple contracts. The Marketplace will always default to the lowest priced. If you wish to change to a different contract (for example, change from an Agency Contract to a Mandatory State Contract), you can select the appropriate contract while in the Shopping Cart. **If you are ever unsure which contract to use, contact your institution's Procurement Lead.**

Selecting Fulfillment Addresses (applies only to fax or email suppliers)

In instances where a supplier has multiple fax numbers or email addresses, for example by region, the GeorgiaFIRST Marketplace will have multiple fulfillment addresses for that supplier. When an item from a supplier with multiple fulfillment addresses is added to the shopping cart, an **edit** button is displayed next to the current default fulfillment address. By clicking on the **edit** button, the user may select a different fulfillment address for this item. Note also that a user may click the **save as my preferred** checkbox to update this as the default fulfillment address.

Deleting a Shopping Cart

On occasion, you may find it necessary to delete your shopping cart. You can delete entire shopping carts with one click. Once you delete a shopping cart, it is permanently removed.

Working with Draft Carts

Earlier, we discussed the difference between an active cart and a draft cart. Remember, an active cart is the shopping cart you are actively working on. You can, however, create additional carts whenever necessary. Additionally, draft carts can be created for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later. For example, you can have draft carts for different standing orders.

Under the **Shopping Cart** icon, you will see a link for **My Carts and Orders**. Within that link you will see a link for **Open My Active Shopping Cart** and a link for **View Draft Shopping Carts**. Under the **Active cart** link will be the current shopping cart that you are working with. Under the **Draft carts** link are all of the carts you have created. The shopping cart that you are current working with, or your active cart, will have a colored background in its shopping cart icon. Draft carts will have a white background.

Whenever needed, you can create a new draft cart. To make a different draft cart active, simply click on that cart's icon so that it has the colored background. Your active cart will always be listed in the Cart Summary in the upper right corner of the screen.

Adding Items to a Draft Cart

Generally, when you add an item to a cart as we explained earlier, that item is added to your active cart. If you want to add an item to a draft cart without making that cart active, you can do so.

- To add an item to a draft cart from the Product Search Results page, select the arrow next to the Add to Cart button. Choose "Add to Draft Cart". You will then get a pop-up box asking which draft cart you want to add the item to. Select the appropriate cart by clicking its radio button. Then select the Add to Draft Cart button.
- Note: If your browser is set to block pop-ups, you will have to temporarily allow pop-ups to add to a draft cart.
- You will then see an "Added Successfully" message. You have not changed which cart is currently active though.

You will follow this same procedure whenever you want to add an item to a draft cart without making it your active cart. Wherever you add an item, there will be some sort of drop down allowing you to select “Add to Draft Cart”.

[Reviewing Line Item History](#)

The Line Item History feature allows users to view all purchases of the same item within a date range specified by the organization. Having the ability to see other recent purchases may prevent unnecessary external purchases. To perform this task, you must have the “View Line Item History” permission assigned.

[Rename Shopping Cart](#)

1. Retrieve your shopping cart.
2. Input your new shopping cart name in the ‘Name this cart’ box.
3. Click the **Update** button directly below the cart name.

[Remove Selected Items from a Shopping Cart](#)

1. Go to the **Shopping Cart**.
2. Option 1:
 - a. Select the **Remove** button on the product line.
3. Option 2:
 - a. In the cart, select one or more items to remove by placing a checkmark in its **Select** checkbox.
 - b. Click in the **action** drop down list.
 - c. Select **Remove Selected Items**.
4. The selected items are then removed from your shopping cart.

[Remove All Items from a Shopping Cart](#)

1. Go to the **Shopping Cart**.
2. Select the **Empty Cart** button.
3. To remove all items, click the **OK** button to proceed.
4. Your active shopping cart should now be empty.

[Update Quantity of Items in a Cart](#)

1. Go to the **Shopping Cart**.
2. For the item you want to update, go to the **Quantity** field in that row.
3. Enter the desired quantity.
4. Click the **Update** button directly under the Quantity field.
5. If you are making updates to more than one item, you can enter the desired quantity for all items and then select the **update** button directly below the Shopping cart name to update all quantities at one time.

Select a Contract for an Item

1. Go to the **Shopping Cart**.
2. For the item you want to select a different contract for, select the **change...** hyperlink next to the contract name.
3. A pop-up box will appear with the contract choices. Select the appropriate contract by using the **radio button**.
4. Click **OK**.

Select Fulfillment Address

1. Go to the **Shopping Cart**.
 - a. Note: If a supplier has multiple fulfillment addresses, an **edit** button will appear below their name on the Shopping Cart. If there is no **edit** button, there is only one fulfillment address for the supplier.
2. Select the **edit** button below the supplier name.
3. Using the drop down list, select the fulfillment address you wish to use.
4. To save the supplier's fulfillment address as the preferred address you always want to use, select the **save as my preferred** checkbox.
5. Click the **Save** button.

Delete a Shopping Cart

1. Select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Draft Shopping Carts** sub link.
4. Locate the cart you want to delete.
 - a. Your current (or active) cart will have an icon with a colored background.
 - b. Draft carts have an icon with a white background.
5. Press the **Delete** button on the right side of the screen.
6. After selecting Delete, the system deletes the cart immediately. Once a cart is deleted it is permanently removed and it cannot be restored.

Create a New Cart

1. Select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Draft Shopping Carts** sub-link.
4. Select the **Create Cart** button.
5. In the **Name this cart** field, you can replace the system default cart name with a different one if desired. Then click the **Update** button.

[Review Line Item History](#)

1. In order to review line item history, you must first **add the item** to your cart.
2. Access your **shopping cart**.
3. For the item you want to review history for, select the **More Actions** drop down list.
4. Select **Line Item History**.
5. The Line Item History pop-up box appears.
 - a. **Previous Purchases Found:** An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including quantity, date, User ID, and User email address.
 - b. **No Previous Purchases Found:** An item having no previous purchases meeting the organization's timeframe, department, and custom field criteria (if any) will display the item's description and a message that no items were found.

[Assigning Shopping Cart to Requester](#)

Now that you have searched for and added your items to your shopping cart, you can then assign your shopping cart to your Requester. By assigning your cart to a Requester, you are enabling that Requester to create a Requisition for your items and submit them for approval.

When you have finished adding items to your cart and you are ready to assign it to a Requester, you will first **Proceed to Checkout**. This step serves as a final review of your Shopping Cart. Through the comments tab, you can enter comments to be attached to your shopping cart. These comments are not, however, included in the email notification to the Requester. In the Final Review, you can also edit items if needed. After you have finished your final review, you then assign your cart to your Requester.

If you do not want your default Chartfields charged for these items, you should include instructions in the **Note to Assignee** section. The information you enter here before clicking the **Assign** button will be included in the email notification sent to the Requester.

[Un-assigning a Cart](#)

On occasion, you may have a reason to unassign a shopping cart. For example, imagine that you have assigned a shopping cart to your Requester. After assigning it, you realize that you ordered the wrong item and wish to correct it. If your Requester has not pulled your shopping cart into a requisition yet (you will receive an email notification when this happens), then you can unassign your cart. If your shopping cart has already been pulled into a requisition, you will need to contact your Requester to determine the best corrective action.

[Reviewing Cart History](#)

You can review your cart's history after you have selected the "Proceed to Checkout" button to perform your final review of your shopping cart. The History tab is located right next to the Comments tab. The cart history provides a listing of the current line items in the cart. As items are added, a line in History is added, and as items are removed from the cart, the line is removed. A "delete" line is not created in the history. Cart history also indicates the following:

- If an item was selected from a favorite.
- Details about cart assignment, including what Requester was assigned the cart and when the assignment occurred.
- If the cart was created from a previous cart.
- When items were added and by who, the product name, and line number.

Once the cart is pulled into a requisition, the cart history is removed and a snapshot of the requisition at that point is taken.

Assign a Cart

1. Pull up your **shopping cart**.
2. Review your shopping cart to ensure that everything is correct. Make any necessary updates to the items in your cart.
3. Select the **Proceed to Checkout** button.
4. Here you perform a final review of your shopping cart. If you need to make any updates, you can select the appropriate edit button and make changes. You can also select the **Return to shopping cart** link in the upper right corner of the page.
5. If you want to add any notes or comments, click the **Comments** tab.
 - a. Click the **Add Comment** button.
 - b. Enter your **comment** regarding the Chartfields. Keep in mind there is a 1000 character limit here.
 - c. Do not include any slashes (/) in your comments.
 - d. Click the **Add Comment** button.
 - e. Note: These comments are available to the Requester, but they are not included in the email notification.
6. When you are ready to assign your cart, click the **Assign Cart** button.
7. If you have a Default Requester in your profile, that Requester's name should appear next to "**Assign Cart To:**".
 - a. If you want to assign your cart to another Requester set up in your User Profile, select the "**Search from profile values**" link.
 - i. Using the drop down list, select the appropriate Requester.
 - b. If you do not have a Default Requester in your profile and need to search for your requester, select the "**Search for an assignee**" link.
 - i. In the User Search box, confirm your **Business Unit** appears in the Business Unit drop down list.
 - ii. If you want to refine your search by department, select your **Department** in the drop down list.
 - iii. Click the **Search** button.
 - iv. Select the **Requester** you want to assign your shopping cart to and click the **Choose Selected User** button.

8. In the **Note to Assignee** section, enter any instructions about charging Chartfields that are not your default. This note is included in the email notification to the Requester.
9. Click the **Assign** button. A shopping cart notification displays. Your shopping cart has now been assigned to your Requester.

Un-Assign a Cart

1. From the GeorgiaFIRST Marketplace home page, select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** link.
3. Select the **View Draft Shopping Carts** link.
4. Locate the cart you want to un-assign under the section “My Drafts Assigned to Others” and click the **Unassign** button.
5. Edit your cart as needed and then reassign it back to your Requester.

Review History for a Cart

1. Retrieve your **Shopping Cart** that already has items.
2. Click the **Proceed to Checkout** button.
3. Select the **History** sub-tab.
4. Review the cart history. You can use the “**Click to filter history**” selection to filter your results by date or by action.
5. To export the cart history to a csv file, click the **Export CSV** button.

Shopper Notifications

In order to help you manage your requests for goods, the eProcurement and GeorgiaFIRST Marketplace systems employ the use of automatic emails to provide notifications to you throughout the process.

Notification #1: Shopping Cart Has Been Pulled into a Requisition

The first notification that you may see is when the Requester that you assigned your cart to has pulled your cart into a requisition in the eProcurement system. When the Requester does this, the system will automatically send you an email notifying you of this step. This way, you are aware that your shopping cart has been picked up and is being processed by your Requester.

Notification #2: Your Requisition Has Been Approved

Once the Requester has pulled your shopping cart into a requisition, he/she submits the requisition for approval. Depending on your institutional setup for approvals, your requisition may be approved by one or more individuals. Once the last approver has approved your requisition, the system will notify you via email that your requisition has been fully approved.

Once your requisition has been approved, it will then be available for further automatic processing such as budget checking and sourcing into a purchase order. It is then dispatched to the vendor for order fulfillment.

Likewise, if your requisition (or a requisition line) is denied, you will also receive an email indicating this. When you do, you should notify your Requester to determine the best course of action. We recommended that if you receive a “Denied Requisition” email that you forward it to your Requester. Only your Requester can go into the system and correct your requisition for resubmission.

Notification #3: Your Requisition has Failed Budget Checking

Once your requisition is approved, the next step is for the system to verify if budget checking is required and if so, are funds available. If your requisition fails budget checking, an email is sent to the shopper. If you receive an email indicating your requisition has failed budget checking, you should contact your Department Manager responsible for that budget, or contact your default Requester to correct the requisition if an error was made in entering the budget/Chartfield information.

Notification #4: Your Requisition Items Need to be Received

Once your requisition has been turned into a purchase order and dispatched to the vendor, the vendor can then fill your order. In addition to sending you the purchased items, the vendor will send an invoice to your Accounts Payable department for these items. Before Accounts Payable can pay an invoice, it will check to see if the items you purchased require a receipt before payment can be made. If a receipt is required and has not been entered into the system yet, you may receive an email indicating that you need to “receive” your items in the system.

Please note: You should not “receive” an item in the system unless you have actually received it. Do not enter a receipt just because you get this email. This system is in place to ensure that the institution only pays for goods that it receives.

Additional Methods for Shopping

Creating a New Cart from a Previous Cart

This function allows you to copy a cart you previously used into a new active cart. This is a convenient way to repeat an order. Items can be removed or additional products can be added to the copied cart if needed.

Create a New Cart from a Previous Cart

1. Select the **Shopping Cart** icon.
2. Select **My Carts and Orders**.
3. Select either View My Orders (Last 90 Days) or View My Orders (Last 5 Orders).
 - a. Tip: Use the Refine Search Results section to select different criteria.
4. Locate the cart you want to copy and select it by clicking on the cart number. Use the **Quick View** icon to see a summary.
5. Select the **Cart Number** link.
6. In the **Available Actions** drop down list, select **Copy to New Cart** and select the **Go** button.
7. A new active cart has now been created. You can now treat this new cart as you would any other active cart.

Favorites

As a Shopper, you can set up favorites in the GeorgiaFIRST Marketplace to easily retrieve items that you order frequently. By setting up favorites, you spend less time searching for items that you will order again in the future.

There are two types of ‘favorites’ in the GeorgiaFIRST Marketplace. There are Personal Favorites and Shared Favorites. Personal favorites are those items that you identify as a favorite. Only you can see your personal favorites. With personal favorites, you create folders and sub-folders to manage these items. You have full control over the items in your personal favorites.

Shared favorites and folders are set up by administrators and can be set up for viewing and use for your institution or department. Shared favorites typically represent frequently ordered products or suggested products for purchase. Your institution will notify you of any shared favorites available for your use.

Each institution has a “Custom Configuration” shared favorites folder which can be used to highlight or specify particular items and configurations standard or recommended by the institution procurement department.

Recommendation: Only save items from hosted catalogs as favorites. Punch-out Items can be saved as a favorite, however, the pricing tied to the favorite will not be updated when the supplier updates that item’s price.

Creating Favorites Folders

Folders and sub-folders are used to house favorite items. There are two types of folders – personal and shared. Personal folders are only viewable by the user and are most commonly used. Shared folders are used to house favorite items to be used for the institution or department.

You can create any kind of folder structure. You can create a structure as simple as one folder named “favorites” to creating several folders to separate favorite item types. In order to save a favorite item, you will need to create at least one personal folder.

Create a Personal Folder or Sub-Folder

1. Select the **Shopping Cart** icon
2. Select **Shopping**.
3. Select **View Favorites** in the Go To section.
4. On the left side of the window, the Personal and Shared headings display, as well as any existing folders. For new users, you should start by creating at least one Personal folder.
5. To add a top-level folder, click the **New** button.
 - a. Select the option **Top level personal folder**
 - b. Enter a folder name and description.
 - c. Click **Save**.
6. To add a sub-folder, select the **top-level folder** you want to add the sub-folder to by clicking on it.
 - a. Click the **New** button.

- b. Select the option **Subfolder of selected folder**.
- c. Enter a folder name and description.
- d. Click **Save**.

Adding Items as Favorites

You can add personal favorites from the Product Search Results page or from a cart. Adding favorites is a fairly simple process. Once an item is saved as a favorite, it is identified in search results by a star icon.

Add an Item as a Personal Favorite

1. **Search** for items using your preferred method in the GeorgiaFIRST Marketplace.
2. From the search results, locate the item you want to add as a favorite.
3. Directly under that item's "Add to Cart" button, click on the **add favorite** hyperlink. The **Add to Favorites** popup displays.
4. In the **Item Nickname** field, you can enter a name to reference the item. If you do not enter a nickname here, the supplier's description will remain.
5. In the **Quantity** field, you can enter the standard quantity that will be ordered for this item. Once you add a favorite item to your cart, the quantity can be updated there as well.
6. Select the **Destination Folder**.
 - a. If you already have folders created, you will see your Personal Folders listed.
 - i. Select the **folder** you want to add your favorite item to, so that it is highlighted.
 - ii. Click the **Submit** button.
 - iii. Click the **Close** button.
 - b. If you do not have any Personal folders created, you will need to create at least one personal folder in order to save an item as a Favorite.
 - i. Click the **New** button.
 - ii. Select the option **Top level personal folder**.
 - iii. Enter a folder name and description. Click **Save**.
 - iv. The new folder displays in the list and is automatically selected for the favorite item.
 - v. Click **Submit** to save the item.
 - vi. Click **Close**.
7. After an item is added as a favorite, it can be accessed via the **favorites** link.
8. To add an item as a Favorite from a cart, select the **Add to Favorites** button on the item line within the cart.
 - a. Give the item a nickname and update the quantity if desired.
 - b. Select a **folder**.
 - c. Click **Submit**.
 - d. Click **Close**.

Adding Favorite Items to Your Cart

The Favorites functionality allows shoppers to store items that are referenced or ordered on a regular basis. Once items are added to Favorites, they can be added to a shopping cart from either of two places: from the Favorites page or from the Product Search results page (if favorite items are listed in the search results). Favorite items are designated with a star icon on the search results and can be added like any other item.

Add Favorite Items to Your Cart Using the Favorites Link

1. From the GeorgiaFIRST Marketplace, select the **favorites** link.
2. Select the appropriate **folder**.
3. The items for the selected folder will display on the right side of the screen.
4. To add an individual item to your cart, select the **Add to Cart** button.
5. To add multiple items to your cart, select the items with a **checkmark**, and then click **add to cart** at the top of the list.
6. Your selected favorite items are now in your cart.

Lesson 3: Training Requesters

Another segment of end-users that you will need to train are the Requesters. Requesters are the ones who actually build requisitions in the ePro module. These requisitions can be either Marketplace Requisitions or Special Request Requisitions. A Marketplace Requisition is built from items in the GeorgiaFIRST Marketplace. A Special Request Requisition is built by inputting items manually that are not from the GeorgiaFIRST Marketplace.

Requesters are responsible for the following:

- Creating Marketplace Requisitions from Assigned Shopping Carts
- Creating Marketplace Requisitions from Personal Shopping Carts
- Creating Special Request Requisitions
- Ensuring proper schedule and distribution information is on each Requisition
- Submitting the requisition for approval
- Monitoring the requisition throughout its lifecycle
- Managing requisitions for themselves and their Shoppers (Review, edit and cancel requisitions as needed)
- Receiving items requested through requisitions by using Desktop Receiving (some Shoppers may have this responsibility as well)

ePro Requisition Basics

When building an eProcurement Requisition, there are three steps in the process: Defining the requisition, Adding items or services, and then reviewing and submitting.

Creating a Requisition

To begin creating an ePro Requisition, Requesters access ePro through the PSFIN Core system. Once in ePro, users should select Requisition. Even if creating a Marketplace Requisition, Requesters should always begin by creating a Requisition in ePro before accessing the Marketplace.

Defining the Requisition/Requisition Settings

In v8.9, the first step after starting the requisition was to define it. In v9.2, this is now called Requisition Settings. This is still an optional step where you can specify defaults that will apply to all lines of the entire requisition. You are not allowed to define requisition defaults for a Marketplace Requisition. However, when creating a Special Request Requisition, setting up these defaults may be useful.

On the Requisition Settings page, you can specify a Requisition Name if you want to. If you do not specify a Requisition name, the Requisition ID will be populated in this field upon saving the requisition.

The Line Defaults section is used to enter values that will default to all lines added to the requisition. Once you begin building your requisition, you can override these defaults on the individual lines if necessary. When using the Line Defaults, keep in mind the following:

- If you have a Department ID populated on your User Preferences page, it will override the value you enter on the line defaults page.
- The account code defaults from the NIGP code. The account code defaulting from the NIGP code will override anything you enter on the line defaults.

Therefore, if you need to make changes to either the Department or Account on requisition lines, you will need to update those fields on the Checkout – Review and Submit page and not on the Requisition Settings page.

The Line Defaults that you can specify on this page that will carry over to every requisition line you add includes:

- Supplier
- Buyer
- Category (NIGP Code)
- Unit of Measure
- Ship To Code
- Due Date (N/A for GeorgiaFIRST Marketplace Requisitions)
- Attention To
- Chartfields

Once you are finished specifying defaults for the Special Request Requisition (remember, this is optional), you can proceed to the next step, which is Adding Items and Services, by selecting OK.

Adding Items

There are two ways to add requisition line items: Add them through a GeorgiaFIRST Marketplace or Add them manually for a Special Request. When creating a requisition, you cannot combine Marketplace Requisition items with Special Request Requisition items.

When creating a Marketplace Requisition, you will select the GAFIRST Marketplace link INSTEAD of selecting the Special Requests link. When creating a Special Request Requisition, you will select the Special Requests link. This guide reviews both ways of creating a requisition.

Once you add items to your requisition, the Requisition Summary (or shopping cart) will indicate how many requisition lines have been added and what the total amount of the requisition is. As you add additional items, the Requisition Summary (shopping cart) will update. After you have added all requisition line items, you can proceed to reviewing and submitting your requisition by selecting the Checkout button.

Checking Out – Review and Submit

On the Review and Submit page, you can review all of your requisition lines and make any necessary changes. You can make changes manually to individual lines or to multiple lines through the “Mass Change” button. You can also enter comments or attach documents on requisition lines. Do not include any slashes (/) in the Comments field.

Before submitting the requisition for approval, you have the chance to save it and preview the approval path the requisition will follow. Also, when previewing the approval chain, you have the ability to insert additional ad hoc approvers when necessary.

Once you submit the requisition for approval, the requisition line status changes to “Pending”. And the requisition is routed to the first approver’s Worklist.

Accessing the GeorgiaFIRST Marketplace as a Requester

As a Requester, you will access the GeorgiaFIRST Marketplace and the eProcurement module through the PeopleSoft Financials Core System. Depending on what you are doing, you will either go to the GeorgiaFIRST Marketplace through the eProcurement module in order to create or process a shopping cart assigned to you.

Access the GeorgiaFIRST Marketplace through PSFIN Core as a Requester

1. On the PeopleSoft Financials login page, enter your **User ID** and **Password**. Remember, both of these items are case sensitive. If you try to log in more than five times with an incorrect User ID and/or password, the system will lock you out.
2. Click the **Sign In** button.
3. Select **eProcurement** in the menu.
4. Select **Requisition**
5. Select the **GAFirst Marketplace link** in the Web section.
6. Notice that the GeorgiaFIRST Marketplace is now displayed in your main window. You are now able to start navigating through the marketplace.

The GeorgiaFIRST Home Page and layout is identical for Requesters as it for Shoppers. In addition, search for and selecting items are done the same way. In this lesson, we are not going to go over those tasks again. The instructions for searching and selecting items can be used for Requesters, just like Shoppers.

Creating a Marketplace Requisition from an Assigned Cart

When a Shopper assigns a cart to you, you will be notified via email. In addition, when you enter the GeorgiaFIRST Marketplace, you will easily be able to see all of the shopping carts assigned to you. Once you are notified of your assigned shopping cart, you can begin the process of building the Marketplace Requisition

In order to begin, you create a Requisition in the ePro module and select the GAFirstMarketplace link. Once you get into the GeorgiaFIRST Marketplace, there are two additional ways to see if any carts have been assigned to you. First, on the **home/shop** page, you can see in the Action Items section if you have any pending Action Items. Also, note that the Notifications section may also show pending messages.

Second, if you go to the **Shopping Cart** icon and select the **My Carts and Orders** link, then **View Draft Shopping Carts link**, you will see an area titled “**Drafts Assigned to Me**” if you have any carts assigned to you. If you select the link in the **Action Items** box, the system will bring you to this draft carts page.

To begin reviewing the order, click on the shopping cart name. You are able to edit the shopping cart by changing quantities, removing and adding line items, and updating contract information if necessary.

When the shopping cart is ready to be pulled into an ePro Requisition, from the Shopping Cart, you can select the “**Proceed to Checkout**” button, and then select the “**Issue Requisition**” button. This pulls the Marketplace shopping cart into eProcurement.

Once your shopping cart has been pulled into eProcurement, the original Shopper is notified via email that their shopping cart is now being worked in ePro. From here, you should see your Requisition Summary box on the left-side of the screen populate with your Marketplace line items. You will not be able to select the Special Request tab to add additional items.

The system automatically returns you to the Checkout – Review and Submit page. On this page, if you are creating a Shopper’s requisition, you will insert the shopper’s User ID in the Requester field. By completing this step, this enables the system to tie the requisition to the shopper so that they will receive all future notifications regarding the requisition. In addition, the shopper’s defaults including Chartfields will be assigned to each requisition line item, which is used in the approval process.

It is also here that you can update the requisition line distribution if needed. For example, if the Shopper indicates in their cart comments to you that a different department or project needs to be charged, you would update this information here. This page is also where you can indicate whether the item needs to be identified as an asset. Finally, if you need to submit any header comments regarding this requisition, you can do so at the bottom of the page. You can also enter comments individually on the requisition lines. Do not include any slashes (/) in your comments.

After making any necessary edits, you will need to select the “**Save for Later**” button, then the **Preview Approvals** link. Here you will see the approval path this requisition will follow. The exact approval path depends upon the department and project charged, as well as other criteria specified by your institution. If you need to insert an additional ad hoc approver, you will do so on this page. When you are ready to submit your requisition for approval, you click the **Submit** button. At this point the system routes the requisition lines to all required GeorgiaFIRST approver’s Worklist.

Editing an Assigned Marketplace Shopping Cart

There may be times when you need to edit a shopping cart that has been assigned to you. You can easily do this in the GeorgiaFIRST Marketplace. Some of the reasons why you may need to edit an assigned shopping cart include updating a quantity, specifying the correct contract, and adding or removing cart items. On occasion, a shopper may assign a cart to you and then realize the cart was incorrect. You can either assign the cart back to the shopper or make the edits yourself.

Once you pull up an assigned cart, you can make it active by clicking on the cart name hyperlink. Once it is an active cart, you can make any necessary edits. If the original shopper has requested that you change the quantity or delete an item, you can do that from an active cart. However, because the requisition built from the shopping cart will be tagged with the original shopper as the official requester, caution should be used when making changes to the shopping cart.

To update a cart created from Hosted content, you can change the Quantity in the field shown below, and then select the update button. If you need to delete a line, take that action, then select the Update button.

Another change that you may need to make is to specify the correct contract for an item. Some items that the shopper selects will be listed on multiple contracts. For example, there may be an item that is listed on a mandatory statewide contract, as well as on a convenience state contract. If the incorrect contract has been selected, you can specify the appropriate contract while processing the Shopping cart.

To update the quantity of an item on an active cart, simply enter a new quantity for the line item in the quantity field and select the Update button. To delete an item from a shopping cart, select the item's checkbox and then select Remove selected item from the dropdown menu.

Note: A user's ability to modify lines may be limited from a punch-out vendor.

[Create a Marketplace Requisition from an Assigned Shopping Cart](#)

1. Log into PeopleSoft Financials Core System.
2. In the menu, select **eProcurement**.
3. Select **Requisition**.
4. Select the **GAFIRST Marketplace link**.
5. In the GeorgiaFIRST Marketplace, select the **Shopping Cart** icon.
6. Select the **My Carts and Orders** link.
7. Select the **View Draft Shopping Carts** link.
8. Under the **Drafts Assigned to Me** section, click on a cart to activate it.
9. Review the shopping cart and perform any necessary edits.
10. Select the **Proceed to Checkout** button.
11. Select the **Issue Requisition** button.
12. Confirm the Requisition Summary has the same number of line items as the requisition.
13. On the **Check Out – Review and Submit** page, insert the Shopper's User ID in the **Requester** field.
14. Name the requisition by populating the Requisition Name field if desired.
15. For each requisition line item, edit **Chartfields, Ship To Location, and Asset information** if necessary.
16. Add a comment on each requisition line if needed by clicking the **"call out"** (comment) icon at the end of the line.
17. Add a header comment to be attached to the requisition if needed, using the Justification/Comments section. Do not include any slashes (/) in your comments.
18. Click the **Save for Later** button and the **Preview Approvals** link.
19. Review the approval path. Insert additional ad hoc approvers if necessary.
20. Click the **Submit** button to route the requisition for approval.

[Change a Contract for an Item](#)

1. After entering the GeorgiaFIRST Marketplace from ePro – Requisitions, select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** link.
3. Select the **View Draft Shopping Carts** link.
4. Under the **Drafts Assigned to Me** section, click on a cart to activate it.
5. For the item you want to select a different contract for, select the **change...** hyperlink next to the contract name.
6. A pop-up box will appear with the contract choices. Select the appropriate contract by using the **radio button**.
7. Click **OK**.
8. After finishing all edits, select the **Proceed to Checkout** button.
9. Select the **Issue Requisition** button and then continue with creating the Marketplace Requisition within PeopleSoft.

[Creating a Marketplace Requisition from a Personal Shopping Cart](#)

As a Requester, you are able to build a Marketplace Requisition from your own personal shopping cart, rather than from one assigned to you. Most of the steps are very similar though.

[Create a Marketplace Requisition from a Personal Shopping Cart](#)

1. Log into PeopleSoft Financials Core System.
2. Select **eProcurement** in the menu.
3. Select **Requisitions**.
4. Select the **GeorgiaFIRST Marketplace** link.
5. Build your **shopping cart** (or retrieve one that you built and saved earlier) by searching for and adding items.
6. Select the **Proceed to Checkout** button.
7. Here you perform a final review of your shopping cart. If you need to make any updates, you can select the appropriate edit button and make changes. You can also select the **Return to shopping cart** link in the upper right corner of the page.
8. Select the **Issue Requisition** button.
9. Confirm the **Requisition Summary** within ePro has the same number of line items as the GeorgiaFIRST Marketplace cart.
10. Name the requisition if desired.
11. For each requisition line item, edit **Chartfields** and **Ship To** Location if necessary.
12. Add a comment on each requisition line if needed by clicking the **“call out” (comment)** icon at the end of the line.
13. Add a **header comment** to be attached to the requisition if needed within the **Justification/Comment** box.
14. Click the **Save for Later** button and the **Preview Approvals** link.
15. Review the approval path. Insert additional ad hoc approvers if necessary.

16. Click the **Submit** button to route the requisition for approval.

Creating a Special Request Requisition

Special Request Requisitions are built by entering information directly into the requisition using the Special Request tab – Special Item link. Therefore, you create the individual requisition line items as opposed to originating from the Marketplace Shopping cart. Outside of how you add the requisition lines to the requisition, much of the steps between a Marketplace Requisition and a Special Request Requisition are the same.

To create a Special Request Requisition, you are going to start in the same way as you did with the Marketplace Requisition. You begin by selecting “Requisition” in the ePro Module.

Depending on the number of lines you need to add to your requisition, you may or may not find it useful to setup the defaults for your requisition. As we mentioned earlier, by selecting the Requisition Settings link, you can specify defaults that apply to the entire requisition so that you do not have to add them line by line. This is an optional step though. If you do set up requisition defaults, you should not include anything in the Account field. The item’s NIGP code will determine the proper account.

After setting up your requisition defaults, if any, you can proceed to Step #2 – Adding Items and Services. Since this requisition will not be built from contract catalog items in the GeorgiaFIRST Marketplace, you will use the Special Requests link on this page. On the Special Requests page, you begin entering your item information. This is how you enter line items directly into a requisition.

For each line item, you need to complete this page. If you entered any defaults in Step 1, that information will carry over to the appropriate fields here. The information that you will need to input is:

- Item Description – this is where you enter the description of the item you are requesting
- Price
- Quantity
- Unit of Measure
- Category – this is the NIGP Code
- Due Date
- Supplier or Supplier ID – if you know the supplier you wish to use, enter the Supplier Name or ID; once the Buyer receives the requisition, they can modify the supplier if needed

Additional Information – you can use the text box to enter comments regarding the requisition line item. You can also specify if you want those comments sent to the vendor, shown on the receipt, or shown on the voucher. Do not include any slashes (/) in the Additional Information field.

When you are finished entering your line item information, you have to select the “**Add to Cart**” button at the bottom of the page to add it to your requisition. Once you do, you should see the Requisition Summary box on the left side of the page update. To add another line item, simply begin entering the line information again. When you have finished adding all requisition line items, you can go to Step 3 – Review and Submit.

When you get to Step #3, this is where you can update the distribution information for each line, as well as the Ship To information. Just like a Marketplace Requisition, you can update this information for each line individually or multiple lines through the Modify Line/Shipping/Accounting button. If you need to include asset information for a line item, you can also do this on step 3. Finally, you can add comments and attachments to each line, as well as to the overall requisition. When all of your information has been added, you can preview your approvals by selecting the **Save for Later button & Preview Approvals** link.

The Confirmation page lists the Requisition ID and the number of lines on the requisition. It also lets you see the approval path for the requisition based on the distribution line and your institution specific Workflow setup. You will see an approval for each Requisition Line. If you need to insert additional approvers, you can do so using the Ad Hoc approver functionality. If you notice an error and need to edit your requisition, select the Edit Requisition button. When you are ready to submit your requisition for approval, click the Submit button. The requisition header is set to a Pending Status until all lines are fully approved.

[Create a Special Request Requisition](#)

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisitions**.
3. Select Special Requests
4. To enter Requisition Defaults, click the **Requisition Settings** link. Otherwise, go to step 4.
 - a. If desired, enter a name for your requisition (if left blank, the Requisition ID will be listed here after saving).
 - b. Expand the **Line Defaults** section by clicking on the expand button.
 - c. To enter a default vendor for all requisition lines, enter the **Supplier ID** or select it using the Look Up icon.
 - d. To enter a default Buyer for all requisition lines, enter the **Buyer's User ID** or select it using the Look Up icon.
 - e. If all of your line items will have the same NIGP code, enter it in the **Category** field or select it using the Look Up icon.
 - f. If all of your line items will have the same **Unit of Measure**, enter it or select it using the Look Up icon.
 - g. To set a default **Ship To Address**, enter it or select it using the Look Up icon.
 - h. To enter a default **Due Date** for each line item, enter it or select it using the Calendar icon. The Due Date for a Requisition is typically within 30 days of the current date.
 - i. To enter a default "**Attention To**" for each line, enter in the Attention field.
 - j. In the **Accounting Defaults – Chartfields 1** tab, the Location, GL Unit, and Department originally default from your User ID. If needed, you can change the Fund Code, Department, Program, Class, and Project that are to be charged for each line item.
 - k. In the **Accounting Defaults – Asset Information** tab, you can enter the default AM Business Unit field and Profile ID that will appear on each requisition line item. This

- should only be set if all requisition line items are to be tracked in the Asset Management module, and each line item requires the same Profile ID.
- I. Click the **OK** button.
5. For each line that you want to enter, complete the following steps (some fields may have been completed through the requisition defaults – these defaults can be overwritten on this page if needed):
 - a. Enter an **Item Description**
 - b. Enter the **Price** of the item
 - c. Enter the **Quantity** requested
 - d. Enter or select the **Unit of Measure**
 - e. In the **Category** field, enter or select the NIGP Code for the item
 - f. Enter or select the **Due Date** for the item
 - g. Enter or select the **Supplier ID** for the item if you have a preferred vendor
 - h. If you have any information that needs to be sent to the vendor, shown on the receipt, and/or shown on the voucher, enter it in the **Additional Information** field and select the appropriate checkboxes.
 - i. Select the **Add to Cart** button.
 - j. Confirm the **Requisition Summary** updated with your new requisition line.
 - k. To add an addition requisition line, complete steps 5a through 5k again.
 6. Select the **Checkout** button.
 7. To update a requisition line's distribution information, click its **Expand** button and make necessary updates.
 8. To update multiple requisition line's information simultaneously, select the lines to update with a check mark and then select the **Mass Change** link. Make all necessary updates, and apply to all selected lines.
 9. To enter a **comment** on an individual requisition line, click that line's **call out** (comment) icon. Enter the comments and select where you want the comment to appear.
 10. Enter any justification or comments you wish to on the requisition header in the **Justification/Comments** field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
 11. Click the **Save for Later** button, then the **Preview Approvals** link.
 12. Insert any additional approvers if necessary.
 13. Click the **Submit** button.

Editing Requisition on Checkout – Review and Submit Page

As mentioned earlier, when needed you can update schedule and distribution information for requisition line items. You can also add asset information when required. Below are tasks that you may need to perform while editing your requisition on the Checkout – Review and Submit page.

Changing a Requisition Line Item to a Different Chartstring

As we mentioned earlier, when you pull a marketplace shopping cart into a requisition, you indicate that the official requester was the shopper who built the shopping cart. This way, the requisition line distribution is automatically populated with the shopper's default Chartfields. These Chartfields, primarily the Department and Project, dictate the approval path the requisition line will take. On occasion, a shopper may need a different set of Chartstrings charged for a requisition line.

When this happens, the Shopper should include an assignee comment in the Shopping Cart indicating what the new Chartstring should be and which line items the Chartstring should apply to. These comments should be visible on the shopping cart as well within the notification email received when you were notified that a shopping cart was assigned to you.

To make the change in Chartfields, you will need to do so after pulling the shopping cart into the ePro requisition. On **the Checkout - Review and Submit page**, you can individually edit each line or you can select and edit multiple lines at one time.

Using Multiple Distributions for a Requisition Line

At times, it may be necessary for you to have multiple distributions for a requisition line. Once you pull the GeorgiaFIRST Marketplace shopping cart into a requisition, you can split the distribution for the line needed.

To set up multiple distributions for a requisition line, you first specify whether you want to distribute by quantity or by amount. Then, you can add a new distribution line. After adding the new distribution line, you will need to update the percentage or amount in the original distribution line first. Then, you can set the distribution percentage or amount for the new distribution line. On the Chartfields tabs, you can specify the new distribution Chartstring.

Entering Asset Information for an Item

If the item being requested is an asset needs to be tracked in the Asset Management module, you can specify this information on the requisition. By specifying the asset information on the requisition, the information will transfer to the Purchase Order, the Receipt, and finally the Voucher. After that, the information from the Purchasing and Accounts Payable modules can be interfaced into Asset Management.

Items that need to be tracked in Asset Management include any item valued over \$3,000. Fixed assets are those items valued at or above \$5,000. An item costing less than \$5,000, but more than \$2,999.99, are considered Small Value Property and must also be tracked in the Asset Management module. Finally, any item that must be tracked through the physical inventory process, such as fire arms, should be entered into the Asset Management module.

In order to enter the asset information for an item in the Marketplace Requisition, you need to be on the **Checkout - Review and Submit page**. You will need to enter the AM Business Unit and Profile ID.

Creating an Amount-Only Requisition Line

An Amount-Only Requisition can now be created so that it can be properly sourced into an amount-only purchase order. This new feature ensures that the requisition is liquidated by amount, just as the

Purchase Order is. Previously, the requisition liquidated by quantity even though the Purchase Order liquidated by amount.

Inserting Ad Hoc Approvers

The approval path is determined by the department and project charged on a requisition line along with other criteria specified by your institution, which may include line amount, item type, and agency fund. If you have reviewed the approval path and determine that you need to include another approver, you can do that through the Ad Hoc Approver functionality.

On the approval page, you can insert an ad hoc approver anywhere you see a green plus (+) button. You will need to know the User ID of the additional approver, or you will have to scroll through the list of names. In addition, you can specify the ad hoc user as an Approver or Reviewer. Choosing the Approver option will require the user selected to actually approve the requisition for it to progress onto the next step. Selecting the Reviewer option will place the requisition into the selected user's Worklist. However, they will not be required to take action on the requisition for it to move onto the next step. The Reviewer provides visibility only to the ad hoc user.

Change a Requisition Line Item to a Different Chartstring

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Expand the line you want to modify by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Chartfields 2** tab to update the following if needed:
 - a. Account
 - b. Fund Code
 - c. Department
 - d. Program
 - e. Class
5. Go to the **Chartfields 3** tab to update the following if needed:
 - a. Project
6. Make other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.

Changing Multiple Requisition Line Items to a Different Chartstring

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Select the lines you want to change distribution information for by placing a **checkmark** in their **select** boxes.
3. Select the **Mass Change** button. (In v8.9, this link was called "Modify Line/Shipping/Accounting.")
4. In the Accounting Information section, enter the new **Chartfields Values** and then click **Apply**.
5. On the **Distribution Change Options**, to apply changes to all selected lines, select the option "**All Distribution Lines**" and click **OK**.

6. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.

Split Distribution for a Requisition Line

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Expand the line by clicking on its **Expand Section** button.
3. Choose whether to **Distribute by Amount** or **Quantity** through the drop down list.
4. Locate the **Accounting Lines** section.
5. At the end of the line under the **Chartfields1** tab, click the **Add a New Row** button (+).
6. If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.
 - a. In the original distribution line, edit the **quantity** for the revised distribution.
 - b. **Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
 - c. In the new distribution line, enter the **quantity** for the second Chartstring.
 - d. **Tab** out of the **Quantity** field. The **Percent** field will adjust accordingly.
 - e. Make the necessary **changes** to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.
7. If distributing by **Amount**, continue. Otherwise, go to step 8.
 - a. In the original distribution line, edit the **amount** for the revised distribution.
 - b. **Tab** out of the Amount field. The **Percent** field should adjust accordingly.
 - c. In the new distribution line, enter the **amount** for the second Chartstring.
 - d. **Tab** out of the Amount field. The **Percent** field will adjust accordingly.
 - e. Make the necessary **changes** to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.
8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save and Preview Approvals** button.

Enter Asset Information for a Requisition Line Item

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Expand the line by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Asset Information** tab.
5. In the **AM Business Unit** field, enter or use the look up icon to select your institution's business unit.
6. In the **Profile ID** field, enter or use the look up icon to select the asset's Profile ID (i.e., SVP, AV05YR).
7. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.

Create Amount-Only Requisition Line

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. On the Requisition Line, select the Details icon.
3. In the Line Details box, select the Amount Only checkbox and return to the Checkout – Review and Submit page.
4. Make any other necessary changes and then continue with the Marketplace Requisition by saving and submitting the requisition.

Insert an Ad Hoc Approver

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Make any necessary changes to the line item information on the requisition.
3. Select the **Save for Later** button.
4. To insert an Ad Hoc approver, click the **green** plus (+) button where you want the approver to go.
5. Enter the **User ID** of the Ad Hoc approver, or use the look up button to select the User ID.
6. Select either the **Approver** or **Reviewer** radio button.
7. Click the **insert** button.
8. You should now see the additional approver in the approval chain.
9. To remove the Ad Hoc approver, select the **red** minus (-) button for that approver. Click **OK** when prompted.
10. Submit the requisition for approval by clicking the **Submit** button.

Managing Requisitions

Once you have saved a requisition, it is easy to track what stage it is in by using the Manage Requisitions page. From this page, you can see the requisition status, review requisition details, edit requisitions, and take various actions on requisitions if needed.

There are many statuses that a Requisition goes through during its lifecycle. In v9.2, Requisition Status is now referred to as Request State:

| Request State | Explanation |
|-------------------------|--|
| Open | Requisition has been entered and saved in the system, but not yet submitted for approval |
| Pending | Requisition has been submitted and is awaiting approval |
| Approved | Requisition has been fully approved and can become a PO |
| Denied | Requisition was denied in the approval process |
| Canceled | Requisition was entered and saved, but was canceled; a canceled requisition can be reopened within a certain number of days |
| PO(s) Created | Requisition has been placed on a Purchase Order |
| PO(s) Dispatched | Requisition has been placed on a Purchase Order and that PO has been sent to the supplier |
| PO(s) Canceled | Requisition has been placed on a PO that has been canceled |
| Received | Requisition has been placed on a PO; PO has been dispatched to the supplier, and the goods have been partially or fully received |
| Complete | After requisition is dispatched on a PO, goods are received, and vendor is paid; Background process identifies the requisition status as Complete; Canceled requisitions are also identified as Complete |

After a requisition has been approved, it must go through the Budget Checking process. The possible Budget Statuses include Not Checked, Error and Valid.

| Budget Status | Explanation |
|------------------|--|
| Not Chk'd | Requisition has not had budget checking run on it yet |
| Error | Requisition has gone through budget checking and failed; the budget checking error must be corrected before the requisition can be sourced into a purchase order |
| Valid | Requisition has passed budget checking and is available to be sourced into a purchase order |

When searching for requisitions on the Manage Requisitions page, the more search criteria that you enter, the more narrow your search results will be. In your list of search results, you will see the following for each Requisition:

- Requisition ID
- Requisition Name
- Business Unit
- Date
- Request State
- Budget
- Total
- Action Drop Down box and Go button

You can sort by a search result, such as Budget, by clicking on the column heading hyperlink. In the results, you can quickly see the status the requisition is in, as well as its budget checking status. To see the lifespan of the requisition, as well as line item information, you can expand the requisition.

Once you have expanded a Requisition, you can see its lifecycle represented by the lifespan icons. If an icon is in color, the requisition is either currently in or has completed that stage.

From this page, there are many items that you can review. If you select the Requisition ID or the Requisition icon in the lifecycle, you will get a summary of the requisition details.

If the requisition has already been sourced to a PO, you will see a "PO Information" bar. To get the PO Information for a sourced requisition line, you can click on this bar and see the PO number, receipt status, and PO line information.

If you want to see a requisition schedule and distribution information, you can select the Requisition Schedule and Distribution link from the Requisition Details page.

The Line section contains all of the line items on a requisition. The Schedule section displays shipping information for the item, such as where the item is being shipped, when it is due, the quantity, the price, and the total amount of the line.

The Distribution section details the Chartfields and additional information. The Dist # displays the number the system assigned to the distribution. The system uses this numbering to distinguish between multiple distributions for a single requisition line. The distribution statuses include the following:

- Open: The distribution line is open
- Complete: the distribution line is closed
- Processed: the distribution line has been processed and is unavailable for sourcing
- Canceled: the distribution has been canceled

To get the detailed information for a requisition line, you can select the line hyperlink in the Description column under the lifespan or from the Requisition Schedule and Distribution page. Users will see an

error when the item description link is selected for items originating from the GeorgiaFIRST Marketplace.

If you select the Approvals icon in the lifespan, you will see the approval status and path of the requisition lines.

Finally, you can select the Purchase Orders, Receipts, Invoices, and Payments icons after they are enabled to get the information regarding those specific documents.

The choices in the Action drop down box for each requisition will be specific to the stage that requisition is in. The choices that you as a Requester will use the most are “Edit Requisition,” “Cancel Requisition,” and “Check Budget” (depending on your institution setup). We will talk more about these choices later in this chapter.

Edit a Requisition

There will be times when you need to edit a requisition. This includes those requisitions that you have created and saved, but not yet submitted, as well as requisitions that have been denied and may need to be corrected. And, there may be a few occasions when you need to edit a requisition that has already been submitted for approval.

In order to edit a requisition, you can go through the Manage Requisitions page and search for the requisition in need of editing. When it is displayed in your search results, there will be the option of “Edit Requisition” in its action drop down list. If the requisition is no longer available for editing, that option will not appear in the drop down list. For example, once a PO is created from a requisition, that requisition can no longer be edited.

Once you select the choice of “Edit Requisition”, the system will take you to the Edit Requisition page. This page is the same type of page used when creating a requisition. From the Review and Submit page, to edit a line, click on the line description (for Special Request Requisitions only). This will bring up the page where you can edit the price, category, unit of measure, etc.

To edit a requisition line’s distribution and schedule information, click on the expand link for that line. The shipping information can be updated, and the Chartfields can be updated if necessary. After making all of your edits, you can select the Save & Preview Approvals button. If you have made changes to a requisition that is already in the approval process, when you submit the edited requisition, it will reinitiate the approval process. Therefore, it may be helpful to add a comment explaining why an approver may be seeing the same requisition again. After previewing approvals, you can then submit the requisition.

Deleting a Requisition Line

You can delete a requisition line if needed, as long as the requisition line has not been budget checked. To delete a requisition line, you will again go through the Manage Requisitions page and select “Edit Requisition.” From the “**Checkout - Review and Submit** page” page, you can select the line to be deleted by placing a checkmark in its select box. You can select multiple lines at one time if needed. To delete the selected lines, simply click the Delete button. The system will ask you to confirm the deletion before

proceeding. Since you have modified the overall requisition, you will need to Save and Submit the requisition again.

Canceling a Requisition

On occasion, you may find the need to cancel a requisition. If you need to cancel a requisition, you can do so as long as the requisition has not been sourced into a Purchase Order. Once it has been sourced into a purchase order, the requisition can no longer be canceled and you will have to work with the purchase order. To cancel a requisition, you will go through the Manage Requisitions page.

Manage Requisitions

1. In PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter **search criteria** for your requisitions.
4. Click the **Search** button.
5. To see a requisition's lifespan, click its **expand** button.
6. To see details about an active or completed stage in the lifespan, click on the lifespan icon.
7. To see the approval path for a requisition, click on the **Approvals** lifespan icon.
8. To see requisition line information, click on the **line description**.
9. To see requisition schedule and distribution information, click on the **Requisition lifespan** icon and then select the **Requisition and Schedule Information** link.

Edit a Requisition

1. In PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. In the search field, enter the **Requisition ID** that needs to be edited (you may need to clear some of the search fields).
4. Click the **Search** button.
5. In the Requisition ID's action drop-down list, select **Edit Requisition**.
6. Click the **Go** button.
7. To update the requisition line information, select the link under **Description**. Make the necessary changes and the return to 3. Review and Submit.
8. To update an individual requisition line Chartfield information, click its **expand** button. Make the necessary changes.
9. To update multiple requisition lines at one time, select the lines to be edited and the select the **Mass Change link**. Make the necessary edits.
10. Select the **Save & Preview Approvals** button.
11. If reinitiating the approval process, consider adding a **comment** to inform your approvers of this.
12. Insert any **ad hoc approvers** if necessary.
13. Click the **Submit** button.

Delete a Requisition Line

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter the **Requisition ID** in the Search Criteria (you may need to clear some of the search fields).
4. Click the **Search** button.
5. In the Requisition ID's action drop-down list, select **Edit Requisition**.
6. Click the **Go** button.
7. **Select** the line(s) you want to delete.
8. Click the **Delete** button.
9. To confirm the deletion, click the **OK** button.
10. Click the **Save and Submit** button.

Cancel a Requisition

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter the **Requisition ID** in the Search Criteria (you may need to clear some of the search fields).
4. Click the **Search** button.
5. In the Requisition ID's action drop-down list, select **Cancel Requisition**.
6. Click the **Go** button.
7. On the Requisition Details page, select the **Cancel Requisition** button.
8. On the Manage Requisitions page, the requisition status should change to Canceled.

Desktop Receiving

For many items that are purchased, a receipt will be required before payment is issued by your Accounts Payable department. The receiving requirement is set on purchase orders. By creating a receipt in the system, your Accounts Payable Department can be sure that they are issuing payment for goods that have been received.

Some requesters will have the responsibility of performing Desktop Receiving, which is creating a receipt in the system. This receipt is tied into the Requisition, Purchase Order, and Invoice so that payment can be issued. Without the receipt, the payment cannot be issued.

Not all requesters will have this responsibility. Some shoppers may be responsible for their own desktop receiving. Check with your institution for your applicable business processes. If you do have the Desktop Receiving responsibility, continue with this chapter to learn how to create receipts in the PeopleSoft system.

Desktop Receiving is a function within the eProcurement module. It is a simplified version of what your Central Receiving department does on campus. Your Central Receiving Department will still be responsible for creating receipts in the PeopleSoft system for assets and other items that need to be inventoried. However, this eProcurement Desktop Receiving function will enable you to receive many of the goods ordered through ePro Requisitions. You will need the proper security setup to perform desktop receiving.

Desktop receiving is done through the PeopleSoft Core system, in the eProcurement module. On the Receive Items page, all of your requisitions that have not been fully received will be listed. Through the Receive Items page, you will be able to indicate whether you have received the full quantity requested, or just a partial quantity. On the Receive Form, you will indicate the Receipt Date and how many you received. Once you save your receipt, the system will generate a Receipt Number. This Receipt Number will be tied into the Requisition number, Purchase Order number, and Voucher number.

[Create a Desktop Receipt](#)

1. Log into the **PeopleSoft Core** system.
2. Select **eProcurement** in the menu.
3. Select **Receive Items** in the menu.
4. Location the **Requisition Line Item** you need to receive.
5. Select the requisition by placing a **checkmark** in its **Select** box (or to receive all line items, choose the Check All button).
6. Select the **Receive Selected** button.
7. If needed, change the **Received Date**. By default, the current date will be listed.
8. In the **Received Qty** field, enter the **quantity** received.
9. To review details about the actual purchase order, select the **Details...** icon.
10. To attach comments to the Receipt, select the **Comments** icon.
 - a. Here you can indicate the condition and input a comment if needed.
 - b. Do not include any slashes (/) in your comments.
11. Click the **Save Receipt** button.
12. Your Receipt Number will be listed on the "Receipt Saved Successfully" page.

[Requester Notifications](#)

The system sends you important notifications regarding ePro requiring your attention.

Requester Notification #1: You have been assigned a shopping cart

The first notification that you will see is when a shopping cart has been assigned to you. After a Shopper has built a GeorgiaFIRST Marketplace cart and assigned it, the system notifies you via email. In that email, you will also see any comments attached to the shopping cart by the shopper.

Requester Notification #2: Your Requisition Has Been Approved

If you are listed as the Requester on either a Special Request Requisition or a Marketplace Requisition, you will also receive an email notification once your requisition has been approved. Depending on your institutional setup for approvals, your requisition may be approved by one or more individuals. Once the last approver has approved your requisition, the system will notify you via email that your requisition has been fully approved.

Once your requisition has been approved, it will then be available for further automatic processing such as budget checking and sourcing into a purchase order. It is then dispatched to the vendor for order fulfillment.

Likewise, if your requisition (or a requisition line) is denied, you will also receive an email indicating this. If your Shopper receives notification that a requisition has been denied, they have been instructed to forward the message to you. Denied requisitions can be edited and resubmitted when necessary.

Notification #3: Your Requisition Items Need to be Received

Once your requisition has been turned into a purchase order and dispatched to the vendor, the vendor can then fill your order. In addition to sending you the purchased items, the vendor will send an invoice to your Accounts Payable department for these items. Before Accounts Payable can pay an invoice, it will check to see if the items you purchased require a receipt before payment can be made. If a receipt is required and has not been entered into the system yet, you may receive an email indicating that you need to “receive” your items in the system.

Please note: You should not “receive” an item in the system unless you have actually received it. Do not enter a receipt just because you get this email. This system is in place to ensure that the institution only pays for goods that it receives.

Lesson 4: Workflow and ePro Approvers

A critical component to the whole eProcurement process is the ability to submit requisitions for approval electronically. Because approvals are handled online within the PeopleSoft Financials system, each institution can customize the approval process to their own specifications.

How Do Approvals Work?

As mentioned earlier, a Requester builds a requisition in ePro. Each item on a requisition is actually placed on its own requisition line. Theoretically, each line in a requisition can be charged to a different set of Chartfields (though, as a best practice, these scenarios should be limited). Therefore, there may be different approval paths for each line on a requisition.

Once the Requester submits the requisition for approval, each line has its own approval path. This approval path is determined by a number of factors. At a minimum, each requisition line will go to the Department Manager and Project Manager (if a Project is to be charged). These are the managers that are tied into the Department and Project Chartfields on that requisition line.

Depending on how your institution has set up approvals for eProcurement, the requisition line may go to many additional approvers as well. This includes approvers for assets, IT items, and items above a certain amount. Below is a summary of all of the approval stages and paths available for eProcurement. To determine what stages and paths your institution is using, check with your Purchasing Department or Local Security Administrator.

Approval Stages

Overall, there are five approval stages that can be used for eProcurement requisitions. They include:

- Stage 1: Department and Project Approval
- Stage 2: Agency Fund Approval
- Stage 3: Amount Approval (for requisitions built from the GeorgiaFIRST Marketplace)
- Stage 4: Item-Type Based Approvals
- Stage 5: Buyer Approval (for requisitions not built from the GeorgiaFIRST Marketplace)

Here is a summary of each stage:

Stage 1: Department and Project Approval

This is a mandatory approval stage for all requisition lines. Each requisition line must be charged to a Department. In addition, requisition lines can be charged to a Project. The requisition line is routed to the Department Manager (as entered in PeopleSoft) for approval. If the Project Chartfield is used on the requisition line, the system also routes it to the Project Manager.

Stage 2: Agency Fund Approval

This approval stage is an optional one for institutions. It is set up so that any requisition line charged to an Agency Fund Code must go to an individual specified for Agency Fund Approvals. Agency funds are

used to account for resources held by an institution as custodian or fiscal agent for individual students, faculty, staff members, or other organizations. Agency Fund Codes include 60000, 61000, and 62000.

If your institution chooses to employ this approval stage, there may be multiple Agency Fund Approvers. Each Agency Fund Approver will have the role BOR_AGENCY_FUND_APPR. The institution will determine whether all amount approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. If an agency fund code is not used on a requisition line, the system bypasses this approval stage.

Stage 3: Amount Approval

The Amount Approval stage is also an optional one. This stage is for all requisitions that were built from the GeorgiaFIRST Marketplace and has a monetary amount of \$10,000 or more. Again, your institution may set up multiple approvers to serve as the Amount Approver. Each Amount Approver will have the role BOR_CAT_AMOUNT_APPR. The institution will determine whether all amount approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. The institution also does not have to use the \$10,000 threshold and can edit this if needed.

If the requisition was not generated from the GeorgiaFIRST Marketplace, it will bypass this approval stage (this can be changed by the institution). If the requisition is below the set threshold and was generated from the GeorgiaFIRST Marketplace, it will also bypass this approval stage.

Stage 4: Item-Type Based Approvals

In Approval Stage 4, approvals are based upon the type of item being requested. Within this stage, there are seven potential approval paths. Each path is optional for the institutions.

- **Stage 4, Path 1: Asset Approval**

If the item on a Requisition line is an asset and charged to an Asset Account, it will be routed to the person set up as the Asset Approver. The accounts included in this path are 743200, 744200, and 800000 through 899999.

An Asset Approver must have the role "BOR_ASSET_APPR." If your institution chooses to use the Asset Approver path, there can be multiple asset approvers. The institution will determine whether all asset approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. In addition, institutions may identify additional account codes for asset approval, and they may add monetary amount criteria (i.e., asset item unit price greater than \$5,000.).

- **Stage 4, Path 2: Audio Visual Approver**

This is an optional approval path and is for any item on a requisition line that contains an NIGP code related to Audio Visual items or services. NIGP stands for National Institute of Governmental Purchasing Commodity Services Code. The NIGP Code is a coding classification used primarily to classify products and services procured by state and local governments.

In PeopleSoft, the Category ID is tied into the NIGP Code. In the GeorgiaFIRST Marketplace, the NIGP code is already tied into item. For requisition line items not generated from the Marketplace, the Requester enters the proper Category ID. For those line items that have an NIGP Code related to Audio Visual items and services, the system will route the requisition line to the Audio Visual Approver.

An Audio Visual Approver must have the role "BOR_AUDIO_VIS_APPR". If your institution chooses to use the Audio Visual (AV) Approver path, there can be multiple AV approvers. The institution will determine whether all AV approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. In addition, institutions may identify additional NIGP codes for audio visual approval, and they may add monetary amount criteria (i.e., item has an NIGP code of 06400 and is greater than \$1,000.).

- **Stage 4, Path 3: Chemical Approver**

This path is also an optional one, and is for any requisition line with an NIGP code associated with chemicals. If the NIGP code for the requisition line is associated with a chemical purchase, the line will route to the Chemical Approver.

A Chemical Approver must have the role "BOR_CHEMICAL_APPR". If your institution chooses to use the Chemical Approver path, there can be multiple Chemical Approvers. The institution will determine whether all chemical approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for chemical approval, and they may add monetary amount criteria.

- **Stage 4, Path 4: Facilities Planning and Design Approver**

This optional path is for any requisition line with an NIGP code associated with the facilities planning and design.

A Facilities Planning and Design Approver must have the role "BOR_FACILITIES_APPR". If your institution chooses to use the Facilities Planning and Design Approver path, there can be multiple approvers in this path. The institution will determine whether all Facilities Planning and Design approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for facilities planning and design approval, and they may add monetary amount criteria.

- **Stage 4, Path 5: IT Approver**

This approval path is for any IT hardware or software approvals, and is also optional. For any requisition line that is for an computer hardware or software purchase or service (based on NIGP Code), the system routes the line to the IT Approver.

An IT Approver must have the role "BOR_IT_APPR". If your institution chooses to use the IT Approver path, there can be multiple approvers in this path. The institution will determine whether all IT Approvers must approve the requisition, or if only one from the group of

approvers must approve it. In addition, institutions may identify additional NIGP codes for IT approval, and they may add monetary amount criteria.

- **Stage 4, Path 6: University Relations Approver**

The sixth approval path in stage 4 is also optional and is for the University Relations Approver. For any requisition line that relates to media contact, logo use or copyright items (based on NIGP code), the system routes it to the University Relations Approver.

The University Relations Approver must have the role “BOR_UNIVREL_APPR”. If your institution chooses to use the University Relations Approver path, there can be multiple approvers in this path. The institution will determine whether all University Relations Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for University Relations approval, and they may add monetary amount criteria.

- **Stage 4, Path 7: Default NIGP Code – 00000**

The seventh approval path in stage 4 will route to a Buyer Approver in the event that a GeorgiaFIRST Marketplace Requisition line does not have an NIGP code. If the line item does not have an NIGP code, it will default to the “00000” NIGP code. This requisition line will automatically route to a Buyer Approver for correction.

Stage 5: Buyer Approval

In Approval Stage 5, the system will route all special request requisitions (those requisitions not built from the GeorgiaFIRST Marketplace) to the person designated to give buyer approval. This stage is primarily used for Special Request Requisitions since they are not built from contract-approved catalogs. The Buyer Approver can then ensure the line item meets all procurement policies.

Institutions may choose to have multiple Buyer Approvers. In addition, the Institution can choose whether all Buyer Approvers must approve the requisition or if only one needs to act on it. Finally, the institution may choose to inactivate this stage or include it for all requisitions.

Approver’s Worklist

As an approver, when a requisition is routed to you for approval, it will appear in your Worklist in PeopleSoft Financials. You must access the PeopleSoft Financials Core system to work requisitions in your Worklist. The system will also notify you with an email indicating that you have a requisition awaiting your action. This email will contain a hyperlink to the approval page. If you are not signed into PeopleSoft, you will first be required to sign into the system.

The Worklist is a queue which holds items waiting for approval. Once an approver works a transaction, it is removed from their Worklist. Once a requisition has been placed in your Worklist, you have a limited time in which to act upon it. After three days of inactivity on a requisition, the system will send you a reminder notification that the requisition must be worked. After four days without approving or denying a requisition, that transaction will escalate to another level and be removed from your Worklist. The

ePro Administrator will then need to reassign that transaction to another approver. Individual institutions can customize the number of days before escalating or reassignment to the ePro Admin.

After approving or denying a requisition line, the system removes it from your Worklist. However on rare occasions, a requisition line may be distributed to multiple Chartfields. If you feel that a requisition that you have already worked should have left your Worklist and still remains, contact your ePro Admin for assistance.

As you are reviewing a requisition, you have the ability to either approve or deny it. When you approve it, it moves onto the next approver. If you are the last approver for a requisition, it will then be made available for budget checking and processing into a purchase order. If you deny the requisition, the system will notify the Requester of this. The system will require you to input a comment before denying it so that the Requester will know why it was denied. If the requisition just needs to be adjusted, you can indicate this in the comments and then deny it. The Requester can make the necessary adjustments and resubmit it for approval.

Retrieving Your Worklist

When a requisition line has been routed to you for approval, it will appear in your Worklist. You will also be notified via email that a requisition is awaiting your action. You can access your Worklist from the home page in PeopleSoft Financials Core system. Keep in mind, that to approve requisitions, you must be in the Core system and not the Self Service system (used for Expenses).

After entering your PeopleSoft User ID and Password, you can sign into the system. Remember, your User ID and Password are case sensitive. Also, if you attempt to sign-in five times with the incorrect login information, the system will lock you out. To unlock your account, notify your Local Security Administrator.

You can access the Worklist through either the link in the upper right corner of the page or in the Main Menu.

Your Worklist is separated into different columns. First, the person who submitted the requisition is listed in the “**From**” Column. The “**Date From**” column indicates when the requisition was submitted. The “**Work Item**” column indicates what action is required. The “Priority” column is not used. And the “**Link**” column displays the link to the Requisition needing approval. Note that the “Reassign” button has been inactivated on this page.

On your Worklist, you can sort the page by clicking on a column heading. For example, if you wanted to sort your Worklist by the Requester, you would click the “From” column heading.

In each Requisition link, there are certain pieces of information used to identify it. First, the link begins with the term “Requisition” and is followed by your institution’s Business Unit. The Requisition ID is listed next. To go to the Requisition Approval page, simply click on that Requisition link.

On the Requisition Approval page, approvers will see the following:

- Requisition Name: If given a specific name, it will appear here; otherwise it will be the Requisition ID

- Requisition Total Amount
- Requester: selecting this link displays the Requester's name, Employee ID, and Department
- Date Requisition was entered into the system
- Requisition Status: Pending (pending approval)
- If Requester entered any comments about the whole requisition, they will be listed next to Requester's Justification
- Business Unit, Requisition ID, and Priority are listed
- Edit Requisition: Some approvers may have this option in order to modify the requisition, which may restart Workflow

In the Line Information section are the requisition lines upon which you are required to act. The "clock" icon indicates that the line is pending your approval. Selecting the item description hyperlink displays the Item Description page, which shows the item price, category and supplier (if listed). The "Requester's Comments" call-out icon appears for those lines that have comments or attachments.

To see the line details, select the requisition line with a checkmark and select the View Line Details button. Multiple lines can be selected in order to display those line details simultaneously. A new window opens with shipping and distribution information, along with the Chartfields charged for that requisition line.

To see the approval path for a requisition, select the "expand" icon next to "Review/Edit Approvers." The Review/Edit Approvers section expands and lists all approvers that have acted or need to act on a requisition. In addition, there will be an approval path for each requisition line, since each line can have a different set of approvers depending on their Chartfields and item type.

Under the approval path, you can enter any comments that you wish to attach to the requisition. Do not include any slashes (/) in your comments. When you are ready to act on the requisition, you can select your requisition lines and then click the "Approve" or "Deny" button. Once approved, the "Requisition Approval" page should update indicating that you have completed your approval action. A requisition line will go to "approved" once all approvers have acted on it. Until then, the Requisition Status is still "Pending."

To return to your Worklist to work another requisition, select the "Return to Worklist" link.

Ad-Hoc Approvers

eProcurement gives you the ability to insert additional approvers if you feel it is necessary. After reviewing a requisition's approval path, you can insert additional approvers if you have the "BOR_AD_HOC_APPROVE" security role.

While you are reviewing the approval path for a requisition, you can insert the ad hoc approver wherever you see a green plus sign (+). After clicking the green plus sign where you want to insert the additional approver, the system will display a pop-up box where you can select the ad hoc approver.

If you select the User ID look up icon, you will be able to search for the approver by User ID or by name. After selecting the additional approver, you can specify whether you want that approver to be inserted as an Approver or a Reviewer.

- Approver: If you select another person to be an approver, that person will be required to approve the requisition before it can move onto the next step.
- Reviewer: If you select another person to be a reviewer, that person will see the requisition in their Worklist, but they will not need to approve the requisition line.

If you have inserted an approver and then decide to remove them, you must do this before you approve the requisition. To remove a user you added as an Ad Hoc approver, select the red minus sign (-) in that person's approval box.

When you insert another person in the approval path for a requisition, that user will need to proper 'approver' security setup in the system to work the requisition. If you unsure if the user has the correct security setup, contact that user and your Local Security Administrator.

[Requisition Push Back](#)

All approvers can approve or deny a requisition that is submitted to them. Some approvers also have the ability to push a requisition back to the previous approver. This may be necessary if an approver has additional questions about a requisition. Initial approvers for a requisition will be unable to push back a requisition since there are no previous approvers in the approval path. Project approvers and inserted ad hoc approvers can use the push back function.

When you push back a requisition, it places that requisition back into a Pending status for that approval step. If you receive a requisition that was pushed back, you will be required to approve it again or deny it. When you push back a requisition, you will be required to enter comments explaining why you are pushing the requisition back. Do not include any slashes (/) in the comments field. After pushing it back, you will receive confirmation the requisition has been pushed back to the previous approver.

As the approver who receives a pushed back requisition, you will easily be able to see that it was pushed back and you can review the comments to determine why it was pushed back. You can then perform the necessary actions and either approve or deny the requisition. If you approve it, it will proceed on the approval path.

[Access Your Worklist](#)

1. Log into PeopleSoft Financials Core System with your **User ID** and **Password**.
2. Click the **Worklist** hyperlink in the upper right corner of the home page.
3. Click a **Requisition link** under the "link" column to display a requisition.

[Approve a Requisition](#)

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a **checkmark** and clicking the **View Line Details** button.
4. Review the **approval path** if desired. You can insert additional approvers if needed (see lesson #).

5. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
6. Select the lines you want to approve with a **checkmark** and then click the **Approve** button.
7. After receiving the approval confirmation, click the **Return to Worklist** link.

Deny a Requisition

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a **checkmark** and clicking the **View Line Details** button.
4. Review the **approval path** if desired.
5. Enter **comments** explaining why you are denying the requisition. Do not include any slashes (/) in the comments field.
6. Select the **lines** you want to deny with a **checkmark** and then click the **Deny** button.
7. After receiving the denial confirmation, click the **Return to Worklist** link.

Insert an Ad-Hoc Approver

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a checkmark and clicking the **View Line Details** button.
4. Review the **approval path**.
5. Click the **green plus sign (+)** where you want to insert the ad hoc approver.
6. Click the **User ID** look up icon in the pop-up window.
7. **Search** for the name or User ID of the approver you want to add. Click on that person's name.
8. Select either **Approver** or **Reviewer**.
9. Click the **Insert** button.
10. Click the **Apply Approval Changes** button.
11. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
12. Select the lines you want to approve with a checkmark and then click the **Approve** button.
13. After receiving the approval confirmation, click the **Return to Worklist** link.

Push Back a Requisition to the Previous Approver

1. Select the **requisition** from your **Worklist**.
2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
3. Review each line item's details by selecting them with a checkmark and clicking the **View Line Details** button.
4. Review the approval path if desired.
5. Enter **comments** as to why you are pushing the requisition back to the previous approver. Do not include any slashes (/) in the comments field.

6. Select the lines you want to push back with a checkmark and then click the **Push Back** button.
7. After receiving the Push Back confirmation, click the **Return to Worklist** link.

Assigning an Alternate Approver

When you assign an alternate approver, you are telling the system that whenever your Worklist receives new requisitions to work, that you want them routed to the alternate approver during the time frame specified. The system will then automatically forward any new Worklist items to your Alternate User during that specified time. You will not be able to reassign the items already in your Worklist.

You will need to work with your Local Security Administrator to ensure that the alternate approver you wish to assign has the proper security setup needed to work the requisitions. They will need the same approval authority that you have. Otherwise, they will not be able to access the requisition.

Assign an Alternate Approver

1. In PeopleSoft Financials Core System, select **eProcurement** in the menu.
2. Select **My Profile**.
3. Select the **Alternate User ID** look up icon.
4. Search for your alternate user by either **User ID** or name (Description).
5. Select your alternate user by clicking on their **User ID**.
6. Enter the **Effective Date From**.
7. Enter the **Effective Date To**.
8. Click the **Save** button.

Lesson 5: Helpful Hints for Training End-Users

One of the more challenging part of an application upgrade is dealing with end-users' resistance to change. This is a common reaction and occurs in almost every upgrade. Therefore, a large part of training your institutional end-users is helping them prepare for the change.

Preparing End-Users for Change

One way to help your end-users overcome their resistance to change is to properly frame the upcoming change. Instead of just saying, "PSFIN is being upgraded so we need to instruct you on how to use the changed application now," consider communicating how there is new functionality designed to make it easier to enter Requisitions.

There are certain bits of information that you can communicate with your End-Users to help them be more receptive to the upgraded application, including:

- The ePro module has a cleaner and faster interface
- No changes affecting the GeorgiaFIRST Marketplace (shoppers should see little difference outside of the home page)
- New functionality in PSFIN enables multiple Ship To locations on Requisitions and Purchase Orders
- Easier to search for suppliers now; no longer restricted to searching just by Supplier ID
- Can now create an "Amount Only" requisition, in order to be sourced into an "Amount Only" purchase order

Train-the-Trainer Kit for ePro

There have been various items created for you to use when training your end-users on ePro. The materials include lesson plans, supporting PowerPoint slides, and information for job aids. All items are created and provided to you with little to no formatting. This enables you to apply your own formatting or copy and paste into your own documentation. These materials are stored on the GeorgiaFIRST website.

Additional Tips for Training End Users

- Consider offering multiple opportunities for users to attend training
- Consider chunking up the training into small sessions if possible
- Consider allowing hands-on training so end-users can practice in a safe environment