Introduction to ePro and the GeorgiaFIRST Marketplace

The content of this presentation was the most up-to-date information available at the revision date. However, policies, procedures and guidelines may be updated during an academic year. Please refer to the University Policy website for the most current version of these policies, procedures and guidelines.

8/09/2016
Day 1 – Important Notes

- Discuss handouts
- Security Request Forms (w/default acct #)
- ePro Listserv
- Coaster
- Test Database URL, login and password
- Production Database; no access until after training
- Login to test database
Learning Outcomes

• Understand the basics of the eProcurement module
• Log in and access the ePro module
• Understand the responsibilities of a requester
• Create a Marketplace requisition
• Create a Special Request requisition
• Edit, cancel and view a requisition
• View a requisition in the lifecycle
• Perform desktop receiving
What is ePro?

- PSFIN module for requisition creation and management
  - Request goods and services
- Electronic approvals via Workflow
- ePro Requisitions are routed to various approvers, are budget checked, and then sourced into Purchase Orders
ePro Requisitions

• Marketplace Requisitions
  – Items selected from the GeorgiaFIRST Marketplace and pulled into the ePro Requisition
  – GeorgiaFIRST Marketplace items are contract/catalog items

• Special Request Requisitions
  – Items are manually entered onto requisition
What is the GAFirst Marketplace?

• Online catalog system accessed through PSFIN
• SciQuest is the managing company of the Marketplace
• Shop online from State and USG approved suppliers/contracts
Types of Catalogs in Marketplace

• Hosted Catalogs
  – Online version of a supplier’s printed catalog

• Punch-out Catalogs
  – Integrated external links to a supplier’s web-based catalog dedicated to contract items/pricing
Requester enters PSFIN and begins creation of requisition in ePro

Requester enters GAFIRST Marketplace and selects items to create shopping cart

Requester “issues requisition” to pull cart into ePro

Requester makes updates to Distribution/Schedule information if needed

Requesters can approve or deny requisition; some can make edits

Approvers log into PSFIN Core to access Worklist

Approvers can approve or deny requisition; some can make edits

Requester submits requisition for approval; system notifies approver(s) via email

Requester previews approvals and inserts ad hoc approvers if necessary

Once fully approved, requisition is available for further processing; Requester is notified via email

Marketplace Requisition can be fully processed through SCIQUEST batch job (run 5x each day)

After item(s) is delivered, receipt is created in PSFIN

Accounts Payable pays invoice
Special Request Requisitions

- No entry to the GeorgiaFIRST Marketplace
- Items are manually entered onto requisition
- For non-catalog/contract items
- Not available to be automatically sourced into a PO; Purchasing Department will source these requisitions into POs
Roles Involved - Shoppers

- Not every department uses Shoppers
- Search for and select items in the GeorgiaFIRST Marketplace
- Create shopping carts and assign to a requester
Roles Involved – Requesters

• Create Marketplace Requisitions from Assigned Shopping Carts (from Shoppers if utilized in their department)
• Create Marketplace Requisitions from their own Shopping Carts
• Create Special Request Requisitions
• Manage requisitions by editing or canceling
• View where requisition is in its lifecycle
• Responsible for completing their own Desktop Receiving
Roles Involved – Approvers

• UWG has identified Workflow stages and paths
• Minimum approval required by Department and Project Managers (if project Chartfield is included)
• Special approvals for different commodities will also be required (i.e. IT/AV, chemicals and assets)
Roles Involved – Buyers

• Approve Special Request Requisitions as Buyer Approver
• Corrects processing error for Marketplace Requisitions
• Source Special Request Requisitions into Purchase Orders
• Reconciles Purchase Order and Requisitions
Roles Involved – Others

• ePro Admin
  – Responsible for monitoring Workflow
  – Reassigning any escalated requisitions

• Local Security Admin
  – Set up security roles, Requester & Buyer Setup, and User preferences
Roles Involved – Others

• Accounts Payable (not a part of Purchasing)
  – Process invoices and submits payments to vendors
  – Send all invoices received to AP via email or campus mail
  – AP cannot pay from a quote
  – Contact AP with any questions on payments
    ➢ Rhoanda McCrary rmccrary@westga.edu x96397
      o Regular PO payments
    ➢ Jamie Fernander jfernand@westga.edu x95357
      o Check request payments (except for registration) and utility PO’s
Requester Responsibilities in ePro and the GeorgiaFIRST Marketplace
What does a Requester do?

- Creates Marketplace Requisitions from Assigned Shopping Carts
- Creates Marketplace Requisitions from Personal Shopping Carts
- Creates Special Request Requisitions
- Ensures proper schedule and distribution information
- Submits requisition for approval
- Monitors the Requisition through its lifecycle
- Manages Requisitions
- Receives Items through Desktop Receiving
Entering the GeorgiaFIRST Marketplace

- Must always enter through the ePro Menu
- Requester permissions are passed from PeopleSoft to the Marketplace
- If Accessing through direct link in the menu and try to pull shopping cart into ePro, system will generate errors
- eProcurement > Requisition > GaFIRST Marketplace
Entering the GeorgiaFIRST Marketplace
Entering the Georgia FIRST Marketplace
Entering the Georgia FIRST Marketplace
Activity: Enter the GeorgiaFIRST Marketplace

• Log into PSFIN
• Select eProcurement
• Select Requisition
• Select the GeorgiaFIRST Marketplace link
Verify Profile Information

• Select dropdown arrow next to name.
• Select “View My Profile”
  – Notify Purchasing if it is incorrect
• First time in; Verify Name, Phone, Email, Business Unit and Department
# Activity: Verify Profile Information

![Profile Information]

**User's Name, Phone Number, Email, etc.**

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Patricia</td>
</tr>
<tr>
<td>Last Name</td>
<td>Durrough</td>
</tr>
<tr>
<td>Phone Number</td>
<td>+1 (678) 839-6392</td>
</tr>
<tr>
<td>E-mail Address</td>
<td><a href="mailto:pdurroug@westga.edu">pdurroug@westga.edu</a></td>
</tr>
<tr>
<td>Business Unit</td>
<td>University of West Georgia (54000)</td>
</tr>
<tr>
<td>Department</td>
<td>~NO_DEPT_FOUND (~NO_DEPT_FOUND)</td>
</tr>
<tr>
<td>User Name</td>
<td>pdurroug</td>
</tr>
<tr>
<td>Authentication Method</td>
<td>cXML</td>
</tr>
</tbody>
</table>

**Save**
Welcome to the GeorgiaFirst Marketplace site. Please see below for important notes and updates:

We have over 60 suppliers in the GeorgiaFirst Marketplace. To access suppliers that do not have icons in the showcase to the right, enter the product or supplier name in the Shop/Search bar at the top and click "Go".
Searching and Selecting Items in the GeorgiaFIRST MarketPlace
Simple Search

• Similar to a Google-type search
• Keywords searches all item fields, including product name, description, SKU number, supplier and manufacturer name
• Best Practice: Select a category first
• After entering a keyword(s), click Go
Marketplace Product Categories

- Lab Supplies
- Medical/Clinical
- Office/Computer
- MRO/Facilities
- Services
- Supplies
- Manager
- Manufacturer
- Books
- Electronics
- Specialty
- Food/Food Equipment
Advanced Search
**Browse by Supplier**

![Browse by Supplier interface](image)

<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSN SPORTS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dal-Kawa Cycle Center</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1st Coast Printing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Order 2 Remit 2 bus and fax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A Legendary Event</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A&amp;D Painting, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A. Daigger &amp; Co.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC Sign Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ace Glass Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activate the Space</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adrenalin Powerports, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Backflow Technologies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Business Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agilent Technologies, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airgas South</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airgas South</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Star Screen Printing LLC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allgood Pest Solutions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alligare, LLC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allmond, Sarah E</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Browse by Category

Categories
- Lab Supplies
- Medical/Clinical
- Office/Computer
- MRO/Facilities
- Furniture
- Services
- Supplies Manager
- Manufacturing
- Books
- Electronics
- Specialty
- Food/Food Equipment
Add Additional Keywords
Using Filter Results
Using Product Comparison

- Search for furniture chairs
- Compare selected products
- View details of each product

- Spark stacking side chair with seat pad - Drop Ship
- Part Number: 444 Spark - Drop Ship
- Contract Number: SWC60748
- Price: $50.00

- Spark stacking side chair with seat pad - Desktop Ship
  - Part Number: 444 Spark - Desktop Ship
  - Contract Number: SWC60748
  - Price: $50.50

- Generation task chair, high performance arms, plastic base, standard cylinder, no lumber, hard casters - Drop Ship
  - Part Number: 333 Task - Drop Ship
  - Contract Number: SWC60748
  - Price: $60.00
Add Items from Product Comparison

<table>
<thead>
<tr>
<th>Select</th>
<th>Add to Cart</th>
<th>Qty 1</th>
<th>Add to Cart</th>
<th>Qty 1</th>
<th>Add to Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Details</td>
<td></td>
<td>Generation task chair, high performance arms, plastic base, standard cylinder, no lumbar, hard casters - Drop Ship</td>
<td></td>
<td>Spark stacking side chair with seat pad - Drop Ship</td>
<td></td>
</tr>
<tr>
<td>Catalog No.</td>
<td></td>
<td>333 Task - Drop Ship</td>
<td></td>
<td>444 Spark - Drop Ship</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td></td>
<td>60.00 USD</td>
<td></td>
<td>50.00 USD</td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td></td>
<td>Statewide Contract Supplier</td>
<td></td>
<td>Statewide Contract Supplier</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td></td>
<td>Office furniture</td>
<td></td>
<td>Office furniture</td>
<td></td>
</tr>
</tbody>
</table>
Add Items from Product Results Page

Shop: Furniture

Results for: Furniture : chair

Showing 1 - 20 of 967 Results

Spark stacking side chair with seat pad - Drop Ship
from Statewide Contract Supplier
Part Number: 444 Spark - Drop Ship
Contract Number: SWC60748 more info...
Furniture, Office, Computer and Educational
Price: 50.00 USD
Add to Cart

Spark stacking side chair with seat pad - Desktop Ship
from Statewide Contract Supplier
Part Number: 444 Spark - Desktop Ship
Contract Number: SWC60748 more info...
Furniture, Office, Computer and Educational
Price: 50.50 USD
Add to Cart
Add Item from Product Description
Searching from a Punch-Out Supplier

- Click on the Suppliers Logo on the Home page
- Actually accessing that supplier’s website dedicated to our contract
- Each supplier’s search feature will be different
Add Items from Punch-Out Supplier

• It is best to make any updates to items (adjust quantity, remove item, etc.) while still in the Punch-Out Supplier’s website.

• Complete order by following directions in the Punch-Out supplier site (i.e. Complete Order, Submit, etc.)

• When doing this, you are not creating an order with that supplier; you are simply pulling that order into your Marketplace Shopping Cart
Demonstrations

• Simple Search
• Advanced Search
• Use Filter Results
• Browse by Supplier
• Browse by Category
• Add from Product Results Page
• Add from Product Description Page
• Use Product Comparison
• Search from Punch-Out Supplier
Practice Activity

• Search for one item from a hosted catalog
• Search for one item from a punch-out catalog
• Add both to your shopping cart
Building a Marketplace
Requisition from a Personal Cart
Building a Marketplace Requisition from a Personal Cart

- Build Marketplace Requisitions from carts you create
- Building Marketplace Requisitions from carts assigned to you (when shopper functionality is utilized)
Beginning a Marketplace Requisition
Beginning a Marketplace Requisition

**eProcurement**
Set up eProcurement; manage or approve eProcurement requisitions or POs.

- **Requisition**
  Create a new requisition by browsing or searching company or external catalogs.

- **Manage Requisitions**
  Review requisitions, edit or view status, cancel, receive, and Return To Vendor (Supplier).

- **Manage Requisition Approvals**
  Take actions on requisitions that require your approval.

- **Buyer Center**
  Create/edit/approve purchase order; source requisition; process purchase change request;
  Suppliers

- **Receive Items**
  Create, edit, and process receipts and Return To Vendor (Supplier).

- **My Profile**
  Modify personal information and preferences.
Beginning a Marketplace Requisition

- Web: Browse Supplier Websites
  - GAFirstMarketplace
- Forms: Create and Submit Forms
- ePro Services: Request Services
- Express Item Entry: Create an Express Requisition
- Favorites: Browse Favorite Items and Services
- Recently Ordered: View recently ordered items and services
  - Row Hall Copier Rental S/N V...
  - Copier Usage
- Special Requests: Create a non-catalog request
- Templates: Browse Company and Personal Templates
Building a Shopping Cart

• Search and select items to add to your cart
• View cart:
  – Carts icon > Open My Active Shopping Cart
  – Cart Summary Link at top right corner of the page
Building a Shopping Cart

Shopping Cart for Patricia Durrough

Name this cart: 2013-11-15 pduroug 01

Have you made changes? Update

Continue Shopping

Multi Media Services more info...

Product Description Unit Price Quantity Total

- Advantage® Motor Extension Cord
  Part Number: 85427
  Manufacturer: Dalite
  Contract: 99999-SPD-SPD0000021-0002
  Computer Peripherals and General Audio Visual Product...

  Unit Price: 10.35 USD
  Quantity: 1
  Total: 10.35 USD

TIG Technology Integration Group (TIG) more info...

Product Description Unit Price Quantity Total

ETHERNET PATCH CABLE FOR Q24/M24 1 METER
  Part Number: MBX-OPTCBLLAN1
  Manufacturer Info: MX-OPT-CBL-LAN-1 - (MOBOTIX)
  Contract: 99999-SPD-SPD0000031-0001

  Unit Price: 11.83 USD
  Quantity: 1
  Total: 11.83 USD
Checking Out of the Marketplace

Shopping Cart for Patricia Durrough

Have you made changes? [Update]

Multi Media Services

- Advantage® Motor Extension Cord
  - Part Number: 85427
  - Manufacturer: Dalite
  - Contract: 99999-SPD-SPD0000021-0002

Total: 10.35 USD

Technology Integration Group (TIG)

ETHERNET PATCH CABLE FOR Q24/M24 1 METER
  - Part Number: MBX-OPTCBLLAN1
  - Manufacturer Info: MX-OPT-CBL-LAN-1 - (MOBOTIX)
  - Contract: 99999-SPD-SPD0000031-0001

Total: 11.83 USD

2 Item(s) for a total of 22.18 USD

[Continue Shopping]

[Proceed to Checkout]
Checking Out of the Marketplace

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.
Complete the Marketplace Requisition in ePro

• System will return you to Checkout – Review and Submit

• Can update/add:
  – Requisition Name
  – Line Comments
  – Header comments in Justification/Comments
  – Requisition line schedule and distribution (chartstring and ship to information)
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Pilot G2 Premium Retractable</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.7300</td>
<td>27.46</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Shipping**
- **Ship To**: BUS EXCELL
- **Address**: University of West Georgia, Cent Ctr for Bus. Excellence, 1601 Maple Street, Carrollton, GA 30118
- **Attention To**: Durrough, Patricia S
- **Due Date**:

**Accounting Lines**
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pilot G2 Premium Retractable</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.7300</td>
<td>27.46</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Staples Top-Tab File Folders,</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Box</td>
<td>7.2200</td>
<td>14.44</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Swingline LightTouch High Capa</td>
<td></td>
<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Avery Framed View Binder With</td>
<td></td>
<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>6.8800</td>
<td>6.88</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total Amount: 71.06 USD

Select lines to:  Add to Favorites  Add to Template(s)  Delete Selected  Mass Change
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Supplier ID
Buyer

Supplier Location
Category

Shipping Information

Ship To Location
Due Date

Add One Time Address
Attention

SpeedChart

Accounting Lines

Please enter GL Business Unit before selecting other chartfield values.

Accounting Information

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Chartfields3</th>
<th>Details</th>
<th>Asset Information</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund</td>
<td>Dept</td>
<td>Program</td>
<td>Class</td>
<td>Bud Ref</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>110500</td>
<td>1045125</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OK Cancel Refresh

Load Values From Defaults
Complete the Marketplace Requisition in ePro

Distribution Change Options

For the selected requisition lines, apply distribution changes to

- **All Distribution Lines**
  Apply changes to all existing distribution lines.

- **Matching Distribution Lines**
  Apply changes to each existing distribution line by matching the distribution line numbers.

- **Replace Distribution Lines**
  Remove the existing distribution lines and replace with the distribution lines changes.

[Buttons: OK, Cancel, Refresh]
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Preview Approvals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Unit</strong></td>
</tr>
<tr>
<td><strong>Status</strong></td>
</tr>
<tr>
<td><strong>Priority</strong></td>
</tr>
<tr>
<td><strong>Budget Status</strong></td>
</tr>
</tbody>
</table>

### Department and Proj. Approval

#### Line 1: Initiated
- **Chair #4256396**
  - **Department and Proj. Approver**
  - **Skipped**
    - No approvers found
    - Multiple Department Approval
  - **Not Routed**
    - Sears, Richard H
    - Req-Dept Mgr-Line Level
  - **Not Routed**
    - Sutherland, James R.
    - Inserted Approver

#### Line 2: Initiated
- **Desk #745896321**
  - **Department and Proj. Approver**
  - **Skipped**
    - No approvers found
    - Multiple Department Approval
  - **Not Routed**
    - Sears, Richard H
    - Req-Dept Mgr-Line Level

**Actions:**
- **Return**
- **Apply Approval Changes**
Complete the Marketplace Requisition in ePro

**Do not attempt to manually budget check the requisition. It will budget check automatically.**
Complete the Marketplace Requisition in ePro

Department and Proj. Approval

- Line 1: Pending
  - Skipped
    - No approvers found
    - Multiple Department Approval
  - Pending
    - Sears, Richard H
    - Req-Dept Mgr-Line Level
  - Not Routed
    - Sutherland, James R
    - Inserted Approver

- Line 2: Pending
  - Skipped
    - No approvers found
    - Multiple Department Approval
  - Pending
    - Sears, Richard H
    - Req-Dept Mgr-Line Level
Demonstration

• Log in and follow along with the instructor to create a Marketplace Requisition using the items you placed in your shopping cart in the previous exercise.
Building a Special Request Requisition

PeopleSoft 9.2
Marketplace Practice Activity

• As a refresher from Day 1, use the Marketplace Practice Activity to enter a marketplace requisition

• ePro Listserv
Special Request Requisitions

• For items that are not found in the GeorgiaFIRST Marketplace

• Can use a supplier that is in the Marketplace, but if item can be found there, create a Marketplace Requisition

• Items are added manually to a Special Request Requisition
Entering a Requisition
Entering a Requisition

- Requisition: Create a new requisition by browsing or searching company or external catalogs.
Requisition Settings
Requisition Settings

- **Business Unit**: 54000
- **Requester**: pdurrough
- **Currency**: USD

**Default Options**
- **Override**: If selected, the defaults specified below will override any predefined values for these fields.

**Line Defaults**
- **Supplier**: [Search]
- **Category**: [Search]
- **Unit of Measure**: [Search]

**Shipping Defaults**
- **Ship To**: BUS EXCELL
- **Due Date**: [Input]
- **Attention**: [Input]
- **Freight Terms**: FOB:DEST

**Distribution Defaults**
- **SpeedChains**: [Input]

**Accounting Defaults**
- **Chartfields1**: [Table]
- **Chartfields2**: [Table]
- **Chartfields3**: [Table]
- **Details**: [Table]
- **Asset Information**: [Table]

**Accounting**: [Table]
Searching for a Supplier

Requisition Settings

Business Unit: 54000  
Requester: pdurroug  
Currency: USD

Requisition Name
Priority: Medium

Line Defaults

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

**Supplier**

Category
Unit of Measure

Supplier Location
Buyer

Shipping Defaults

Ship To: BUS EXCELL
Due Date

Add One Time Address
Attention

Accounting Defaults

Fund
Dept
Program
Class
Bud Ref: 2015

UNIVERSITY of WestGeorgia  Center for Business Excellence
Searching for a Supplier

Supplier Search

Supplier ID
Name
Short Supplier Name
Alternate Supp Name
City
Country
Postal Code
State

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

OK Cancel Refresh
Searching for a Supplier

• If your supplier is not in the PeopleSoft database, you must have the vendor added prior to entering your requisition
• Send the Vendor Profile Form and Vendor W-9 Form to your recommended supplier
• Send the completed forms to the Controller’s office to have the supplier added.
• Once supplier is added, you will be able to enter your requisition
Searching for an Item Category
Searching for An Item Category

Select “Description” in the dropdown and enter a brief item description. Click the “Find” button.
Searching for an Item Category

Select the appropriate category from the NIGP_SHORT_TREE.

<table>
<thead>
<tr>
<th>Catalog</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NIGP_SHORT_TREE</td>
<td>42507</td>
<td>Chairs, Wood</td>
</tr>
<tr>
<td>NIGP_SHORT_TREE</td>
<td>42558</td>
<td>Plastic, Polypropylene, Fiberglass Office Furniture: Chairs,</td>
</tr>
<tr>
<td>NIGP_SHORT_TREE</td>
<td>61523</td>
<td>Chair Mats (Carpet Protectors), All Types</td>
</tr>
<tr>
<td>NIGP_TREE</td>
<td>05590</td>
<td>Wheelchair Lift and Accessories, Vehicle-Mounted</td>
</tr>
<tr>
<td>NIGP_TREE</td>
<td>09529</td>
<td>Beauty Shop Chairs and Parts</td>
</tr>
</tbody>
</table>
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

Web
Browse Supplier Websites
GAFirstMarketplace

Express Item Entry
Create an Express Requisition

Forms
Create and Submit Forms

Favorites
Browse Favorite Items and Services

Recently Ordered
View recently ordered items and services
Row Hall Copier Rental S/N V...
Copier Usage

Templates
Browse Company and Personal Templates

Special Requests
Create a non-catalog request
Adding Items
Adding Items

Special Requests
Enter information about the non-catalog item you would like to order:

Item Details
- Item Description: Desk #741256395 Black and Cherry Wood
- Price: 250.00
- Quantity: 1
- Category: 42506
- Currency: USD
- Unit of Measure: ea

Supplier
- Supplier ID: 0000006558
- Supplier Name: Advantage Office Solution
- Supplier Item ID: 

Due Date: 

Suggest New Supplier
Line Comments & Adding Items

Additional Information

- Send to Supplier
- Show at Receipt
- Show at Voucher

Request New Item

- Request New Item
  A notification will be sent to a buyer regarding this new item request.

Add to Cart
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

All

Checkout

Search

Advanced Search

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

All

Checkout

Search

Advanced Search

Special Requests

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description: Credenza #415632963 Black and cherry wood

*Price: 300.00

*Quantity: 1

*Category: 42506

*Currency: USD

*Unit of Measure: EA

Supplier

Supplier ID: 0000008558

Supplier Name: Advantage Office Solutions

Supplier Item ID:

Manufacturer

Mfg ID:

Manufacturer

Mfg Item ID:
Requisition Summary
Adding Items
Checkout – Review and Submit

• Can edit the schedule or distribution information
• To upgrade multiple lines at the same time, select lines and click “Mass Change”
• Can add comments to requisition line by using Comments (call-out) icon at end of line.
• Can add any comments needed for the entire requisition
• When finished, “Save for Later” and “Preview Approvals”
• “Submit” to route for approval
Requisition Name & Expand the Line

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>University of West Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>pdurroag</td>
</tr>
<tr>
<td>*Currency</td>
<td>USD</td>
</tr>
</tbody>
</table>

Requisition Name: Special Request Test

Cart Summary: Total Amount 550.00 USD
Expand lines to review shipping and accounting details

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.000</td>
<td>250.00</td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.000</td>
<td>300.00</td>
</tr>
</tbody>
</table>
Updating the Schedule & Distribution Information
Charging a Requisition Line to Multiple Chartstrings
Enter Line Comments & Add Attachments

Checkout - Review and Submit
Review the item information and submit the req for approval.

Requisition Summary
- **Business Unit**: 54000
- **Requester**: pdurroug
- **Currency**: USD

**Requisition Name**: Special Request Test
**Priority**: Medium

Cart Summary: Total Amount 550.00 USD
Expand lines to review shipping and accounting details

<table>
<thead>
<tr>
<th>Requisition Lines</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cherry</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.0000</td>
<td>250.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and Cherry</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.0000</td>
<td>300.00</td>
<td></td>
</tr>
</tbody>
</table>

Add More Items
Enter Line Comments & Add Attachments
Update Chartstring Information on All Lines

<table>
<thead>
<tr>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desk #741256395 Black and Cher</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000 Each</td>
<td>250.00</td>
<td>250.00</td>
<td></td>
</tr>
<tr>
<td>Credenza #415632963 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000 Each</td>
<td>300.00</td>
<td>300.00</td>
<td></td>
</tr>
</tbody>
</table>
Enter Requisition Comments & Save for Later
## Preview Approvals

### Requisition Comments
Enter requisition comments

| Tricia Durrough  
| CBE 678-839-6392 |

- [ ] Send to Supplier  
- [ ] Show at Receipt  
- [ ] Shown at Voucher

### Approval Justification
Enter approval justification for this requisition

- Check Budget

- [ ] Save & submit  
- [ ] Save for Later  
- [ ] Add More Items  
- [ ] Preview Approvals
**Do not attempt to manually budget check the requisition. It will budget check automatically.**
Requisition Confirmation Page

Confirmation

Your requisition has been submitted.

Requested For: Durrough, Patricia S
Requisition Name: Special Request Test

Requisition ID: 0000500063
Business Unit: 54000
Status: Pending
Priority: Medium
Budget Status: Not Checked

Number of Lines: 2
Total Amount: 550.00 USD

View printable version
Edit This Requisition
Check Budget
Demonstration

• Demonstration of entering a Special Request Requisition
  – Searching for a Supplier
  – Searching for a Category Code

• Demonstration of splitting a line among multiple chartstrings

• Demonstration of adding an attachment
Special Request Practice Activity

• Use the Special Request Practice Activity to enter a special request requisition
Important Notes

- PCARD purchases
- Purchases of furniture on statewide contract
  - Pay special attention to “Issue Purchase Order To” section
  - “Ship To” address may be different
## Quotation #09416

Date: 14-Mar-2016

**Issued To:** University of West Georgia  
Center for Business Excellence  
Patricia Durrough’s Office  
Tricia Durrough

**Attention:**

---

<table>
<thead>
<tr>
<th>Ln No.</th>
<th>Product Code</th>
<th>Product Description</th>
<th>List Price</th>
<th>Product Cost</th>
<th>Qty</th>
<th>Extended Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ML-E30784224RB</td>
<td>Extended Desk Shell - C4</td>
<td>$1,813.00</td>
<td>$924.63</td>
<td>1</td>
<td>$924.63</td>
</tr>
<tr>
<td></td>
<td>MID</td>
<td>Breakfront</td>
<td>$71.00</td>
<td>$36.21</td>
<td>1</td>
<td>$36.21</td>
</tr>
<tr>
<td></td>
<td>HJA</td>
<td>Handles</td>
<td>$11.00</td>
<td>$5.61</td>
<td>3</td>
<td>$16.83</td>
</tr>
<tr>
<td>2</td>
<td>ML-2454R29CL36</td>
<td>Return Unit with Lateral File - C4</td>
<td>$1,107.00</td>
<td>$564.57</td>
<td>1</td>
<td>$564.57</td>
</tr>
<tr>
<td>3</td>
<td>ML-1684HP43</td>
<td>Hutch Unit - C4</td>
<td>$1,228.00</td>
<td>$626.28</td>
<td>1</td>
<td>$626.28</td>
</tr>
<tr>
<td></td>
<td>T536</td>
<td>Task Light - C24</td>
<td>$181.00</td>
<td>$92.31</td>
<td>1</td>
<td>$92.31</td>
</tr>
<tr>
<td></td>
<td>84TB</td>
<td>Tack Board - C24</td>
<td>$370.00</td>
<td>$188.70</td>
<td>1</td>
<td>$188.70</td>
</tr>
<tr>
<td>4</td>
<td>ML-2042MU24</td>
<td>File/Storage Multi Unit - C4</td>
<td>$1,952.00</td>
<td>$995.52</td>
<td>1</td>
<td>$995.52</td>
</tr>
</tbody>
</table>

**Finishes to be Determined**

---

**Pricing Includes Freight, Assembly/Installation & Design/Consultation Fees**

**Quote Submitted By:** L. Mark Camp  
770.830.6868 Ext 15  
mark@usadvantage.net

**Subtotal:** $3,445.05  
**Freight:** $0  
**Sales Tax:** $0  
**Installation:** $0  
**TOTAL:** $3,445.05

---

**Issue Purchase Order To:**  
Mobiler De Bureau Logiflex, Inc.  
Logiflex  
1235 Saint-Roch Nord  
Sherbrooke, QC, CA J1N 0H2

**Show Ship To:**  
Advantage Office Solutions  
65 Leggett Drive  
Villa Rica, GA 30180  
Call to Schedule Delivery
Important Notes

• Check Request purchases
  – [www.westga.edu/purchasing](http://www.westga.edu/purchasing)
  – Click on Forms > Check Request Form
For Accounts Payable Use Only:

Voucher #: ____________________________

Approved for Payment: __________________

Date of Entry: ______/____/____

---

Check Request Form
University of West Georgia
1801 Maple Street, Carrollton, Georgia 30118
678-339-6390

---

Requester Name: ______________________

Date: _____________________________

Requesting Department Name: ______________________

Phone#: _____________________________

---

Chart of Accounts:

<table>
<thead>
<tr>
<th>Acct Code</th>
<th>Fund</th>
<th>Dept</th>
<th>Prog</th>
<th>Class</th>
<th>Proj</th>
<th>AmtS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

---

Total Amount: $ 0.00

---

Description of Item(s):

---

Vendor Look Up (copy & paste): ______________________

---

Vendor Information:

---

OFFICE OF CONTROLLER USE ONLY:

---

Requested by: ____________________________

Approved by: ____________________________

Approved by: ____________________________

---

Check Request Form should be typed and requesters are to be knowledgeable of criteria for “Qualified Check Request Purchases” located on the Purchasing Services website.
Searching for a Supplier when Submitting a Check Request

• Log into PeopleSoft
• Suppliers > Add/Update>Supplier
• Enter the Supplier Name and click the Search button
• If you do not see the supplier listed, the supplier is not in PeopleSoft and will need to be added before the check request can be processed. Have the supplier complete a Vendor Profile Form and a W9 Form and submit with your Check Request
Managing Requisitions

PeopleSoft 9.2
Managing Requisitions

• eProcurement > Manage Requisitions
• Review Requisition information
• Edit a Requisition
• Delete a Requisition line
• Cancel a requisition
• You will be able to see the requisitions for all requesters that you have authority for (set up via User Preferences)
Searching for Requisitions

• Can use the following to search for requisitions:
  – Business Unit
  – Requisition
  – Requisition Name
  – Request Status
  – Budget Status
  – Date From/Date To
  – Requester
  – Entered By
  – PO ID
Searching for Requisitions

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

- **Business Unit**: 54000
- **Requisition Name**
- **Request State**: All but Complete
- **Date From**
- **Date To**
- **Requester**: pdurroug
- **Budget Status**
- **Origin**
- **PO ID**

Search for Requisitions

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
<th>[Select Action]</th>
<th>Go</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>2,165.00</td>
<td>USD</td>
<td>Go</td>
</tr>
<tr>
<td>0000500063</td>
<td>Special Request Test</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>550.00</td>
<td>USD</td>
<td>Go</td>
</tr>
<tr>
<td>0000500062</td>
<td>Test for Training</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>300.00</td>
<td>USD</td>
<td>Go</td>
</tr>
<tr>
<td>0000500061</td>
<td>0000500061</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Open</td>
<td>Not Chk'd</td>
<td>29.16</td>
<td>USD</td>
<td>Go</td>
</tr>
<tr>
<td>0000500060</td>
<td>0000500060</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Open</td>
<td>Not Chk'd</td>
<td>71.06</td>
<td>USD</td>
<td>Go</td>
</tr>
<tr>
<td>0000500059</td>
<td>Testing</td>
<td>54000</td>
<td>03/24/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>1,900.00</td>
<td>USD</td>
<td>Go</td>
</tr>
<tr>
<td>0000500052</td>
<td>Test</td>
<td>54000</td>
<td>03/24/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>2,165.00</td>
<td>USD</td>
<td>Go</td>
</tr>
</tbody>
</table>

Show Advanced Search
Reviewing Requisitions and Their Life Cycle
## Department and Proj. Approval

### Line 1: Pending
Desk #741256395 Black and Cherry Wood

<table>
<thead>
<tr>
<th>Department and Proj. Approver</th>
<th>Pending</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skipped</td>
<td>Sears, Richard H&lt;br&gt;Req-Dept Mgr-Line Level</td>
<td>Sutherland, James R. &lt;br&gt;Inserted Approver</td>
</tr>
</tbody>
</table>

### Line 2: Pending
Credenza #415632963 Black and cherry wood

<table>
<thead>
<tr>
<th>Department and Proj. Approver</th>
<th>Pending</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skipped</td>
<td>Sears, Richard H&lt;br&gt;Req-Dept Mgr-Line Level</td>
<td>Sutherland, James R. &lt;br&gt;Inserted Approver</td>
</tr>
</tbody>
</table>
Requisition Status and Life Cycle
Requisition Status and Life Cycle

![Oracle Requisition Status and Life Cycle](image)

### Business Unit
54000

### Requisition Information
- **Requisition ID**: 0000500069
- **Line Number**: 1

### PO Information
- **PO Number**: 0000510015
- **PO Date**: 03/27/2015
- **Supplier ID**: 0000008558
- **Terms**: N10
- **PO Status**: Dispatched

<table>
<thead>
<tr>
<th>Lines</th>
<th>Item ID</th>
<th>Description</th>
<th>Merchandise Amt</th>
<th>UOM</th>
<th>PO Qty</th>
<th>Status</th>
<th>Line Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Chair #415263986</td>
<td>100.00 USD</td>
<td>EA</td>
<td>1.0000</td>
<td>Approved</td>
<td></td>
</tr>
</tbody>
</table>

Return to Manage Requisitions
Edit a Requisition

• Can edit a requisition until it has been sourced to a Purchase Order
• Select the Edit Requisition option in the Action drop down list and click “Go”
• Requisition may have to restart Workflow approvals if edited
• Can only edit schedule and distribution information for a Marketplace Requisition
Edit a Requisition
Edit a Requisition

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036.6248)

OK  Cancel
Edit a Requisition
Delete a Requisition Line

• You can delete a requisition line from the Manage Requisitions page by choosing the “Edit Requisition” option.
• Can delete a REQ line as long as it does not have a valid budget check yet.
• Select the REQ line and click the Delete button.
• Resubmit the Requisition for approval.
Delete a Requisition Line

Manage Requisitions

To locate requisitions, edit the criteria below and click the Search button.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Requisition ID</th>
<th>Request State</th>
<th>Budget Status</th>
<th>Origin</th>
<th>PO ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></td>
<td>All but Complete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>03/20/2015</td>
<td>03/27/2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requester</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Requisitions

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chkd</td>
<td>250.00 USD</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>

Show Advanced Search
Delete a Requisition Line

### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.000</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chair</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.000</td>
<td>300.00</td>
<td></td>
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<tr>
<td></td>
<td>and</td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select lines to: [Add to Favorites] [Add to Template(s)] [Delete Selected]
Delete a Requisition Line

Delete Confirmation

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK  Cancel
Cancel a Requisition

• Can cancel a requisition if you decide the items are not needed or because the entire requisition was denied

• Can cancel a REQ as long as it has not been sourced to a Purchase Order yet

• On Manage Requisitions page, verify requisition status is not “PO Created” or “PO Dispatched”

• Select “Cancel Requisition” from Action drop down list
# Cancel a Requisition

## Manage Requisitions

### Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

- **Business Unit**: 54000
- **Requisition ID**: pdurrough
- **Date From**: 03/20/2015
- **Request State**: All but Complete
- **Date To**: 03/27/2015
- **Entered By**: pdurrough

### Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chkd</td>
<td>250.00</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,165.00</td>
</tr>
</tbody>
</table>
# Cancel a Requisition

**Requisition Details for:** Durrough, Patricia S

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>54000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID</td>
<td>000050000G7</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>Test for ePro Training</td>
</tr>
<tr>
<td>Date</td>
<td>03/27/2015</td>
</tr>
<tr>
<td>Status</td>
<td>Pending</td>
</tr>
<tr>
<td>Total</td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>

## Line Details

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Status</th>
<th>Price</th>
<th>Qty</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>rounded memo holder white</td>
<td>Pending Approval</td>
<td>9.50000 Each</td>
<td>100.000</td>
<td>950.00</td>
</tr>
<tr>
<td>2</td>
<td>Rounded Memo holder Green</td>
<td>Pending Approval</td>
<td>9.50000 Each</td>
<td>120.000</td>
<td>1140.00</td>
</tr>
<tr>
<td>3</td>
<td>Set Up Charge</td>
<td>Pending Approval</td>
<td>75.000000 Each</td>
<td>1.0000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

[Return to Manage Requisitions](#)
Cancel a Requisition

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

- Business Unit: 54000
- Requisition ID
- Date From: 03/20/2015
- Date To: 03/27/2015
- Requester:rodug
- Request State: All but Complete
- Budget Status
- Origin: Special Request
- PO ID

Search Clear

Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
<th>Select Action</th>
<th>Go</th>
</tr>
</thead>
<tbody>
<tr>
<td>000050063</td>
<td>Chairs for Training Room</td>
<td>5400</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chk'd</td>
<td>250.00</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
<tr>
<td>000050067</td>
<td>Test for ePro Training</td>
<td>5400</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>2,165.00</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
<tr>
<td>000050063</td>
<td>Special Request Test</td>
<td>5400</td>
<td>03/25/2015</td>
<td>Canceled</td>
<td>Not Chk'd</td>
<td>0.00</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
<tr>
<td>000050062</td>
<td>Test for Training</td>
<td>5400</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>300.00</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
</tbody>
</table>

UNIVERSITY of WestGeorgia | Center for Business Excellence
Copy a Requisition

[Image of Oracle interface showing requisition details and action buttons]

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.
Practice Activity

• Edit the quantity on your special request requisition created in the last lesson
• Cancel the requisition that was created for you by the instructor
Desktop Receiving

PeopleSoft 9.2
Proper Shipping Identification

Central Stores Receiving & Delivery
Desktop Receiving

- Allows you to create receipts for items requested through an ePro Requisition
- Required to receive both Marketplace and Special Request Requisitions
- Can receive full or partial quantities
- May receive an email notification indicating that receiving is necessary
  - Only create receipts for items actually received
Creating a Desktop Receipt
Creating a Desktop Receipt

### Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

- **Business Unit**: 54000
- **Requisition ID**: [Search]
- **Date From**: 03/23/2015
- **Requester**: [Search]

**Show Advanced Search**

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Partially Received</td>
<td>Valid</td>
<td>250.00 USD</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,165.00 USD</td>
</tr>
<tr>
<td>0000500063</td>
<td>Special Request Test</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Canceled</td>
<td>Not Chkd</td>
<td>0.00 USD</td>
</tr>
<tr>
<td>0000500062</td>
<td>Test for Training</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>300.00 USD</td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

You have 4 lines open for receiving
and go to the Receive Form.

Desktop Receiving should not be used for Receipt of Assets. Request the appropriate staff on your campus to create a PO Receipt instead.

<table>
<thead>
<tr>
<th>Requisition Lines to Receive</th>
<th>Purchase Order Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req BU</td>
<td>Requisition</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

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<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amnt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></td>
<td>VXX091528 Row Hall Copier Lease</td>
<td></td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td></td>
<td>Copier Usage</td>
<td></td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td></td>
<td>Chairs for Training Room</td>
<td>415263986</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough.Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td></td>
<td>Chairs for Training Room</td>
<td>756893284</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough.Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

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Requisition Lines to Receive

<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>Copier Usage</td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415263986</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #756693254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

Receive Items

New Receipt

Business Unit: 54000

Received Date: 03/30/2015

Receipt Lines:

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Id</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>UOM</th>
<th>Accept Quantity</th>
<th>Details</th>
<th>Procurement Group ID</th>
<th>Primary Unit</th>
<th>Unit Allocation Amt</th>
<th>Unit Allocation Qty</th>
<th>PO</th>
<th>Cancel Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chair #415253986</td>
<td>1.0000</td>
<td></td>
<td>EA</td>
<td>1.0000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

You have saved receipt # 0000520004 containing the following items:

<table>
<thead>
<tr>
<th>Receipt Lines</th>
<th>Line</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>Reject Quantity</th>
<th>Accept Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>Chair #415263986</td>
<td>1.0000</td>
<td></td>
<td>1.0000</td>
</tr>
</tbody>
</table>

Return to Manage Requisitions  Return to Receiving
Creating a Desktop Receipt

You have 3 lines open for receiving
and go to the Receive Form.

Desktop Receiving should not be used for Receipt of Assets. Request the appropriate staff on your campus to create a PO Receipt instead.

Requisition Lines to Receive

<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
<td></td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>Copier Usage</td>
<td></td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7569383254</td>
<td></td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

You have 4 lines open for receiving

[Image of the interface with a table]

**Note:** Desktop Receiving should not be used for Receipt of Assets. Request the appropriate staff on your campus to create a PO Receipt instead.

### Requisition Lines to Receive

<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Total Req Qty/Amnt</th>
<th>Accepted to Date</th>
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<th>Ship To</th>
<th>Ship To GLN</th>
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<td>Copier Rental for Row Hall</td>
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<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>Copier Usage</td>
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<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415263986</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td></td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7566983254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td></td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>

[Check All] [Clear All]

**Source:** UNIVERSITY of West Georgia Center for Business Excellence
Practice Activity

• Practice receiving the requisition using the requisition created for you by the instructor
• Can receive partial or full quantity