Introduction to ePro and the GeorgiaFIRST Marketplace
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
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
Process Flow

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

Approvers can approve or deny requisition; some can make edits

Approvers log into PSFIN Core to access Worklist

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

• AP Dept
  – Process invoices, create vouchers and submit payments
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 Georgia FIRST Marketplace
Entering the Georgia FIRST Marketplace
Entering the GeorgiaFIRST 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

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

- **First Name**: Patricia
- **Last Name**: Durrough
- **Phone Number**: +1 (678) 839-6392
- **E-mail Address**: pdurroug@westga.edu
- **Business Unit**: University of West Georgia (54000)
- **Department**: ~NO_DEPT_FOUND (~NO_DEPT_FOUND)
- **Position**: 
- **User Name**: pdurroug
- **Authentication Method**: cXML

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

PeopleSoft
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
## Browse by Supplier

**Shop:** Everything

**Enter Search Keywords Here:**

**Browse:** suppliers

### Click to expand Search for Vendor Filter

Showing 1 - 20 of 243 Results

<table>
<thead>
<tr>
<th>Results Per Page</th>
<th>20</th>
<th>20</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td><strong>Preference</strong></td>
<td>☑️</td>
<td>☑️</td>
</tr>
</tbody>
</table>

**Page:** 1 of 13
Browse by Category

GeorgiaFirst Marketplace

Categories

- Lab Supplies
- Medical/Clinical
- Office/Computer
- MRO/Facilities
- Furniture
- Services
- Supplies Manager
- Manufacturing
- Books
- Electronics
- Specialty
- Food/Food Equipment

Go to: advanced search | favorites | quick order
Browse: supplies | categories | contracts | chemicals
Add Additional Keywords

<table>
<thead>
<tr>
<th>Results Per Page</th>
<th>Sort by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>20</td>
<td>Best Match</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Part Number</th>
<th>Contract Number</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>444 Spark - Drop Ship</td>
<td>SWC06748 more info...</td>
<td>Furniture, Office, Computer and Educational</td>
</tr>
<tr>
<td>444 Spark - Desktop Ship</td>
<td>SWC06748 more info...</td>
<td>Furniture, Office, Computer and Educational</td>
</tr>
<tr>
<td>333 Task - Drop Ship</td>
<td>SWC06748 more info...</td>
<td>Furniture, Office, Computer and Educational</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Generation task chair, high performance arms, plastic base, standard cylinder, no lumbar, hard casters - Drop Ship</th>
<th>Generation task chair, high performance arms, plastic base, standard cylinder, no lumbar, hard casters - Drop Ship</th>
</tr>
</thead>
</table>
Using Filter Results

- **Filter Results**
  - By Product Flag
    - Green (18)
  - By Vendor
    - Carolina Biological Supply Co. (30)
    - Grainger, Inc. (413)
    - HD Supply Facilities Maintenance (410)
    - Statewide Contract Supplier (16)
  - By Category
    - Arm chair (23)

- **Search Results**
  - Spark stacking side chair with seat pad - Drop Ship from Statewide Contract Supplier
    - Part Number: 444 Spark - Drop Ship
    - Contract Number: SWC60748
    - Unit Price: $50.00 USD
  - Spark stacking side chair with seat pad - Desktop Ship from Statewide Contract Supplier
    - Part Number: 444 Spark - Desktop Ship
    - Contract Number: SWC60748
    - Unit Price: $50.50 USD
  - Generation task chair, high performance arms, plastic base, standard cylinder, no lumbar, hard casters - Drop Ship from Statewide Contract Supplier
    - Part Number: 333 Task - Drop Ship
    - Contract Number: SWC60748
    - Unit Price: $60.00 USD
  - Generation task chair, high performance arms, plastic base, standard cylinder, no lumbar, hard casters - Desktop Ship from Statewide Contract Supplier
    - Part Number: 333 Task - Desktop Ship
    - Contract Number: SWC60748
    - Unit Price: $60.50 USD
Using Product Comparison
Add Items from Product Comparison

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

Shop: Furniture

Results for: Furniture : chair

Results Per Page: 20

Sort by: Best Match

Spark stacking side chair with seat pad - Drop Ship
from Statewide Contract Supplier
- 444 Spark - Drop Ship
- SWC60748 more info...
- Furniture, Office, Computer and Educational

Spark stacking side chair with seat pad - Desktop Ship
from Statewide Contract Supplier
- 444 Spark - Desktop Ship
- SWC60748 more info...
- Furniture, Office, Computer and Educational

Add to Cart
Add Item from Product Description

Spark stacking side chair with seat pad - Drop Ship

- Supplier: Statewide Contract Supplier
- Part Number: 444 Spark - Drop Ship
- Manufacturer Name: 
- Manufacturer Part Number: 
- System Packaging: EA
- Preferred location: Fulfillment Address 1
- Price: 50.00 USD
- Quantity: 1

All Locations

<table>
<thead>
<tr>
<th>Location</th>
<th>Price</th>
<th>Quantity</th>
<th>Add to Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfillment Address 1</td>
<td>50.00 USD</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Product Details

- Vendor UOM: EA
- Buyer UOM: EA
- Category: Office furniture
- Color: 
- UNSPSC: 56-10-17-00
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

PeopleSoft 9.2
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
Beginning a Marketplace Requisition
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 pdurroug 01

Have you made changes? Update

Multi Media Services more info...

- Advantage® Motor Extension Cord
  - Product Description
  - Unit Price: 10.35 USD
  - Quantity: 1
  - Total: 10.35 USD

Add to Favorites
Remove

More Actions

Technology Integration Group (TIG) more info...

ETHERNET PATCH CABLE FOR Q24/M24 1 METER
  - Product Description
  - Unit Price: 11.83 USD
  - Quantity: 1
  - Total: 11.83 USD

Add to Favorites
Remove

More Actions

Continue Shopping

Proceed to Checkout or Assign Cart
Checking Out of the Marketplace

A screenshot of a shopping cart showing two items: a "Multi Media Services" item and a "Technology Integration Group (TIG)" item. Each item has details such as part number, manufacturer, contract, unit price, quantity, and total cost. The image also highlights a button labeled "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

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

Requisition Summary
- Business Unit: 54000
- Requester: pdurroug
- Currency: USD
- University of West Georgia
- Requisition Name: 
- Priority: Medium

Cart Summary: Total Amount 71.06 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>Pilot G2 Premium Retractable G</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.730</td>
<td>27.46</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>
</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>
</tr>
</tbody>
</table>

Add More Items
Details
Comments
Delete
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Accounting Lines</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chartfields1</strong></td>
<td><strong>Chartfields2</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Class</th>
<th>Budget Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
</tr>
</tbody>
</table>
Complete the Marketplace Requisition in ePro

<table>
<thead>
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<th>Line</th>
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<td>Pilot G2 Premium Retractable G</td>
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<td></td>
<td></td>
</tr>
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<td>Staples Top-Tab File Folders</td>
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<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</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
Complete the Marketplace Requisition in ePro

![Edit Lines/Shipping/Accounting for Selected Lines](image-url)
Complete the Marketplace Requisition in ePro
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
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
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
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
Searching for a Supplier
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.

[Buttons: OK, Cancel, Refresh, Find, Reset]
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>
<th>Find in Tree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NIGP_SHORT_TREE</td>
<td>42507 Chairs, Wood</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NIGP_SHORT_TREE</td>
<td>42558 Plastic, Polypropylene, Fiberglass Office Furniture: Chairs,</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>NIGP_SHORT_TREE</td>
<td>01523 Chair Mats (Carpet Protectors), All Types</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>NIGP_TREE</td>
<td>05590 Wheelchair Lift and Accessories, Vehicle-Mounted</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>NIGP_TREE</td>
<td>09529 Beauty Shop Chairs and Parts</td>
<td></td>
</tr>
</tbody>
</table>
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

Web
Browse Supplier Websites
GAFirstMarketplace

Express Item Entry
Create an Express Requisition

Special Requests
Create a non-catalog request

Forms
Create and Submit Forms

Favorites
Browse Favorite Items and Services

Templates
Browse Company and Personal Templates

ePro Services
Request Services

Recently Ordered
View recently ordered items and services

Fixed Cost Service
Variable Cost Service
Time and Materials

Row Hall Copier Rental S/N V...
Copier Usage
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

All Request Options
- Web
  - GAFirstMarketplace
- Express Item Entry
- Special Requests
- Forms
- Favorites
- Templates
ePro Services
  - Fixed Cost Service
  - Variable Cost Service
  - Time and Materials
- Recently Ordered

Search

Home My Preferences Requisition Settings

0 Lines

Checkout

Special Requests

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

Item Details

*Item Description

*Price

*Quantity

*Currency USD

*Unit of Measure

Due Date

Category 42506

Supplier ID 0000008558

Supplier Name Advantage Office Solution

Supplier Item ID

Manufacturer

Mfg ID

Suggest New Supplier

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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
- **Currency**: USD
- **Unit of Measure**: ea

**Supplier**

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

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[UNIVERSITY of West Georgia | Center for Business Excellence]
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

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

*Currency: USD

*Quantity: 1

*Unit of Measure: EA

Category: 42506

Supplier

Supplier ID: 0000008558

Supplier Name: Advantage Office Solutions

Supplier Item ID:

Manufacturer

Mfg ID:

Mfg Item ID:
Requisition Summary
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

Special Requests

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

Item Details

*Item Description
*Price
*Quantity
*Category
*Currency
*Unit of Measure
Due Date

Checkout
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**

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

**Requisition Name**: Special Request Test

**Priority**: Medium

**Cart Summary**: Total Amount 550.00 USD

Expand lines to review shipping and accounting details

### 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 Cher</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>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>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Updating the Schedule & Distribution Information

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>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Chair</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Shipping Line 1**
*Ship To Address*
University of West Georgia
Cent Rtg for Ctr. for Bus. Excellence
1501 Maple Street
Carrollton, GA 30018

Attention To: Durrough, Patricia S
Due Date: [ ]

Price Adjustment
Pegging Inquiry
Pegging Workbench

**Accounting Lines**

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Chartfields3</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[UNIVERSITY of West Georgia] Center for Business Excellence
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

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>University of West Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>pdurroug Durrough, Patricia S</td>
</tr>
<tr>
<td>*Currency</td>
<td>USD</td>
</tr>
</tbody>
</table>

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

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>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cherry</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.00</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>300.00</td>
<td>300.00</td>
</tr>
</tbody>
</table>

Add More Items

Add
Enter Line Comments & Add Attachments

**Line Comment**

- **Business Unit**: 54000
- **Requisition Date**: 03/25/2015
- **Status**: Pending

**Line 1**

- Comments: 

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

- **Add Attachments**

- **Attachments**
Update Chartstring Information on All Lines
Enter Requisition Comments & Save for Later
Preview Approvals
Approval Routing

Department and Proj. Approval

Line 1: Initiated
Desk #741256395 Black and Cherry Wood

Not Routed
Skipped
No approvers found
Multiple Department Approval
Sears, Richard H
Req-Dept Mgr-Line Level

Line 2: Initiated
Credenza #415632963 Black and cherry wood

Not Routed
Skipped
No approvers found
Multiple Department Approval
Sears, Richard H
Req-Dept Mgr-Line Level
**Do not attempt to manually budget check the requisition. It will budget check automatically.**
Requisition Confirmation Page

<table>
<thead>
<tr>
<th>Requisition ID</th>
<th>0000500063</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested For</td>
<td>Durrough, Patricia S</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>Special Request Test</td>
</tr>
<tr>
<td>Business Unit</td>
<td>54000</td>
</tr>
<tr>
<td>Status</td>
<td>Pending</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium</td>
</tr>
<tr>
<td>Budget Status</td>
<td>Not Checked</td>
</tr>
</tbody>
</table>

Number of Lines | 2 |
Total Amount    | 550.00 USD |
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
• Check Request purchases
  – www.westga.edu/purchasing
  – Click on Forms > Check Request Form
# Check Request Form

**University of West Georgia**  
1801 Maple Street, Carrollton, Georgia 30118  
678-333-6390

**For Accounts Payable Use Only:**

<table>
<thead>
<tr>
<th>Voucher #:</th>
<th>________________________________</th>
<th>Approved for Payment:</th>
<th>Date of Entry:</th>
<th><em><strong><strong>/</strong></strong></em>/_______</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Requester Name:</th>
<th>________________________________</th>
<th>Date:</th>
<th>Requesting Department Name:</th>
<th>________________________________</th>
<th>Phone#:</th>
<th>________________________________</th>
</tr>
</thead>
</table>

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

**Total Amount:** $0.00

**Description of Item(s):**

<table>
<thead>
<tr>
<th>Vendor Look Up: (copy &amp; paste)</th>
</tr>
</thead>
</table>

---

**Vendor Information:**

<table>
<thead>
<tr>
<th>Requested by:</th>
<th>________________________________</th>
</tr>
</thead>
</table>

**Approved by:**

<table>
<thead>
<tr>
<th>Authorized Approver</th>
<th>(Research &amp; Sponsored Ops or Tech Fees) if Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Dean or Vice President) if Applicable</td>
</tr>
</tbody>
</table>

**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
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

**Search Requisitions**

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

- **Business Unit**: 54000
- **Requisition ID**: 
- **Requisition Name**: 
- **Request State**: All but Complete
- **Date From**: 11
- **Date To**: 11
- **Entered By**: pdurroocg

**Clear**

**Search**

**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>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 USD</td>
<td>[Select Action]</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 USD</td>
<td>[Select Action]</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 USD</td>
<td>[Select Action]</td>
<td>[Go]</td>
</tr>
<tr>
<td>0000500061</td>
<td>00005000611</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Open</td>
<td>Not Chk'd</td>
<td>29.16 USD</td>
<td>[Select Action]</td>
<td>[Go]</td>
</tr>
<tr>
<td>0000500060</td>
<td>00005000601</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Open</td>
<td>Not Chk'd</td>
<td>71.06 USD</td>
<td>[Select Action]</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 USD</td>
<td>[Select Action]</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 USD</td>
<td>[Select Action]</td>
<td>[Go]</td>
</tr>
</tbody>
</table>
Reviewing Requisitions and Their Life Cycle
Approval Life Cycle

Department and Proj. Approval

Line 1: Pending
Desk #741256395 Black and Cherry Wood

Department and Proj. Approver
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
Credenza #415632963 Black and cherry wood

Department and Proj. Approver
Skipped

No approvers found
Multiple Department Approval

Pending
Sears, Richard H
Req-Dept Mgr-Line Level

Not Routed
Sutherland, James R.
Inserted Approver
# Requisition Status and Life Cycle

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

### Oracle Requisition Management System

- **Requisition ID:** 0000500069
- **Requestor:** Durrough, Patricia S
- **Pre-Encumbrance Balance:** 0.00 USD
- **Priority:** Medium

### Request Lifespan:

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Status</th>
<th>Price</th>
<th>Quantity</th>
<th>UOM</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chair #415263936</td>
<td>Received</td>
<td>100.000000 USD</td>
<td>1.0000 EA</td>
<td>Advantage Office Solutions</td>
<td></td>
</tr>
</tbody>
</table>

### Actions:
- **[Select Action]**
- **Go**

---

**University of West Georgia | Center for Business Excellence**
Requisition Status and Life Cycle

![Oracle screenshot](image)

**Business Unit:** 54000

**Requisition Information**

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

**PO Information**

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

**Lines**

<table>
<thead>
<tr>
<th>Line</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
This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036.6248)
Edit a Requisition

### Edit Requisition - Review and Submit
Review the item information and submit the req for approval.

#### Requisition Summary
- **Business Unit**: 54000
- **Requester**: pdurrough
- **Currency**: USD
- **University of West Georgia**
- **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>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 Cher</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.00</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>300.00</td>
<td>300.00</td>
</tr>
</tbody>
</table>

Additional options:
- Select All / Deselect All
- Select lines to:
  - Add to Favorites
  - Add to Template(s)
  - Delete Selected
  - Mass Change
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
Delete a Requisition Line
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

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>Requester</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></td>
<td>All but Complete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date From: 03/20/2015</td>
<td>Date To: 03/27/2015</td>
<td>Entered By</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Search

<table>
<thead>
<tr>
<th>Requisitions</th>
<th>Approvals</th>
<th>Budget</th>
<th>Check</th>
<th>Copy</th>
<th>Edit</th>
<th>View Cycle</th>
<th>View Print</th>
<th>Select Action</th>
<th>Go</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req ID</td>
<td>Action</td>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0000500069</td>
<td>[Select Action]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chairs for Training Room</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0000500067</td>
<td>[Select Action]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Test for ePro Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Show Advanced Search

Go
Cancel a Requisition

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

- **Business Unit:** 54000
- **Requisition ID:** 0000500067
- **Requisition Name:** Test for ePro Training
- **Date:** 03/27/2015
- **Status:** Pending
- **Total:** 2,165.00 USD

<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>75.00000 Each</td>
<td>1.00000</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**: [Enter ID]
- **Date From**: 03/20/2015
- **Date To**: 03/27/2015
- **Requester**: [Enter Name]

**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>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chk'd</td>
<td>250.00 USD</td>
<td>[Select Action]</td>
<td>Go</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 Chk'd</td>
<td>2,165.00 USD</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
<tr>
<td>0000500063</td>
<td>Special Request Test</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Canceled</td>
<td>Not Chk'd</td>
<td>0.00 USD</td>
<td>[Select Action]</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 USD</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
</tbody>
</table>
Copy a Requisition

---

<table>
<thead>
<tr>
<th>Requisition ID</th>
<th>Request State</th>
<th>Budget Status</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Partially Received</td>
<td>Valid</td>
<td>250.00 USD</td>
</tr>
<tr>
<td>0000500067</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>2,165.00 USD</td>
</tr>
<tr>
<td>0000500063</td>
<td>Canceled</td>
<td>Not Chk'd</td>
<td>0.00 USD</td>
</tr>
</tbody>
</table>

---

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
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

<table>
<thead>
<tr>
<th>Main Menu &gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>eProcurement</td>
</tr>
<tr>
<td>Set up eProcurement; manage or approve eProcurement requisitions or POs.</td>
</tr>
<tr>
<td>Requisition</td>
</tr>
<tr>
<td>Create a new requisition by browsing or searching company or external catalogs.</td>
</tr>
<tr>
<td>Manage Requisitions</td>
</tr>
<tr>
<td>Review requisitions, edit or view status, cancel, receive, and Return To Vendor (Supplier).</td>
</tr>
<tr>
<td>Manage Requisition Approvals</td>
</tr>
<tr>
<td>Take actions on requisitions that require your approval.</td>
</tr>
<tr>
<td>Buyer Center</td>
</tr>
<tr>
<td>Created/approve purchase order; source requisition; process change request.</td>
</tr>
<tr>
<td>Suppliers</td>
</tr>
<tr>
<td>Receive Items</td>
</tr>
<tr>
<td>Create, edit, and process receipts and Return To Vendor (Supplier).</td>
</tr>
<tr>
<td>My Profile</td>
</tr>
<tr>
<td>Modify personal information and preferences.</td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

Manage Requisitions

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

- **Business Unit**: 54000
- **Requisition ID**
- **Date From**: 03/23/2015
- **Date To**: 03/30/2015
- **Requestor**: [Resolve Requestor]

**Search Requisitions**

- **Requisition Name**
- **Request State**: All but Complete
- **Budget Status**
- **Origin**: Special Request
- **PO ID**

**Show Advanced Search**

**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>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 Chk'd</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 Chk'd</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 Chk'd</td>
<td>300.00 USD</td>
</tr>
</tbody>
</table>

- **Process Return**
- **Receive**

View Print

New Window

**UNIVERSITY of West Georgia Center for Business Excellence**
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>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req BU</td>
<td>Requisition</td>
<td>Item Description</td>
<td>Item ID</td>
<td>Tot Req Qty/Amt</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
<td>11</td>
<td>0</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>Copier Usage</td>
<td>100</td>
<td>0</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415263986</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7566893254</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

Check All | Clear All
Creating a Desktop Receipt

You have 4 lines open for receiving. Receive Selected 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>Req BU</th>
<th>Requisition</th>
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<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>
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<td>Qty</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>0</td>
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<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>
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<tr>
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<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
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<td></td>
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Check All Clear All
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.

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<td></td>
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<td></td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>

Check All | Clear All
Creating a Desktop Receipt

Receive Items

New Receipt

Business Unit: 54000

Receipt Status: Open

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>Receipt</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>EA</td>
<td>1.0000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save Receipt
Creating a Desktop Receipt

Receipt Saved Successfully

You have saved receipt # 0000520004 containing the following items:

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>Reject Quantity</th>
<th>Accept Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<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.

<table>
<thead>
<tr>
<th>Req BU</th>
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<td></td>
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<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7568983254</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>

Check All  Clear All

UNIVERSITY of WestGeorgia  Center for Business Excellence
Creating a Desktop Receipt

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

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