Introduction to ePro and the GAFIRST Marketplace for Shoppers
Important Notes

• Discuss handouts
• Security Request Forms (w/default acct #)
• 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 GAFIRST Marketplace and pulled into the ePro Requisition
  – GAFIRST 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
Shopper logs into PSFIN

Shopper enters GAFIRST Marketplace and selects items to create shopping cart

Shopper searches for and selects items for their shopping cart.

Shopper assigns cart to default requester.

Requester “issues requisition”, makes updates and submits for approval

Requester makes any necessary updates to the shopping cart

Requester enters GAFIRST Marketplace and retrieves cart

Requester enters GAFIRST Marketplace and retrieves cart

System notifies requester of cart assignment via email.

Approver reviews requisition and can approve or deny it.

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
Roles Involved - Shoppers

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

- Create Marketplace Requisitions from Assigned Shopping Carts and from their own 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 – 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
Being a Shopper in the GAFIRST Marketplace

4/1/2015
What does a GAFIRST Marketplace Shopper do?

• Responsible for shopping for contract/catalog items in the Marketplace in support of their office/department
• After selecting items for a cart, Shoppers then assign the cart to their Requester
• Each Shopper should have at least one Requester specified
• Requester creates requisition from cart and submits it for approval through Workflow
Entering the GAFIRST Marketplace

- Access the GAFIRST Marketplace via the link in the PSFIN menu
- Verify your User Profile
- To exit the Marketplace, click the Sign Out link
Entering the GAFIRST Marketplace
Entering the GAFIRST Marketplace
Activity: Enter the GAFIRST Marketplace

- Log into PeopleSoft
- Select GAFIRST Marketplace Link
- Select the GAFIRST Marketplace button
Getting Started as a Shopper

• Verify your personal information in the Marketplace
  – Notify your ePro Admin if it is incorrect
• View “My Profile” (name drop down) > User’s Name, Phone Number, Email, etc.
Verify Profile Information
Verify Profile Information

<table>
<thead>
<tr>
<th>User's Name, Phone Number, Email, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>First Name</strong></td>
</tr>
<tr>
<td><strong>Last Name</strong></td>
</tr>
<tr>
<td><strong>Phone Number</strong></td>
</tr>
<tr>
<td><strong>E-mail Address</strong></td>
</tr>
<tr>
<td><strong>Business Unit</strong></td>
</tr>
<tr>
<td><strong>Department</strong></td>
</tr>
<tr>
<td><strong>Position</strong></td>
</tr>
<tr>
<td><strong>User Name</strong></td>
</tr>
<tr>
<td><strong>Authentication Method</strong></td>
</tr>
</tbody>
</table>

Save
Activity: Verify Profile Information

• Click drop down arrow next to profile name
• Click “View My Profile”
• Verify Information under User’s Name, Phone Number, Email
Specify Default Requester

- You will be able to set up a requester that all carts will default to
- Can have a back-up Requester as well
- View My Profile > User Information and Settings > Show All > Cart Assignees
Specify Default Requester
Specify Default Requester
Specify Default Requester

Search using the last name of the requester
Specify Default Requester

Select the appropriate requester

<table>
<thead>
<tr>
<th>Name</th>
<th>User Name</th>
<th>Email</th>
<th>Phone</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werner, Dana</td>
<td>dwerner</td>
<td><a href="mailto:dwerner@westga.edu">dwerner@westga.edu</a></td>
<td>+1 (678) 839-6410</td>
<td>[select]</td>
</tr>
</tbody>
</table>
Specify Default Requester

Patricia Durrough
User Name: pdurrough

Cart Assignees
Add Assignee...

My Cart Assignees
Name | Action
--- | ---
Dana Werner | Set as Preferred, Remove

Set as Preferred
Specify Default Requester

Requester can be removed at anytime
Activity: Specify Default Requester

• Find your default requester and add them as your cart assignee
  – Cart Assignee > Search

• Establish the default requester as the preferred cart assignee
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
## Browse by Supplier

### Search for Vendor Filter

Showing 1 - 20 of 243 Results

<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>

### Additional Links
- advanced search
- favorites
- quick order
- suppliers
- categories
- contracts
- chemicals
Browse by Category

- Shop
- Everything
- Enter Search Keywords Here

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

Marketplace Browser | Action Items | Notifications | 0.00 USD

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

back to shop...
Add Additional Keywords
Using Filter Results
Using Product Comparison

Shop Furniture chair

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

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

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 more info...
Furniture, Office, Computer and Educational
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>Add to Cart</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Details</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>333 Task - Drop Ship</td>
<td></td>
<td>444 Spark - Drop Ship</td>
<td></td>
</tr>
<tr>
<td>Price</td>
<td>60.00 USD</td>
<td></td>
<td>50.00 USD</td>
<td></td>
</tr>
<tr>
<td>Vendor</td>
<td>Statewide Contract Supplier</td>
<td></td>
<td>Statewide Contract Supplier</td>
<td></td>
</tr>
<tr>
<td>Category</td>
<td>Office furniture</td>
<td></td>
<td>Office furniture</td>
<td></td>
</tr>
</tbody>
</table>
Add Items from Product Results Page

Shop: Furniture chair

Results for: Furniture: chair

Showing 1 - 20 of 967 Results

Add to Cart

Spark stacking side chair with seat pad - Drop Ship
- Part Number: 444 Spark - Drop Ship
- Contract Number: SWC60748 more info...

Spark stacking side chair with seat pad - Desktop Ship
- Part Number: 444 Spark - Desktop Ship
- Contract Number: SWC60748 more info...

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**: EA
- **Manufacturer Part Number**: EA
- **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

• Make sure 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
Assigning a Shopping Cart to a Requester
Retrieving the Shopping Cart

• Two ways to open the shopping cart page:
  – Select the **Carts** icon, and then select My Carts & Order and then the Open My Active Shopping Cart link
  – Select the **Cart Summary** link at top right corner

• Once shopping cart page is displayed, you can rename the cart if you wish.
  – The default cart name is the date the cart was initiated plus your userid.
  – After renaming the cart, click the update button.
Retrieving the Shopping Cart

- Open My Active Shopping Cart
- View Draft Shopping Carts
- View My Orders (Last 90 Days)
- View My Orders (Last 5 Orders)

Punch-out

- CDWG
- Complete Book
- DELL
- Fisher Scientific
- Grainger
- Computers and Servers
- Computers (SWC90814)
- MSC
- Grainger Contract SWC1234-1234
Retrieving the Shopping Cart

Welcome to the GeorgiaFirst Marketplace TEST site!

Showcased Suppliers

Punch-out

Grainger Contract SWC1234-1234
Retrieving the Shopping Cart

Shopping Cart for Patricia Durrough

Name this cart: 2013-12-04 pdurrough 01

Fisher Scientific
Fulfillment Address 1
3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US

Product Description

Extension Cord, Extendable, for Type K Probes, 47 in.; 1/EA

Unit Price: 9.99 USD
Quantity: 1
Total: 9.99 USD

Part Number: 1393580C
Manufacturer Info: 8505 - (Thermo Scientific Heating and Stirring)
Contract: SWC30747-5 more info...
Biological Supplies and Laboratory Equipment change...

Update
Updating the Shopping Cart

- Add to Favorites
- Remove
- Update
- Empty cart
- Continue Shopping

Product Description:
- Extension Cord, Extendable, for Type K Probes, 47 in.; 1/EA
- Part Number: 1393580C
- Manufacturer Info: 8505 - (Thermo Scientific Heating and Stirring)
- Contract: SWC30747-5
- Unit Price: 9.99 USD
- Quantity: 1
- Total: 9.99 USD

Fisher Scientific
Fulfillment Address 1
3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US
Updates to Punch-Out Supplier Items

• Items from punch-out suppliers are listed separately
• Some punch-out suppliers will allow you to update quantities directly in the shopping cart; others will not
• If you wish to add additional items from the same punch-out supplier, use the Modify Items link if available
• Some punch-out suppliers will not let you do any modification
Assigning the Cart to a Requester

• When you are ready to assign the cart, click the Assign Cart button

• In the Assign Cart pop-up
  – Your default (preferred) requester will be listed
  – If you are assigning your cart to your default requester, there is nothing you need to do to select him/her
  – To select a requester other than your default, use “Select from profile values” link
  – To select a requester not added to your profile, use “Search for an assignee” link
Assigning the Cart to a Requester

• To send a note to your Requester, include your comments in the Note to Assignee box
  – This information will be included on the email notification sent to the Requester

• If you need to specify a different Ship To location or Chartstring (other than your default), you must indicate it in the Note to Assignee box
Assigning the Cart to a Requester
Assigning the Cart to a Requester

**Assign Cart**

- Select from profile values: Dana Werner
- Note To Assignee:
Assigning the Cart to a Requester

To search for an assignee not in your profile

Assign Cart

Select from profile values

Search for an assignee

Selected Assignee:

Assign Cart To:

Search for an assignee

Note To Assignee:

Assign

Close
Demonstration

- Assign Cart to Default Requester
Activity

• Assign the shopping cart created in Lesson 3 to your default requester.