Introduction to ePRO and the GeorgiaFirst Marketplace

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5/26/2020
Day 1 – Important Notes

• Discuss handouts
• Security Request Forms (w/default acct #)
• ePro Listserv
• 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
Accessing PeopleSoft

- [https://www.usg.edu/gafirst-fin](https://www.usg.edu/gafirst-fin)
- GeorgiaFIRST Financials button
- Login with UWG Username and Password
- Must dual authenticate using OneLogin
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
• 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

1. Requester enters PSFIN and begins creation of requisition in ePRO.
2. Requester enters GAFIRST Marketplace and selects items to create shopping cart.
3. Requester "issues requisition" to pull cart into ePRO.
4. Requester makes update to Distribution/Schedule information if needed.
5. Requesters can approve or deny requisition.
6. Approvers log into PSFIN Core to access worklist.
7. Requester submits requisition for approval; system notifies approver(s) via email.
8. Requester previews approvals and inserts ad-hoc approvers if necessary.
9. Once fully approved, requisition is available for further processing; requester is notified via email.
10. Marketplace requisition can be fully processed through SCIQUEST batch job (run 5x each day).
11. After item is delivered, receipt is created in PSFIN.
12. Accounts Payable pays invoice.
Special Request Requisitions

- No entry to the GeorgiaFIRST Marketplace
- Items are manually entered onto requisition
- For non-catalog 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
    ❑ Crystal Pritchett cpritch@westga.edu x95357
    ❑ Lindsey Robison lrobison@westga.edu x2471
Requester Responsibilities in ePRO and the GeorgiaFIRST Marketplace

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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
- Do not access through the GFM Shopper Access tile on the Employee Self Service Homepage
Entering the GeorgiaFIRST Marketplace

Navigation: NavBar > Navigator > eProcurement
Entering the GeorgiaFIRST Marketplace
Entering the GeorgiaFIRST Marketplace
Activity: Enter the GeorgiaFIRST Marketplace

• Log into PSFIN
• NavBar > Navigator > eProcurement
• Requisition
• GeorgiaFIRST Marketplace link
Welcome to the GeorgiaFIRST Marketplace! Please see below for important notes and updates:

FOR ORDER STATUS, PLEASE CONTACT THE PURCHASING OFFICE AT YOUR INSTITUTION.

Amazon Punchout Information:

All training videos and documentation for the GeorgiaFIRST Marketplace may be accessed here:
http://www.usg.edu/gafirst-fin/training/e-pro_georgiafirst_marketplace

We have over 200 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

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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
- Furniture
- Services
- Manufacturing
- Books
- Electronics
- Specialty
- Food/Food Equipment
- Supplies Manager
<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acuity Specialty Products</td>
<td></td>
<td></td>
<td>ASSA Group, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adrenalin Powersports Inc.</td>
<td></td>
<td></td>
<td>ATLANTA X-RAY CORP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advanced Business Supplies</td>
<td></td>
<td></td>
<td>Bob Barker Company Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agilent Technologies Inc</td>
<td></td>
<td></td>
<td>Bridgestone Americas Tire Operations LLC, (Alt)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alligare LLC</td>
<td></td>
<td></td>
<td>Carolina Biological Supply Co.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allocating Corp.</td>
<td></td>
<td></td>
<td>Clyde Armory INC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AllSteel</td>
<td></td>
<td></td>
<td>CPS/Timberland Division</td>
<td></td>
<td></td>
</tr>
<tr>
<td>American Bio Medical</td>
<td></td>
<td></td>
<td>CRAIG'S FIREARM SUPPLY, INC.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANTHRO INTERNATIONAL</td>
<td></td>
<td></td>
<td>CWC Chemical, Inc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ARTOPEX INC</td>
<td></td>
<td></td>
<td>Cyrgus Co, LLC</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Add Additional Keywords
Using Filter Results

Filter Results

- By Custom Attribute
  - 1-Mandatory State Contract (166)
  - 4-Convenience State Contract (9)
- By Product Flag
  - Energy Star (3)
  - Green (328)
  - Recycled (6)
- By Supplier
  - Fastenal Company (123)
  - MSC Industrial Supply (52)
  - Southern Computer Warehouse (SCW) (504)
  - WWR International, LLC (78)
  - W.W. Grainger Inc (89)
Mandatory State Contract Items

Results for: Everything : surge protector

Sort by: Best Match

Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black from Southern Computer Warehouse (SCW)
- Part Number: BEL-060000-08R
- Manufacturer Info: BE106000-08R - BELKIN
- 1-Mandatory State Contract: Yes

10.84 USD

Surge Protector, 2320 Joules, 7 Outlets, 6 Cord, White from Southern Computer Warehouse (SCW)
- Part Number: BEL-072000-06
- Manufacturer Info: BE107200-06 - BELKIN
- 1-Mandatory State Contract: Yes

12.57 USD

Surge Protector, 2320 Joules, 7 Outlets, 12 Cord, White from Southern Computer Warehouse (SCW)
- Part Number: BEL-072000-12
- Manufacturer Info: BE107200-12 - BELKIN
- 1-Mandatory State Contract: Yes

19.64 USD
Add Items from Product Results Page

Results for: Everything : surge protector

Showing 1 - 20 of 846 Results

Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black from Southern Computer Warehouse (SCW)

Part Number: BE106000-08R
Manufacturer Info: BE106000-08R - (BELKIN)
1-Mandatory State Contract: Yes

Price: 10.84 USD

Surge Protector, 2320 Joules, 7 Outlets, 6 Cord, White from Southern Computer Warehouse (SCW)

Part Number: BE107200-06
Manufacturer Info: BE107200-06 - (BELKIN)
1-Mandatory State Contract: Yes

Price: 12.57 USD

Surge Protector, 2320 Joules, 7 Outlets, 12 Cord, White from Southern Computer Warehouse (SCW)

Part Number: BE107200-12
Manufacturer Info: BE107200-12 - (BELKIN)
1-Mandatory State Contract: Yes

Price: 19.64 USD
Using Product Comparison
## Add Items from Product Comparison

<table>
<thead>
<tr>
<th>Select</th>
<th></th>
</tr>
</thead>
</table>

### Add to Cart

<table>
<thead>
<tr>
<th>Qty</th>
<th>Add to Cart</th>
<th>Qty</th>
<th>Add to Cart</th>
</tr>
</thead>
</table>

### Product Details

<table>
<thead>
<tr>
<th>Surge Protector, 2320 Joules, 7 Outlets, 6 Cord, White</th>
<th>Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog No.</td>
<td>BEL-BE107200-06</td>
</tr>
<tr>
<td>Price</td>
<td>12.57 USD</td>
</tr>
<tr>
<td>Supplier</td>
<td>Southern Computer Warehouse (SCW)</td>
</tr>
<tr>
<td>Category</td>
<td>Surge suppressers</td>
</tr>
<tr>
<td>UOM</td>
<td></td>
</tr>
<tr>
<td>Price per UOM</td>
<td>12.57 USD / unit</td>
</tr>
<tr>
<td>Product Size</td>
<td></td>
</tr>
<tr>
<td>Price per Product Size Unit</td>
<td></td>
</tr>
<tr>
<td>Select units...</td>
<td></td>
</tr>
</tbody>
</table>
## Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black
- **Part Number:** BEI06000-08R
- **Manufacturer Info:** BEI06000-08R (BELKIN)
- **Mandatory State Contract:** Yes

**Price:** $10.84 USD

**Quantity:** 1/EA

**Add to Cart:** [Link]

**Check Availability:** [Link]

**Add Favorite:** [Link]

**Compare:** [Link]
Add Item from Product Description

Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black

Supplier: Southern Computer Warehouse (SCW)
Part Number: BEL-BE106000-08R
Manufacturer Name: BELKIN
Manufacturer Part Number: BE106000-08R
System: 1/EA
Packaging: 

Price: $10.84
Zip Code: 
Quantity: 1

Add To Active Cart

Go
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

• Can modify some items selected from a punch out catalog but 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 Category
- Add from Product Results Page
- Add from Product Description Page
- Use Product Comparison
- Search from Punch-Out Supplier
- Demo custom attribute of a mandatory item
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

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5/26/2020
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)
• Ensure items purchased through the Marketplace are permissible with your funding source
• Never purchase food from the Marketplace even if permissible by funding source
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 > My Carts & Orders > Open My Active Shopping Cart
  ➢ Cart Summary Link at top right corner of the page
Building a Shopping Cart
Checking Out of the Marketplace

Shopping Cart for Patricia Durrough

Have you made changes? Update

Southern Computer Warehouse (SCW) more info...

Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black</td>
<td>10.84</td>
<td>1</td>
<td>10.84</td>
</tr>
</tbody>
</table>

Proceed to Checkout

More Actions:
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Line Item History
- Add to Favorites
- Remove
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

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

Requisition Summary
- Business Unit: 040000
- Requester: pdurroug
- Currency: USD
- Requisition Name: [Blank]
- Priority: Medium

Cart Summary: Total Amount 71.06 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>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>Add</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>Add</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>Add</td>
<td></td>
</tr>
</tbody>
</table>
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

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

Priority: Medium

Cart Summary: Total Amount 71.06 USD
Expand lines to review shipping and accounting details

Requisition Lines

<table>
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<td>22.28</td>
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<th>Supplier</th>
<th>Quantity</th>
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<th>Price</th>
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<th>Comments</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>13.7300</td>
<td>27.46</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Ship To*: BUS EXCELL

Address:
University of West Georgia
Cent Rcvg for 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 G</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.730</td>
<td>27.46</td>
<td></td>
<td>Add</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>7.220</td>
<td>14.44</td>
<td></td>
<td>Add</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>22.280</td>
<td>22.28</td>
<td></td>
<td>Add</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>6.880</td>
<td>6.88</td>
<td></td>
<td>Add</td>
</tr>
</tbody>
</table>

Select All / Deselect All
Select lines to: Add to Favorites Add to Template(s) Delete Selected
Mass Change
Total Amount 71.06 USD
Complete the Marketplace Requisition in ePro
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

Shipping Summary

- **Ship To Location:** BUS EXCELL
- **Address:** University of West Georgia
  Cent Rm gp for Ctr. for Bus. Excellence
  1631 Maple Street
  Carrollton, GA 30118
- **Attention To:** Durrough Patricia S
- **Comments:** The State of Georgia Terms and Conditions are applicable to this order. They can be viewed at www.doas.georgia.gov/StateLocal/SPD/Docs_SPD_GeneralTerms-conditions.pdf
  Vendor/contractor agrees to invoice the user agency according to the purchase order.

Requisition Comments and Attachments

- **Enter requisition comments:**
  The State of Georgia Terms and Conditions are applicable to this order. They can be viewed at www.doas.georgia.gov/StateLocal/SPD/Docs_SPD_GeneralTerms-conditions.pdf
  Vendor/contractor agrees to invoice the user agency according to the purchase order.

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

- **Edit more Comments and Attachments**

- **Add name, department, email and phone # in comments section. Also add any special delivery or handling instructions.**
- **Select all 3 checkboxes**
If you are a requester who also has approver responsibilities, please ensure that you are not the requester and only approver on a particular requisition. If this should occur, the requisition should be ad-hoc to the next higher level approval authority.
Complete the Marketplace Requisition in ePro

Business Unit: 64000
Status: Open
Priority: Medium
Budget Status: Not Checked

Department and Proj. Approval

Line 1: Initiated
Chair #4256398
Department and Proj. Approver
Skipped
No approvers found
Multiple Department Approval

Not Routed
Sears, Richard H
Req Dept Mgr-Line Level

Line 2: Initiated
Desk #746896321
Department and Proj. Approver
Skipped
No approvers found
Multiple Department Approval

Not Routed
Sears, Richard H
Req Dept Mgr-Line Level

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
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

Requisition ID: 0000525280
Business Unit: 54000
Status: Pending
Priority: Medium
Budget Status: Not Checked

View printable version  Edit This Requisition  Check Budget

Line 1: Pending
Chair: 456395

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
Desk: 456896321

Department and Proj. Approver
Skipped: No approvers found
Multiple Department Approval
Pending: Sears, Richard H
Req Dept Mgr-Line Level

Apply Approval Changes
Create New Requisition  Manage Requisitions
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 Marketplace Requisition from a Personal Cart

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.

5/26/2020
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)
- Ensure items purchased through the Marketplace are permissible with your funding source
- Never purchase food from the Marketplace even if permissible by funding source
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 > My Carts & Orders > Open My Active Shopping Cart
  ➢ Cart Summary Link at top right corner of the page
Building a Shopping Cart

Shopping Cart for Patricia Durrough

Have you made changes? Update

Southern Computer Warehouse (SCW) more info...

Surge Protector, 6 Outlet, 720 Joules, 8 Cord, Black

- Unit Price: 10.84
- Quantity: 1
- Total: 10.84

More Actions:
- Move to Another Cart
- Add to Draft Cart or Pending PR/PO
- Line Item History
- Add to Favorites
- Remove
Checking Out of the Marketplace
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

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

Requisition Summary
- Business Unit: 640000
- Requester: pdurroug
- Currency: USD
- Requisition Name: [Blank]
- Priority: Medium

Cart Summary: Total Amount 71.06 USD
Expand lines to review shipping and accounting details

Requisition Lines
<table>
<thead>
<tr>
<th>Line</th>
<th>Description</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>2.0000</td>
<td>Dozen</td>
<td>13.7300</td>
<td>27.46</td>
</tr>
<tr>
<td>2</td>
<td>Staples Top-Tab File Folders.</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>1.0000</td>
<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
</tr>
</tbody>
</table>
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 71.66 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>13.7300</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>
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<td>Swingline LightTouch High Capa</td>
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<td>1.0000</td>
<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
</tr>
</tbody>
</table>
### 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 R</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>

*Ship To: BUS EXCELL*

Address:
- University of West Georgia
- Cent Rcvg for Ctr. for Bus. Excellence
- 1601 Maple Street
- Carrollton, GA 30118

Attention To: Durrough, Patricia S

### Accounting Lines
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Accounting Lines</th>
<th>Personlize</th>
<th>Find</th>
<th>View All</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Account</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Fund</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dept</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Program</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Class</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Budget Reference</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<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>Chartfields2</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
<td></td>
</tr>
</tbody>
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Complete the Marketplace Requisition in ePro

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<td>27.46</td>
<td></td>
<td>Add</td>
</tr>
<tr>
<td>2</td>
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<td>Staples</td>
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<td>14.44</td>
<td></td>
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<td>Staples</td>
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<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
<td></td>
<td>Add</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>Add</td>
</tr>
</tbody>
</table>

**Select lines to:** Add to Favorites Add to Template(s) Delete Selected

Mass Change

Total Amount 71.06 USD
Complete the Marketplace Requisition in ePro
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

• Add name, department, email and phone # in comments section. Also add any special delivery or handling instructions.
• Select all 3 checkboxes
If you are a requester who also has approver responsibilities, please ensure that you are not the requester and only approver on a particular requisition. If this should occur, the requisition should be ad-hoc to the next higher level approval authority.
Complete the Marketplace Requisition in ePro

Business Unit: 64000
Status: Open
Priority: Medium
Budget Status: Not Checked

**Department and Proj. Approval**

**Line 1: Initiated**
Chair #1256398
Department and Proj. Approver: Skipped
- No approvers found
- Multiple Department Approval

**Line 2: Initiated**
Desk #745886321
Department and Proj. Approver: Skipped
- No approvers found
- Multiple Department Approval

Not Routen:
Sears, Richard H
Req Dept Mgr-Line Level

**Return**
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
Complete the Marketplace Requisition in ePro.
Complete the Marketplace Requisition in ePro

Requisition ID: 0000525280

Business Unit: 54000
Status: Pending
Priority: Medium
Budget Status: Not Checked

Department and Proj. Approval

Line 1: Pending
- Chair: #456399
  - Department and Proj. Approver:
    - Skipped: No approvers found
    - Pending: Sears, Richard H
  - Not Routed: Sutherland, James R

Line 2: Pending
- Desk: #45686321
  - Department and Proj. Approver:
    - Skipped: No approvers found
    - Pending: Sears, Richard H

Apply Approval Changes

Create New Requisition
Manage Requisitions
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.
Managing Requisitions

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Managing Requisitions

- eProcurement > Manage Requisitions
- Review Requisition information
- Edit a Requisition
- Delete a Requisition line
- Cancel a requisition
- You will only see your requisitions unless you have been granted authority to see others (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
Reviewing Requisitions and Their Life Cycle

Diagram showing the life cycle of a requisition process, from requisition to payment, with specific steps and a table listing requisition details.
Approval Life Cycle

Department and Proj. Approval

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

- **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

- **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

### Business Unit
- 54000

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

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

<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>415263986</td>
<td>Chair #110050069</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

Manage Requisitions

Search Requisitions
To locate requisitions, edit the criteria below and click the Search button.
- Business Unit: 54000
- Requisition Name
- 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>
</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>
</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>
</tbody>
</table>

[Select Action] | Go
Edit a Requisition

Message

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)

OK  Cancel
### 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**: Durrough, Patricia S
- **Requisition Name**: Special Request Test
- **Requisition ID**: 0000500063
- **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>250.0000</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>300.0000</td>
<td>300.00</td>
</tr>
</tbody>
</table>

- **Select All / Deselect All**
- **Select lines to**: Add to Favorites, Add to Template(s), Delete Selected, Mass Change
- **Add More Items**

---

**GO WEST UWG**
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.

- Business Unit: 54000
- Requisition ID
- Request State: All but Complete
- Date From: 03/20/2015
- Date To: 03/27/2015
- Requester: pdurroug
- 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>
</tr>
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<tbody>
<tr>
<td>00000500069</td>
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<td>54000</td>
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<td>Approved</td>
<td>Not Chk'd</td>
<td>250.00 USD</td>
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<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>

[Select Action] Go

[Select Action] Go

[Select Action] Go

Approvals
Cancel
Check Budget
Copy
Edit
View Cycle
View Print
Delete a Requisition Line

Business Unit: 54000  
Requester: Durrough Patricia S  
Currency: USD

Requisition Name: Special Request Test  
Requisition ID: 0000500063  
Priority: Medium

Requisition Summary: Total Amount 550.00 USD

<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 #741265306 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>
<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>300.00</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select All / Deselect All  
Select lines to:  
- Add to Favorites  
- Add to Template(s)  
- Delete Selected  
- Mass Change
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 Name**
- **Request State**: All but Complete
- **Budget Status**
- **Origin**
- **PO ID**: Special Request

**Show Advanced Search**

**Requisitions**

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

<table>
<thead>
<tr>
<th>Req ID</th>
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<td>03/27/2015</td>
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<td>Not Chkd</td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>

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

### 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>75.00000 Each</td>
<td>1.00000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

If you wish to cancel the requisition, please click on the **Cancel Requisition** button.

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

#### Manage 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**: pdurroug
- **Request State**: All but Complete
- **Budget Status**:
- **Origin**: Special Request
- **PO ID**

#### 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.

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<td>[Select Action]</td>
<td>Go</td>
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<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>
<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 Chkd</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 Chkd</td>
<td>300.00 USD</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
</tbody>
</table>
Copy a Requisition

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>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>
</tbody>
</table>
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.
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.

05/26/2020
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 Using Manage Requisitions
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
- Date From: 03/23/2016
- Requester: oduroug
- Request State: All but Complete
- Date To: 03/30/2015
- Entered By
- 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>View Print</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>
<td>[Select Action]</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>
</tr>
<tr>
<td>0000500063</td>
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<td>54000</td>
<td>03/25/2015</td>
<td>Canceled</td>
<td>Not Chk'd</td>
<td>0.00 USD</td>
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<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>
</tr>
</tbody>
</table>
Creating a Desktop Receipt Using Receive Items
## Creating a Desktop Receipt

You have 4 lines open for receiving

You can 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><strong>Req BU</strong></td>
<td><strong>Requisition</strong></td>
</tr>
<tr>
<td>---</td>
<td>---</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>

[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.

<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>-------</td>
<td>-------------</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>

Check All   Clear All
## Creating a Desktop Receipt

You have 4 lines open for receiving. Please select the lines you wish to receive 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 (Item Description)</th>
<th>Item ID</th>
<th>Tot Req Qty/Amnt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Qty</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 (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>Durrough,Patricia S</td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall (Copier Usage)</td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>Durrough,Patricia S</td>
<td>XEROX-001</td>
</tr>
<tr>
<td></td>
<td>Chairs for Training Room (Chair #415263986)</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>Durrough,Patricia S</td>
<td>ADVANTAG-001</td>
</tr>
<tr>
<td></td>
<td>Chairs for Training Room (Chair #7566983254)</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>Durrough,Patricia S</td>
<td>ADVANTAG-001</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

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Id</th>
<th>Item Description</th>
<th>Received Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chair #415263986</td>
<td>1.0000</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>1.00000</td>
<td></td>
<td>1.0000</td>
</tr>
</tbody>
</table>

Return to Manage Requisitions

Return to Receiving
Creating a Desktop Receipt

Receive Items

You have 3 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>
<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>
<th>Su</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VX091528 Row Hall Copier Lease</td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td>XEROX-001</td>
<td></td>
<td></td>
<td></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>XEROX-001</td>
<td></td>
<td></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>ADVANTAG-001</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

You have 4 lines open for receiving

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>
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<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
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</thead>
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<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>XEROX-001</td>
<td></td>
<td></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>XEROX-001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415263386</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td>Durrrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7569383254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td>Durrrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>

Check All    Clear All

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