Introduction to ePro and the GeorgiaFIRST Marketplace

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

8/09/2016
Day 1 – Important Notes

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

• Understand the basics of the eProcurement module
• Log in and access the ePro module
• Understand the responsibilities of a requester
• Create a Marketplace requisition

• Create a Special Request requisition
• Edit, cancel and view a requisition
• View a requisition in the lifecycle
• Perform desktop receiving
What is ePro?

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

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

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

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

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

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

Requester enters GAFIRST Marketplace and selects items to create shopping cart

Requester “issues requisition” to pull cart into ePro

Requester makes updates to Distribution/Schedule information if needed

Requesters can approve or deny requisition; some can make edits

Approvers log into PSFIN Core to access Worklist

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

Requester previews approvals and inserts ad hoc approvers if necessary

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

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

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

Accounts Payable pays invoice
Special Request Requisitions

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

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

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

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

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

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

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

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

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

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

[Image of Oracle Create Requisition screen with GAFirstMarketplace highlighted]
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: pduroog@westga.edu
- Business Unit: University of West Georgia (54000)
- Department: ~NO_DEPT_FOUND (~NO_DEPT_FOUND)
- Position: 
- User Name: pduroog
- Authentication Method: cXML

Save
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

**Shop**
- **Everything**
- **Enter Search Keywords Here**

- **Go to:** advanced search | favorites | quick order
- **Browse:** suppliers | categories | contracts | chemicals

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#### Click to expand Search for Vendor Filter

Showing 1 - 20 of 243 Results

<table>
<thead>
<tr>
<th>Results Per Page</th>
<th>20</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Vendor Name</strong></td>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>BSN SPORTS</td>
<td></td>
</tr>
<tr>
<td>Dal-Kawa Cycle Center</td>
<td></td>
</tr>
<tr>
<td>1st Coast Printing</td>
<td></td>
</tr>
</tbody>
</table>
| 3 Order 2 Remit 2 bus and fax | | | Agilent Technologies, Inc. | | 🌟
| A Legendary Event | | | Airgas South | | |
| A&D Painting, Inc | | | Airgas South | | |
| A. Daigger & Co. | | | All Good Pest Solutions | | |
| ABC Sign Group | | | All Star Screen Printing LLC | | |
| Ace Glass Inc. | | | Alligare, LLC | | |
| Activate the Space | | | Allmond, Sarah E | | |

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**Page 1 of 13**
Browse by Category

- Lab Supplies
- Medical/Clinical
- Office/Computer
- MRO/Facilities
- Furniture
- Services
- Supplies Manager
- Manufacturing
- Books
- Electronics
- Specialty
- Food/Food Equipment
Add Additional Keywords
Using Filter Results
Mandatory State Contract Items
Add Items from Product Results Page

- **Spark stacking side chair with seat pad - Drop Ship**
  - Part Number: 444 Spark - Drop Ship
  - Contract Number: SWC60748 more info...
  - Furniture, Office, Computer and Educational
  - Price: $50.00 USD

- **Spark stacking side chair with seat pad - Desktop Ship**
  - Part Number: 444 Spark - Desktop Ship
  - Contract Number: SWC60748 more info...
  - Furniture, Office, Computer and Educational
  - Price: $50.50 USD

- **Filter Results**
  - By Product Flag: Green (18)
  - By Vendor: Carolina Biological Supply Co. (30)

**Add Keywords**

- **Shop**
  - Furniture
  - chair
  - Go

**Results for**: Furniture: chair

Showing 1 - 20 of 967 Results

- **Sort by**: Best Match

**Add to Cart**
Using Product Comparison

![Product Comparison](image-url)
Add Items from Product Comparison

<table>
<thead>
<tr>
<th>Select</th>
<th>Qty</th>
<th>Add to Cart</th>
<th>Qty</th>
<th>Add to Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to Cart</td>
<td>1</td>
<td>Add to Cart</td>
<td>1</td>
<td>Add to Cart</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Details</th>
<th>Catalog No.</th>
<th>Price</th>
<th>Vendor</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<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>
<td>Office furniture</td>
</tr>
<tr>
<td>Spark stacking side chair with seat pad - Drop Ship</td>
<td>444 Spark - Drop Ship</td>
<td>50.00 USD</td>
<td>Statewide Contract Supplier</td>
<td>Office furniture</td>
</tr>
</tbody>
</table>
Add Items from Product Description
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

Add To Active Cart

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

• 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 (extension cord in production)
Practice Activity

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

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

- **Requisition**: Create a new requisition by browsing or searching company or external catalogs.
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
Checking Out of the Marketplace

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

- **Ethernet Patch Cable for Q24/M24 1 Meter**
  - Unit Price: 11.83 USD
  - Quantity: 1
  - Total: 11.83 USD

[Image of a shopping cart page with options to continue shopping or 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

<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>
<tr>
<td>Requisition Name</td>
<td></td>
</tr>
<tr>
<td>Priority</td>
<td>Medium</td>
</tr>
</tbody>
</table>

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>
<th>Details</th>
<th>Comments</th>
<th>Delete</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>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Staples Top-Tab File Folders,</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Box</td>
<td>7.2200</td>
<td>14.44</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Swingline LightTouch High Capa</td>
<td></td>
<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Accounting Lines</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfields1</td>
<td>Chartfields2</td>
<td>Chartfields3</td>
<td>Details</td>
<td>Details 2</td>
<td>Asset Information</td>
<td>Asset Information 2</td>
<td>Budget Information</td>
</tr>
<tr>
<td>Account</td>
<td>Fund</td>
<td>Dept</td>
<td>Program</td>
<td>Class</td>
<td>Budget Reference</td>
<td></td>
<td></td>
</tr>
<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>
Complete the Marketplace Requisition in ePro

| Line | Description                        | Item ID | Supplier | Quantity | UOM     | Price  | Total  | Details | Comments | 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
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

PeopleSoft 9.2
Marketplace Practice Activity

• As a refresher from Day 1, use the Marketplace Practice Activity to enter a marketplace requisition
• ePro Listserv
Special Request Requisitions

• For items that are not found in the GeorgiaFIRST Marketplace
• Can use a supplier that is in the Marketplace, but if item can be found there, create a Marketplace Requisition
• Items are added manually to a Special Request Requisition
Entering a Requisition
Entering a Requisition
Requisition Settings
Searching for a Supplier

Requisition Settings

Business Unit: 54000
Requester: pdurrough
Currency: USD

Requisition Name: [Blank]
Priority: Medium

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

- Supplier
- Supplier Location
- Buyer

Category
Unit of Measure

Shipping Defaults

Ship To: BUS EXCELL
Due Date: [Blank]

Add One Time Address
Attention: [Blank]

Accounting Defaults

Chartfields1
Chartfields2
Chartfields3
Details
Asset Information

Fund
Dept
Program
Class
Bud Ref

[Blank]

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

Create Requisition

Welcome  Durrough, Patricia S

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

Request Options

Search

Special Requests

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

Item Details

- Item Description
- Price
- Quantity
- Currency
- Unit of Measure

Category: 42506
Supplier ID: 0000008558
Supplier Name: Advantage Office Solution
Supplier Item ID:
Manufacturer
Mfg ID:

Suggest New Supplier

Checkout
Adding Items

Special Requests

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

**Item Details**

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

**Supplier**

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

*Due Date:* 

---

Welcome Durrough, Patricia S

Request Options

Search

Checkout

Advanced Search

[Image: Picture of a software interface showing a form for adding items with fields for item description, price, quantity, category, currency, unit of measure, supplier ID, and supplier name.]
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

Search

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

Special Requests

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

Item Details

*Item Description: Credenza #415632963 Black and cherry wood

*Price: 300.00

*Quantity: 1

*Currency: USD

*Unit of Measure: EA

Category: 42506

Supplier

Supplier ID: 000006556

Supplier Name: Advantage Office Solutions

Supplier Item ID:

Manufacturer

Mfg ID:

Manufacturer:

Mfg Item ID:

Due Date:

Advanced Search

Check out
Requisition Summary
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

All Request Options
- Web
  - GAFirstMarketplace
- Express Item Entry
- Special Requests
- Forms
- Favorites

Search

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

Item Details
- *Item Description
- *Price
- *Currency USD
- *Quantity
- *Unit of Measure
- *Category 42506
- 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
Updating the Schedule & Distribution Information
Charging a Requisition Line to Multiple Chartstrings

---

**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>
</tbody>
</table>

**Shipping Line 1**

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

- **Attention To:**
  - Durrough, Patricia S

**Accounting Lines**

- **Distribute By:** Qty

<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>
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<td>16200</td>
<td>11000</td>
<td>2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# 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>odurroug 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>
<th>Details</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cherry</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.0000</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and Cherry</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.0000</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

![Image of requisition summary with line items selected and mass change option highlighted]

- **Line 1**: Desk #741256395 Black and Chair
  - Item ID: 415632963 Black and
  - Supplier: Advantage Office Solutions
  - Quantity: 1.0000 Each
  - Price: 250.0000 USD
  - Total: 250.00

- **Line 2**: Credenza #415632963 Black and
  - Supplier: Advantage Office Solutions
  - Quantity: 1.0000 Each
  - Price: 300.0000 USD
  - Total: 300.00

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

Mass Change button highlighted
Enter Requisition Comments & Save for Later
Preview Approvals
Approval Routing

Department and Proj. Approval

Line 1: Initiated
Desk #741256395 Black and Cherry Wood

Department and Proj. Approver

Skipped
No approvers found
Multiple Department Approval

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

Line 2: Initiated
Credenza #415632963 Black and cherry wood

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
**Do not attempt to manually budget check the requisition. It will budget check automatically.**
Requisition Confirmation Page

Confirmation

Your requisition has been submitted.

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

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

Number of Lines: 2
Total Amount: 550.00 USD

View printable version  Edit This Requisition  Check Budget
Demonstration

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

• Demonstration of splitting a line among multiple chartstrings

• Demonstration of adding an attachment
Special Request Practice Activity

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

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

**Date:** 14-Mar-2016

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

**Attention:**

---

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

**Finishes to be Determined**

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

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

**Subtotal** $3,445.05  
**Freight** $-  
**Sales Tax** $-  
**Installation** $-  
**TOTAL** $3,445.05

---

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

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

---
Important Notes

• Check Request purchases
  - www.westga.edu/purchasing
  - Click on Forms > Check Request Form
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

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**: 

**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.

- **0000500067**  Test for ePro Training  54000  03/27/2015  Pending  Not Chk'd  2,165.00 USD  [Select Action]  Go
- **0000500063**  Special Request Test  54000  03/25/2015  Pending  Not Chk'd  550.00 USD  [Select Action]  Go
- **0000500062**  Test for Training  54000  03/25/2015  Pending  Not Chk'd  300.00 USD  [Select Action]  Go
- **0000500061**  0000500061  54000  03/25/2015  Open  Not Chk'd  29.16 USD  [Select Action]  Go
- **0000500060**  0000500060  54000  03/25/2015  Open  Not Chk'd  71.06 USD  [Select Action]  Go
- **0000500059**  Testing  54000  03/24/2015  Pending  Not Chk'd  1,900.00 USD  [Select Action]  Go
- **0000500052**  Test  54000  03/24/2015  Pending  Not Chk'd  2,165.00 USD  [Select Action]  Go
Reviewing Requisitions and Their Life Cycle
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

ORACLE

Requisition ID
Date From 03/23/2015
Requester pdurroug

Request State
Date To 03/30/2015
Entered By

Budget Status
Origin
PO ID
Special Request

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.

Req ID Requisition Name BU Date Request State Budget Total
---------- ------------------- ----- ------------------- -------- --------
0000500069 Chairs for Training Room 54000 03/27/2015 Partially Received Valid 250.00 USD [Select Action] Go

Requester Durrough, Patricia S
Pre-Encumbrance Balance
0.00 USD

Entered By Durrough, Patricia S
Priority Medium

Purchase Orders

Request Lifespan:

Line Information

<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 #415263986</td>
<td>Received</td>
<td>100.00000</td>
<td>USD</td>
<td>1.0000 EA</td>
<td>Advantage Office Solutions</td>
</tr>
</tbody>
</table>
Requisition Status and Life Cycle

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

**Business Unit**: 54000

**Requisition Information**
- **Requisition ID**: 0000500069
- **Line Number**: 1
- **PO Information**
  - **PO Number**: 0000510015
  - **PO Date**: 03/27/2015
  - **Supplier ID**: 000008558
  - **Terms**: N10
  - **PO Status**: Dispatched

**Change Order**
- **Buyer**: sparker
- **Terms**: N10

**ORACLE**

[Return to Manage Requisitions]
Edit a Requisition

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

Message

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

[OK] [Cancel]
Edit a Requisition
Delete a Requisition Line

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

### Manage Requisitions

**Search 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>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></td>
<td>All but Complete</td>
<td></td>
</tr>
</tbody>
</table>

**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>00000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td></td>
<td>250.00 USD</td>
</tr>
<tr>
<td>00000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td></td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>

**Actions**

- Approvals
- Cancel
- Check Budget
- Copy
- Edit
- View Cycle
- View Print

Select Action: Edit, Go
Delete a Requisition Line

<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 #74126395 Black and</td>
<td></td>
<td>Advantage Office</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></td>
<td>Credenza #415632963 Black</td>
<td></td>
<td>Advantage Office</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 lines to: Add to Favorites, Add to Template(s), Delete Selected

Select All / Deselect All
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
### Manage Requisitions

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

**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>Action</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></td>
<td>250.00</td>
<td></td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td></td>
<td>2,165.00</td>
<td></td>
</tr>
</tbody>
</table>

**Actions**

- Approve
- Cancel

[Select Action] Go
### Cancel a Requisition

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

<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>1.000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

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

[Cancel Requisition]

[Return to Manage Requisitions]
## Cancel a Requisition

### Manage Requisitions

**Search Requisitions**

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>54000</td>
</tr>
<tr>
<td>Requisition ID</td>
<td></td>
</tr>
<tr>
<td>Date From</td>
<td>03/20/2015</td>
</tr>
<tr>
<td>Date To</td>
<td>03/27/2015</td>
</tr>
<tr>
<td>Requester</td>
<td>pdurog</td>
</tr>
<tr>
<td>Status</td>
<td>Approved</td>
</tr>
<tr>
<td>Requestor</td>
<td></td>
</tr>
<tr>
<td>Entered By</td>
<td></td>
</tr>
<tr>
<td>Budget Status</td>
<td></td>
</tr>
<tr>
<td>Origin</td>
<td>Special Request</td>
</tr>
<tr>
<td>PO ID</td>
<td></td>
</tr>
</tbody>
</table>

**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>
</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>
</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>
<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>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>Go</td>
</tr>
</tbody>
</table>
Copy a Requisition
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><strong>eProcurement</strong></td>
</tr>
<tr>
<td>Set up eProcurement; manage or approve eProcurement requisitions or POs.</td>
</tr>
<tr>
<td><strong>Requisition</strong></td>
</tr>
<tr>
<td>Create a new requisition by browsing or searching company or external catalogs.</td>
</tr>
<tr>
<td><strong>Manage Requisitions</strong></td>
</tr>
<tr>
<td>Review requisitions, edit or view status, cancel, receive, and Return To Vendor (Supplier).</td>
</tr>
<tr>
<td><strong>Manage Requisition Approvals</strong></td>
</tr>
<tr>
<td>Take actions on requisitions that require your approval.</td>
</tr>
<tr>
<td><strong>Buyer Center</strong></td>
</tr>
<tr>
<td>Create/edit, approve purchase order; source requisition; process change request.</td>
</tr>
<tr>
<td><strong>Receive Items</strong></td>
</tr>
<tr>
<td>Create, edit, and process receipts and Return To Vendor (Supplier).</td>
</tr>
</tbody>
</table>

*Oracle*

*University of West Georgia Center for Business Excellence*
Creating a Desktop Receipt

Manage 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 Chkd</td>
<td>2,165.00 USD</td>
</tr>
<tr>
<td>0000500063</td>
<td>Special Request Test</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Canceled</td>
<td>Not Chkd</td>
<td>0.00 USD</td>
</tr>
<tr>
<td>0000500062</td>
<td>Test for Training</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>300.00 USD</td>
</tr>
</tbody>
</table>

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.
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>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amnt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
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</thead>
<tbody>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
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</table>
Creating a Desktop Receipt

You have 4 lines open for receiving

**Receive Selected** and go to the Receive Form.

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<td>Durrough, Patricia S</td>
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</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

Requisition Lines to Receive

- Req BU
- Requisition
- Item ID
- Item Description
- Tot Req Qty/Amt
- Accepted to Date
- UOM
- Recv By
- Ship To
- Ship To GLN
- Attention To
- Supplier

Check All  Clear All
Creating a Desktop Receipt

Receive Items

New Receipt

Business Unit 54000

Receipt Status: Open

*Received Date: 02/30/2015

<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>
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Save Receipt
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.

### Requisition Lines to Receive

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<tr>
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- [Check All]
- [Clear All]
Creating a Desktop Receipt

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Practice Activity

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