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.

10/14/2019
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
- GeorgiaFIRST Financials button
- Login with UWG Username and Password
- Must dual authenticate using the Duo authentication method
What is ePro?

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

- Marketplace Requisitions
  - Items selected from the GeorgiaFIRST Marketplace and pulled into the ePro Requisition
  - GeorgiaFIRST Marketplace items are contract/catalog items
- Special Request Requisitions
  - Items are manually entered onto requisition
What is the GAFirst Marketplace?

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

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

• Punch-out Catalogs
  ➢ Integrated external links to a supplier’s web-based catalog dedicated to contract items/pricing
Process Flow

Requester enters PSFIN and begins creation of requisition in ePRO

Requester enters GAFIRST Marketplace and selects items to create shopping cart

Requester “issues requisition” to pull cart into ePRO

Requester makes update to Distribution/Schedule information if needed

Requesters can approve or deny requisition

Requesters 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 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
    ❑ Crystal Pritchett cpritche@westga.edu x95357
    ❑ Lindsey Robison lrobison@westga.edu x2471
Requester Responsibilities in 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.

9/13/2019
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
- 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
Welcome to the GeorgiaFirst Marketplace (GFM)!

Effective August 31, 2017 the General Office Supplies, Paper and Toner Contract (99999-001-SPD0000103-0001) with Staples Contract & Commercial Inc will have a Price Increase on 6,857 of their items.

In order to receive the currently listed price of any items you have selected for purchase, please ensure all of your Staples’ related Purchase Orders have been dispatched to Staples no later than Wednesday, August 30th at 5:00 p.m.
Searching and Selecting Items in 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.

9/13/2019
Simple Search

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

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

### Search Interface

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

### Filter Options

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

### Results Display

Showing 1 - 20 of 97 Results

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
<th>Supplier Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acuity Specialty Products</td>
<td></td>
<td></td>
<td>ASSA Group, Inc.</td>
</tr>
<tr>
<td>Adrenalin Powersports, Inc.</td>
<td></td>
<td></td>
<td>ATLANTA X-RAY CORP</td>
</tr>
<tr>
<td>Advanced Business Supplies</td>
<td></td>
<td></td>
<td>Bob Barker Company Inc.</td>
</tr>
<tr>
<td>Agilent Technologies</td>
<td></td>
<td></td>
<td>Bridgestone Americas Tire Operations LLC.</td>
</tr>
<tr>
<td>Alligare LLC</td>
<td></td>
<td></td>
<td>Carolina Biological Supply Co.</td>
</tr>
<tr>
<td>Allseating Corp.</td>
<td></td>
<td></td>
<td>Clyde Armory INC</td>
</tr>
<tr>
<td>AllSteel</td>
<td></td>
<td></td>
<td>CPS/Timberland Division</td>
</tr>
<tr>
<td>American Bio Medical</td>
<td></td>
<td></td>
<td>CRAIG'S FIREARM SUPPLY, INC.</td>
</tr>
<tr>
<td>ANTHRIG INTERNATIONAL</td>
<td></td>
<td></td>
<td>CWC Chemical, Inc</td>
</tr>
<tr>
<td>ARTOTEK INC</td>
<td></td>
<td></td>
<td>DADE Paper</td>
</tr>
</tbody>
</table>

### Sorting Options

- **Sort by:** Best Match

### Pagination

- **Page:** 1 of 5

---

**Legend:**
- [ ] Click to expand Search for Supplier Filter
Browse by Category

Shop: Everything

Categories

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

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

### Product Details
- **Advantage® Motor Extension Cord**

<table>
<thead>
<tr>
<th>Catalog No.</th>
<th>$10.35 USD / unit</th>
<th>$5.17 USD / unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>85427</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CTG-29933</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multi Media Services</td>
</tr>
<tr>
<td>Southern Computer Warehouse (SCW)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projection screens or displays</td>
</tr>
<tr>
<td>Power cord</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UOM</th>
</tr>
</thead>
<tbody>
<tr>
<td>----</td>
</tr>
<tr>
<td>----</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product Size</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Price per Product Size Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select units...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>* 1-Mandatory State Contract</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alternate Part Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>55526742,10101622,140645,2437683,697385,706638,29933,29933,29933,29933,29917,29966,29965,29964</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category UNSPSC</th>
</tr>
</thead>
<tbody>
<tr>
<td>45-11-16-03</td>
</tr>
<tr>
<td>26-12-16-36</td>
</tr>
</tbody>
</table>
Add Items from Product Description
Add Item from Product Description

Home Series Surge Protector, 720 Joules, 6-Outlets, 8ft Cord, 360 Degree Rotating Plug

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

Price: 9.59 USD

Quantity: 1
Add To Active Cart

Product Details
Supplier: Southern Computer Warehouse (SCW)
UOM: 1/EA
Buyer UOM: 1/EA
Yes
1-Mandatory State Contract: No
Alternate Part Numbers:
Category: Surge suppressers
Category UNSPSC: 39-12-16-10
Color: 
Image URL: https://content.etilize.com/600/...]
Lead Time: 1
More Information: https://shop2.scw.com/catalogsea...
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

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.

9/13/2019
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

[Image showing an Oracle interface with a navigation panel and various options, including eProcurement highlighted.]
Beginning a Marketplace Requisition
Beginning a Marketplace Requisition

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search All

Request Options

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

Web
Browse Supplier Websites
GAFirstMarketplace

Forms
Create and Submit Forms

Web
Browse Supplier Websites
GAFirstMarketplace

Express Item Entry
Create an Express Requisition

Favorites
Browse Favorite Items and Services

Recently Ordered
View recently ordered items and services
Shipping
"Ask me about OneUSG Connect...
Reset of printing for earbud...
DevelopWest earbuds to be us...
UWG Name Badges
More...

Special Requests
Create a non-catalog request

Templates
Browse Company and Personal Templates
Building a Shopping Cart

• Search and select items to add to your cart

• View cart:
  ➢ Carts icon > Open My Active Shopping Cart
  ➢ Cart Summary Link at top right corner of the page
Building a Shopping Cart
Checking Out of the Marketplace

![Screenshot of the checkout process in a marketplace](image)

**Shopping Cart for Patricia Durrough**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Advantage® Motor Extension Cord</strong></td>
<td>10.35 USD</td>
<td>1</td>
<td>10.35 USD</td>
</tr>
<tr>
<td><strong>Technology Integration Group (TIG)</strong></td>
<td>11.83 USD</td>
<td>1</td>
<td>11.83 USD</td>
</tr>
</tbody>
</table>

*Have you made changes? [Update]*

*Multi Media Services* [more info...]

*Technology Integration Group (TIG)* [more info...]

*Click *Proceed to Checkout* to complete the checkout process.*
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**: 64000
- **Requester**: pdurroug
- **Currency**: USD
- **University of West Georgia**
- **Requisition Name**: [highlighted]
- **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 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>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

<table>
<thead>
<tr>
<th>Line Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
</tr>
<tr>
<td>Requisition Date</td>
</tr>
<tr>
<td>Status</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entered On:</td>
</tr>
</tbody>
</table>

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

[Add Attachments]

[Attachments]

[OK] [Cancel] [Refresh]
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<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>*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

<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>13.7300</td>
<td>27.46</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>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>Add</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Avery Framed View Binder With</td>
<td></td>
<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>6.8800</td>
<td>6.88</td>
<td>Add</td>
<td></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

**Edit Lines/Shipping/Accounting for Selected Lines**

**Line Information**

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

- **Supplier ID**
  - **Buyer**
- **Supplier Location**
  - **Category**

**Shipping Information**

- **Ship To Location**
- **Due Date**
- **Add One Time Address**
  - **Attention**
  - **SpeedChart**

**Accounting Lines**

*Please enter GL Business Unit before selecting other chartfield values*

<table>
<thead>
<tr>
<th>Accounting Information</th>
<th>GL Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfields1</td>
<td>Chartfields2</td>
</tr>
<tr>
<td>Percent</td>
<td>Location</td>
</tr>
<tr>
<td>1</td>
<td>54000</td>
</tr>
</tbody>
</table>

*Load Values From Defaults*
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

<table>
<thead>
<tr>
<th>Requisition Comments and Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter requisition comments:</td>
</tr>
<tr>
<td>The State of Georgia Terms and Conditions are applicable to this order. They can be viewed at <a href="http://www.doe.gov/StateLocal/SPD/Docs/SPD_GeneralTerms-conditions.pdf">www.doe.gov/StateLocal/SPD/Docs/SPD_GeneralTerms-conditions.pdf</a>. Vendor/contractor agrees to invoice the user agency according to the purchase order.</td>
</tr>
<tr>
<td>Send to Supplier</td>
</tr>
</tbody>
</table>

- 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
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

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

View printable version  Edit This Requisition  Check Budget

**Department and Proj. Approval**

**Line 1:** Pending
Char #4246098
Department and Proj. Approver
Skipped
No approvers found
Multiple Department Approval

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

**Line 2:** Pending
Desk #745895321
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
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
- Skipped: No approvers found, Multiple Department Approval
- Pending: Sears, Richard H, Req Dept Mgr-Line Level
- Not Routed: Sutherland, James R., Inserted Approver

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

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 Special Request Requisition

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. 9/13/2019
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
- All special request requisitions must have a quote
Entering a Requisition
Entering a Requisition
Searching for a Supplier

Requisition Settings

Business Unit: 40000
*Requester: pudroug
*Currency: USD

University of West Georgia
Durrough, Patricia S

Requisition Name
Priority: Medium

Custom Fields

Line Defaults

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

Add One Time Address
Attention

Accounting Defaults

Fund
Dept
Program
Class
Bud Ref: 2015

Personalize | Find | First | 1 of 1 | Last

OK | Cancel | Refresh
Searching for a Supplier

Supplier Search

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

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

Find Reset
Searching for a Supplier

- If your supplier is not in the PeopleSoft database, you must have the vendor added prior to entering your requisition.
- Send the **Vendor Profile Form**, **Vendor W-9 Form** and **Vendor ACH Form** to your recommended supplier.
- Send the completed forms to vendor@westga.edu to have the supplier added.
- Once supplier is added, you will be able to enter your requisition.
Searching for an Item Category

Requisition Settings

[Form fields for Business Unit, Requester, Currency, Requisition Name, Priority, Custom Fields, etc.]

Line Defaults

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

[Form fields for Supplier, Supplier Location, Buyer, Category, Unit of Measure, etc.]

Shipping Defaults

Ship To, Due Date, Add One Time Address, Attention

Accounting Defaults

[Form fields for Fund, Dept, Program, Class, Bud Ref, etc.]

[Buttons: OK, Cancel, Refresh]
Searching for An Item Category

• Visit the [NIGP/Category Code](#) link from the State of Georgia list
• Search for appropriate category code (CTRL F)
• Recommend making a personal quick list for commonly used codes
• Enter code in the category field
• Codes beginning with a “9” should be used for services only
Adding Items

Enter a detailed description of the item being requested. Make sure enough information is listed in the item description to identify exactly what is being purchased and also include the item #.
Adding Items

Create Requisition

Welcome Durrough, Patricia S

[Image of a webpage for adding items with options such as Request Options, Search, and Special Requests.]

Special Requests

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

Item Details

- *Item Description
- *Price
- *Quantify
- *Category: 42506
- *Currency: USD
- *Unit of Measure
- Due Date

Checkout button highlighted.
Checkout – Review and Submit

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

Checkout - Review and Submit

Review the item information and submit the req for approval.

**Requisition Summary**

- **Business Unit**: 54000
- **Requester**: pdurroug
- **Currency**: USD
- **Requisition Name**: Special Request Test
- **Priority**: Medium

**Cart Summary: Total Amount 550.00 USD**

Expend 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>Desk #741256395 Black and Cherry</td>
<td>1</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.000</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and</td>
<td>2</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.000</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Updating the Schedule & Distribution Information
Charging a Requisition Line to Multiple Chartstrings

<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>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk st741256385 Black and Cheri</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.000</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Accounting Lines**

- **Distribute By**: Qty
- **Account**: 714100
- **Fund**: 10500
- **Dept**: 1045103
- **Program**: 16200
- **Class**: 11000
- **Budget Reference**: 2015
### Requisition Summary

- **Business Unit**: 54000
- **Requester**: pdurroug
- **Currency**: USD
- **University of West Georgia**
- **Duration**: Durrough, Patricia S
- **Requisition Name**: Special Request Test
- **Priority**: Medium

### Cart Summary: Total Amount 550.00 USD

Expand lines to review shipping and accounting details

#### Requisition Lines

| Line | Description                        | Item ID | Supplier                      | Quantity | UOM  | Price  | Total  | Details | Comments | Delete |
|------|-----------------------------------|---------|-------------------------------|----------|------|--------|--------|---------|---------|--------|--------|
| 1    | Desk #741256395 Black and Chair   |         | Advantage Office Solutions    | 1.0000   | Each | 250.00 | 250.00 |         |         |        |
| 2    | Credenza #415632963 Black and     |         | Advantage Office Solutions    | 1.0000   | Each | 300.00 | 300.00 |         |         |        |
### Requisition Summary

- **Business Unit**: 54000
- **University of West Georgia**
- **Requester**: pdurrough
- **Multiplier/Department**: Durrough, Patricia S
- **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 #415532563 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
Enter Requisition Comments & Save for Later

- Add name, department, email and phone # in comments section. Also add any special delivery or handling instructions.
- Can also add an attachment for the entire requisition
- 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.
Approval Routing

Department and Proj. Approval

Line 1: Initiated
Desk #741256395 Black and Cherry Wood

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

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.**
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
### Sample Advantage Quote

**Quotation #09416**

**Date:** 14-Mar-2016

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

**Attention:** Tricia Durrough

**E-Verify:** 570525 **Issued:** 15-Jun-2012

<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>

---

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

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

---

**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 transactions
  - Purchasing Webpage
  - Click on Purchasing Information > Check Request
  - Form and Qualified Check Request Purchases
### Qualified Check Request Purchases

<table>
<thead>
<tr>
<th>Payment Purpose</th>
<th>Other Requirements Approvals &amp; Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artists/Models – Students (less than $2,499.99)</td>
<td>Standard Engagement Agreement</td>
</tr>
<tr>
<td>Awards &amp; Prizes for students (less than $2,499.99)</td>
<td>See Controller’s Office Website</td>
</tr>
<tr>
<td>Consultants (less than $2,499.99)</td>
<td>Standard Engagement Agreement</td>
</tr>
<tr>
<td>Lodging - Direct Billed (No Limit)</td>
<td>Approved Travel Authorization</td>
</tr>
<tr>
<td>Registration (travel to conferences) (No Limit) registered with a UWG address</td>
<td>Approved Travel Authorization</td>
</tr>
<tr>
<td>Entertainers/DJ’s</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O.)</td>
</tr>
<tr>
<td>Federal Express/UPS/Courier Service (No Limit)</td>
<td>Must use State Contract if Mandatory</td>
</tr>
<tr>
<td>HR/Payroll Payments to Vendors for Payroll Deductions (Insurance, garnishments, etc.) (No Limit)</td>
<td>HR/Payroll Only</td>
</tr>
<tr>
<td>Medical or Related Lab Services</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O.)</td>
</tr>
<tr>
<td>Memberships (Chamber of Commerce Memberships are prohibited)</td>
<td>Must be to a UWG address</td>
</tr>
<tr>
<td>Minor Equipment Repair or Maintenance by Authorized Agents</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O. &amp; EVenify)</td>
</tr>
<tr>
<td>Minor Instrument Repair or Maintenance</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O. &amp; EVenify)</td>
</tr>
<tr>
<td>Officials for Sanctioned Sporting Events</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O. &amp; EVenify)</td>
</tr>
<tr>
<td>Postage (No Limit)</td>
<td>UWG Post Office Only</td>
</tr>
<tr>
<td>Speakers/Lecturers</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O. &amp; EVenify) may also require a certificate of insurance</td>
</tr>
<tr>
<td>Sponsorships</td>
<td>Pre-approval by Controller on a case by case basis</td>
</tr>
<tr>
<td>Art Purchase/Student $2,500 &amp; over requires P.O.</td>
<td>Up to $2,499.99, $2,500 &amp; over requires VP/Dean Approval</td>
</tr>
<tr>
<td>Food/Beverage (with Owe West Approval)</td>
<td>Food Purchase With Institutional Funds Form</td>
</tr>
<tr>
<td></td>
<td>Food Purchases Policy Link over $2,500 requires P.O.</td>
</tr>
<tr>
<td>Subscriptions (Excluding Subscription Services) Subscription to a UWG address</td>
<td>Subscriptions up to 1 yr, $2,500 &amp; over requires P.O.</td>
</tr>
<tr>
<td>Wright Express (No Limit)</td>
<td>Fuel purchases in accordance with State Contract</td>
</tr>
<tr>
<td>Attorney &amp; Legal Related Payments (No Limit) Legal Services must have USG approval</td>
<td>Prescribed to Dept. of Law via O.C.G.A. §45-15-34</td>
</tr>
<tr>
<td>Benefit payments directly to recipients (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 7/1/2017</td>
</tr>
<tr>
<td>Intergovernmental agreements/omts. (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 7/1/2017</td>
</tr>
<tr>
<td>Real estate rental/lease payments (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 7/1/2017</td>
</tr>
<tr>
<td>Sales and Use tax payments (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 7/1/2017</td>
</tr>
<tr>
<td>Utilities (e.g., electric, telephone, etc.) (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 7/1/2017</td>
</tr>
</tbody>
</table>
Check Request Form
University of West Georgia
1601 Maple Street, Carrollton, Georgia 30118
Ph.: (678)-839-6390

Requester Name: ____________________________  Date: ____________________________
Requesting Department Name: ____________________________  Phone #: ____________________________

Chart of Accounts:

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

Total Amount: $ ____________________________

Description of Item(s):

Vendor Information:

UWG Vendor Number: ____________________________
Vendor Name & Address:

Approved by: Research & Sponsored Ops or Tech fees (If Applicable)

Approved by: (Authorized Approver)

Approved by: Dean or Vice President (If Applicable)

Check Request Form should be typed and requesters are to be knowledgeable of the criteria for "Qualified Check Request Purchases" located on the Purchasing Services website.

HANDWRITTEN CHECK REQUESTS ARE NOT ALLOWED AND WILL BE RETURNED TO THE REQUESTING DEPARTMENT
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, a W9 Form and aVendor ACH form and submit with your Check Request
Managing Requisitions

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.

9/13/2019
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.

### Search Requisitions

- **Business Unit**: S4000
- **Requisition ID**: 
- **Date From**: 
- **Requirer**: pdurrug
- **Requisition Name**: 
- **Request State**: All but Complete
- **Date To**: 
- **Entered By**: 
- **Budget Status**: 
- **Origin**: 
- **PO ID**: 

### Search Results

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

<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>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,165.00</td>
</tr>
<tr>
<td>0000500063</td>
<td>Special Request Test</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>550.00</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</td>
</tr>
<tr>
<td>0000500061</td>
<td>0000500061</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Open</td>
<td>Not Chkd</td>
<td>29.16</td>
</tr>
<tr>
<td>0000500060</td>
<td>0000500060</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Open</td>
<td>Not Chkd</td>
<td>71.06</td>
</tr>
<tr>
<td>0000500059</td>
<td>Testing</td>
<td>54000</td>
<td>03/24/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>1,900.00</td>
</tr>
<tr>
<td>0000500052</td>
<td>Test</td>
<td>54000</td>
<td>03/24/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,165.00</td>
</tr>
</tbody>
</table>

### Action Buttons

- [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

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.
# 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**: sparker
- **Supplier ID**: 0000008558
- **Terms**: N10
- **PO Status**: Dispatched

### Lines

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

[Return to Manage Requisitions]
Edit a Requisition

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

### Manage Requisitions

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

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

#### Search Requisitions

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td></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></td>
<td>2,165.00 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.

**Actions**: Approvals, Cancel, Check Budget, Copy, **Edit**, View Cycle, View Print
Edit a Requisition

Message

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

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**: 0000000063
- **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
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
- Date From: 03/20/2015
- Request State: All but Complete
- Date To: 03/27/2015
- 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>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chkd</td>
<td>250.00 USD</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>
## Delete a Requisition Line

### Requisition Summary

- **Business Unit**: 54000
- **Requester**: Durrough, Patricia S
- **Requisition Name**: Special Request Test
- **Requisition ID**: 0000500063
- **Priority**: Medium

### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cher</td>
<td>Desk #741256395</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>Credenza #415632963</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>
Delete a Requisition Line

Delete Confirmation

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

[OK] [Cancel]
Cancel a Requisition

• Can cancel a requisition if you decide the items are not needed or because the entire requisition was denied
• Can cancel a REQ as long as it has not been sourced to a Purchase Order yet
• On Manage Requisitions page, verify requisition status is not “PO Created” or “PO Dispatched”
• Select “Cancel Requisition” from Action drop down list
## Cancel a Requisition

### Manage Requisitions

#### Search Requisitions

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

- **Business Unit**: 54000
- **Requisition ID**: 
- **Date From**: 03/20/2015
- **Date To**: 03/27/2015
- **Requester**: pdrug

#### 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>
## 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>1.0000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

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.

- Business Unit: 54000
- Requisition ID
- Date From: 03/20/2015
- Requester: pdurrong
- Request State: All but Complete
- Date To: 03/27/2015
- 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>Action</th>
<th>Go</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chkd</td>
<td>250.00 USD</td>
<td>[Select Action]</td>
<td>Go</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not 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

<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>

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

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

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.

9/13/2019
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
- Requisition Name
- Request State: All but Complete
- Date To: 03/30/2015
- Entered By
- Budget Status
- Origin: Special Request
- PO ID

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>Action</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>
<td>Special Request Test</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Canceled</td>
<td>Not Chk'd</td>
<td>0.00 USD</td>
<td>[Select Action]</td>
</tr>
<tr>
<td>0000500062</td>
<td>Test for Training</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>300.00 USD</td>
<td>[Select Action]</td>
</tr>
</tbody>
</table>

New Window
Creating a Desktop Receipt Using Receive Items
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/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>Suggestion</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
<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></td>
<td></td>
<td>XEROX-001</td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415253986</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>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #756693254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td>Durrough,Patricia S</td>
<td>ADVANTAG-001</td>
<td></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>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>54000</td>
<td>Copier Rental for Row Hall Copier Lease</td>
<td>VXX091528</td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td>Durrough, Patricia S</td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>54000</td>
<td>Copier Usage</td>
<td></td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td>Durrough, Patricia S</td>
<td>XEROX-001</td>
</tr>
<tr>
<td>✔ 54000</td>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415263986</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAGE-001</td>
<td></td>
</tr>
<tr>
<td>54000</td>
<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>ADVANTAGE-001</td>
<td></td>
</tr>
</tbody>
</table>

Check All  Clear All
Creating a Desktop Receipt

You have 4 lines open for receiving

Receive Selected

and go to the Receive Form.

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

<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
<td>11</td>
<td>0</td>
<td>MO</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>Copier Usage</td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #415263986</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td></td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7566983254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td></td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>

Check All  Clear All
Creating a Desktop Receipt

Receive Items

New Receipt

- Business Unit: 54000
- Receipt Status: Open

- Received Date: 03/30/2015

Receive Items Table:

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

- Save Receipt
Creating a Desktop Receipt

You have saved receipt #0000520004 containing the following items:

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

Return to Manage Requisitions  Return to Receiving
Creating a Desktop Receipt

**Receive Items**

You have 3 lines open for receiving

and go to the Receive Form.

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

<table>
<thead>
<tr>
<th>Requisition Lines to Receive</th>
<th>Purchase Order Details</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Req BU</td>
<td>Requisition</td>
<td>Item Description</td>
<td>Item ID</td>
<td>Tot Req Qty/Amt</td>
<td>Accepted to Date</td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
<td>11</td>
<td>0</td>
<td>MO</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>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7566933254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
</tr>
</tbody>
</table>

**Check All** |  **Clear All**
Creating a Desktop Receipt

You have 4 lines open for receiving

Receive Selected

and go to the Receive Form.

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

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