Introduction to ePRO and the GeorgiaFirst Marketplace

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8/17/2017
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://core.fprod.gafirst.usg.edu](https://core.fprod.gafirst.usg.edu)
- Direct link available on Office of the Controller’s webpage
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 enter PSFIN Core to access worklist

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 is 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
    • Elicia Kelley ekelley@westga.edu x92471
    • Crystal Bentley cbentley@westga.edu x95357
Requester Responsibilities in ePRO and the GeorgiaFIRST Marketplace

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8/17/2017
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

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

- First Name: Patricia
- Last Name: Durrough
- Phone Number: +1 678-839-4000
- E-mail Address: pdurrough@westga.edu
- University of West Georgia (54000)
- User Name: pdurrough
- Authentication Method: cXML
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

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8/17/2017
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
Advanced Search

Find Results That Have:
- All of These Words
- Part Number (SKU)
- Supplier
- Manufacturer Name

Other Options
- Exact Phrase
- Any of These Words
- Exclude Words

Custom Attributes
- 1-Mandatory State Contract
- 3-Statutory Mandatory
- 4-Convenience State Contract
- 5-Preferred

Search
## Browse by Supplier

![Search for Supplier Filter](image)

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

Results Per Page: 20
Browse by Category

Category Search

- 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
Mandatory State Contract Items
Add Items from Product Results Page

- **Home Series Surge Protector, 720 Joules, 6-Outlets, 8ft Cord, 360 Degree Rotating Plug** from Southern Computer Warehouse (SCW): $9.59 USD
- **Surge Protector, 2320 Joules, 7 Outlets, 6 Cord, White** from Southern Computer Warehouse (SCW): $13.17 USD
- **Surge Protector, 2320 Joules, 7 Outlets, 12 Cord, White** from Southern Computer Warehouse (SCW): $17.39 USD
Using Product Comparison

Shop Office/Computer surge protector

Results for: Office/Computer : surge protector

Comparing products:
1. Home Series Surge Protector, 720 Joules, 6-Outlets, 8ft Cord, 360 Degree Rotating Plug from Southern Computer Warehouse (SCW)
   - Price: 9.59 USD
   - Quantity: 1/EA

2. Surge Protector, 2320 Joules, 7 Outlets, 6 Cord, White from Southern Computer Warehouse (SCW)
   - Price: 13.17 USD
   - Quantity: 1/EA

3. Surge Protector, 2320 Joules, 7 Outlets, 12 Cord, White from Southern Computer Warehouse (SCW)
   - Price: 17.39 USD
   - Quantity: 1/EA

4. Surge Protector, 3550 Joules, 8 Outlets, 6 Cord, Black from Southern Computer Warehouse (SCW)
   - Price: 15.85 USD
   - Quantity: 1/EA
## Add Items from Product Comparison

### Product Details

<table>
<thead>
<tr>
<th>Select</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to Cart</td>
<td>Qty 1</td>
</tr>
<tr>
<td>Product Details</td>
<td>- Advantage® Motor Extension Cord</td>
</tr>
<tr>
<td>Catalog No.</td>
<td>85427</td>
</tr>
<tr>
<td>Price</td>
<td>10.35 USD</td>
</tr>
<tr>
<td>Supplier</td>
<td>Multi Media Services</td>
</tr>
<tr>
<td>Category</td>
<td>Projection screens or displays</td>
</tr>
<tr>
<td>UOM</td>
<td>----</td>
</tr>
<tr>
<td>Price per UOM</td>
<td>10.35 USD / unit</td>
</tr>
<tr>
<td>Product Size</td>
<td>----</td>
</tr>
<tr>
<td>Price per Product Size Unit</td>
<td>----</td>
</tr>
<tr>
<td>* 1-Mandatory State Contract</td>
<td>Yes</td>
</tr>
<tr>
<td>Alternate Part Numbers</td>
<td>----</td>
</tr>
<tr>
<td>Category UNSPSC</td>
<td>45-11-16-03</td>
</tr>
</tbody>
</table>
Add Items from Product Description

Home Series Surge Protector, 720 Joules, 6-Outlets, 8ft Cord, 360 Degree Rotating Plug from Southern Computer Warehouse (SCW)

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

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

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

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

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

Zip Code

Quantity
1

Add To Active Cart

Product Details

Supplier UOM 1/EA

Buyer UOM 1/EA

1-Mandatory Yes

State Contract

Alternate Part Numbers
S3860963,10080359,K85866,1757626,A569240,BLKBE10600008R,BE10600008R,BKNBE106000-08R,BE106000-08R,BE106000-08R,BE112230-08,BE107200-12,BE106000FC04,BE106000SN,BE106200-06-BN,BE107200-04,BE106000-10,BE106000-04-BLK

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

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8/17/2017
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

[Image of Oracle Employee Self Service interface with focus on the Requisition option in the Navigator pane.]
Beginning a Marketplace Requisition

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search All

Search

Options:
- Web
  - Browse Supplier Websites
    - GAFirstMarketplace
- Forms
  - Create and Submit Forms
- ePro Services
  - Request Services
    - Fixed Cost Service
    - Variable Cost Service
    - Time and Materials
- Express Item Entry
  - Create an Express Requisition
- Favorites
  - Browse Favorite Items and Services
- Special Requests
  - Create a non-catalog request
- Templates
  - Browse Company and Personal Templates
- Recently Ordered
  - View recently ordered items and services
    - Shipping
    - "Ask me about OneUSG Connect..."
    - Reset of printing for earbud...
    - DevelopWest earbuds to be used...
    - UWG Name Badges
    - More...
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

Shop > My Carts and Orders > Open My Active Shopping Cart

Shopping Cart for Patricia Durrough

Name this cart: 2013-11-15 pdurrough 01

Have you made changes? Update

Continue Shopping

Empty cart

Multi Media Services

- Advantage® Motor Extension Cord
  - Part Number: 85427
  - Manufacturer: Dalite
  - Contract: 99999-SPD-SPD00000021-0002
  - Unit Price: 10.35 USD
  - Quantity: 1
  - Total: 10.35 USD

More Actions

Technology Integration Group (TIG)

ETHERNET PATCH CABLE FOR Q24/M24 1 METER
  - Part Number: MBX-OPTCBLLLAN1
  - Manufacturer Info: MX-OPT-CBL-LAN-1 - (MOBOTIX)
  - Contract: 99999-SPD-SPD00000031-0001
  - Unit Price: 11.83 USD
  - Quantity: 1
  - Total: 11.83 USD

More Actions
Checking Out of the Marketplace

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - Draft Requisition

Shopping Cart for Patricia Durrough

Name this cart: 2013-11-15 pdurough 01

Have you made changes? Update

Continue Shopping

2 Item(s) for a total of 22.18 USD

Proceed to Checkout

Assign Cart

Multi Media Services

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advantage® Motor Extension Cord</td>
<td>10.35 USD</td>
<td>1</td>
<td>10.35 USD</td>
</tr>
<tr>
<td>Part Number: 85427</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer: Dalite</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract: 99999-SPD-SPD0000021-0002</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Computer Peripherals and General Audio Visual Prod...</td>
<td>change price...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Technology Integration Group (TIG)

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>ETHERNET PATCH CABLE FOR Q24/M24 1 METER</td>
<td>11.83 USD</td>
<td>1</td>
<td>11.83 USD</td>
</tr>
<tr>
<td>Part Number: MBX-OPTCBLLLN1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manufacturer Info: MX-OPT-CBL-LAN-1 - (MOBOTIX)</td>
<td>change price...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract: 99999-SPD-SPD0000031-0001</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>CCTV Board Products...</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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

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>
</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>13.73</td>
<td>27.46</td>
</tr>
<tr>
<td>2</td>
<td>Staples Top-Tab File Folders,</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Box</td>
<td>7.22</td>
<td>14.44</td>
</tr>
<tr>
<td>3</td>
<td>Swingline LightTouch High Capa</td>
<td></td>
<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>22.28</td>
<td>22.28</td>
</tr>
</tbody>
</table>

Add More Items

Go West UWG
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>pduroog</td>
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<tr>
<td>*Currency</td>
<td>USD</td>
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</tbody>
</table>

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>
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<tbody>
<tr>
<td>1</td>
<td>Pilot G2 Premium Retractable G</td>
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<td>Staples</td>
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<td>Dozen</td>
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<tr>
<td>3</td>
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<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
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</table>
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

Accounting Lines

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Information</th>
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<tbody>
<tr>
<td><strong>Account</strong></td>
<td><strong>Fund</strong></td>
<td><strong>Dept</strong></td>
<td><strong>Program</strong></td>
<td><strong>Class</strong></td>
<td><strong>Budget Reference</strong></td>
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</tr>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
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Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Line</th>
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<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>Mass Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pilot G2 Premium Retractable</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.7300</td>
<td>27.46</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>G G</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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></td>
<td>G</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Swingline LightTouch High</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>
<tr>
<td></td>
<td>Capa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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></td>
<td></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.

<table>
<thead>
<tr>
<th>Supplier ID</th>
<th>Supplier Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyer</td>
<td>Category</td>
</tr>
</tbody>
</table>

**Shipping Information**

<table>
<thead>
<tr>
<th>Ship To Location</th>
<th>Add One Time Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>Attention</td>
</tr>
<tr>
<td></td>
<td>SpeedChart</td>
</tr>
</tbody>
</table>

**Accounting Lines**

Please enter GL Business Unit before selecting other chartfield values

<table>
<thead>
<tr>
<th>Accounting Information</th>
<th>Personalize</th>
<th>Find</th>
<th>Asset Information</th>
</tr>
</thead>
</table>

**Chartfields1**

<table>
<thead>
<tr>
<th>Percent</th>
<th>Location</th>
<th>GL Unit</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>54000</td>
<td></td>
</tr>
</tbody>
</table>

Load Values From Defaults
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.

Accounting Information

<table>
<thead>
<tr>
<th>Fund</th>
<th>Dept</th>
<th>Program</th>
<th>Class</th>
<th>Bud Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>10500</td>
<td>1045125</td>
<td>16200</td>
<td>11000</td>
</tr>
</tbody>
</table>

Load Values From Defaults

[OK] [Cancel] [Refresh]
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>Shipping Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Edit for All Lines</strong></td>
</tr>
<tr>
<td><strong>Ship To Location</strong></td>
</tr>
<tr>
<td><strong>Address</strong></td>
</tr>
<tr>
<td><strong>Cent Rcvy for Ctr. for Bus. Excellence</strong></td>
</tr>
<tr>
<td><strong>Carrollton, GA 30118</strong></td>
</tr>
<tr>
<td><strong>Attention To</strong></td>
</tr>
<tr>
<td><strong>Comments</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition Comments and Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enter requisition comments</strong></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.doas.georgia.gov/StateLocal/SPD/Docs_SPD_General/termin-condition.pdf">www.doas.georgia.gov/StateLocal/SPD/Docs_SPD_General/termin-condition.pdf</a>. Vendor/contractor agrees to invoice the user agency according to the purchase order.</td>
</tr>
<tr>
<td><strong>Send to Supplier</strong></td>
</tr>
<tr>
<td><strong>Show at Receipt</strong></td>
</tr>
<tr>
<td><strong>Shown at Voucher</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Approval Justification</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enter approval justification for this requisition</strong></td>
</tr>
</tbody>
</table>

[Edit more Comments and Attachments]
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

Preview Approvals
- Business Unit: 54000
- Status: Open
- Priority: Medium
- Budget Status: Not Checked

Department and Proj. Approval

Line 1: Initiated
- Chair: #4256398
- Not Routed: Sears, Richard H, Req-Dept Mgr-Line Level

Line 2: Initiated
- Desk: #745890321
- Not Routed: Sears, Richard H, Req-Dept Mgr-Line Level

Options:
- Return
- Apply Approval Changes
Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

Preview Approvals
- Business Unit: 54000
- Status: Open
- Priority: Medium
- Budget Status: Not Checked

Department and Proj. Approval

Line 1: Initiated
- Chair #4256398
- Department and Proj. Approver
  - Skipped: No approvers found
  - Not Routed: Sears, Richard H
    - Req-Dept Mgr-Line Level
  - Not Routed: Sutherland, James R.
    - Inserted Approver

Line 2: Initiated
- Desk #745896321
- Department and Proj. Approver
  - Skipped: No approvers found
  - Not Routed: Sears, Richard H
    - Req-Dept Mgr-Line Level

[Buttons]
- Return
- Apply Approval Changes

[Logos]
Complete the Marketplace Requisition in ePro

Approval Justification

Enter approval justification for this requisition

**Do not attempt to manually budget check the requisition. It will budget check automatically.**
Complete the Marketplace Requisition in ePro

Your requisition has been submitted.

Requested For: Durrough, Patricia S
Requisition Name: Test for Training
Requisition ID: 0000500062
Business Unit: 54000
Status: Pending
Priority: Medium
Budget Status: Not Checked

Number of Lines: 2
Total Amount: 300.00 USD

Department and Proj. Approval

Line 1: Pending
Chair #4258398
Department and Proj. Approver
Skipped
No approvers found
Multiple Department Approval
Pending
Sears, Richard H
Req. Dept Mgr-Line Level
Not Routed
Sutherland James R.
Inserted Approver

Line 2: Pending
Desk #74589321
Department and Proj. Approver
Skipped
No approvers found
Multiple Department Approval
Pending
Sears, Richard H
Req. Dept Mgr-Line Level
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.

8/17/2017
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

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

Web
Browse Supplier Websites
GAFirstMarketplace

Forms
Create and Submit Forms

ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials

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 used...
UWG Name Badges
More...

Special Requests
Create a non-catalog request

Templates
Browse Company and Personal Templates

Checkout
Requisition Settings

**Default Options**
- **Default**: If selected, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- **Override**: If selected, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults**
- **Supplier**
- **Category**
- **Supplier Location**
- **Unit of Measure**
- **Buyer**

**Shipping Defaults**
- **Ship To**: BUS EXCELL
- **Due Date**: (date field)
- **Ship Via**: VENDOR
- **Attention**
- **Freight Terms**: FOB:DEST

**Distribution Defaults**
- **SpeedChart**

**Accounting Defaults**
- **Chartfields1**
- **Chartfields2**
- **Chartfields3**
- **Details**
- **Asset Information**
- **Dist**
- **Percent**
- **Location**
- **GL Unit**
- **Account**
Searching for a Supplier

Requisition Settings

Business Unit: 54000
*Requester: pduroug
*Currency: USD

University of West Georgia

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

Category

Supplier Location

Unit of Measure

Buyer

Shipping Defaults

Ship To: BUS EXCELL

Due Date

Add One Time Address

Attention

Accounting Defaults

Fund

Dept

Program

Class

Bud Ref

2015

OK  Cancel  Refresh
Searching for a Supplier

Supplier Search

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country

Postal Code

State

Find

Reset

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

OK  Cancel  Refresh
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

Requisition Settings

Business Unit: 54000
*Requester: odurrough
*Currency: USD

University of West Georgia

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.

Category

Supplier Location
Buyer

Unit of Measure

Shipping Defaults

Ship To: BUS EXCELL
Due Date:

Add One Time Address
Attention:

Accounting Defaults

Charfields1 Charfields2 Charfields3 Details Asset Information

Fund Dept Program Class Bud Ref

Personalize Find First 1 of 1 Last

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

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

Request Options

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

Web
Browse Supplier Websites
GAFirstMarketplace

Express Item Entry
Create an Express Requisition

Special Requests
Create a non-catalog request

Forms
Create and Submit Forms

Favorites
Browse Favorite Items and Services

Templates
Browse Company and Personal Templates

ePro Services
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials

Recently Ordered
View recently ordered items and services
Row Hall Copier Rental S/N V...
Copier Usage
Adding Items

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

Item Details
- Item Description
- Price
- Currency
- Quantity
- Unit of Measure
- Due Date
- Category

Supplier
- Supplier ID
- Supplier Name: Advantage Office Solutions
- Supplier Item ID

Manufacturer
- Mfg ID
Enter a detailed description of the item being requested. If attaching a quote, make sure enough information is listed in the item description to identify exactly what is being purchased.
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

[Image 0x0 to 720x540]

Request Options

Search

All

Search

Checkout

GO WEST UWG

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

*Category: 42506

*Currency: USD

*Unit of Measure: EA

Supplier

Supplier ID: 00000000556

Supplier Name: Advantage Office Solutions

Supplier Item ID:

Manufacturer

Mfg ID:

Manufacturer:

Mfg Item ID:
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options Search

Search All

Special Requests

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

Item Details

*Item Description

*Price

*Quantity

*Category 42506

*Currency USD

*Unit of Measure

Due Date

Checkout

All Request Options

Express Item Entry

Special Requests

Forms

Favorites

Go West UWG
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
- **Priority**: Medium
- **Currency**: USD
- **Requisition Name**: Special Request Test
- **University of West Georgia**

### 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>
Updating the Schedule & Distribution Information

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

Shipping Line 1
*Ship To Address
University of West Georgia
Cent Rcg for Ctr. for Bus. Excellence
1501 Maple Street
Carrollton, GA 30118

Attention To: Durrough, Patricia S
Due Date:

Accounting Lines

Accounting Lines
*Distribute By
Qty: 

<table>
<thead>
<tr>
<th>Accounting Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
<th>SpeedChart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfields1</td>
<td>Fund</td>
<td>Dept</td>
<td>Details</td>
<td>Details 2</td>
</tr>
<tr>
<td>Chartfields2</td>
<td>Asset Information</td>
<td>Asset Information 2</td>
<td>Budget Information</td>
<td></td>
</tr>
<tr>
<td>Chartfields3</td>
<td>Program</td>
<td>Class</td>
<td>Budget Reference</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account</th>
<th>Fund</th>
<th>Dept</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td></td>
<td></td>
<td>2015</td>
</tr>
</tbody>
</table>
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>
<th>Details</th>
<th>Comments</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cer</td>
<td></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>Add</td>
</tr>
</tbody>
</table>

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

`Attention To Due Date`:
Durrough, Patricia S

**Accounting Lines**

<table>
<thead>
<tr>
<th>Accounting Lines</th>
<th>Distribute By Qty</th>
<th>SpeedChart</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Chartfields 1**
- Account: 714100
- Fund: 10500
- Dept: 1045103
- Program: 16200
- Class: 11000
- Budget Reference: 2015

**Chartfields 2**

**Chartfields 3**

**Details**

**Details 2**

**Asset Information**

**Asset Information 2**

**Budget Information**

[Image of Go West UWG logo]
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>pdurough, Patricia S</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>Special Request Test</td>
</tr>
<tr>
<td>Priority</td>
<td>Medium</td>
</tr>
</tbody>
</table>

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>
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<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cher</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.000</td>
<td>250.00</td>
<td></td>
<td>Add</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415832963 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.000</td>
<td>300.00</td>
<td></td>
<td>Add</td>
<td></td>
</tr>
</tbody>
</table>
Enter Line Comments & Add Attachments

### Line Comment

<table>
<thead>
<tr>
<th>Comments</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Enter comment here]</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

- **Add Attachments**

- **Attachments**

- **OK**
- **Cancel**
- **Refresh**
Update Chartstring Information on All Lines

Requisition Summary

<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>
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<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and</td>
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<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.00</td>
<td>250.00</td>
</tr>
<tr>
<td></td>
<td>Credenza #415632963 Black and</td>
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<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.00</td>
<td>300.00</td>
</tr>
</tbody>
</table>

Cart Summary: Total Amount 550.00 USD
Expand lines to review shipping and accounting details.
Enter Requisition Comments & Save for Later

Requisition Comments and Attachments

Enter requisition comments

☐ Send to Supplier  ☐ Show at Receipt  ☐ Shown at Voucher

Add more Comments and Attachments

Approval Justification

Enter approval justification for this requisition

Check Budget

Save & submit  Save for Later  Add More Items  Preview Approvals
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

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
# Sample Advantage Quote

**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>
<tr>
<td></td>
<td></td>
<td>Finishes to be Determined</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**TOTAL:** $3,445.05

---

**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 (<a href="#">less than $2,499.99</a>)</td>
<td>Consultant Authorization Form</td>
</tr>
<tr>
<td>Awards (<a href="#">less than $2,499.99</a>)</td>
<td>Documentation per <a href="#">Policy # BFCNEX-01</a></td>
</tr>
<tr>
<td>Consultants (<a href="#">less than $2,499.99</a>)</td>
<td>Consultant Authorization Form</td>
</tr>
<tr>
<td>Lodging - Direct Billed (<a href="#">No Limit</a>)</td>
<td>Approved <a href="#">Travel Authorization</a></td>
</tr>
<tr>
<td>Registration (travel to conferences) (<a href="#">No Limit</a>)</td>
<td>Approved <a href="#">Travel Authorization</a></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 (<a href="#">No Limit</a>)</td>
<td>Must use State Contract if Mandatory</td>
</tr>
<tr>
<td>UWG Food Services from Auxiliary Services Awarded Provider (<a href="#">less than $2,499.99</a>)</td>
<td><a href="#">Food Purchase With Institutional Funds Form</a> <a href="#">Food Purchases Policy Link</a> over $2,500 requires P.O.</td>
</tr>
<tr>
<td>HR/Payroll Payments to Vendors for Payroll Deductions (insurance, garnishments, etc.) (<a href="#">No Limit</a>)</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 (<a href="#">Chamber of Commerce Memberships are prohibited</a>)</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 (used to pay for repairs when the repair cost is not known)</td>
</tr>
<tr>
<td>Minor Instrument Repair or Maintenance</td>
<td>Up to $2,499.99 (used to pay for repairs when the repair cost is not known)</td>
</tr>
<tr>
<td>Officials for Sanctioned Sporting Events</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O.)</td>
</tr>
<tr>
<td>Postage (<a href="#">No Limit</a>)</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.)</td>
</tr>
<tr>
<td>Sponsorships</td>
<td>Pre-approval by Controller on a case by case basis</td>
</tr>
<tr>
<td>Stipends for non-employees only</td>
<td>Up to $2,499.99 ($2,500 &amp; over requires P.O.)</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</td>
<td><a href="#">Food Purchase With Institutional Funds Form</a> <a href="#">Food Purchases Policy Link</a> over $2,500 requires P.O.</td>
</tr>
<tr>
<td>Prizes ($2,500 &amp; over requires P.O.)</td>
<td>Documentation per <a href="#">Policy # BFCNEX-05</a></td>
</tr>
<tr>
<td>Subscriptions (<a href="#">Excluding Subscription Services</a>)</td>
<td>Subscriptions up to 1 yr $2,500 &amp; over requires P.O.</td>
</tr>
<tr>
<td>Wright Express (<a href="#">No Limit</a>)</td>
<td>Fuel purchases in accordance with State Contract</td>
</tr>
<tr>
<td>Attorney &amp; Legal Related Payments (<a href="#">No Limit</a>)</td>
<td>Prescribed to Dept. of Law via O.C.G.A. §45-15-34</td>
</tr>
<tr>
<td>Benefit payments directly to recipients (<a href="#">No Limit</a>)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Intergovernmental agreements/pmts. (<a href="#">No Limit</a>)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Real estate rental/lease payments (<a href="#">No Limit</a>)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Sales and Use tax payments (<a href="#">No Limit</a>)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Utilities (e.g., electric, telephone, etc.) (<a href="#">No Limit</a>)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
</tbody>
</table>
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

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.

8/17/2017
Managing Requisitions

- eProcurement > Manage Requisitions
- Review Requisition information
- Edit a Requisition
- Delete a Requisition line
- Cancel a requisition
- You will be able to see the requisitions for all requesters that you have authority for (set up via User Preferences)
Searching for Requisitions

• Can use the following to search for requisitions:
  - Business Unit
  - Requisition
  - Requisition Name
  - Request Status
  - Budget Status
  - Date From/Date To
  - Requester
  - Entered By
  - PO ID
### Searching for Requisitions

#### Manage Requisitions

**Search Requisitions**

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

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Requisition Name</th>
<th>Request State</th>
<th>Budget Status</th>
<th>Origin</th>
<th>PO ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></td>
<td>All but Complete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date From</td>
<td>Date To</td>
<td>Entered By</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Department and Proj. Approval

Line 1: Pending
Desk #741256395 Black and Cherry Wood

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.

Request Lifespan:

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Status</th>
<th>Price</th>
<th>Quantity</th>
<th>UOM</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chair #415263986</td>
<td>Received</td>
<td>100.00000</td>
<td>1.00000</td>
<td>EA</td>
<td>Advantage Office Solutions</td>
</tr>
</tbody>
</table>
Requisition Status and Life Cycle

Business Unit 54000

Requisition information
Requisition ID 0000500069  Line Number 1

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

<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>

Return to Manage Requisitions
Edit a Requisition

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

Manage Requisitions

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

- Business Unit: 54000
- Requisition ID
- Date From: 03/20/2015
- Date To: 03/27/2015
- Request State: All but Complete
- Entered By

Requisitions
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>
<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>Not Chkd</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 Chkd</td>
<td>2,165.00 USD</td>
<td>[Select Action]</td>
</tr>
</tbody>
</table>

Copy
Edit
Go

Show Advanced Search

Approvals
Cancel
Check Budget
View Cycle
View Print
Edit a Requisition

Message

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

[OK] [Cancel]
Edit a Requisition

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

Requisition Summary

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Requester</th>
<th>University of West Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td>Durrough, Patricia S</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition Name</th>
<th>Requisition ID</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Request Test</td>
<td>00005000563</td>
<td>Medium</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Requisition Lines</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Description</td>
<td>Item ID</td>
<td>Supplier</td>
</tr>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cher</td>
<td></td>
<td>Advantage Office Solutions</td>
</tr>
<tr>
<td>2</td>
<td>Credenza #4156323963 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
</tr>
</tbody>
</table>
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

<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>

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

View the item information and submit the req for approval.

**Requisition Summary**

- **Business Unit**: 54000
- **Requester**: pdurroug
- **Supplier**: Advantage Office Solutions
- **Requisition Name**: Special Request Test
- **Requisition ID**: 0000500063
- **Priority**: Medium

**Reqt Summary: Total Amount 550.00 USD**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cherry</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.00</td>
<td>250.00</td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and Cherry</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.00</td>
<td>300.00</td>
</tr>
</tbody>
</table>

Select lines to: [Add to Favorites] [Add to Template(s)] [Delete Selected] [Mass Change]
Delete a Requisition Line

Delete Confirmation

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

[OK] [Cancel]
Cancel a Requisition

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

Manage Requisitions

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: pduroog
- Requisition Name
- Request State: All but Complete
- Budget Status
- Origin: Special Request
- PO ID
- Entered By

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>

[Select Action] Go

[Select Action] Go
## Cancel a Requisition

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

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>54000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition ID</td>
<td>0000500067</td>
</tr>
<tr>
<td>Requisition Name</td>
<td>Test for ePro Training</td>
</tr>
<tr>
<td>Date</td>
<td>03/27/2015</td>
</tr>
<tr>
<td>Status</td>
<td>Pending</td>
</tr>
<tr>
<td>Total</td>
<td>2,165.00 USD</td>
</tr>
</tbody>
</table>

### Line Details

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Status</th>
<th>Price</th>
<th>Qty</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>rounded memo holder white</td>
<td>Pending Approval</td>
<td>9.50000 Each</td>
<td>100.0000</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>120.0000</td>
<td>1140.00</td>
</tr>
<tr>
<td>3</td>
<td>Set Up Charge</td>
<td>Pending Approval</td>
<td>75.000000 Each</td>
<td>1.0000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

[Button: Cancel Requisition]

[Link: Return to Manage Requisitions]
Cancel a Requisition

Manage Requisitions

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

- Business Unit: 54000
- Requisition ID
- Date From 03/20/2015
- Requestor: pدورough
- Requisition Name
- 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>
</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</td>
<td>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</td>
<td>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</td>
<td>USD</td>
</tr>
<tr>
<td>0000500062</td>
<td>Test for Training</td>
<td>54000</td>
<td>03/25/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>300.00</td>
<td>USD</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</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</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</td>
</tr>
</tbody>
</table>
Practice Activity

• Edit the quantity on your special request requisition created in the last lesson
• Cancel the requisition that was created for you by the instructor.
The content of this presentation was the most up-to-date information available at the revision date. However, policies, procedures and guidelines may be updated during an academic year. Please refer to the University Policy website for the most current version of these policies, procedures and guidelines.

8/17/2017
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

1. Open the ORACLE Employee Self Service application.
2. Navigate to the "Manager Self-Service" section.
3. Under the "Manager Self-Service" menu, select "eProcurement."
Creating a Desktop Receipt

ORACLE
Employee Self Service

Create Expense Report
My Expense Reports

Expense Report History
GeorgiaFIRST Financial Website
Pagelets

NavBar: Navigator

Manage Requisitions

eProcurement
Recent Places
Requisition
My Favorites

Buyer Center
Manage Requisition Approvals
Receive Items
Procurement Card Center
My Profile

GO WEST
UWG
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: 03/23/2015
- Date To: 03/30/2015
- Request State: All but Complete
- Requester: pdurroug
- 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.

- Req ID: 0000500069, Requisition Name: Chairs for Training Room, BU: 54000, Date: 03/27/2015, Request State: Partially Received, Budget: Valid, Total: 250.00 USD
- Req ID: 0000500067, Requisition Name: Test for ePro Training, BU: 54000, Date: 03/27/2015, Request State: Pending, Budget: Not Chkd, Total: 2,165.00 USD
- Req ID: 0000500063, Requisition Name: Special Request Test, BU: 54000, Date: 03/25/2015, Request State: Canceled, Budget: Not Chkd, Total: 0.00 USD
- Req ID: 0000500062, Requisition Name: Test for Training, BU: 54000, Date: 03/25/2015, Request State: Pending, Budget: Not Chkd, Total: 300.00 USD

[Select Action] [Select Action] [Select Action] [Select Action]
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>Requisition Lines to Receive</th>
<th>Purchase Order Details</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>
</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></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BUS EXCELL</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></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BUS EXCELL</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></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #756683254</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
</tr>
</tbody>
</table>
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/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>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></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></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>ADVANTAG-001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7566983284</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Check All  Clear All
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></td>
<td>VXX091528 Row Hall Copier</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></td>
<td>Lease</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>BUS EXCELL</td>
<td></td>
<td></td>
<td></td>
<td>XEROX-001</td>
</tr>
<tr>
<td></td>
<td></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</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>ADVANTAG-001</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training Room</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for</td>
<td>Chair #7566983254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough.Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Training Room</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating a Desktop Receipt

Receive Items

New Receipt

- Business Unit: 54000
- Receipt Status: Open
- Received Date: 03/30/2015

<table>
<thead>
<tr>
<th>Receipt Lines</th>
<th>Item Id</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>UOM</th>
<th>Accept Quantity</th>
<th>Details</th>
<th>Receipt</th>
<th>Procurement Group ID</th>
<th>Primary Unit</th>
<th>Unit Allocation Amt</th>
<th>Unit Allocation Qty</th>
<th>PO</th>
<th>Cancel Line</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chair #415263986</td>
<td></td>
<td>1.0000</td>
<td>EA</td>
<td>1.0000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Save Receipt]

[Reject Shipment]
Creating a Desktop Receipt

Receipt Saved Successfully

You have saved receipt # 0000520004 containing the following items:

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

Return to Manage Requisitions  
Return to Receiving
Creating a Desktop Receipt

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>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>BUS EXCELL</td>
<td>XEROX-001</td>
<td></td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Copier Rental for Row Hall</td>
<td>Copier Usage</td>
<td>100</td>
<td>0</td>
<td>EA</td>
<td>Amount</td>
<td>BUS EXCELL</td>
<td>XEROX-001</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #7566983254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
<td></td>
</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/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>
</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 #415253966</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrrough,Patricia S</td>
<td></td>
<td></td>
<td>ADVANTAG-001</td>
</tr>
<tr>
<td>54000</td>
<td>Chairs for Training Room</td>
<td>Chair #756683254</td>
<td>1</td>
<td>0</td>
<td>EA</td>
<td>Qty</td>
<td>BUS EXCELL</td>
<td>Durrrough,Patricia S</td>
<td></td>
<td></td>
<td>ADVANTAG-001</td>
</tr>
</tbody>
</table>
Practice Activity

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