Introduction to ePRO and the GeorgiaFirst Marketplace

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12/11/2018
Day 1 – Important Notes

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

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

• Create a Special Request requisition
• Edit, cancel and view a requisition
• View a requisition in the lifecycle
• Perform desktop receiving
Accessing PeopleSoft

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

Requester keeps updated on Distribution/Schedule information

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

Approver(s) log into PSFIN Core to access worklist

Approvers can approve or deny requisition

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

After item is delivered, receipt is created in PSFIN

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

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
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
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

Enter Search Keywords Here

Advanced Search

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

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

Showing 1 - 20 of 97 Results

Results Per Page: 20

Sort by: Best Match

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

Go to shop...
Browse by Category

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
Mandatory State Contract Items

By Custom Attribute
- 1-Mandatory State Contract (268)
- 4-Convenience State Contract (18)

Results for: Office/Computer : surge protector

Showing 1 - 20 of 654 Results

Home Series Surge Protector, 720 Joules, 6-Outlet, 8ft Cord, 360 Degree Rotating Plug from Southern Computer Warehouse (SCW)
- Part Number: BEL-BE106000-08R
- Manufacturer Info: BEL106000-08R (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: BEL107200-06 (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: BEL107200-12 (BELKIN)
- 1-Mandatory State Contract: Yes
Add Items from Product Results Page

Add to Cart
Using Product Comparison
Add Items from Product Comparison
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: Go

Product Details
Supplier UOM: 1/EA
Buyer UOM: 1/EA
1-Mandatory: Yes
State Contract: [ ]
Alternate Part Numbers: S3860963, 10080359, K85866, 1757626, A569240, BLKBE106000-08R, BE106000-08R, BKNBE106000-08R, BE106000-08R, BE106000-08R, BE106000-08R, BE112230-08, BE107200-12, BE106000-FC04, BE106000 SN, BE108200-06-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)
- Ensure items purchased through the Marketplace are permissible with your funding source
- Never purchase food from the Marketplace even if permissible by funding source
Beginning a Marketplace Requisition
Beginning a Marketplace Requisition
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

Shopping Cart for Patricia Durrough

- **Advantage® Motor Extension Cord**
  - Part Number: 85427
  - Manufacturer: Dalite
  - Contract: 99999-SPD-SPD0000021-0002
  - Unit Price: $10.35
  - Quantity: 1
  - Total: $10.35

- **ETHERNET PATCH CABLE FOR Q24/M24 1 METER**
  - Part Number: MBX-OPTCBLLAN1
  - Manufacturer Info: MX-OPT-CBL-LAN-1 - (MOBOTIX)
  - Contract: 99999-SPD-SPD0000031-0001
  - Unit Price: $11.83
  - Quantity: 1
  - Total: $11.83

Options:
- Continue Shopping
- Update
- Empty cart
Checking Out of the Marketplace
Checking Out of the Marketplace

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.
Complete the Marketplace Requisition in ePro

• System will return you to Checkout – Review and Submit
• Can update/add:
  ➢ Requisition Name
  ➢ Line Comments
  ➢ Header comments in Justification/Comments
  ➢ Requisition line schedule and distribution (chartstring and ship to information)
Complete the Marketplace Requisition in ePro

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

Requisition Summary

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>54000</th>
<th>Number of Items</th>
<th>University of West Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Requester</td>
<td>durrugo</td>
<td>Durrough, Patricia S</td>
<td></td>
</tr>
<tr>
<td>*Currency</td>
<td>USD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Requisition Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

Priority: Medium

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

<table>
<thead>
<tr>
<th>Requisition Lines</th>
<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></td>
<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>
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<tr>
<td></td>
<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>
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<tr>
<td></td>
<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>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Complete the Marketplace Requisition in ePro

Line Comment

Business Unit 54000  
Requisition Date 03/25/2015
Status Pending

Entered On:

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

Add Attachments

Attachments

OK  Cancel  Refresh
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>
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</thead>
<tbody>
<tr>
<td>Requester</td>
<td>pduroog Durrough, Patricia S</td>
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<td>Requisition Name</td>
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<td>Priority</td>
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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>
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<td>13.730</td>
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<td>Add</td>
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Complete the Marketplace Requisition in ePro
Complete the Marketplace Requisition in ePro

<table>
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<th>Accounting Lines</th>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Chartfields3</th>
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<th>Details 2</th>
<th>Asset Information</th>
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<th>Total</th>
<th>Details</th>
<th>Comments</th>
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<tbody>
<tr>
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<td>Staples</td>
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<td>Dozen</td>
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<td>Staples</td>
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<tr>
<td>4</td>
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<td>6.88</td>
<td></td>
<td>Add</td>
<td></td>
</tr>
</tbody>
</table>

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

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>
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</thead>
<tbody>
<tr>
<td>Buyer</td>
<td>Category</td>
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</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>
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<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>Chartfields1</th>
<th>Chartfields2</th>
<th>Chartfields3</th>
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</table>

<table>
<thead>
<tr>
<th>Percent</th>
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<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.

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

#### Shipping Information

<table>
<thead>
<tr>
<th>Ship To Location</th>
<th>Due Date</th>
<th>Add One Time Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Attention</strong></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>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chartfields1</td>
<td>Chartfields2</td>
<td>Chartfields3</td>
<td>Details</td>
<td>Asset Information</td>
<td>Chartfields1</td>
</tr>
<tr>
<td><strong>Fund</strong></td>
<td><strong>Dept</strong></td>
<td><strong>Program</strong></td>
<td><strong>Class</strong></td>
<td><strong>Bud Ref</strong></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>10500</td>
<td>1045125</td>
<td>16200</td>
<td>11000</td>
<td></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

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

Business Unit: 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
Multiple Department Approval

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

**Line 2: Initiated**
Desk: #745896321

**Department and Proj. Approver**
Skipped
No approvers found
Multiple Department Approval

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

[Return] [Apply Approval Changes]
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

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

**Department and Proj. Approval**

- **Line 1**: Pending
  - Chair #4256398
  - Skipped: No approvers found Multiple Department Approval
    - Approved by: Sears, Richard H
    - Req-Dept Mgr-Line Level

- **Line 2**: Pending
  - Desk #745896321
  - Skipped: No approvers found Multiple Department Approval
    - Approved by: Sears, Richard H
    - Req-Dept Mgr-Line Level

[Apply Approval Changes]
[Create New Requisition]
[Manage Requisitions]
Complete the Marketplace Requisition in ePro

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

Department and Proj. Approval

Line 1: Pending
Chair #4256398

Department and Proj. Approver

Skipped
No approvers found
Multiple Department Approval

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

Line 2: Pending
Desk #745869321

Department and Proj. Approver

Skipped
No approvers found
Multiple Department Approval

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

Insert additional approver or reviewer
Choose an approver or reviewer to insert

User ID: sutherla
Search: Sutherland, James R.

Insert as:
- Approver
- Reviewer

Insert
Cancel

Apply Approval Changes
Create New Requisition
Manage Requisitions
Complete the Marketplace Requisition in ePro

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

Department and Proj. Approval

Line 1: Pending
Chair #425638
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 #745896321
Department and Proj. Approver

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

Apply Approval Changes
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
• All special request requisitions must have a quote
Entering a Requisition
Entering a Requisition
Requisition Settings

Requisition Settings

Business Unit 54000
*Requester pdurroug
*Currency USD

Requisition Name
Priority Medium

Default Options
- Default
- Override

If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier
Supplier Location
Buyer

Category
Unit of Measure

Shipping Defaults

Ship To BUS EXCELL
Due Date
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

Personalize Find

First 1 of 1 Last
Searching for a Supplier

Requisition Settings

- Business Unit: 54000
- *Requester: pdurrough
- *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: 
- Unit of Measure: 
- Supplier Location: 
- Buyer: 

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 | Last

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 **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
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

All Request Options
Web
GAFirstMarketplace
Express Item Entry
Special Requests
Forms
Favorites
Templates
ePro Services
 Fixed Cost Service
 Variable Cost Service
 Time and Materials
Recently Ordered

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

Item Details
*Item Description
*Price
*Currency USD
Quantity
Unit of Measure
Due Date

Supplier
*Category 42506
Supplier ID 0000008558
Supplier Name Advantage Office Solution
Supplier Item ID

Manufacturer
Mfg ID
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 #.
Line Comments & Adding Items

**Additional Information**

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

**Request New Item**

- Request New Item
  
  A notification will be sent to a buyer regarding this new item request.

- Add to Cart
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

Request Options

All Request Options

Web

GAFirstMarketplace

Express Item Entry

Special Requests

Forms

Favorites

Templates

ePro Services

Fixed Cost Service

Variable Cost Service

Time and Materials

Recently Ordered

Special Requests

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

Item Details

*Item Description: Credenza #415632963 Black and cherry wood

*Price: 300.00

*Quantity: 1

*Category: 42506

*Unit of Measure: EA

Supplier

Supplier ID: 0000008556

Supplier Name: Advantage Office Solutions

Supplier Item ID: Advantage Office Solutions

Manufacturer

Mfg ID: 

Manufacturer

Mfg Item ID: 
Requisition Summary

Create Requisition

Welcome Durrough, Patricia S

Request Options

All Request Options
- Web
  - GAFirstMarketplace
- Express Item Entry
- Special Requests
- Forms
- Favorites
- Templates
  - ePro Services
    - Fixed Cost Service
    - Variable Cost Service
    - Time and Materials

Special Requests

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

Item Details
- Item Description
- Price
- Quantity
- Category

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

Manufacturer

Shopping Cart

<table>
<thead>
<tr>
<th>Description</th>
<th>Qty</th>
<th>UOM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Desk #741256395 Black and...</td>
<td>1</td>
<td>EA</td>
</tr>
<tr>
<td>Credenza #415632963 Black...</td>
<td>1</td>
<td>EA</td>
</tr>
</tbody>
</table>

Total Lines: 2
Total Amount (USD): 550.00

Close  Checkout
Adding Items

Create Requisition

Welcome  Durrough, Patricia S

Request Options

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

Search

Search

Advanced Search

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
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

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

<table>
<thead>
<tr>
<th>Requisition Name</th>
<th>Special Request Test</th>
</tr>
</thead>
<tbody>
<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>Requisition Lines</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</td>
<td>1</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>250.0000</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Cher</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>Credenza #415632963 Black</td>
<td>2</td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.0000</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Updating the Schedule & Distribution Information

Cart Summary: Total Amount $500.00 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>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Chair</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>Add</td>
<td>Add</td>
</tr>
</tbody>
</table>

**Shipping Line 1**

*Ship To Address*
University of West Georgia
Cent Rng for Ctr. for Bus. Excellence
1501 Maple Street
Carrollton, GA 30018

Attention To: Durrough, Patricia S
Due Date: 

**Accounting Lines**

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Chartfields3</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Accounting Lines**

*Distribute By*
Qty:  
SpeedChart:  

**Price Adjustment**
Pegging Inquiry
Pegging Workbench
Charging a Requisition Line to Multiple Chartstrings

Cart Summary: Total Amount $50.00 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>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></td>
<td></td>
</tr>
</tbody>
</table>

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

*Attention To*
Durough, Patricia S

**Accounting Lines**

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

<table>
<thead>
<tr>
<th>Accounting Lines</th>
<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><em>Account</em></td>
<td>Fund</td>
<td>Dept</td>
<td>Program</td>
<td>Class</td>
<td>Budget Reference</td>
<td></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>
<td></td>
</tr>
</tbody>
</table>

**Price Adjustment**
Pegging Inquiry
Pegging Workbench
# Enter Line Comments & Add Attachments

## Checkout - Review and Submit

Review the item information and submit the req for approval.

### Requisition Summary

- **Business Unit:** 54000
- **Requester:** pdurough
- **Requestor:** Durrough, Patricia S
- **Currency:** USD
- **Requisition Name:** Special Request Test
- **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>
<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**

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

**Comments**

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

**Add Attachments**

**OK**  **Cancel**  **Refresh**
Update Chartstring Information on All Lines
Enter Requisition Comments & Save for Later

- 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.
**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
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></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></td>
<td>$92.31</td>
</tr>
<tr>
<td></td>
<td>84TB</td>
<td>Tack Board - C24</td>
<td>$370.00</td>
<td>$188.70</td>
<td>1</td>
<td>$188.70</td>
</tr>
<tr>
<td>4</td>
<td>ML-2042MU24</td>
<td>File/Storage Multi Unit - C4</td>
<td>$1,952.00</td>
<td>$995.52</td>
<td>1</td>
<td>$995.52</td>
</tr>
</tbody>
</table>

**Finishes to be Determined**

Subtotal $3,445.05  
Freight $0  
Sales Tax $0  
Installation $0  
**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 (less than $2,499.99)</td>
<td>Consultant Authorization Form</td>
</tr>
<tr>
<td>Awards (less than $2,499.99)</td>
<td>Documentation per Policy # BFCNEX-01</td>
</tr>
<tr>
<td>Consultants (less than $2,499.99)</td>
<td>Consultant Authorization Form</td>
</tr>
<tr>
<td>Lodging - Direct Billed (No Limit)</td>
<td>Approved Travel Authorization</td>
</tr>
<tr>
<td>Registration (travel to conferences) (No Limit)</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>UWG Food Services from Auxiliary Services Awarded Provider (less than $2,499.99)</td>
<td>Food Purchase With Institutional Funds Form Food Purchases Policy Link over $2,500 requires P.O.</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 (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 (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.)</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>Food Purchase With Institutional Funds Form Food Purchases Policy Link over $2,500 requires P.O.</td>
</tr>
<tr>
<td>Prizes ($2,500 &amp; over requires P.O.)</td>
<td>Documentation per Policy # BFCNEX-05</td>
</tr>
<tr>
<td>Subscriptions (Excluding Subscription Services)</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)</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 5/1/2014</td>
</tr>
<tr>
<td>Intergovernmental agreements/pmts. (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Real estate rental/lease payments (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Sales and Use tax payments (No Limit)</td>
<td>Per SAO Procure to Pay Policy revision 5/1/2014</td>
</tr>
<tr>
<td>Utilities (e.g., electric, telephone, etc.) (No Limit)</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

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

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

### 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>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.

<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>5400</td>
<td>03/27/2015</td>
<td>Partially Received</td>
<td>Valid</td>
<td>250.00 USD</td>
</tr>
</tbody>
</table>

Request Lifespan:
- Requisition
- Approvals
- Inventory
- Purchase Orders
- Change Request
- Receiving
- Returns
- Invoice
- Payment

Request Line Information

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Status</th>
<th>Price</th>
<th>Quantity</th>
<th>UOM</th>
<th>Supplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Chair #415263986</td>
<td>Received</td>
<td>100.00000 USD</td>
<td>1.0000 EA</td>
<td>Advantage Office Solutions</td>
<td></td>
</tr>
</tbody>
</table>
Requisition Status and Life Cycle

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

Business Unit 54000

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

Change Order

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**: 0000500069
- **Date From**: 03/20/2015
- **Request State**: Approved
- **Date To**: 03/27/2015
- **Requester**: pdurrug
- **Entered By**: [Search]
- **Requisition Name**: Chairs for Training Room
- **Budget Status**: Not Chkd
- **Budget**: 250.00 USD

**Requisitions**

- **Req ID**: 0000500069
  - **Requisition Name**: Chairs for Training Room
  - **BU**: 54000
  - **Date**: 03/27/2015
  - **Request State**: Approved
  - **Budget**: Not Chkd
  - **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

**Actions**

- [Select Action]
- [Copy]
- [Edit]
- [Go]
This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)
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>

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.
Delete a Requisition Line

The image shows a screen from a requisition management system. It includes fields for Business Unit, Requisition Name, Requisition ID, Requisitioner, and Currency. Below are the items in the requisition:

<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>250.0000</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>

There is a red box highlighting the 'Delete Selected' button, indicating the action to delete a selected line.
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
# 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>1.00000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

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

[button link] 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
- Date To: 03/27/2015
- Requester: jdurog
- Requisition Name
- Request State: All but Complete
- Budget Status
- Origin: Special Request
- PO ID

Search
Clear
Show Advanced Search

Requisitions

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

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Approved</td>
<td>Not Chk’d</td>
<td>250.00 USD</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chk’d</td>
<td>2,165.00 USD</td>
</tr>
<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>
<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>
</tr>
</tbody>
</table>

[Select Action] Go

[Select Action] Go

[Select Action] Go

[Select Action] Go
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>
<th>Select Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500069</td>
<td>Chairs for Training Room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Partially Received</td>
<td>Valid</td>
<td>250.00</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</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 Chkd</td>
<td>0.00</td>
<td>[Select Action]</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
Creating a Desktop Receipt

[Image of a desktop interface with a highlighted option "Manage Requisitions"]
Creating a Desktop Receipt

Manage Requisitions

Search Requisitions

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

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Requisition ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>54000</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request State</th>
<th>Date From</th>
<th>Date To</th>
<th>Entered By</th>
<th>PO ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>All but Complete</td>
<td>03/23/2015</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Status</th>
<th>Origin</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Special Request</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>
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<th>Date</th>
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<tr>
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<td>Test for ePro Training</td>
<td>54000</td>
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<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>
<tr>
<td>0000500062</td>
<td>Test for Training</td>
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<td>03/25/2015</td>
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<td>300.00 USD</td>
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</table>
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>
</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>
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<td>Copier Usage</td>
<td>100</td>
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<td>0</td>
<td>EA</td>
<td>Qty</td>
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<td>ADVANTAG-001</td>
<td></td>
<td></td>
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<td>Qty</td>
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<td></td>
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</tr>
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</table>
Creating a Desktop Receipt

You have 4 lines open for receiving

Receive Selected and go to the Receive Form.

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Requisition Lines to Receive

<table>
<thead>
<tr>
<th>Requisition Lines to Receive</th>
<th>Purchase Order Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req BU</td>
<td>Requisition</td>
</tr>
<tr>
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Check All Clear All
Creating a Desktop Receipt

You have 4 lines open for receiving
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</tr>
</tbody>
</table>
Creating a Desktop Receipt

Receive Items

New Receipt

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

**Receipt Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Id</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>UOM</th>
<th>Accept Quantity</th>
<th>Details</th>
<th>Receipt</th>
<th>Procurement Group ID</th>
<th>Primary Unit</th>
<th>Unit Allocation Qty</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>(X)</td>
</tr>
</tbody>
</table>

- **Save Receipt**
Creating a Desktop Receipt

Receipt Saved Successfully

You have saved receipt # 0000520004 containing the following items:

<table>
<thead>
<tr>
<th>Receipt Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Item Description</td>
<td>Received Quantity</td>
<td>Reject Quantity</td>
<td>Accept Quantity</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Chair #415263986</td>
<td>1.0000</td>
<td></td>
<td>1.0000</td>
<td></td>
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</tbody>
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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.

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Check All  
Clear All
Creating a Desktop Receipt

You have 4 lines open for receiving
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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