Introduction to ePRO and the GeorgiaFirst Marketplace

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4/02/2019
Day 1 – Important Notes

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

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

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

- [https://www.usg.edu/gafirst-fin](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
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 submits requisition for approval; system notifies approver(s) via email

Approvers log into PSFIN Core to access worklist

Approvers can approve or deny requisition

Approvers preview approvals and inserts ad-hoc approvers if necessary

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

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

After item is delivered, receipt is created in PSFIN

Accounts Payable pays invoice

Go West UWG
Special Request Requisitions

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

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

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

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

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

- **ePro Admin**
  - Responsible for monitoring Workflow
  - Reassigning any escalated requisitions
- **Local Security Admin**
  - Set up security roles, Requester & Buyer Setup, and User preferences
Roles Involved – Others

• Accounts Payable (not a part of Purchasing)
  ➢ Process invoices and submits payments to vendors
  ➢ Send all invoices received to AP via email or campus mail
  ➢ AP cannot pay from a quote
  ➢ Contact AP with any questions on payments
    ❑ Rhoanda McCrary rmccrary@westga.edu x96397
    ❑ Crystal Pritchett cpritche@westga.edu x95357
    ❑ Lindsey Robison lrobinson@westga.edu x2471
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
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

Advanced Search  Everything

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

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

Hide Advanced Search on search results
<table>
<thead>
<tr>
<th></th>
<th>Supplier Name</th>
<th>Type</th>
<th>Preference</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Acuity Specialty Products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Adrenalin Powersports, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Advanced Business Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Agilent Technologies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Alligare LLC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Allseating Corp.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>AllSteel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>American Bio Medical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>ANTHRO INTERNATIONAL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>ARTOPEX INC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>ASSA Group, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>ATLANTA X-RAY CORP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Bob Barker Company Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Bridgestone Americas Tire Operations LLC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Carolina Biological Supply Co.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Clyde Armory INC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>CPS/Timberland Division</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>CRAIG'S FIREARM SUPPLY, INC.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>CWC Chemical, Inc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>DADE Paper</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Add Additional Keywords
Using Filter Results
<table>
<thead>
<tr>
<th>Model</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Series Surge Protector, 720 Joules, 6-Outlets, 8ft Cord, 360 Degree Rotating Plug</td>
<td>1</td>
<td>9.59 USD</td>
</tr>
<tr>
<td>Surge Protector, 2320 Joules, 7 Outlets, 6 Cord, White</td>
<td>1</td>
<td>13.17 USD</td>
</tr>
<tr>
<td>Surge Protector, 2320 Joules, 7 Outlets, 12 Cord, White</td>
<td>1</td>
<td>17.39 USD</td>
</tr>
</tbody>
</table>
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
  - 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) - $13.17 USD
  - 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) - $17.39 USD
  - Part Number: BEL-BE107200-12
  - Manufacturer Info: BE107200-12 - BELKIN
  - 1-Mandatory State Contract: Yes
Using Product Comparison
Add Items from Product Comparison

<table>
<thead>
<tr>
<th>Select</th>
<th>Add to Cart</th>
<th>Product Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Advantage® Motor Extension Cord</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Catalog No.</th>
<th>Price</th>
<th>Supplier</th>
<th>Category</th>
<th>UOM</th>
<th>Price per UOM</th>
<th>Product Size</th>
<th>Price per Product Size Unit</th>
<th>Alternate Part Numbers</th>
<th>Category UNSPSC</th>
</tr>
</thead>
<tbody>
<tr>
<td>85427</td>
<td>10.35 USD</td>
<td>Multi Media Services</td>
<td>Projection screens or displays</td>
<td>----</td>
<td>10.35 USD / unit</td>
<td>----</td>
<td>----</td>
<td>S5526742,10101622,U40645,2437083,A697385,A706638,29933,29933,29917,29966,29965,29964</td>
<td>45-11-16-03</td>
</tr>
<tr>
<td>CTG-29933</td>
<td>5.17 USD</td>
<td>Southern Computer Warehouse (SCW)</td>
<td>Power cord</td>
<td>----</td>
<td>5.17 USD / unit</td>
<td>----</td>
<td>----</td>
<td>----</td>
<td>----</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: 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:
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
Beginning a Marketplace Requisition

Create Requisition

Welcome  Durrough, Patricia S

Request Options

Search

Web
Browse Supplier Websites
GAFirstMarketplace

Express Item Entry
Create an Express Requisition

Forms
Create and Submit Forms

Favorites
Browse Favorite Items and Services

ePro Services
Request Services

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

Special Requests
Create a non-catalog request

Templates
Browse Company and Personal Templates
Building a Shopping Cart

• Search and select items to add to your cart

• View cart:
  ➢ Carts icon > Open My Active Shopping Cart
  ➢ Cart Summary Link at top right corner of the page
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
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>Durrough, 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

Add More Items

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pilot G2 Premium Retractable G</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.7300</td>
<td>27.46</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Staples Top-Tab File Folders,</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Box</td>
<td>7.2200</td>
<td>14.44</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Swingline LightTouch High Capa</td>
<td></td>
<td>Staples</td>
<td>1.0000</td>
<td>Each</td>
<td>22.2800</td>
<td>22.28</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
</tr>
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<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>
</tr>
</tbody>
</table>

**Ship To**: BUS EXCELL

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

Attention To: Durrough, Patricia S

Due Date: 

Accounting Lines
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Chartfields1</th>
<th>Chartfields2</th>
<th>Chartfields3</th>
<th>Details</th>
<th>Details 2</th>
<th>Asset Information</th>
<th>Asset Information 2</th>
<th>Budget Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Fund</td>
<td>Dept</td>
<td>Program</td>
<td>Class</td>
<td>Budget Reference</td>
<td></td>
<td></td>
</tr>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
<td></td>
<td></td>
</tr>
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</table>
Complete the Marketplace Requisition in ePro

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Add</th>
<th>Mass Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Pilot G2 Premium Retractable Gel</td>
<td></td>
<td>Staples</td>
<td>2.0000</td>
<td>Dozen</td>
<td>13.7300</td>
<td>27.46</td>
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<td></td>
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</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>
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<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>
<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>
<td></td>
</tr>
</tbody>
</table>

Total Amount: 71.06 USD
Complete the Marketplace Requisition in ePro

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

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

Supplier ID
Buyer
Supplier Location
Category

Shipping Information
Ship To Location
Due Date
Add One Time Address
Attention
SpeedChart

Accounting Lines
Please enter GL Business Unit before selecting other chartfield values

Chartfields1
Chartfields2
Chartfields3
Details
Account Information

Percent
Location
GL Unit
Account

54000

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

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset 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>0500</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.

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

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
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

Skipped
No approvers found
Multiple Department Approval

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

Line 2: Pending
Desk #745896321

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
Sutherland, James R.
Insert as: Approver

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: #4256398

Skipped
No approvers found
Multiple Department Approval

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

Not Routed
Sutherland, James R
Inspected Approver

Line 2: Pending
Desk: #74686321

Skipped
No approvers found
Multiple Department Approval

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

Apply Approval Changes

Create New Requisition
Manage Requisitions
Demonstration

- Log in and follow along with the instructor to create a Marketplace Requisition using the items you placed in your shopping cart in the previous exercise.
Building a Special Request Requisition

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

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
Searching for a Supplier

Requisition Settings

Business Unit: 54000
Requester: pdurrough
*Currency: USD

University of West Georgia
Durrough, Patricia S
Requisition Name:
Priority: Medium

Custom Fields

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 EXCEL
Due Date:
Add One Time Address
Attention:

Accounting Defaults

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Fund | Dept | Program | Class | Bud Ref

2015
Searching for a Supplier

Supplier Search

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

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, Vendor W-9 Form and Vendor ACH Form to your recommended supplier
- Send the completed forms to vendor@westga.edu to have the supplier added.
- Once supplier is added, you will be able to enter your requisition
Searching for an Item Category

Requisition Settings

| Business Unit | 54000 |
| Business Unit | 54000 |
| Requester     | pdurrough |
| Requester     | pdurrough |
| *Requester    | durrough, Patricia S |
| *Requester    | durrough, Patricia S |
| Currency      | USD |
| Currency      | USD |
| University of West Georgia | |
| University of West Georgia | |
| Requisition Name | |
| Requisition Name | |
| Priority       | Medium |
| Priority       | Medium |

Custom Fields

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

- **Category** field is highlighted.

Line Defaults

- **Supplier**
- **Supplier Location**
- **Buyer**

Shipping Defaults

- **Ship To**: BUS EXCELL
- **Due Date**: 20

Add One Time Address

- **Attention**:  

Accounting Defaults

- **Fund**
- **Dept**
- **Program**
- **Class**
- **Bud Ref**: 2015

**Personalize** | **Find** | **List** | **First** | **1 of 1** | **Last**

**OK** | **Cancel** | **Refresh**

GO WEST UWG
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

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
  - Row Hall Copier Rental S/N V...
  - Copier Usage

Special Requests
- Create a non-catalog request
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options

Search

Special Requests

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

Item Details

*Item Description

*Price

*Currency USD

*Category 42506

Quantity

Unit of Measure

Due Date

Supplier

Supplier ID 0000008558

Supplier Name Advantage Office Solution

Supplier Item ID

Manufacturer

Mfg ID

GO WEST UWG
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

Add to Cart

A notification will be sent to a buyer regarding this new item request.
Adding Items

Create Requisition

Welcome Durrough, Patricia S

Request Options Search All

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
- *Currency: USD
- *Unit of Measure: EA

Supplier
- Supplier ID: 000000000000000
- Supplier Name: Advantage Office Solution
- Supplier Item ID

Manufacturer
- Mfg ID
- Manufacturer
- Mfg Item ID
Adding Items

Create Requisition

Request Options

Search

Special Requests

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

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency USD

*Unit of Measure

Due Date
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>54000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>pdurough</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>Requisition Lines</th>
<th>Add More Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Description</td>
</tr>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Cher</td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and</td>
</tr>
</tbody>
</table>
Updating the Schedule & Distribution Information
Charging a Requisition Line to Multiple Chartstrings

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

Requisition Lines

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

Shipping Line 1

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

Attention To
Durrough, Patricia S

Due Date

Accounting Lines

*Distribute By Qty

SpeedChart

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>*Account</td>
<td>Fund</td>
<td>Dept</td>
<td>Program</td>
<td>Class</td>
<td>Budget Reference</td>
<td></td>
<td></td>
</tr>
<tr>
<td>714100</td>
<td>10500</td>
<td>1045103</td>
<td>16200</td>
<td>11000</td>
<td>2015</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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>540000</th>
<th>University of West Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>pdurroug</td>
<td>Durrough, Patricia S</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
<td></td>
</tr>
</tbody>
</table>

Requisition Name: Special Request Test
Priority: Medium

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

Add More Items

<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>250.00</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.00</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Enter Line Comments & Add Attachments

Line Comment

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

Line 1

Comments  

Send to Supplier  Show at Receipt  Show at Voucher  
Add Attachments  

Attachments  

OK  Cancel  Refresh
## Update Chartstring Information on All Lines

### Requisition Summary

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

### Cart Summary: Total Amount 550.00 USD

Expand lines to review shipping and accounting details

#### Requisition Lines

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
<th>Mass Change</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>250.000</td>
<td>250.00</td>
<td></td>
<td></td>
<td></td>
<td></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>300.000</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Enter Requisition Comments & Save for Later

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

Department and Proj. Approval

Line 1: Initiated
Desk #741256395 Black and Cherry Wood

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

*Totals*

- 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

**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</td>
</tr>
<tr>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>Food Purchases Policy Link $2,500 &amp; over 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</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, a W9 Form and a Vendor ACH form and submit with your Check Request
Managing Requisitions

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

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.

**Business Unit**: 54000
**Requisition ID**: 
**Date From**: 11
**Date To**: 11
**Requester**: pdurroog

**Requisition Name**: 
**Request State**: All but Complete
**Budget Status**: 
**Origin**: 
**PO ID**: 

[Search] [Clear] [Show Advanced Search]

### Requisitions

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

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not 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>Pending</td>
<td>Not Chk'd</td>
<td>550.00 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>
<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>
</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>
</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>
</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>
</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
- 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
- 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:
- Requisition
- Approvals
- Inventory
- Purchase Orders
- Change Request
- Receiving
- Returns
- Invoice
- Payment

Request Information:
- Requester: Durrough, Patricia S
- Pre-Encumbrance Balance: $0.00
- Entered By: Durrough, Patricia S
- Priority: Medium

Line Information:

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

Budget: Valid, Total: 250.00 USD
# Requisition Status and Life Cycle

**Business Unit**: 54000

<table>
<thead>
<tr>
<th>Requisition Information</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Requisition ID</strong></td>
<td>0000500069</td>
<td>Line Number</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PO Information</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PO Number</strong></td>
<td>0000510015</td>
<td><strong>PO Date</strong></td>
<td>03/27/2015</td>
<td></td>
</tr>
<tr>
<td><strong>Supplier ID</strong></td>
<td>0000008558</td>
<td><strong>Terms</strong></td>
<td>N10</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Change Order</th>
<th>PO Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dispatched</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line</td>
<td>Item ID</td>
<td>Description</td>
<td>Merchandise Amt</td>
<td>UOM</td>
<td>PO Qty</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
<td>--------------</td>
<td>-----------------</td>
<td>-----</td>
<td>--------</td>
</tr>
<tr>
<td>1</td>
<td>Chair #415263986</td>
<td>100.00 USD</td>
<td>EA</td>
<td>1.0000</td>
<td>Approved</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**: [Input]
- **Date From**: 03/20/2015
- **Date To**: 03/27/2015
- **Requirer**: pdurog
- **Request State**: All but Complete
- **Budget Status**: [Input]
- **Origin**: Special Request
- **Entered By**: [Input]
- **PO ID**: [Input]

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 [Select Action]</td>
</tr>
<tr>
<td>0000500067</td>
<td>Test for ePro Training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>Pending</td>
<td>Not Chk'd</td>
<td>2,165.00</td>
<td>USD [Select Action]</td>
</tr>
</tbody>
</table>

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

[Go] Button for each record
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>University of West Georgia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester</td>
<td>Durrough, Patricia S</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
</tbody>
</table>

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

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

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

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
- Requisition Name
- Requester: pdurroog
- Entered By
- Budget Status
- Origin: Special Request
- PO ID

Show Advanced Search

Requisitions

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

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
</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>2,185.00 USD</td>
</tr>
</tbody>
</table>

[Select Action] Go

[Select Action] Go

Edit

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

### Requisition Summary
- **Business Unit**: 54000
- **Requester**: pdurroug
- **Currency**: USD
- **Requisition Name**: Special Request Test
- **Requisition ID**: 00000500063
- **Priority**: Medium

### Requisition Lines
<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Desk #741256395 Black and Chrome</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></td>
</tr>
<tr>
<td>2</td>
<td>Credenza #415632963 Black and Chrome</td>
<td></td>
<td>Advantage Office Solutions</td>
<td>1.0000</td>
<td>Each</td>
<td>300.0000</td>
<td>300.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Select lines to:* Add to Favorites, Add to Template(s), Mass Change

*Select All / Deselect All*
Delete a Requisition Line

Delete Confirmation

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

OK  Cancel
Cancel a Requisition

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

manage requisitions

search requisitions

to locate requisitions, edit the criteria below and click the search button.

- business unit: 54000
- requisition id
- date from: 03/20/2015
- date to: 03/27/2015
- requester: pduroog

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>
</tr>
</thead>
<tbody>
<tr>
<td>00000500069</td>
<td>chairs for training room</td>
<td>54000</td>
<td>03/27/2015</td>
<td>approved</td>
<td>not chk'd</td>
<td>250.00 usd</td>
<td>select action</td>
</tr>
<tr>
<td>00000500067</td>
<td>test for epro training</td>
<td>54000</td>
<td>03/27/2015</td>
<td>pending</td>
<td>not chk'd</td>
<td>2,165.00 usd</td>
<td>select action</td>
</tr>
</tbody>
</table>

approve | cancel | check budget | copy | edit | view cycle | view print | go

select action | go
### Cancel a Requisition

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Status</th>
<th>Price</th>
<th>Qty</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>rounded memo holder white</td>
<td>Pending Approval</td>
<td>9.50000 Each</td>
<td>100.000</td>
<td>950.00</td>
</tr>
<tr>
<td>2</td>
<td>Rounded Memo holder Green</td>
<td>Pending Approval</td>
<td>9.50000 Each</td>
<td>120.000</td>
<td>1140.00</td>
</tr>
<tr>
<td>3</td>
<td>Set Up Charge</td>
<td>Pending Approval</td>
<td>75.00000 Each</td>
<td>1.0000</td>
<td>75.00</td>
</tr>
</tbody>
</table>

**Total:** 2,165.00 USD

[Cancel Requisition]

[Return to Manage Requisitions]
Cancel a Requisition

Manage Requisitions

Search Requisitions

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

- Business Unit: 54000
- Requisition ID
- Date From: 03/20/2015
- Date To: 03/27/2015
- Requester: pdurroug
- 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>
Copy a Requisition

### Oracle Requisition System

**Requisition ID**: 00000500069  
**Requisition Name**: Chairs for Training Room  
**BU**: 54000  
**Date**: 03/27/2015  
**Request State**: Partially Received  
**Budget**: Valid  
**Total**: 250.00 USD

**Requisition ID**: 00000500067  
**Requisition Name**: Test for ePro Training  
**BU**: 54000  
**Date**: 03/27/2015  
**Request State**: Pending  
**Budget**: Not Chk'd  
**Total**: 2,165.00 USD

**Requisition ID**: 00000500063  
**Requisition Name**: Special Request Test  
**BU**: 54000  
**Date**: 03/25/2015  
**Request State**: Canceled  
**Budget**: Not Chk'd  
**Total**: 0.00 USD

---

**Approval**  
**Copy**  
**Edit**  
**Process Return**  
**Receive**  
**View Cycle**  
**View Print**

[Select Action]  
[Select Action]  
[Select Action]  
Go  
Go  
Go
Practice Activity

• Edit the quantity on your special request requisition created in the last lesson
• Cancel the requisition that was created for you by the instructor.
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 ORACLE Employee Self Service interface]

- Create Expense Report
- My Expense Reports
- Expense Report History
- GeorgiaFIRST Financial Website
- Pagelets

[Menu options]
- eProcurement
  - Recent Places
  - Requisition
  - Manage Requisitions
  - Manage Requisition Approvals
  - Receive Items
  - Procurement Card Center
  - My Profile

[GO WEST UWG logo]
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
- Requestor: pdurroug
- Request State: All but Complete
- Entered By
- Budget Status
- Origin: Special Request
- PO ID

Search Clear

Show Advanced Search

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

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

Process Return
Receive

[Select Action] Go
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>Requisition Lines to Receive</th>
<th>Purchase Order Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req BU Requisition</td>
<td>Item Description</td>
</tr>
<tr>
<td>54000 Copier Rental for Row Hall</td>
<td>VXX091528 Row Hall Copier Lease</td>
</tr>
<tr>
<td>54000 Copier Rental for Row Hall</td>
<td>Copier Usage</td>
</tr>
<tr>
<td>54000 Chairs for Training Room</td>
<td>Chair #415263986</td>
</tr>
<tr>
<td>54000 Chairs for Training Room</td>
<td>Chair #7566893254</td>
</tr>
</tbody>
</table>

Check All Clear All
Creating a Desktop Receipt

You have 4 lines open for receiving

Receive Selected

and go to the Receive Form.

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

<table>
<thead>
<tr>
<th>Req BU</th>
<th>Requisition</th>
<th>Item Description</th>
<th>Item ID</th>
<th>Tot Req Qty/Amt</th>
<th>Accepted to Date</th>
<th>UOM</th>
<th>Recv By</th>
<th>Ship To</th>
<th>Ship To GLN</th>
<th>Attention To</th>
<th>Supplier</th>
</tr>
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<tbody>
<tr>
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<td>Copier Rental for Row Hall</td>
<td>VXX091528</td>
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<td>Qty</td>
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<td>0</td>
<td>EA</td>
<td>Amount</td>
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</table>
Creating a Desktop Receipt

You have 4 lines open for receiving.

Receive Selected and go to the Receive Form.

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<tr>
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<td>BUS EXCELL</td>
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<td>Durrough, Patricia S</td>
<td>ADVANTAG-001</td>
<td></td>
</tr>
</tbody>
</table>

Check All  Clear All
Creating a Desktop Receipt

Receive Items

New Receipt

Business Unit: 54000
Receipt Status: Open

Received Date: 03/30/2015

<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>
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<td>N</td>
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<td>Save Receipt</td>
</tr>
</tbody>
</table>

Reject Shipment
Creating a Desktop Receipt

Receipt Saved Successfully

You have saved receipt # 0000520004 containing the following items:

<table>
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<th>Receipt Lines</th>
<th>Personalize</th>
<th>Find</th>
<th>First</th>
<th>1 of 1</th>
<th>Last</th>
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<tr>
<td>Line</td>
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<td>Received Quantity</td>
<td>Reject Quantity</td>
<td>Accept Quantity</td>
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<td>1.0000</td>
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</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.

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Practice Activity

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