Introduction to ePRO and the GeorgiaFirst Marketplace for Shoppers

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12/11/2018
Important Notes

• Job Aids
• Test Database URL, login and password
• Security Request Forms
• Production Database; no access until after training
• Log into test database
Learning Outcomes

- Understand the basics of the eProcurement module
- Log in and access the GaFirst Marketplace
- Understand the responsibilities of a shopper
- Understand how to set up default requesters for assigning carts
- Create a Marketplace shopping cart
- Assign a Marketplace shopping cart
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 GAFIRST Marketplace and pulled into the ePro Requisition
  ➢ GAFIRST 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**

1. **Shopper logs into PSFIN**
2. **Shopper enters GAFIRST Marketplace and selects items to create shopping cart**
3. **Shopper searches for and selects items for their shopping cart**
4. **Shopper assigns cart to default requester**
5. **System notifies requester of cart assignment via email.**
6. **Requester enters GAFIRST Marketplace and retrieves cart**
7. **Requester makes any necessary updates to the shopping cart**
8. **Requester enters GAFIRST Marketplace and retrieves cart**
9. **System notifies requester of cart assignment via email.**
10. **Appraiser reviews requisition and can approve or deny it.**
11. **Marketplace requisition can be fully processed through SCIQUEST batch job (run 5x each day)**
12. **After item(s) is delivered, receipt is created is PSFIN**
13. **Accounts Payable pays invoice**
Roles Involved - Shoppers

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

• Create Marketplace Requisitions from Assigned Shopping Carts and from their own 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 – Others

- ePro Admin
  - Responsible for monitoring Workflow
  - Reassigning any escalated requisitions

- Local Security Admin
  - Set up security roles, Requester & Buyer Setup, and User preferences

- AP Dept
  - Process invoices, create vouchers and submit payments
Being a Shopper in the GAFIRST Marketplace

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4/17/2018
What does a GAFIRST Marketplace Shopper do?

• Responsible for shopping for contract/catalog items in the Marketplace in support of their office/department

• After selecting items for a cart, Shoppers then assign the cart to their Requester

• Each Shopper should have at least one Requester specified

• Requester creates requisition from cart and submits it for approval through Workflow
Entering the GAFIRST Marketplace

- Access the GAFIRST Marketplace via the tile on the PSFIN homepage
- To exit PeopleSoft, click the Sign Out link
Entering the GaFIRST Marketplace
Entering the GaFIRST Marketplace
Activity: Enter the GAFIRST Marketplace

- Log into PeopleSoft
- Select GAFIRST Marketplace tile
- Select the GAFIRST Marketplace button
Specify Default Requester

- You will be able to set up a requester that all carts will default to
- Can have a back-up Requester as well
- View My Profile > Default User Settings > Cart Assignees
Specify Default Requester
Specify Default Requester

[Image: Screenshot of the Employee Self Service interface with a red circle highlighting the Cart Assignees link in the User Profile and Preferences section.]
Specify Default Requester
Specify Default Requester

Search using the last name of the requester
Specify Default Requester

Select the appropriate requester

<table>
<thead>
<tr>
<th>Name</th>
<th>User Name</th>
<th>Email</th>
<th>Phone</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><a href="mailto:noemailprovided@usg.edu">noemailprovided@usg.edu</a></td>
<td>+1 678-839-1807</td>
<td>[select]</td>
</tr>
</tbody>
</table>
Specify Default Requester

Set as preferred
Specify Default Requester

Requester can be removed at any time
Activity: Specify Default Requester

- Find your default requester and add them as your cart assignee
  ➢ View My Profile > Default User Settings > Cart Assignees > Add Assignee > Search
- Establish the default requester as the preferred cart assignee
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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4/17/2018
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

Shop: Everything

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

Shop

Enter Search Keywords Here

Go

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
# Browse by Supplier

![Image of Browse by Supplier](image.png)

## Suppliers Table

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

Results Per Page: 20

Go to: advanced search, favorites, quick order, Browse suppliers, categories, contracts, chemicals
Add Additional Keywords
Using Filter Results
Mandatory State Contract Items

- 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: BELBE106000-08R - (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: BELBE107200-06 - (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: BELBE107200-12 - (BELKIN)
  - 1-Mandatory State Contract: Yes
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)
  - Part Number: BEL-BE106000-08R
  - Manufacturer Info: BE106000-08R - BELKIN
  - 1-Mandatory State Contract: Yes
  - Price: $9.59 USD

- **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
  - Price: $13.17 USD

- **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
  - Price: $17.39 USD
Using Product Comparison

Shop Office/Computer surge protector

Results for: Office/Computer : surge protector

Showing 1 - 20 of 654 Results

Compare Selected: 3

1. 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
   - Price: 9.59 USD

2. 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
   - Price: 13.17 USD

3. 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
   - Price: 17.39 USD

4. Surge Protector, 3550 Joules, 8 Outlets, 6 Cord, Black from Southern Computer Warehouse (SCW)
   - Part Number: BEL-BE108200-06
   - Manufacturer Info: BE108200-06 - BELKIN
   - 1-Mandatory State Contract: Yes
   - Price: 15.85 USD
Add Items from Product Comparison

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<thead>
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<th>Select</th>
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<table>
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<th>Qty 1</th>
<th>Add to Cart</th>
<th>Qty 1</th>
<th>Add to Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Product Details</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Advantage® Motor Extension Cord</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td><strong>Catalog No.</strong></td>
<td>85427</td>
<td></td>
<td>5.17 USD</td>
<td>CTG-29933</td>
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<tr>
<td><strong>Price</strong></td>
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<td></td>
<td>5.17 USD</td>
<td></td>
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<tr>
<td><strong>Supplier</strong></td>
<td>Multi Media Services</td>
<td></td>
<td>Southern Computer Warehouse (SCW)</td>
<td></td>
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<tr>
<td><strong>Category</strong></td>
<td>Projection screens or displays</td>
<td></td>
<td>Power cord</td>
<td></td>
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<tr>
<td><strong>UOM</strong></td>
<td>----</td>
<td></td>
<td>----</td>
<td></td>
</tr>
<tr>
<td><strong>Price per UOM</strong></td>
<td>10.35 USD / unit</td>
<td></td>
<td>5.17 USD / unit</td>
<td></td>
</tr>
<tr>
<td><strong>Product Size</strong></td>
<td>----</td>
<td></td>
<td>----</td>
<td></td>
</tr>
<tr>
<td><strong>Price per Product Size Unit</strong></td>
<td>Select units...</td>
<td></td>
<td>----</td>
<td></td>
</tr>
<tr>
<td>*** 1-Mandatory State Contract**</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td><strong>Alternate Part Numbers</strong></td>
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<td></td>
<td>5526742,10101622,U40645,2437083,A697385,A706638,29933,29933,29917,29966,29965,29964</td>
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<tr>
<td><strong>Category UNSPSC</strong></td>
<td>45-11-16-03</td>
<td></td>
<td>26-12-16-36</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: 1-Mandatory State Contract (288) 4-Convenience State Contract (18)
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-Outlet, 8ft Cord, 360 Degree Rotating Plug

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

Price: 9.59 USD
Zip Code:
Quantity: 1
Add To Active Cart

Product Details
- Supplier UOM: 1/EA
- Buyer UOM: 1/EA
- 1-Mandatory: Yes
- State Contract:
- Alternate Part Numbers:
  - S3660963,10080359,K85866,1757626,A569240,BLKBE106000008R,BE106000008R,BKNBE106000-08R,BE106000-08R,BE106000-08R,BE112230-08,BE107200-12,BE106000FC04,BE106000SN,BE108200-06BN,BE107200-04,BE106000-10,BE106000-04-BLK
- Category: Surge suppressors
- 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
Assigning a Shopping Cart to a Requester

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Retrieving the Shopping Cart

- Two ways to open the shopping cart page:
  - Select the Cart icon, and then select My Carts & Order and then the Open My Active Shopping Cart link
  - Select the Cart Summary link at top right corner
- Once shopping cart page is displayed, you can rename the cart if you wish.
  - The default cart name is the date the cart was initiated plus your userid.
  - After renaming the cart, click the update button.
Retrieving the Shopping Cart
Retrieving the Shopping Cart

Shopping Cart

Name this cart: 2018-04-18 SHOPPER2 01

Have you made changes? Update

Empty Cart

Staples

Fulfillment Address 1 Edit
3040 Route 50 North, N Saratoga Springs, NY 12866 US

The item(s) in this group was retrieved from the supplier's website. What does this mean?

You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s): 1

Staples Copy Paper: 8-1/2x11", Letter Size

- Part Number: 135848
- Manufacturer Info: 135848 - (Domtar)
- Contract: 99999-001-SPD00000109-0001

Unit Price 28.26 USD
Quantity 1
Total 28.26 USD

Vendor subtotal 28.26 USD

Continue Shopping

Cancel PunchOut or Assign Cart

Select All
Updates to Punch-Out Supplier Items

- Items from punch-out suppliers are listed separately.
- Some punch-out suppliers will allow you to update quantities directly in the shopping cart; others will not.
- If you wish to add additional items from the same punch-out supplier, use the Modify Items link if available.
- Some punch-out suppliers will not let you do any modification.
Assigning the Cart to a Requester

• When you are ready to assign the cart, click the Assign Cart button

• In the Assign Cart pop-up
  ➢ Your default (preferred) requester will be listed
  ➢ If you are assigning your cart to your default requester, there is nothing you need to do to select him/her
  ➢ To select a requester other than your default, use “Select from profile values” link
  ➢ To select a requester not added to your profile, use “Search for an assignee” link
Assigning the Cart to a Requester

• To send a note to your Requester, include your comments in the Note to Assignee box
  ➢ This information will be included on the email notification sent to the Requester

• If you need to specify a different Ship To location or Chartstring, you must indicate it in the Note to Assignee box
Assigning the Cart to a Requester
Assigning the Cart to a Requester

Assign Cart

- Select from profile values: Marianne Russell
- Note To Assignee:

Assign
Assigning the Cart to a Requester

To search for an assignee not in your profile
Demonstration

- Assign Cart to Default Requester
Activity

- Assign the shopping cart created in Lesson 3 to your default requester.