Introduction to ePro and the GAFIRST Marketplace for Shoppers

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.

5/31/2016
Important Notes

- Discuss handouts
- Security Request Forms (w/default acct #)
- 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 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
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 “issues requisition”, makes updates and submits for approval.
9. Approver reviews requisition and can approve or deny it.
10. Marketplace Requisition can be fully processed through SCIQUEST batch job (run 5x each day).
11. After item(s) is delivered, receipt is created in PSFIN.
12. 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

PeopleSoft 9.2
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 link in the PSFIN menu
• Verify your User Profile
• To exit the Marketplace, click the Sign Out link
Entering the GAFIRST Marketplace
Entering the GAFIRST Marketplace
Activity: Enter the GAFIRST Marketplace

• Log into PeopleSoft
• Select GAFIRST Marketplace Link
• Select the GAFIRST Marketplace button
Getting Started as a Shopper

• Verify your personal information in the Marketplace
  – Notify your ePro Admin if it is incorrect
• View “My Profile” (name drop down) > User’s Name, Phone Number, Email, etc.
Verify Profile Information

Welcome to the GeorgiaFirst Marketplace site. Please see below for important notes and updates:

The MRO Contract renewed on April 6th. The State has changed Grainger and MSC from punch-out sites to "hosted" content, as well as adding Festenol. The "Stickers" that you used to see for Grainger and MSC are no longer available, HOWEVER, you are still able to search for and purchase their items via the regular search options at the top of the page.

We have over 100 suppliers in the GeorgiaFirst Marketplace. To access suppliers that do not have icons in the showcase to the right, enter the product or supplier name in the Shop/Search bar at the top and click "Go".
Verify Profile Information

Patricia Durrough

User Name: pdurroug

First Name: Patricia
Last Name: Durrough
Phone Number: +1 (678) 839-6392
Country Code, Area, Phone Number, Extension

E-mail Address: pdurroug@westga.edu

Business Unit: University of West Georgia (SH000)
Department: ~NO_DEPT_FOUND (~NO_DEPT_FOUND)
Position: 

User Name: pdurroug
Authentication Method: cXML

Save
Activity: Verify Profile Information

• Click drop down arrow next to profile name
• Click “View My Profile”
• Verify Information under User’s Name, Phone Number, Email
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 > User Information and Settings > Show All > Cart Assignees
Specify Default Requester

Patricia Durrough
User Name  pdurroug

User Profile and Preferences
- User's Name, Phone Number, Email, etc.
- Language, Time Zone and Display Settings
- Default User Settings
- Custom Field and Accounting Code Defaults
- Default Addresses
  - Cart Assignees
- User Roles and Access
- Ordering And Approval Settings
- Permission Settings
- Notification Preferences
- User History

User's Name, Phone Number, Email, etc.
- First Name  Patricia
- Last Name  Durrough
- Phone Number  +1 (678) 839-6392
- E-mail Address  pdurroug@westga.edu
- Business Unit  University of West Georgia (54000)
- Department  ~NO_DEPT_FOUND (~NO_DEPT_FOUND)
- Position
- User Name  pdurroug
- Authentication Method  cXML

Save
Specify Default Requester
Specify Default Requester

Search using the last name of the requester

User Search

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>User Name</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Business Unit</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td></td>
</tr>
<tr>
<td>Results Per Page</td>
<td>10</td>
</tr>
</tbody>
</table>

Search
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>Werner, Dana</td>
<td>dwerner</td>
<td><a href="mailto:dwerner@westga.edu">dwerner@westga.edu</a></td>
<td>+1 (678) 839-6410</td>
<td>[select]</td>
</tr>
</tbody>
</table>
Specify Default Requester

Set as Preferred

Patricia Durrough
User Name: pdurrough

Cart Assignees
Add Assignee...

My Cart Assignees
Name: Dana Werner
Action: Set as Preferred

User Profile and Preferences
Default User Settings
Custom Field and Accounting Code Defaults
Default Addresses
Cart Assignees
User Roles and Access
Ordering And Approval Settings
Permission Settings
Notification Preferences
User History
Specify Default Requester

Requester can be removed at anytime.
Activity: Specify Default Requester

• Find your default requester and add them as your cart assignee
  – Cart Assignee > Search

• Establish the default requester as the preferred cart assignee
Welcome to the GeorgiaFirst Marketplace site. Please see below for important notes and updates.

We have over 60 suppliers in the GeorgiaFirst Marketplace. To access suppliers that do not have icons in the showcase to the right, enter the product or supplier name in the Shop/Search bar at the top and click "Go".
Searching and Selecting Items in the GeorgiaFIRST Marketplace

PeopleSoft 9.2
Simple Search

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

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

Click to expand Search for Vendor Filter

Showing 1 - 20 of 243 Results

Results Per Page: 20

Sort by: Best Match

Vendor Name | Type | Preference
BSN SPORTS | | 
Dal-Kawa Cycle Center | | 
1st Coast Printing | | 
3 Order 2 Remit 2 bus and fax | | 
A Legendary Event | | 
A&D Painting, Inc. | | 
A. Daigger & Co. | | 
ABC Sign Group | | 
Ace Glass Inc. | | 
Activate the Space | | 
Adrenalin Powerports, Inc. | | 
Advanced Backflow Technologies | | 
Advanced Business Supplies | | 
Agilent Technologies, Inc. | | 
Aircog South | | 
Aircog South | | 
All Good Pest Solutions | | 
All Star Screen Printing LLC | | 
Alligare, LLC | | 
Allmond, Sarah E | | 

Page 1 of 13
Browse by Category

Categories

Category Search

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

<table>
<thead>
<tr>
<th>Filter Results</th>
<th>By Product Flag</th>
<th>By Vendor</th>
<th>By Category</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Green (18)</td>
<td>Carolina Biological Supply Co. (30)</td>
<td>Arm chair (23)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grainger, Inc. (413)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HD Supply Facilities Maintenance (410)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Statewide Contract Supplier (16)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sort by: Best Match</td>
<td>Part Number 444 Spark - Drop Ship</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Contract Number SWC60748</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>more info...</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Furniture, Office, Computer and Educational</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spark stacking side chair with seat pad - Drop Ship</td>
<td>50.00 USD</td>
</tr>
<tr>
<td>from Statewide Contract Supplier</td>
<td></td>
</tr>
<tr>
<td>Part Number 444 Spark - Drop Ship</td>
<td></td>
</tr>
<tr>
<td>Contract Number SWC60748</td>
<td></td>
</tr>
<tr>
<td>more info...</td>
<td></td>
</tr>
<tr>
<td>Furniture, Office, Computer and Educational</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Spark stacking side chair with seat pad - Desktop Ship</td>
<td>50.50 USD</td>
</tr>
<tr>
<td>from Statewide Contract Supplier</td>
<td></td>
</tr>
<tr>
<td>Part Number 444 Spark - Desktop Ship</td>
<td></td>
</tr>
<tr>
<td>Contract Number SWC60748</td>
<td></td>
</tr>
<tr>
<td>more info...</td>
<td></td>
</tr>
<tr>
<td>Furniture, Office, Computer and Educational</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Generation task chair, high performance arms, plastic</td>
<td>60.00 USD</td>
</tr>
<tr>
<td>base, standard cylinder, no lumbar, hard casters -</td>
<td></td>
</tr>
<tr>
<td>Drop Ship from Statewide Contract Supplier</td>
<td></td>
</tr>
<tr>
<td>Part Number 333 Task - Drop Ship</td>
<td></td>
</tr>
<tr>
<td>Contract Number SWC60748</td>
<td></td>
</tr>
<tr>
<td>more info...</td>
<td></td>
</tr>
<tr>
<td>Furniture, Office, Computer and Educational</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Generation task chair, high performance arms, plastic</td>
<td>60.50 USD</td>
</tr>
<tr>
<td>base, standard cylinder, no lumbar, hard</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Using Product Comparison
Add Items from Product Comparison

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

### Product Details
- **Add to Cart**
  - Qty: 1
  - **Add to Cart**

- **Product Details**
  - **Generation task chair, high performance arms, plastic base, standard cylinder, no lumbar, hard casters** - Drop Ship
  - **Spark stacking side chair with seat pad** - Drop Ship

<table>
<thead>
<tr>
<th>Catalog No.</th>
<th>Price</th>
<th>Vendor</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>333 Task - Drop Ship</td>
<td>60.00 USD</td>
<td>Statewide Contract Supplier</td>
<td>Office furniture</td>
</tr>
<tr>
<td>444 Spark - Drop Ship</td>
<td>50.00 USD</td>
<td>Statewide Contract Supplier</td>
<td>Office furniture</td>
</tr>
</tbody>
</table>
Add Items from Product Results Page

Shop: Furniture

Sort by: Best Match

Results for: Furniture: chair

Showing 1 - 20 of 967 Results

Spark stacking side chair with seat pad - Drop Ship
from Statewide Contract Supplier
Part Number: 444 Spark - Drop Ship
Contract Number: SWC60748
Price: 50.00 USD
EA

Spark stacking side chair with seat pad - Desktop Ship
from Statewide Contract Supplier
Part Number: 444 Spark - Desktop Ship
Contract Number: SWC60748
Price: 50.50 USD
EA

Add to Cart

add favorite | compare
Add Item from Product Description

Spark stacking side chair with seat pad - Drop Ship
Supplier: Statewide Contract Supplier
Part Number: 444 Spark - Drop Ship
Price: 50.00 USD
Quantity: 1

Add To Active Cart

All Locations
<table>
<thead>
<tr>
<th>Location</th>
<th>Price</th>
<th>Quantity</th>
<th>Add to Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fulfillment Address 1</td>
<td>50.00 USD</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

Product Details
- Vendor UOM: EA
- Buyer UOM: EA
- Category: Office furniture
- Color
- UNSPSC: 56-10-17-00
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

- Make sure 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 Supplier
• Browse by Category
• Add from Product Results Page
• Add from Product Description Page
• Use Product Comparison
• Search from Punch-Out Supplier
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
Retrieving the Shopping Cart

• Two ways to open the shopping cart page:
  – Select the **Carts** 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
Retrieving the Shopping Cart

Name this cart: 2013-12-04 pdurroug 01

Fisher Scientific
Fulfillment Address 1
3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US

Product Description: Extension Cord, Extendable, for Type K Probes, 47 in.; 1/EA
Part Number: 1393580C
Manufacturer Info: 8505 - (Thermo Scientific Heating and Stirring)
Contract: SWC30747-5

Unit Price: 9.99 USD
Quantity: 1
Total: 9.99 USD

Options: Add to Favorites, Remove, More Actions
Updating the Shopping Cart

**Shopping Cart for Patricia Durrough**

- **Name this cart:** 2013-12-04 pdurroug 01
- **Continue Shopping**
- **Empty cart**

**Fisher Scientific**

Fulfillment Address 1  
3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US

**Product Description**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extension Cord, Extendable, for Type K Probes, 47 in.; 1/E A</td>
<td>$9.99 USD</td>
<td>1</td>
<td>$9.99 USD</td>
</tr>
</tbody>
</table>

**More Actions**

- Add to Favorites
- Remove

**More Info...**

- Manufacturer Info: 8505 - (Thermo Scientific Heating and Stirring)
- Contract: SWC30747-5
- Biological Supplies and Laboratory Equipment

**Center for Business Excellence**
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 (other than your default), you must indicate it in the Note to Assignee box
Assigning the Cart to a Requester

**Shopping Cart for Patricia Durrough**

- **Name this cart:** 2013-12-04 pdurrough 01
- **Have you made changes?** Update

### Fisher Scientific - More Info

- **Fulfillment Address 1:** Edit
  - 3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Extension Cord, Extendable, for Type K Probes, 47 in.; 1/EA</strong></td>
<td>9.99 USD</td>
<td>1</td>
<td>9.99 USD</td>
</tr>
</tbody>
</table>

- **Part Number:** 1393580C
- **Manufacturer Info:** 8505 - (Thermo Scientific Heating and Stirring)
- **Contract:** SWC30747-5 more info... Biological Supplies and Laboratory Equipment change...
Assigning the Cart to a Requester

Select from profile values: Dana Werner

Note To Assignee:

Assign
Close
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.