



Create a Marketplace Requisition from a Personal Shopping Cart

1. Navigate to the [GeorgiaFIRST Financials webpage](https://www.usg.edu/gafirst-fin/) (<https://www.usg.edu/gafirst-fin/>)
2. Select the **GeorgiaFIRST Financials button** (for Core Users).
3. If prompted, select the **GoWest** shield logo.
4. Login using your **UWG Username** and **Password**.
5. You will be prompted to dual authenticate using the Duo authentication method previously established.
6. From the PeopleSoft Financials homepage, select the **NavBar** (compass icon).
7. Click the **Navigator** icon.
8. Select **eProcurement** from the menu.
9. Select **Requisition**.
10. Select the **GeorgiaFIRST Marketplace** link.
11. Build your **shopping cart** (or retrieve one that you built and saved earlier) by searching for and adding items. There are two types of catalogs in the Marketplace: Hosted Catalogs and Punch-Out Catalogs. To search in the Hosted Catalogs, use the various search options on the Home page. To search in the Punch-Out Catalogs, click on the vendor icon and select the items from the punch-out vendor, place them in your shopping car in the punch-out vendor site and transfer the selected items from the punch-out to the Marketplace.
12. Select the **Proceed to Checkout** button.
13. Here you perform a final review of your shopping cart. If you need to make any updates, you can select the appropriate edit button and make changes. You can also select the **Return to Shopping Cart** link in the upper right corner of the page.
14. Select the **Issue Requisition** button.
15. Confirm the **Requisition Summary** within ePro has the same number of line items as the GeorgiaFIRST Marketplace cart.
16. Name the requisition if desired.
17. For each requisition line item, edit **Chartfields** and **Ship To** Location if necessary.
18. Add a comment on each requisition line if needed by clicking the **Call Out** (comment) icon at the end of the line.
19. Add a comment to be attached to the requisition if needed within the **Requisition Comments and Attachments** box.
20. Click the **Save for Later** button and the **Preview Approvals** link.
21. Review the approval path. Insert additional ad hoc approvers if necessary.
22. Click the **Submit** button to route the requisition for approval.



Charge a Requisition Line Item to a Different Chartstring

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Expand the line you want to modify by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Chartfields 2** tab to update the following if needed:
 - a. Account
 - b. Fund Code
 - c. Department
 - d. Program
 - e. Class
5. Go to the **Chartfields 3** tab to update the following if needed:
 - a. Project
6. Make other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.

Charge Multiple Requisition Line Items to a Different Chartstring

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Select the lines you want to change distribution information for by placing a **Checkmark** in their **Select** boxes.
3. Select the **Mass Change** button.
4. In the Accounting Information section,
 - a. On Chartfields 1 tab, enter 54000 in the **GL Unit** field.
 - b. On Chartfields 2 tab, enter the new **Chartstring Values** and then click **OK**.
5. On the **Distribution Change Options**, to apply changes to all selected lines, select the option **All Distribution Lines** and click **OK**.
6. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.



Split Distribution for a Requisition Line

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Expand the line by clicking on its **Expand Section** button.
3. Choose whether to **Distribute by** Amount or Quantity through the drop down list.
4. Locate the **Accounting Lines** section.
5. At the end of the line under the **Chartfields 1** tab, click the **Add a New Row** button (+).
6. If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.
 - a. In the original distribution line, edit the **quantity** for the revised distribution.
 - b. **Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
 - c. In the new distribution line, enter the **quantity** for the second Chartstring.
 - d. **Tab** out of the Quantity field. The **Percent** field will adjust accordingly.
 - e. Make the necessary changes to the second string of Chartfields on the **Chartfields 1, Chartfields 2, and Chartfields 3** tabs.
7. If distributing by **Amount**, continue. Otherwise, go to step 8.
 - a. In the original distribution line, edit the **amount** for the revised distribution.
 - b. **Tab** out of the Amount field. The **Percent** field should adjust accordingly.
 - c. In the new distribution line, enter the **amount** for the second Chartstring.
 - d. **Tab** out of the Amount field. The **Percent** field will adjust accordingly.
 - e. Make the necessary changes to the second string of Chartfields on the **Chartfields 1, Chartfields 2, and Chartfields 3** tabs.
8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save and Preview Approvals** button.

Insert an Ad-Hoc Approver

1. After adding items to requisition (through GeorgiaFIRST Marketplace or through Special Request), ensure you are on the **Checkout - Review and Submit** page.
2. Make any necessary changes to the line item information on the requisition.
3. Select the **Save for Later** button.
4. Click the **Preview Approvals** link to view the approval routing.
5. To insert an Ad Hoc approver, click the **Save & Submit** button.
6. Click the **green** plus (+) button in the workflow routing where you want the ad-hoc approver to be added.

7. Enter the PeopleSoft **USERID** of the Ad Hoc approver, or use the look up button to select the USERID.
8. Select either the **Approver** or **Reviewer** radio button.
9. Click the **Insert** button.
10. You should now see the additional approver in the approval chain. Click the **Apply Approval Changes** button.
11. To remove the Ad Hoc approver, select the **red** minus (-) button for that approver. Click **OK** when prompted.
12. Submit the requisition for approval by clicking the **Save & Submit** button.