



Create a Special Request Requisition

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. To enter Requisition Defaults, click the **Requisition Settings** link. Otherwise, go to step 7.
 - a. If desired, enter a name for your requisition (if left blank, the Requisition ID will be listed here after saving).
 - b. To enter a default supplier for all requisition lines, enter the **Supplier ID** or select it using the Look Up icon.
 - c. If all of your line items will have the same NIGP code, enter it in the **Category** field or select it using the Look Up icon.
 - d. If all of your line items will have the same **Unit of Measure**, enter it or select it using the Look Up icon.
 - e. To set a default **Ship To Address**, enter it or select it using the Look Up icon.
 - f. To enter a default *Attention To* for each line, enter in the **Attention** field.
 - g. In the **Accounting Defaults – Chartfields 1** tab, the Location, GL Unit, and Department originally default from your User ID. If needed, you can change the Fund Code, Department, Program, Class, and Project that are to be charged for each line item.
 - h. Click the **OK** button.
11. Select **Special Requests**.
12. For each line that you want to enter, complete the following steps (some fields may have been completed through the requisition defaults – these defaults can be overwritten on this page if needed):
 - a. Enter an **Item Description**
 - b. Enter the **Price** of the item
 - c. Enter the **Quantity** requested
 - d. Enter or select the **Unit of Measure**



- e. In the **Category** field, enter or select the NIGP Code for the item
 - f. Enter or select the **Supplier ID** for the item if you have a preferred vendor
 - g. If you have any information that needs to be sent to the vendor, shown on the receipt, and/or shown on the voucher, enter it in the **Additional Information** field and select the appropriate checkboxes.
 - h. Select the **Add to Cart** button.
 - i. Confirm the **Requisition Summary** updated with your new requisition line.
 - j. To add an addition requisition line, complete steps 8a through 8k again.
13. Select the **Checkout** button.
 14. To update a requisition line's distribution information, click its **Expand** button and make necessary updates.
 15. To update multiple requisition line's information simultaneously, select the lines to update with a check mark and then select the **Mass Change** link. Make all necessary updates, and apply to all selected lines.
 16. To enter a **comment** on an individual requisition line, click that line's **call out** (comment) icon. Enter the comments and select where you want the comment to appear. You can also include an electronic attachment, if necessary.
 17. Add a comment to be attached to the requisition, if needed, within the **Requisition Comments and Attachments** box and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
 18. Click the **Save for Later** button, then the **Preview Approvals** link.
 19. Click the **Save & Submit** button.
 20. Insert any additional approvers if necessary.

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 Chartfields1 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.