Shopping and Assigning a Cart

This job aid is designed to help you search for items to create a cart and then assign it to your designated Requester.

*Note: A Requisition cannot be sourced into a Purchase Order until all requisition lines are approved. Therefore, if you need an item quickly, it may be best to order it on its own one-line requisition. This is particularly true if other requisition lines may require additional special approvals, such as asset approval or IT approval.*

1. Log into PeopleSoft Financials.
2. Click on the GeorgiaFIRST Marketplace link. Click on the GeorgiaFIRST Marketplace button.
3. In the Shop at the Top section, enter a part number, description, or other information in the search field. Select a category if known to limit the results, and then click the Go button.
4. Use the Filter Results on the left side of the page to further narrow the results. Click on a filter hyperlink (i.e., Mandatory State Contract) or the “Add Filter” icon (funnel with green plus sign) to apply a filter.
   a. To remove a filter, click the appropriate “remove selected filter” icon (funnel with red minus sign).
5. To see more information about a product, click its name/description hyperlink. A pop-up box will display with that product’s detailed information.
   a. You may add this item to your Shopping Cart directly from this pop-up by selecting the appropriate action in the drop down menu and clicking Go.
6. To add an item to your Shopping Cart from the original search results page, enter the desired quantity in the quantity field.
7. Select the Add to Cart button.
8. Add additional items by repeating steps 3 – 7; when finished adding all items, click on the Cart Summary link (shopping cart icon) in the upper right corner of the screen to process the active Shopping Cart.
9. If desired, rename the cart different from the default name assigned, which includes the cart date, plus your User ID and sequential cart number for that date. To rename the cart, click “View My Cart”. The cart name is located in the upper left corner. If you rename the cart, click the Update button.

10. Make any necessary updates to your shopping cart, such as updating quantities or removing items. You may also return to the home/shop page or click the continue shopping link to add additional items.

11. When you have finished shopping and are ready to assign your cart to your requester, click the Assign cart button.

12. In the Assign Cart pop-up, your default requester appears and will be assigned automatically unless changed.
   a. If you want to select a different requester, click the Select from profile values link.

13. In the Note to Assignee box, if you want your items charged to a different Chartstring from your default, include the revised Chartfields or Speedchart name if applicable. Make any other comments that you want the Requester to see. This information will appear on the email notification sent to the Requester.
   a. Do not include any slashes (/) in your note.

14. Click the Assign button.

15. The system has assigned your cart to your designated requester and notified that person via email about the assigned cart.