eProcurement & GeorgiaFIRST Marketplace

eProcurement and GeorgiaFIRST Marketplace

User's Guide

for

Requesters

Information Technology Services

Version 1.0

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Introduction

This User's Guide is designed for Requesters who will be using the eProcurement module in the PeopleSoft Financials system, as well as the Georgia*FIRST* Marketplace. In this User's Guide, you will find an overview of what the eProcurement module does, as well as what the function of the Georgia*FIRST* Marketplace is. You will learn how to create an ePro Requisition from a Georgia*FIRST* Marketplace shopping cart, as well as how to create a Special Request Requisition. You will also learn how to create your own Shopping Carts in the Georgia*FIRST* Marketplace.

Topics covered in this user's guide:

- Overview of eProcurement and the Georgia*FIRST* Marketplace
- Basic Procurement Policies
- ePro Requisition Basics
- Accessing and Navigating the Georgia*FIRST* Marketplace
- Retrieving an Assigned Shopping Cart and Creating a Marketplace Requisition
- Creating a Special Request Requisition
- Working with Requisitions
- Desktop Receiving
- Requester Notifications
- Searching for Items in the Georgia*FIRST* Marketplace
- Shopping for Items in the Georgia*FIRST* Marketplace
- Georgia*FIRST* Marketplace Favorites
- User Profile in Georgia*FIRST* Marketplace

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Chapter 1: eProcurement and Georgia*FIRST* Marketplace Overview

What are eProcurement and the Georgia*FIRST* Marketplace?

eProcurement (ePro) is a module in PeopleSoft Financials that has a primary function of creating electronic requisitions and routing them for approval. In this PSFIN module, ePro is used to create requisitions for goods and services. A requisition is simply an official request to purchase goods and services.

Previously, you may have used paper requisitions, or some other form, to request an item to be purchased. That hardcopy requisition then had to be routed for approval signatures, and then sent to the Purchasing Office. The Purchasing Office then rekeyed the information into the system to create a Purchase Order to send to the vendor.

With ePro, much of this is completely automated. A requisition is created within ePro and then electronically routed for approval. The approval chain is dependent on the Chartstring charged and item type, among other things. Finally, after the last electronic approval is made, the requisition can be copied into, or sourced into an official Purchase Order that is dispatched to a vendor.

The Georgia*FIRST* Marketplace takes the use of ePro to another level. The Georgia*FIRST* Marketplace is an online shopping site that is accessed from PeopleSoft Financials. Through this online shopping site, users can shop online for contract items from a variety of state and institution approved vendors. Users can select items by placing them in an online shopping cart. They assign these shopping carts to a designated requester when ready, and the requester then turns their shopping cart into an ePro requisition.

Benefits of ePro and the Georgia*FIRST* Marketplace

With this new system of online shopping and electronic requisitioning, you will see some immediate benefits, including:

- Reduction in paper forms routing through different offices
- Online browsing and shopping for items
- Comparison shopping
- You only need one login to shop from multiple vendors
- You can request goods from multiple vendors through one shopping cart
- All items in the Georgia*FIRST* Marketplace are contractually approved items

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- Faster routing for approvals
- Ability to save items as 'favorites' in the Georgia*FIRST* Marketplace

Types of Roles Involved

In order for the ePro and Georgia*FIRST* Marketplace functionality to work properly, users are set up with specific roles and responsibilities. They include:

- Shoppers: These users are the ones who select items in the Georgia*FIRST* Marketplace and place them into shopping carts to be assigned to their Requester.
- Requesters: These users take the shopping carts created by Shoppers and turn them into ePro Requisitions. Requesters can also build their own shopping carts, just like Shoppers.
- Approvers: These users are set up to approve ePro Requisitions.
- Buyers: These users are responsible for ensuring approved requisitions are sourced into a Purchase Order and dispatched to the vendor.
- AP Personnel: The AP office processes the resulting invoice from the vendor.
- ePro Administrator: This user monitors the approval workflow, to make sure requisitions are worked in a timely fashion
- Local Security Administrator: This user is responsible for setting up all users in their appropriate roles.

As a Requester, you are primarily responsible for creating ePro requisitions from shopping carts created in the Georgia*FIRST* Marketplace either created by you or by Shoppers to whom you are assigned. In addition, you are responsible for creating Special Requisitions, which are requisitions containing non-contract/non-catalog items and therefore, not initiated from a Georgia*FIRST* Marketplace shopping cart. Finally, you may be responsible for receiving items in the ePro system so that vendor invoices resulting from ePro requisitions can be paid.

Role Setup

In order for PeopleSoft Financials and the Georgia*FIRST* Marketplace to know what actions you can and cannot perform in the systems, each role requires a specific setup. While role setup is accomplished in the PeopleSoft Financials system which transfers to the Georgia*FIRST* Marketplace, the PS assigned roles inherit permissions within the Georgia*FIRST* Marketplace. In this section, we are going to discuss the setup involved. It includes Security Roles, Requester Assignment, and User Preferences. There is also some manual setup required by Shoppers within Georgia*FIRST* Marketplace, such as Requester Assignment.

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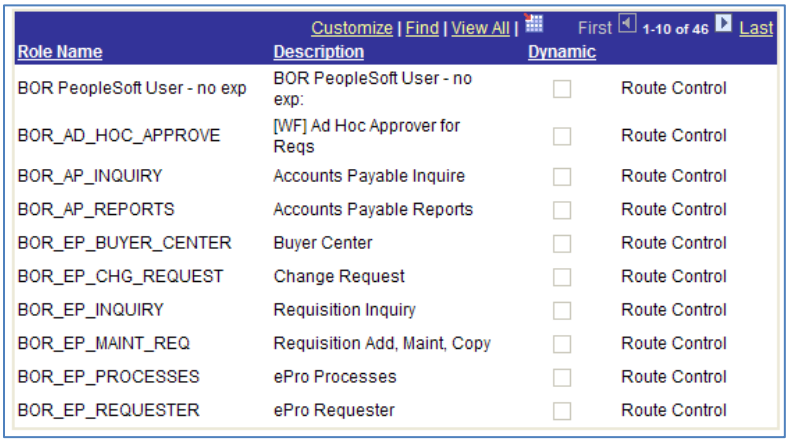
Security Roles

Your Local Security Administrator assigns specific security roles to each user. These Security Roles authorize you to access certain pages within PeopleSoft and when assigned to a Georgia*FIRST* marketplace user, that user inherits certain permissions within Georgia*FIRST* Marketplace. This is why you may be able to see eProcurement in the menu, but not see Accounts Payable, or you can assign a cart within Georgia*FIRST* Marketplace but no issue a requisition, for example.

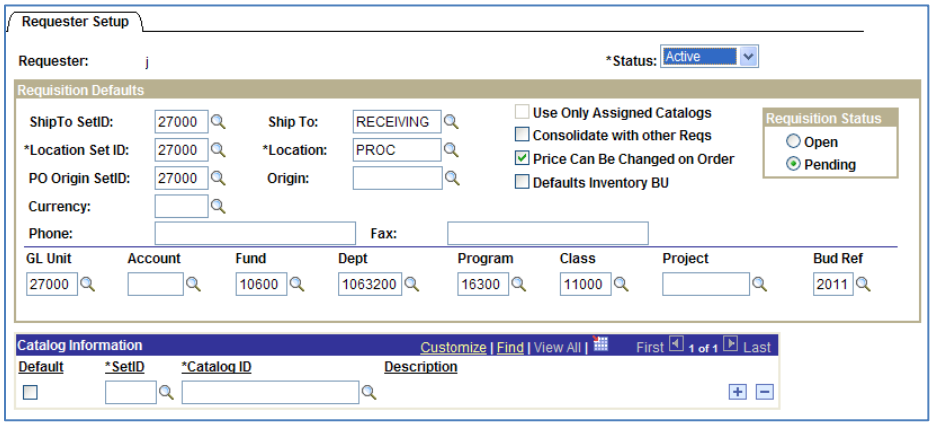


Customize | Find | View All | First 1-10 of 46 Last

Role Name	Description	Dynamic	
BOR PeopleSoft User - no exp	BOR PeopleSoft User - no exp:	☐	Route Control
BOR_AD_HOC_APPROVE	[WF] Ad Hoc Approver for Reqs	☐	Route Control
BOR_AP_INQUIRY	Accounts Payable Inquire	☐	Route Control
BOR_AP_REPORTS	Accounts Payable Reports	☐	Route Control
BOR_EP_BUYER_CENTER	Buyer Center	☐	Route Control
BOR_EP_CHG_REQUEST	Change Request	☐	Route Control
BOR_EP_INQUIRY	Requisition Inquiry	☐	Route Control
BOR_EP_MAINT_REQ	Requisition Add, Maint, Copy	☐	Route Control
BOR_EP_PROCESSES	ePro Processes	☐	Route Control
BOR_EP_REQUESTER	ePro Requester	☐	Route Control

Requester Assignment

In order to create a requisition in the system, you must be set up as a "Requester" in the system. Someone such as your Local Security Administrator or ePro Administrator will create you as a "Requester". It is through this Requester Setup that the following Defaults are set:



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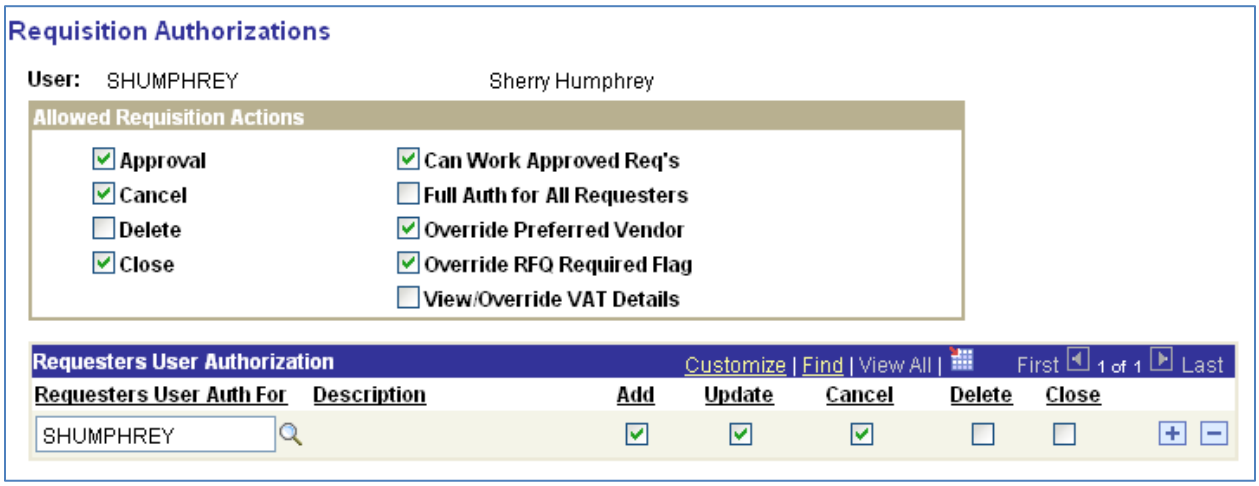
User Preferences

In addition to being created or setup as a Requester in the system, a requester must have their user preferences established prior to creating requisition. Through User Preferences, allowable requisition actions are set up, such as canceling or closing a requisition. In addition, it is through the User Preferences that you can be authorized to create or update requisitions on behalf of other requesters.



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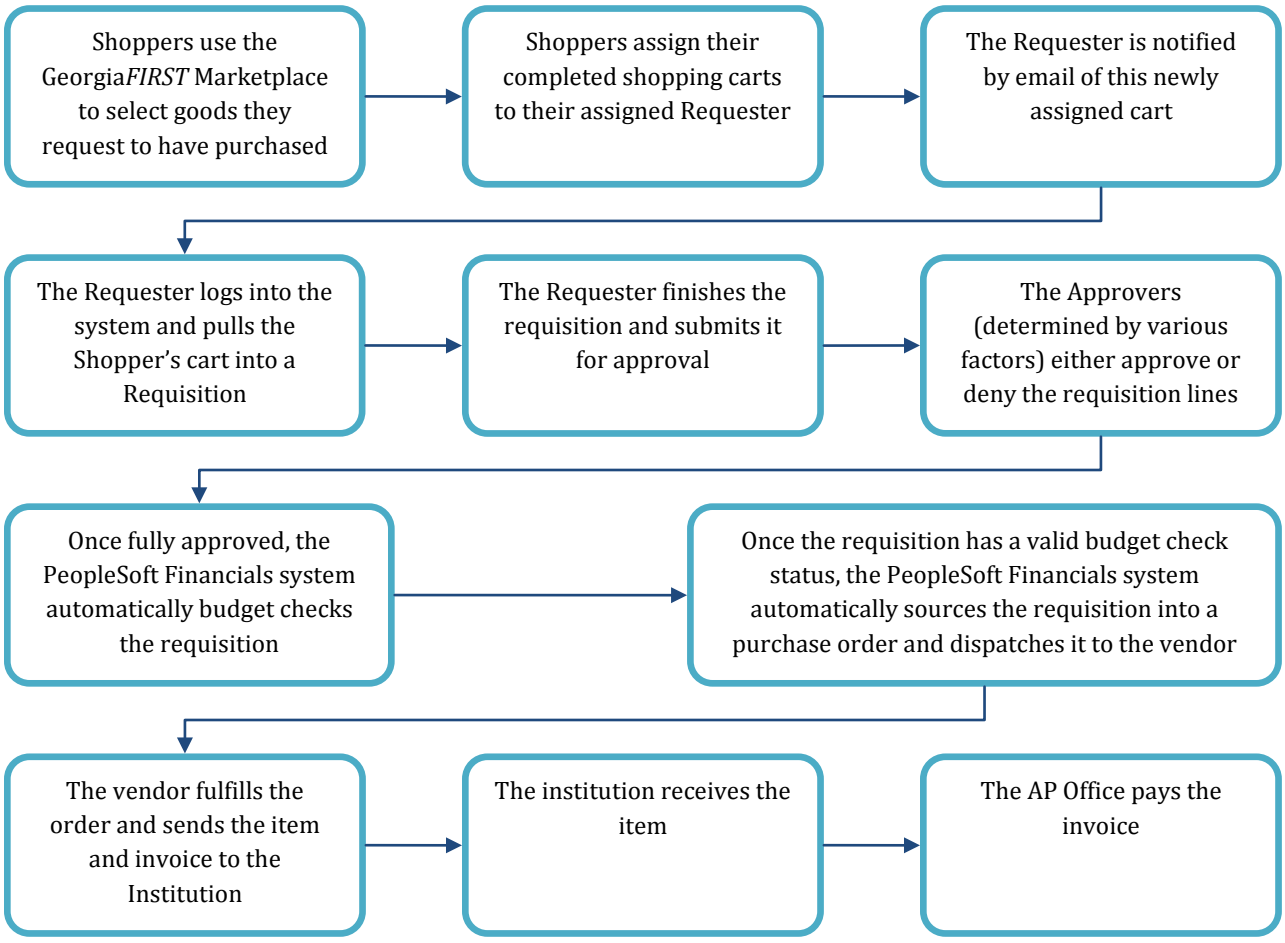
Process Flow

Now that you know all of the roles involved, below is the process flow beginning with Shoppers and ending with the Accounts Payable office.



How does PSFIN pass along user information to Georgia*FIRST* Marketplace?

In order for you to begin using the Georgia*FIRST* Marketplace, your local security administrator first sets you up in the PeopleSoft Financials system, with the correct roles and authorizations. By using your PeopleSoft User ID and Password, you can access the PeopleSoft system. Once in PeopleSoft, you simply proceed to the Georgia*FIRST* Marketplace through a hyperlink.

By logging in through PeopleSoft, the system sends specific user information to the Georgia*FIRST* Marketplace, allowing you to log in only once and shop from multiple vendors. In addition, your

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PeopleSoft User ID is used to store a set of default Chartfields that will be charged for your requested goods, unless otherwise specified.

How Do Approvals Work?

As mentioned earlier, once the Requester builds the requisition in ePro from a GeorgiaFIRST Marketplace shopping cart, the Requester submits it for approval. In ePro, approvals are completed through Workflow. The ePro module looks at certain values in the requisition and automatically routes it to all necessary approvers. Approval routings are based on the individual lines in a requisition. Below is a quick summary of how approvals flow for requisitions originating from the Georgia*FIRST* Marketplace:

- First, all requisitions are routed to a Department Manager for approval. The correct Department Manager is determined by the Department Chartfield used on the requisition line.
- If a Project or Grant is indicated on the requisition line also, then the line is routed to the assigned Project Manager for approval as well.
- The following approval steps are customizable by institution. Therefore, not all of these steps will apply to your requisition line. Check with the ePro Administrator at your institution for configuration details.
    - Agency Fund Approval: If an agency fund is entered on a requisition line, the line will be routed to the approver responsible for approving agency fund transactions.
    - Amount Approval: If a requisition line is over a certain amount (i.e., $10,000 or greater), it will be routed to a special approver responsible for approving these high-amount lines. This is specified by each institution.
    - Item Type Approvals: These approvals are determined by the type of item being requested through the requisition line account number, NIGP code, or both. The special item types include:
        - Assets
        - Audio Visual Equipment
        - Chemical Goods
        - Facilities Planning and Design
        - IT Hardware and Software
        - University Relations (i.e., anything for media contact, logo use, or copyright items)

For Special Requisitions (created for non-catalog/non-contract items not in the Georgia*FIRST* Marketplace), the approval chain can be slightly different. All requisitions are still routed to a Department Manager and Project Manager (if a project is indicated on the requisition line).

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- The agency fund approval stage is optional by institution. If enabled, the requisition will route to your institution's agency fund approver if an agency fund is entered on the requisition distribution line.
- Amount Approval is optional for Special Requisitions.
- The next stage is the item type approvals, which are specific to each institution. This can also have institution-specific criteria defined.
- For Special Requisitions, the final approval stage is the Buyer Approval. This stage is also optional for each institution, and can also be used for Marketplace Requisitions. The Buyer is someone in the Purchasing Department, who is responsible for ensuring the purchase meets all State of Georgia purchasing standards. The Buyer approval step is necessary for Special Requisitions since these items are not from approved contracts in the Georgia*FIRST* Marketplace.

Once your requested items have been placed on a requisition and are routed for approvals, there are time limits in place in which each approver act on the requisition. This ensures that your requisition does not sit around waiting for a required approver for an indefinite amount of time.

When a requisition is submitted for approval, the system routes it to the appropriate approvers' Worklists accordingly, within PeopleSoft Financials. The Worklist is a queue which holds items waiting for approval. Once an approver works a transaction, it is removed from their Worklist.

Once the requisition hits an Approver's Worklist, that approver has 3 days to either approve or deny it, before they get a reminder notification from the system. If the requisition sits in an Approver's Worklist for 4 days without being approved or denied, the system removes the requisition from that Approver's Worklist, the transaction is escalated, and the ePro Administrator reassigns the transaction to another approver. After the Approver has approved the requisition, the system automatically moves it onto the next required Approver's Worklist. If an Approver denies a requisition, the system returns it to the Requester. Denied requisition lines can be edited and resubmitted for approval, or canceled if necessary.

If an approver will be out of the office for an extended period of time and will be unable to work the requisitions in their Worklist, they have the ability to assign an alternate to serve in their place. This way, their Worklist does not build up while they are out of the office, and requisition approval is not delayed.

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Chapter 2: Contract Types

Even though the suppliers and items in the Georgia*FIRST* Marketplace are all contractually approved, it is helpful to know what the contract types are. There are six types of contracts in the GeorgiaFIRST Marketplace. These contract types are automatically mapped to a Purchase Order Type in PeopleSoft Financials.

If a single Purchase Order includes two contract types, the PO type is sent to "MUL" for multiple.

Contract Type	Custom Catalog Attribute	Order of Precedence	Purchase Order Type	Contract Number
Intergovernmental Agreement	Intergovernmental	0	IGA	Goes to the PO Line Item
Mandatory State Contract	Mandatory State Contract	1	SWCM	Goes to the PO Line Item
Agency Contract	Agency Contract	2	AC	Goes to the PO Line Item
Statutory Mandatory	Statutory Mandatory	3	MAN	Goes to the PO Line Item
Convenience State Contract	Convenience State Contract	4a	SWCC	Goes to the PO Line Item
Statutory Preferred	Statutory Preferred	4b	PRF	Goes to the PO Line Item

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Chapter 3: eProcurement Requisition Basics

Before we learn about creating Marketplace Requisitions, we first need to understand how eProcurement requisitions are built and how they work. When building an eProcurement Requisition, there are three steps in the process: Defining the requisition, Adding items or services, and then reviewing and submitting. In this chapter, we will review each step.

Remember, there are two types of requisitions:

- Marketplace Requisition that is built from selected contract/catalog items in the Georgia*FIRST* Marketplace
- Special Request Requisition that is built from non-contract/catalog items without accessing the Georgia*FIRST* Marketplace

Creating a Requisition

To begin creating an eProcurement Requisition, you will need to access eProcurement through the PeopleSoft Financials core system. Once in eProcurement, select Create Requisition.

Step #1 – Define Requisition

Once you have started your requisition, you can select the "1. Define Requisition" link at the top of the page to complete this step. Step #1 is an optional step. Here you can specify defaults that will apply to all lines of the entire requisition. You will not be allowed to define requisition defaults for a Marketplace requisition. However, when creating a Special Request Requisition, setting up your requisition defaults may be useful.

On the Define Requisition page, you can specify a Requisition Name if you want to. If you do not specify a Requisition name, the Requisition ID will be populated in this field upon saving the requisition.

The Line Defaults section is used to enter values that will default to all lines added to the requisition. Once you begin building your requisition, you can override these defaults on the individual lines if necessary. When using the Line Defaults, keep in mind the following:

- If you have a Department ID populated on your User Preferences page, it will override the value you enter on the line defaults page.
- The account code defaults from the NIGP code. The account code defaulting from the NIGP code will override anything you enter on the line defaults.

Therefore, if you need to make changes to either the Department or Account on requisition lines, you will need to update those fields on step 3 and not on the step 1 defaults page.

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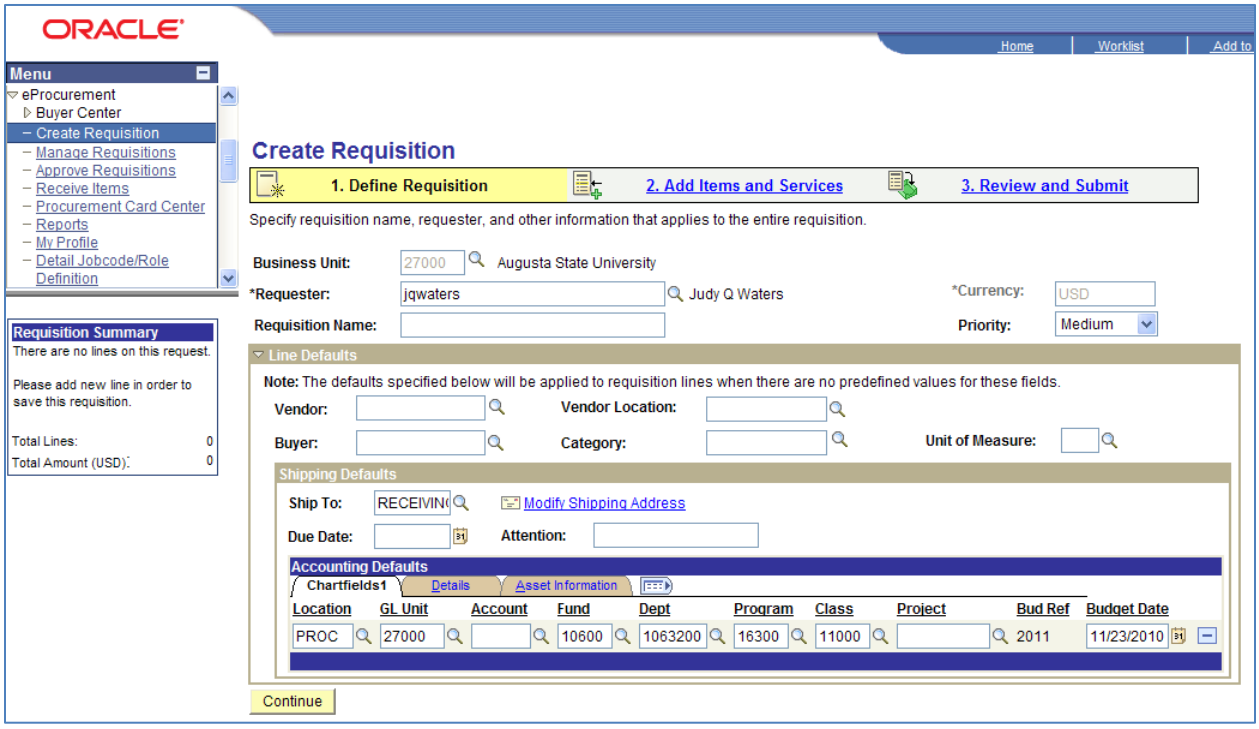

The Line Defaults that you can specify on this page that will carry over to every requisition line you add includes:

- Vendor ID
- Buyer
- Category (NIGP Code)
- Unit of Measure
- Ship To Code
- Due Date (N/A for GeorgiaFIRST Marketplace Requisitions)
- Attention To
- Chartfields

Once you are finished specifying defaults for the Special Request Requisition (remember, this is optional), you can proceed to Step #2, which is Adding Items and Services.

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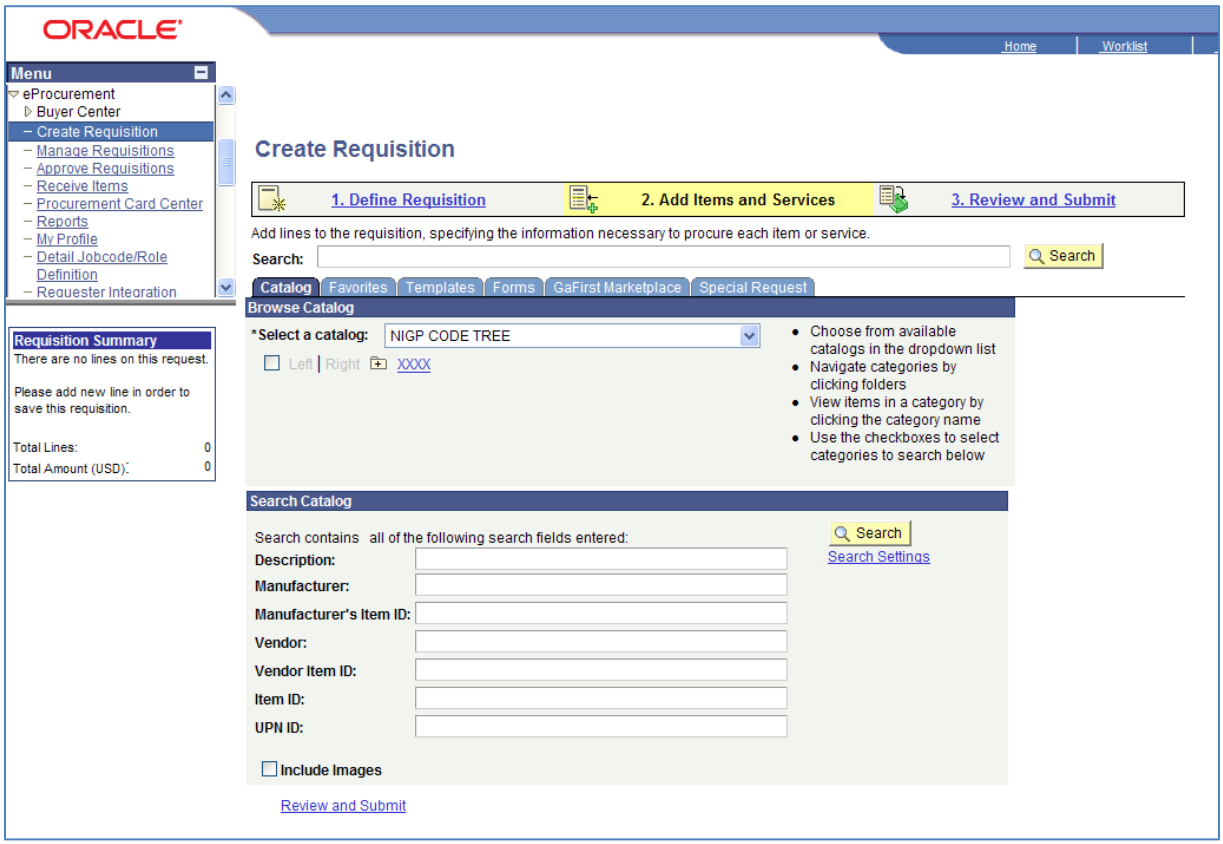
Step #2 – Add Items and Services

There are two ways to add requisition line items: Add them through a Georgia*FIRST* Marketplace or Add them manually for a Special Request. When creating a requisition, you are cannot combine Marketplace Requisition items with Special Request Requisition items.

When creating a Marketplace Requisition, you will select the GA *FIRST* Marketplace tab. When creating a Special Request Requisition, you will select the Special Request tab. We will go into the details of each type of requisition later in this user guide. Here, we will just provide an overview.



Once you add items to your requisition, the Requisition Summary (or shopping cart) will indicate how many requisition lines have been added and what the total amount of the requisition is. As you add additional items, the Requisition Summary (shopping cart) will update. After you have added all requisition line items, you can proceed to Step 3, which is reviewing and submitting your requisition.

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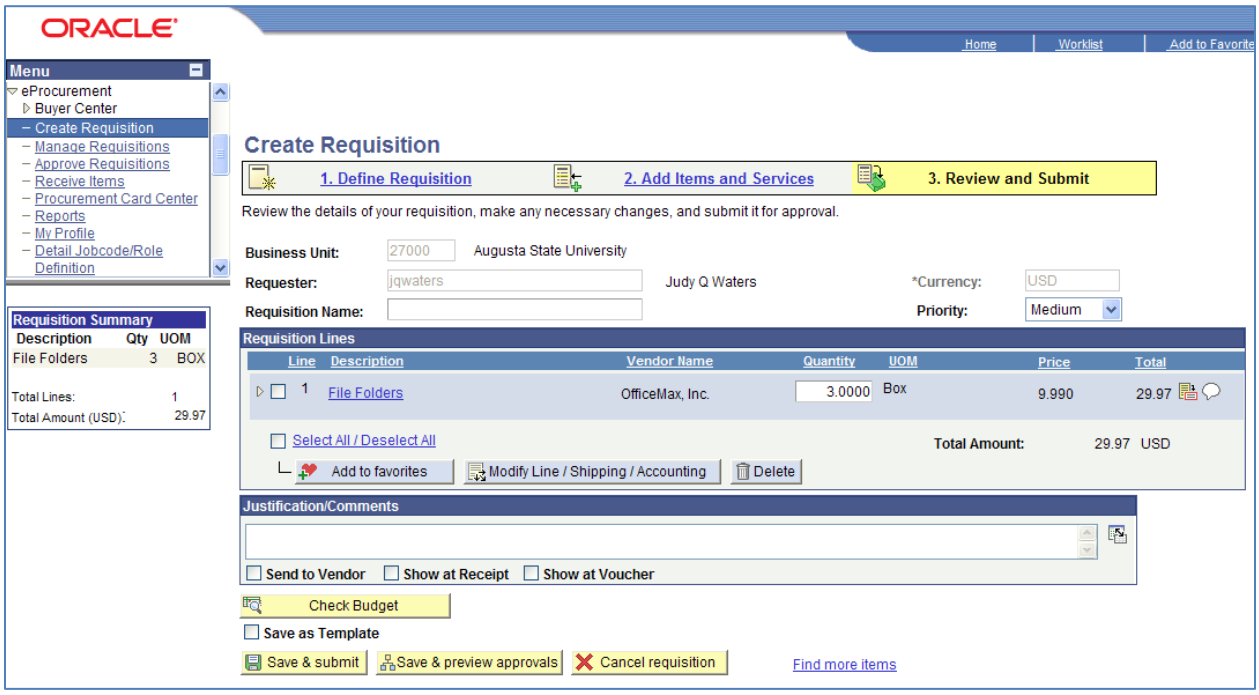
Step #3 – Review and Submit

On the Review and Submit page, you can review all of your requisition lines and make any necessary changes. You can make changes manually to individual lines or to multiple lines through the "Modify Line/Shipping/Accounting button. You can also enter comments or attach documents on requisition lines.



Before submitting the requisition for approval, you have the chance to save it and preview the approval path the requisition will follow. Also, when previewing the approval chain, you have the ability to insert additional ad hoc approvers when necessary.

Once you submit the requisition for approval, the requisition line status changes to "Pending". And the requisition is routed to the first approver's Worklist.

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Chapter 4: Accessing and Navigating the GeorgiaFIRST Marketplace

As a Requester, you have the ability to do the following:

- Create a Marketplace Requisition from a shopping cart assigned to you, and edit the shopping cart assigned to you, or if necessary, reassign the cart back to the original shopper
- Create a Marketplace Requisition from a shopping cart you created
- Create a Special Request Requisition that does not originate from the GeorgiaFIRST Marketplace

Because the GeorgiaFIRST Marketplace plays such a prominent role with the creation of requisitions, we are going to first explain how to access and navigate the GeorgiaFIRST Marketplace.

Logging into PeopleSoft Financials Core System

As a Requester, you will access the GeorgiaFIRST Marketplace and the eProcurement module through the PeopleSoft Financials Core System. Depending on what you are doing, you will either go to the GeorgiaFIRST Marketplace through the eProcurement module in order to create or process a shopping cart assigned to you.

How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Core System

1. On the PeopleSoft Financials login page, enter your **User ID** and **Password**. Remember, both of these items are case sensitive. If you try to log in more than five times with an incorrect User ID and/or password, the system will lock you out.
2. Click the **Sign In** button.
3. Select **eProcurement** in the menu.
4. Select **Create Requisition**.
5. Select **Step 2 – Add Items and Services**.
6. Select the **GeorgiaFIRST Marketplace** tab.
7. Select the **GeorgiaFIRST Marketplace** link.

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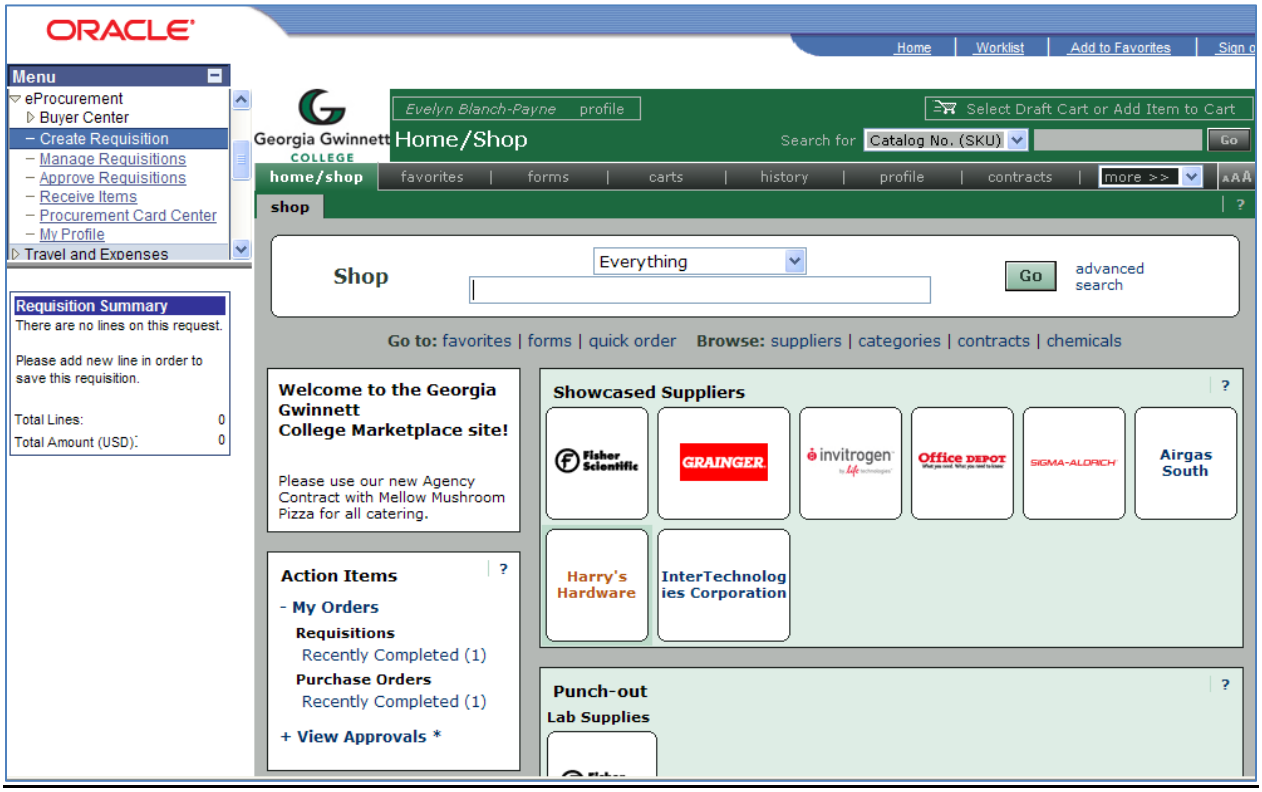

8. Notice that the Georgia*FIRST* Marketplace is now displayed in your main window. You are now able to start navigating through the marketplace.

Georgia*FIRST* Marketplace Home Page

The first step in using the Georgia*FIRST* Marketplace is knowing where things are located, and how to navigate the home page. Whenever you wish to return to the home page, simply click the home/shop tab and select the shop sub-tab. Or you can click the Board of Regents logo in the upper left corner to return to the home page. It is important to be able to navigate through the Georgia*FIRST* Marketplace so that you can build and process your own shopping carts , as well as edit those shopping carts that have been assigned to you by other shoppers.

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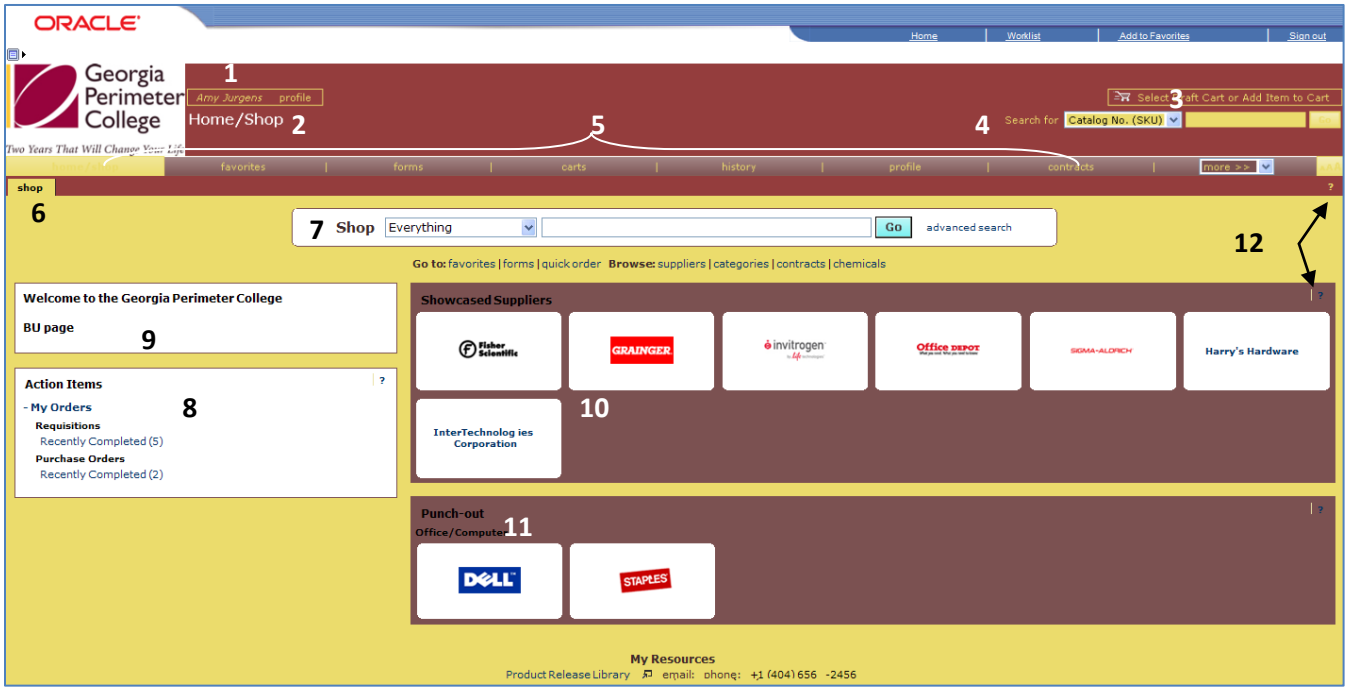

1. **User Information:** In the upper left corner of the Georgia*FIRST* Marketplace, you will find your User Information. In this area is the user name, a link to the user profile, and the logout link.
2. **Screen Title:** The screen title indicates the title of the current page that you are on.
3. **Cart Summary:** The upper right corner displays a summary of your shopping cart. Included is the cart name, the number of items in the cart, and the total cart amount. You can click on this shortcut to go directly to the cart page to review, update, and process your shopping cart.
4. **Quick Search:** This quick search feature allows for a variety of searches to be executed anywhere in the marketplace. To use this feature, a search option must be selected and search criteria must be keyed in. Clicking the "Go" button executes the quick search and displays the results in the appropriate search results screen.
5. **Navigation Tabs:** Across the top of the Georgia*FIRST* Marketplace are the primary navigation tabs. By clicking on a tab, the screen refreshes to display sub-tabs for the topics or functions covered in that particular part of the Marketplace. The tabs that you see are dependent on your permissions. The order of these tabs may be changed in your User Profile.
    - Home/Shop: This tab is used for shopping and provides quick access to other parts of the application.
    - Favorites: Use this tab to create and define personal favorites folders and items.
    - Carts: View and modify the current shopping cart, create new carts, delete existing carts, and prepare the active cart for processing.
    - History: Contains a repository of various documents within the application.
    - Profile: Used to review and update personal user information.

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6. **Navigation Sub-Tabs:** Once you select a tab, additional sub-tabs may be available. If sub tabs are available, they will be located just beneath the primary navigation tabs.
7. **Shop at the Top/Shop Quick Search:** You can access simple and advanced search from this feature. This is the primary area to perform item searches. We will cover search features later in this chapter.
8. **Action Items Box:** This box contains quick links to important information for the user logged in. Depending on your role, the information displayed will vary.
9. **Organization Message:** This box is an important tool system administrators use to communicate with the Georgia*FIRST* Marketplace community. This message box is available to all users and is a common way to communicate important upcoming dates, information about new suppliers, links to training, and more.
10. **Purchasing Showcase:** The Purchasing Showcase is used to highlight suppliers recommended by your institution's Procurement Department.
11. **Punch-Out:** A "punch-out" supplier is a site maintained by the actual suppliers. Catalogs in punch-out sites can still be customized for an individual institution. Punch-out suppliers can be accessed from this area of the screen.
12. **Online Help:** Online Help is accessed by clicking on the question mark anywhere in the application or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays.

Leaving the Georgia*FIRST* Marketplace

When you are ready to leave the Georgia*FIRST* Marketplace and go to another menu selection in PeopleSoft, you can simply select that menu selection. When you are ready to close PeopleSoft, select the Sign Out link in the top right corner. You do not have to log out of the Georgia*FIRST* Marketplace since you accessed it through PeopleSoft, which remains open while you are in the marketplace.

Remember, PeopleSoft will automatically log you out for security purposes after 60 minutes of inactivity

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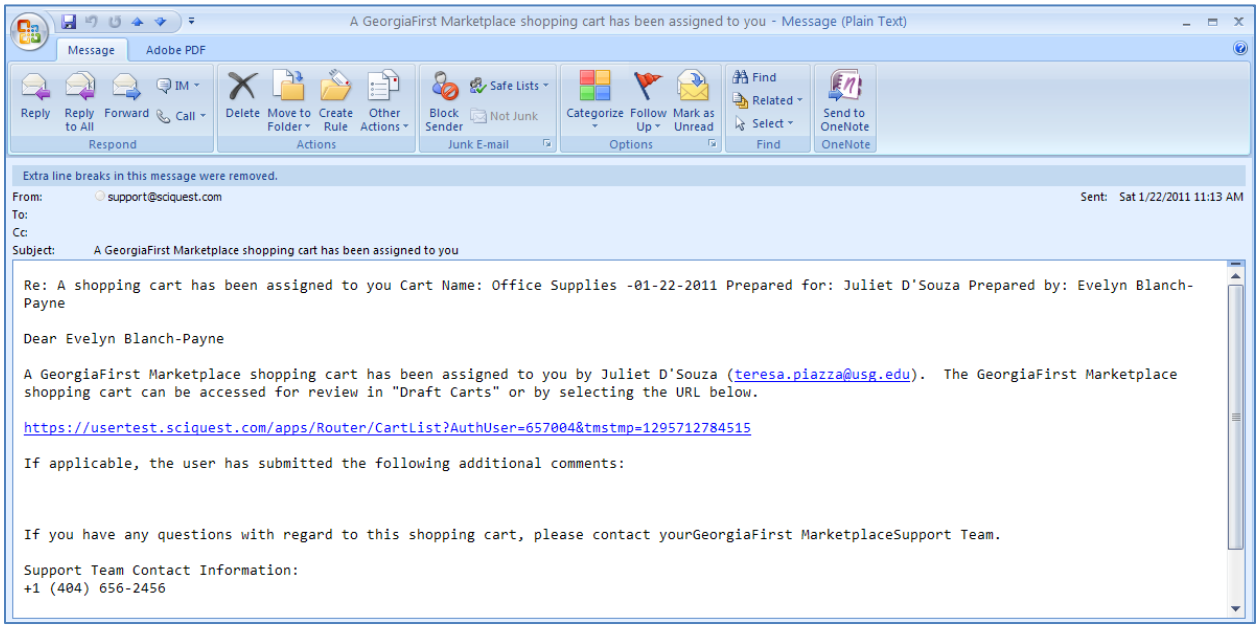
Chapter 5: Retrieving an Assigned Cart and Creating a Marketplace Requisition

As a Requester, your primary role is to retrieve the shopping carts assigned to you and then create a requisition from those shopping carts. In this chapter, you will learn how to build a marketplace requisition and submit it for approval.

Notification

When a Shopper assigns a cart to you, you will be notified via email. In addition, when you enter the Georgia*FIRST* Marketplace, you will easily be able to see all of the shopping carts assigned to you.



Once you are notified of your assigned shopping cart, you can begin the process of building the Marketplace Requisition

Create a Basic Marketplace Requisition

To begin a Marketplace Requisition, you are going to start in the eProcurement module and create a new requisition.

After logging into PeopleSoft Financials, go to eProcurement in the menu, and then select Create Requisition.

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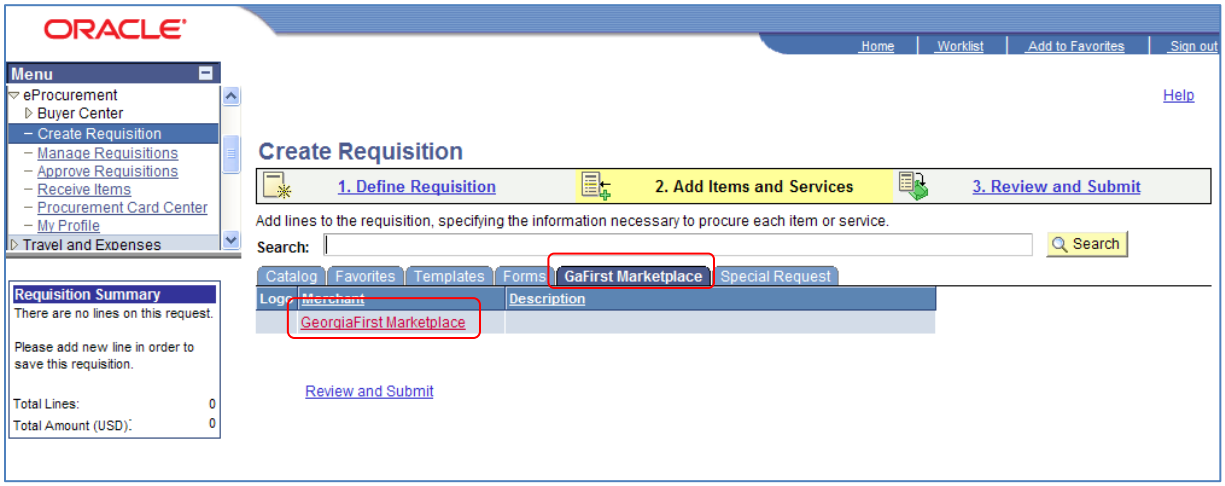
On "**Step 2 – Add Items and Services**", you will need to select the **GeorgiaFIRST Marketplace** tab, and then the **GeorgiaFIRST Marketplace** link. By doing this, you will be creating this requisition from a Georgia*FIRST* Marketplace shopping cart.



Once you get into the Georgia*FIRST* Marketplace, there are two additional ways to see if any carts have been assigned to you. First, on the **home/shop** page, you can see in the Action Items box whether or not you have any carts assigned to you. You may need to expand the "Approvals" section by clicking on the + button.

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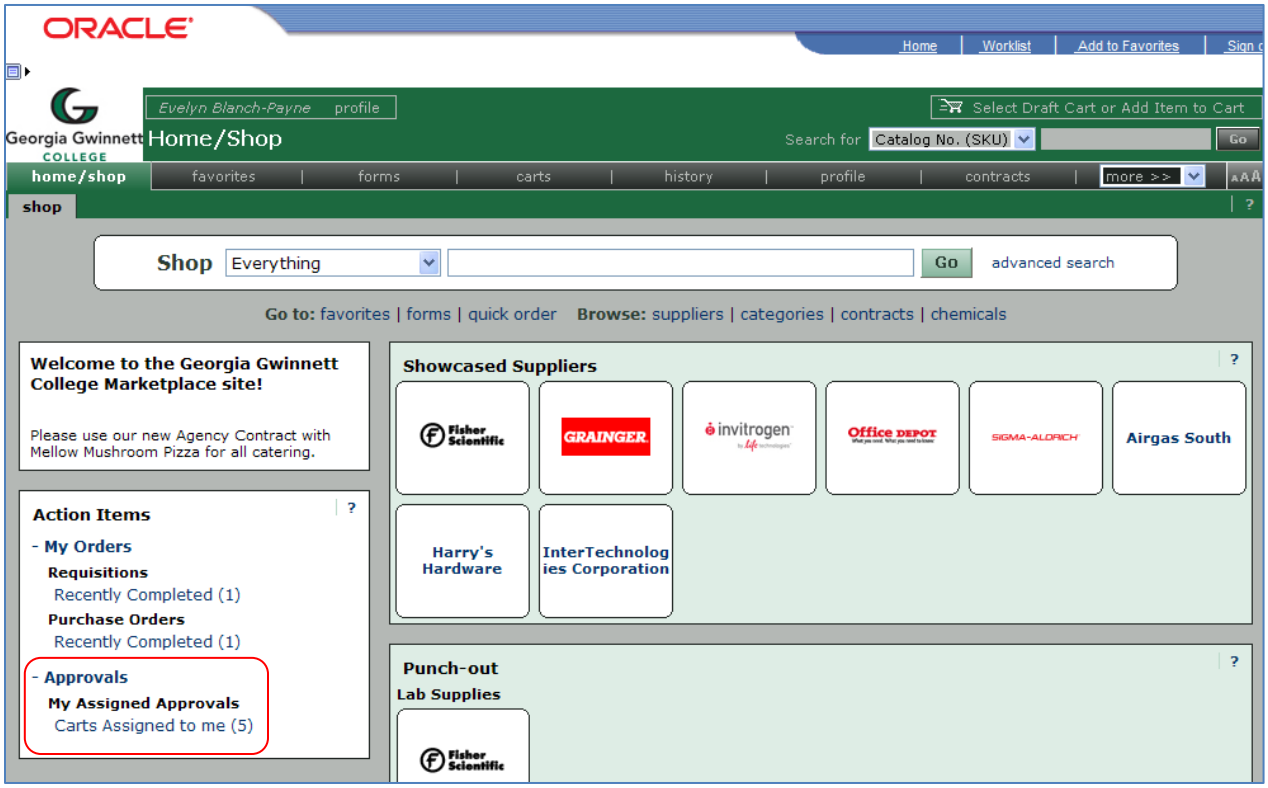
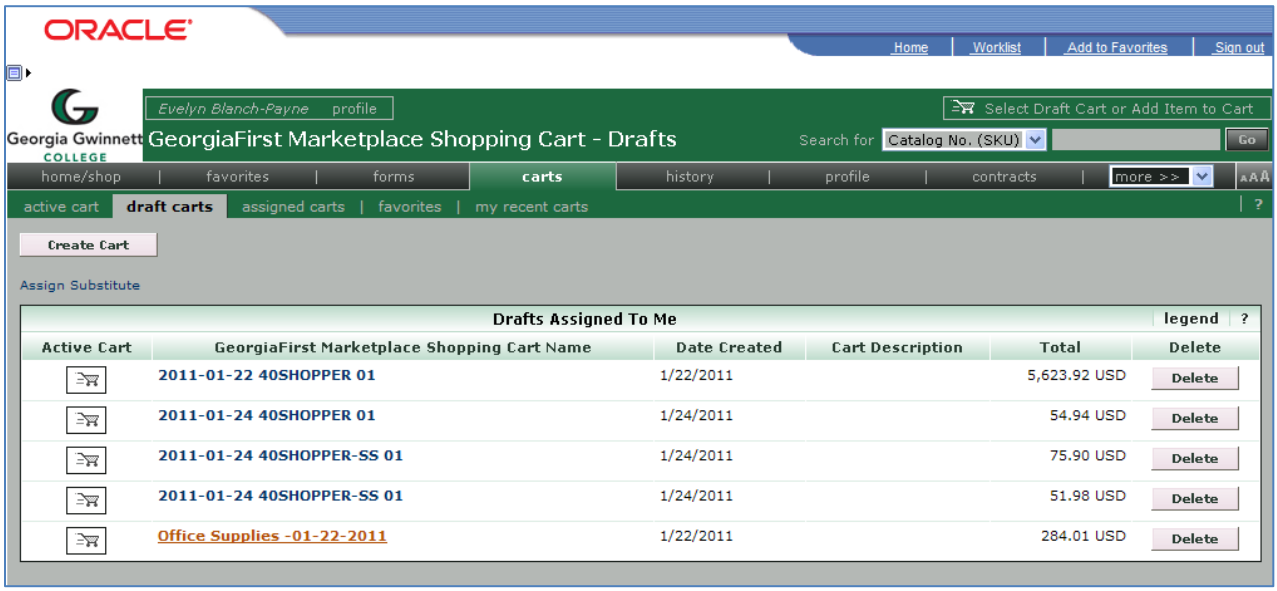


Second, if you go to the **Carts** tab and select the **draft carts** sub-tab, you will see an area titled "**Drafts Assigned to Me**" if you have any carts assigned to you. If you select the link in the **Action Items** box, the system will bring you to this draft carts sub-tab.



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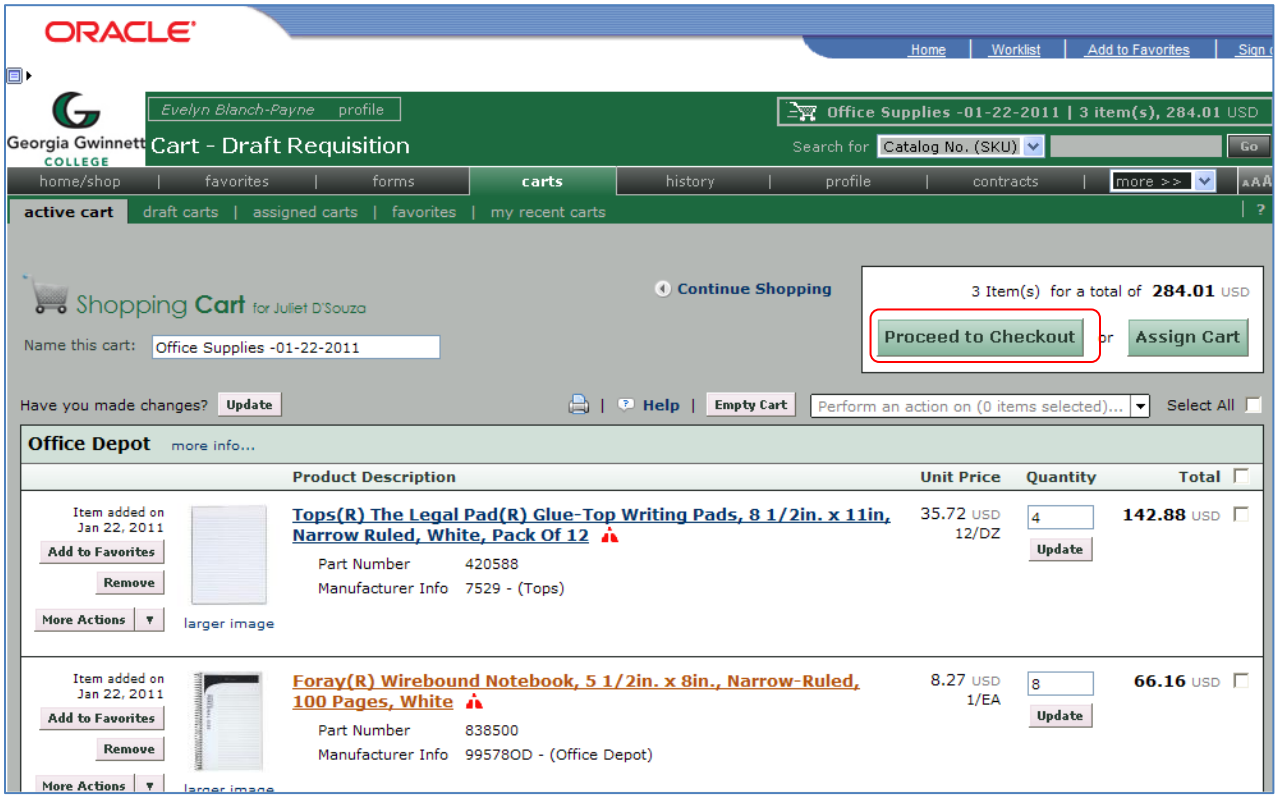
To begin reviewing the order, click on the shopping cart icon or shopping cart name. You are able to edit the shopping cart by changing quantities, removing and adding line items, and updating contract information if necessary. We will review how to do this later in the chapter.



When the shopping cart is ready to be pulled into an ePro Requisition, from the Shopping Cart, you can select the "**Proceed to Checkout**" button, and then select the "**Issue Requisition**" button. This pulls the Marketplace shopping cart into eProcurement.

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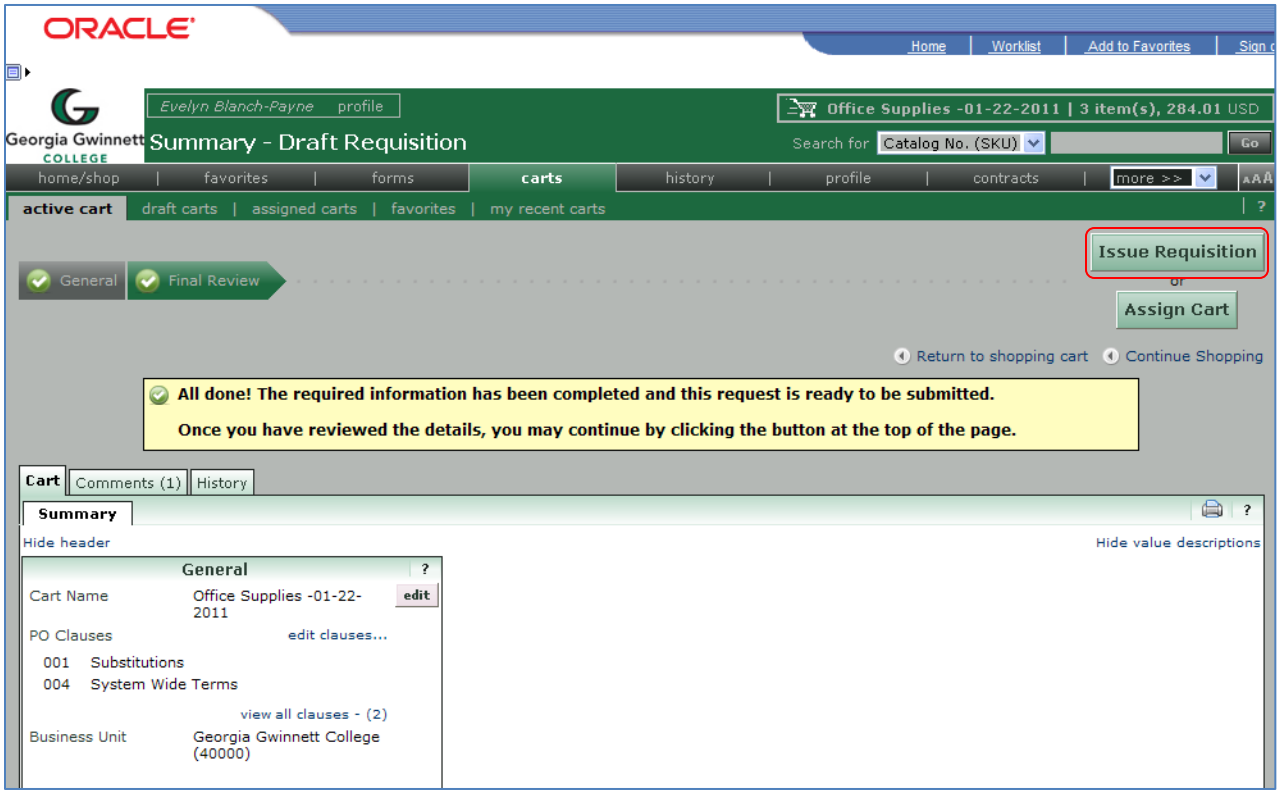

Once your shopping cart has been pulled into eProcurement, the original Shopper is notified via email that their shopping cart is now being worked in ePro. From here, you should see your Requisition Summary box on the left-side of the screen populate with your Marketplace line items. You will not be able to select the Special Request tab to add additional items.

The system automatically returns you to Step 3, which is reviewing and submitting your requisition. On this page, if you are creating a Shopper's requisition, you will insert the shopper's User ID in the Requester field. By completing this step, this enables the system to tie the requisition to the shopper so that they will receive all future notifications regarding the requisition. In addition, the shopper's defaults including Chartfields will be assigned to each requisition line item, which is used in the approval process.

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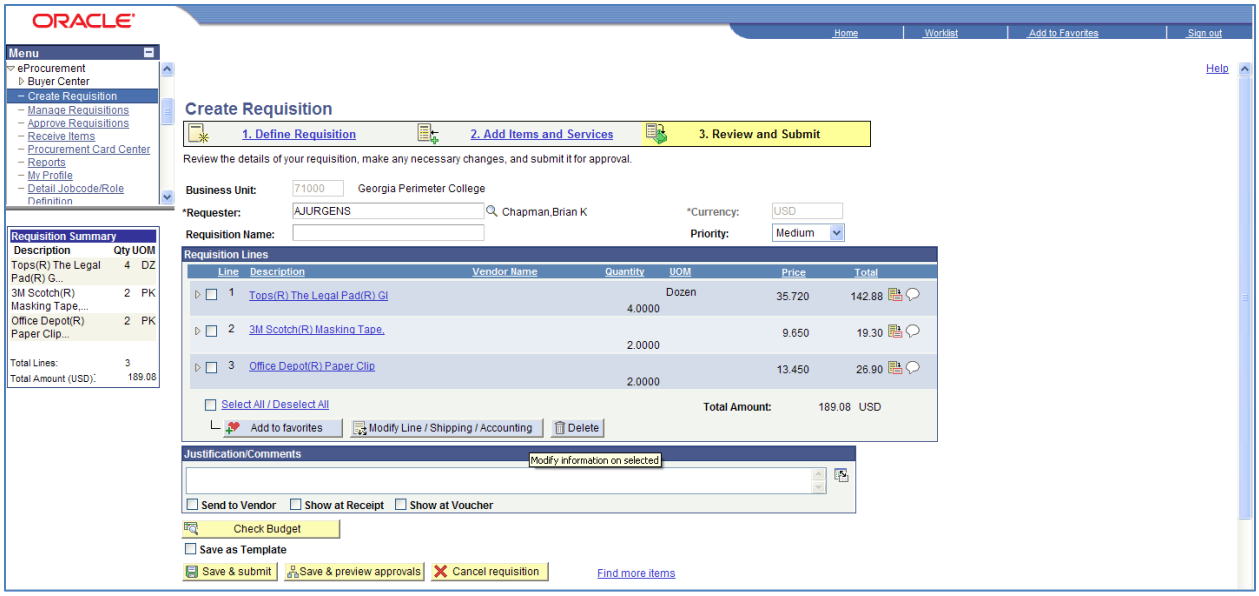

It is also here that you can update the requisition line distribution if needed. For example, if the Shopper indicates in their cart comments to you that a different department or project needs to be charged, you would update this information on step 3. This page is also where you can indicate whether the item needs to be identified as an asset. Finally, if you need to submit any header comments regarding this requisition, you can do so at the bottom of the page. You can also enter comments individually on the requisition lines

After making any necessary edits, you will need to select the "**Save and Preview Approvals**" button. Here you will see the approval path this requisition will follow. The exact approval path depends upon the department and project charged, as well as other criteria specified by your institution. If you need to insert an additional ad hoc approver, you will do so on this page. When you are ready to submit your requisition for approval, you click the **Submit** button. At this point the system routes the requisition lines to all required Georgia*FIRST* approver's Worklist.

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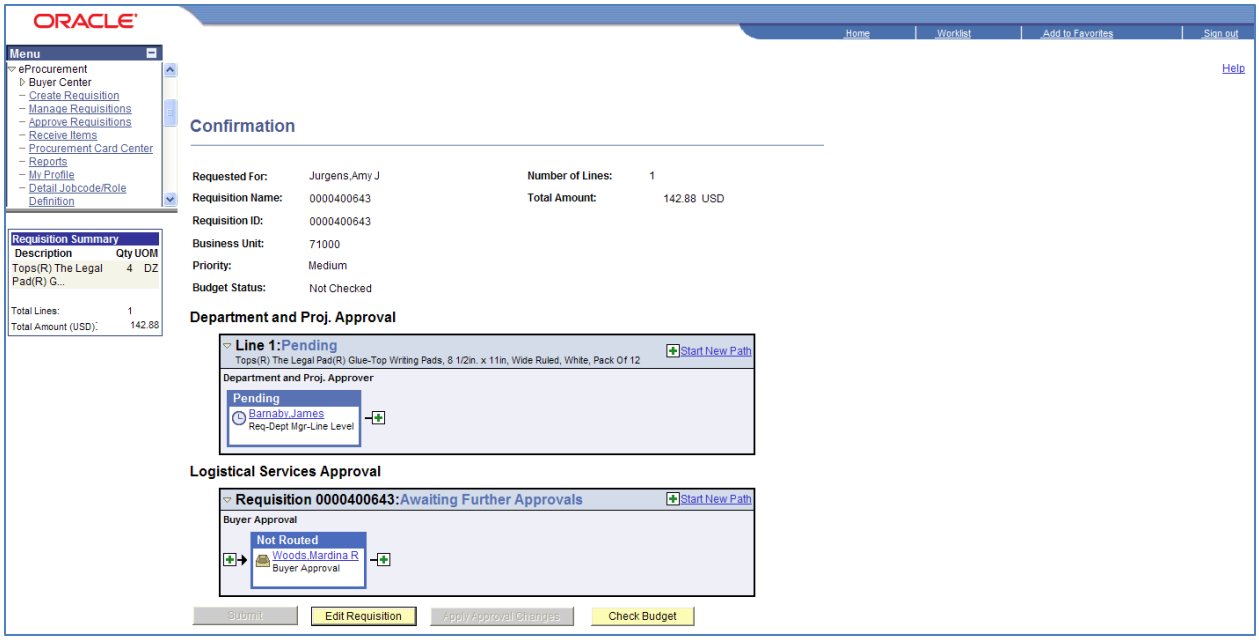

The following "How To" lists the steps of creating a basic Marketplace Requisition. Subsequent sections in this User Guide will detail additional scenarios when creating Marketplace Requisitions.

How To: Create a Basic Marketplace Requisition from an Assigned Shopping Cart

1. Log into PeopleSoft Financials Core System.
2. In the menu, select **eProcurement**.
3. Select **Create Requisition**.
4. On **Step 2 – Add Items and Services**, select the **GeorgiaFIRST Marketplace** tab.
5. Select the **Georgia*FIRST* Marketplace** link.
6. In the Georgia*FIRST* Marketplace, select the **Carts** tab.
7. Select the **Draft Carts** sub-tab.
8. Under the **Carts Assigned to Me** section, click on a cart to activate it.
9. Review the shopping cart and perform any necessary edits.
10. Select the **Proceed to Checkout** button.
11. Select the **Issue Requisition** button.
12. Confirm the Requisition Summary has the same number of line items as the requisition.
13. On **Step 3 – Review and Submit**, insert the Shopper's User ID in the **Requester** field.
14. Name the requisition by populating the Requisition Name field if desired.
15. For each requisition line item, edit **Chartfields, Ship To Location, and Asset information** if necessary.
16. Add a comment on each requisition line if needed by clicking the "**call out**" (comment) icon at the end of the line.

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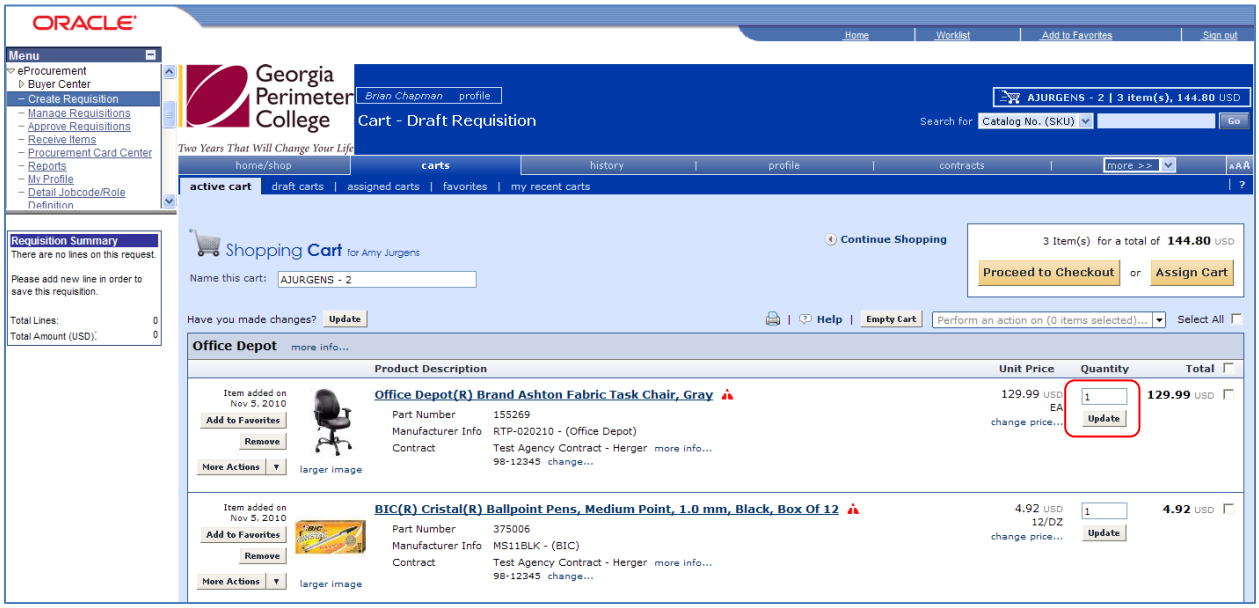
17. Add a header comment to be attached to the requisition if needed, using the Justification/Comments section.
18. Click the **Save and Preview Approvals** button.
19. Review the approval path. Insert additional ad hoc approvers if necessary.
20. Click the **Submit** button to route the requisition for approval.

Now that you know how to create a basic Marketplace Requisition, we are going to review some different scenarios that you may encounter when creating this type of requisition.

Editing an Assigned Marketplace Shopping Cart

There may be times when you need to edit a shopping cart that has been assigned to you. You can easily do this in the Georgia*FIRST* Marketplace. Some of the reasons why you may need to edit an assigned shopping cart include updating a quantity, specifying the correct contract, and adding or removing cart items. On occasion, a shopper may assign a cart to you and then realize the cart was incorrect. You can either assign the cart back to the shopper or make the edits yourself.

Once you pull up an assigned cart, you can make it active by clicking on the cart name hyperlink, or selecting the cart icon. Once it is an active cart, you can make any necessary edits. If the original shopper has requested that you change the quantity or delete an item, you can do that from an active cart. However, because the requisition built from the shopping cart will be tagged with the original shopper as the official requester, caution should be used when making changes to the shopping cart.



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Another change that you may need to make is to specify the correct contract for an item. Some items that the shopper selects will be listed on multiple contracts. For example, there may be an item that is listed on a mandatory statewide contract, as well as on a convenience state contract. If the incorrect contract has been selected, you can specify the appropriate contract while processing the Shopping cart.

To update the quantity of an item on an active cart, simply enter a new quantity for the line item in the quantity field and select the Update button. To delete an item from a shopping cart, select the item's checkbox and then select Remove selected item from the dropdown menu.

Note: A user's ability to modify lines may be limited from a punch-out vendor.

How To: Change a Contract for an Item

1. After entering the Georgia*FIRST* Marketplace from ePro – Create Requisition, go to the **Carts** tab.
2. Select the **draft carts** sub-tab.
3. Locate the cart you wish to process in the **Carts assigned to me** section.
4. Make the cart active by clicking on the **cart name** hyperlink or the cart icon
5. For the item you want to select a different contract for, select the **change…** hyperlink next to the contract name.
6. A pop-up box will appear with the contract choices. Select the appropriate contract by using the **radio button**.
7. Click **OK**.
8. After finishing all edits, select the **Proceed to Checkout** button.
9. Select the **Issue Requisition** button and then continue with creating the Marketplace Requisition within PeopleSoft.

Charging a Requisition Line Item to a Different Chartstring

As we mentioned earlier, when you pull a marketplace shopping cart into a requisition, you indicate that the official requester was the shopper who built the shopping cart. This way, the requisition line distribution is automatically populated with the shopper's default Chartfields. These Chartfields, primarily the Department and Project, dictate the approval path the requisition line will take. On occasion, a shopper may need a different set of Chartstrings charged for a requisition line.

When this happens, the Shopper should include an assignee comment in the Shopping Cart indicating what the new Chartstring should be and which line items the Chartstring should apply to. These comments should be visible on the shopping cart as well within the notification email received when you were notified that a shopping cart was assigned to you.

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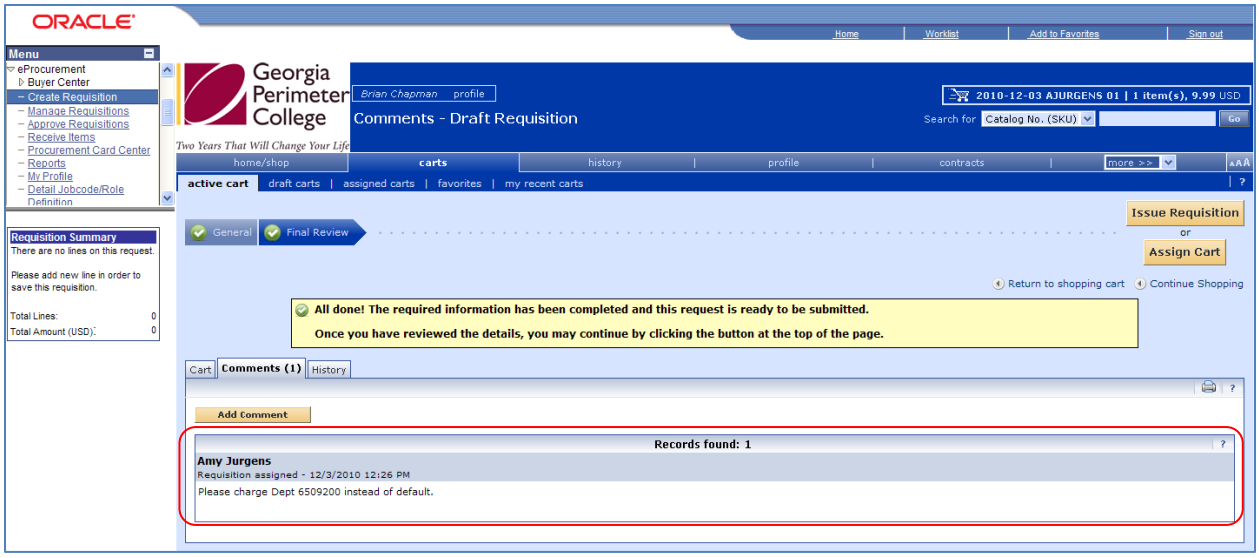
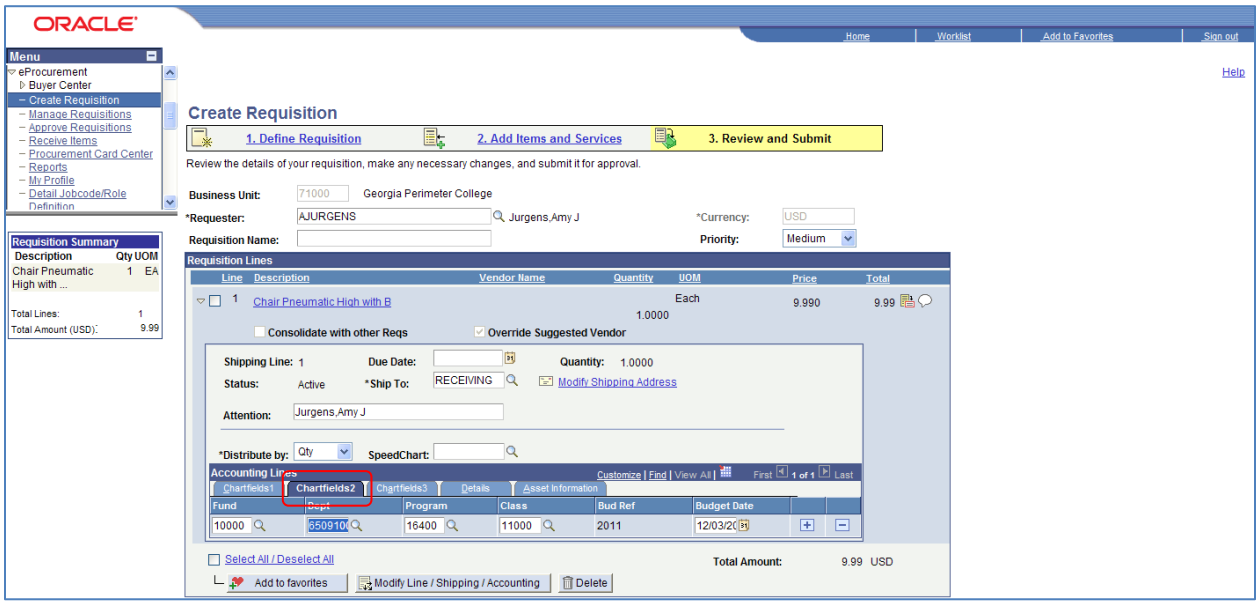


To make the change in Chartfields, you will need to do so after pulling the shopping cart into the ePro requisition. On **Step 3 – Review and Submit**, you can individually edit each line or you can select and edit multiple lines at one time.



How To: Charge a Requisition Line Item to a Different Chartstring

1. When you have pulled the Georgia*FIRST* Marketplace shopping cart into an eProcurement requisition, you are returned to **Step 3 – Review and Submit**.
2. Expand the line you want to modify by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.

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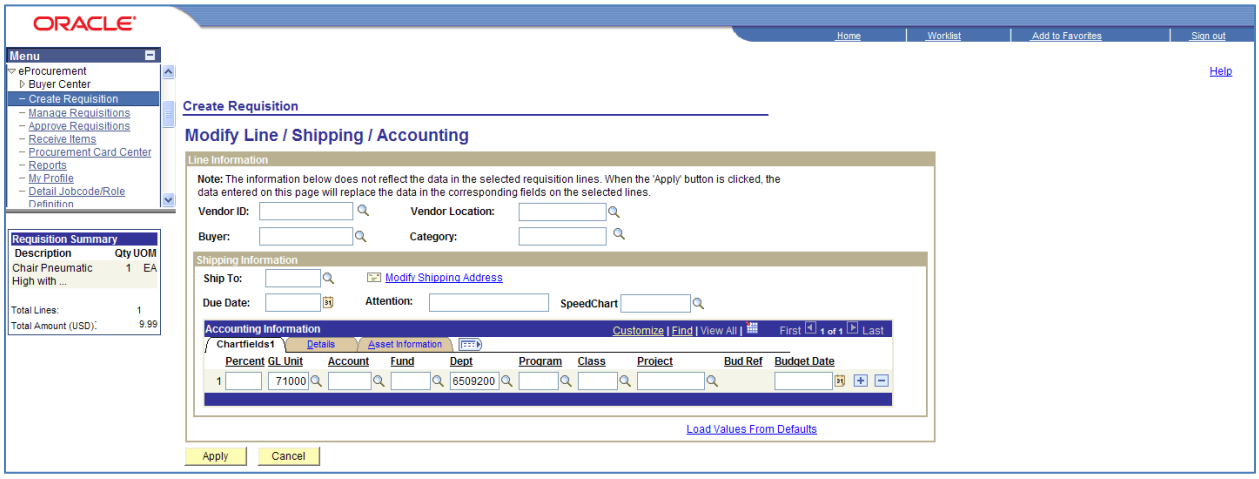
4. Under the Chartfields 1 tab, the Account can be modified.
5. Go to the **Chartfields 2** tab to update the following if needed:
    a. Fund Code
    b. Department
    c. Program
    d. Class
6. Go to the **Chartfields 3** tab to update the following if needed:
    a. Project
7. Make other necessary changes and then continue with the Marketplace Requisition by selecting the **Save and Preview Approvals** button.



How To: Charge Multiple Requisition Line Items to a Different Chartstring

1. When you have pulled the Georgia*FIRST* Marketplace shopping cart into an eProcurement requisition, you are returned to **Step 3 – Review and Submit**.
2. Select the lines you want to change distribution information for by placing a **checkmark** in their **select** boxes.
3. Select the **Modify Line/Shipping/Accounting** button.
4. In the Accounting Information section, enter the new **Chartfields Values** and then click **Apply**.
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 and Preview Approvals** button.

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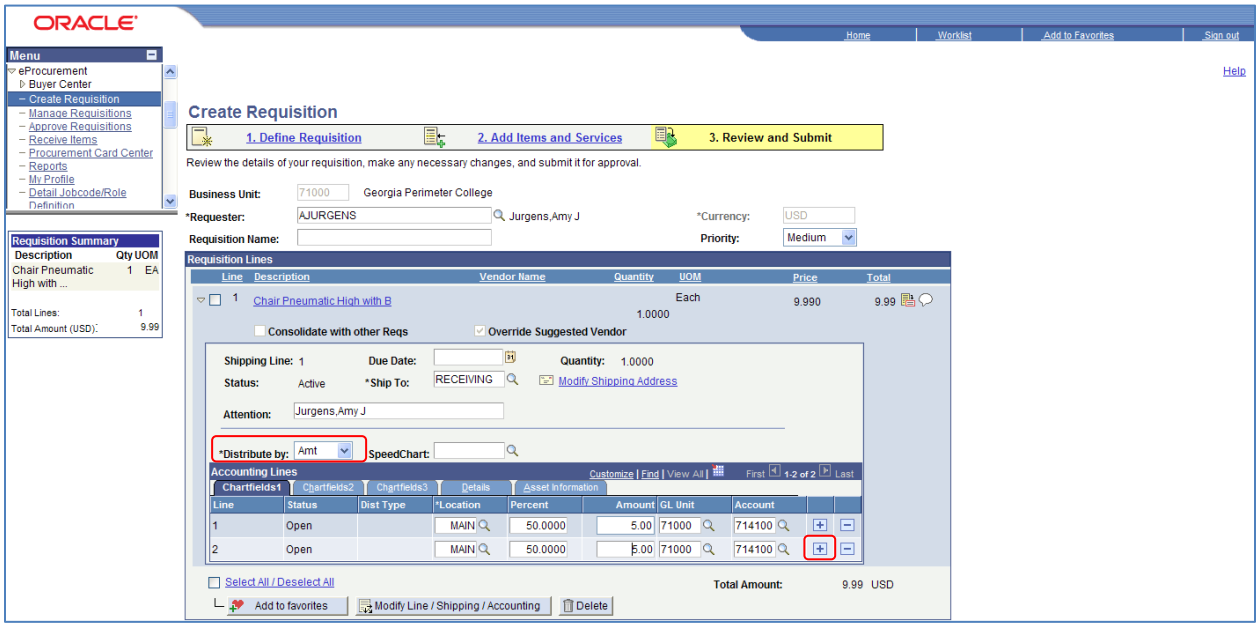
Using Multiple Distributions for a Requisition Line

At times, it may be necessary for you to have multiple distributions for a requisition line. Once you pull the Georgia*FIRST* Marketplace shopping cart into a requisition, you can split the distribution for the line needed.

To set up multiple distributions for a requisition line, you first specify whether you want to distribute by quantity or by amount. Then, you can add a new distribution line. After adding the new distribution line, you will need to update the percentage or amount in the original distribution line first. Then, you can set the distribution percentage or amount for the new distribution line. On the Chartfields tabs, you can specify the new distribution Chartstring.



How To: Split Distribution for a Requisition Line

1. When you have pulled the Georgia*FIRST* Marketplace shopping cart into an eProcurement requisition, you will be returned to **Step 3 – Review and Submit.**
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.

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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.

Entering Asset Information for an Item

If the item being requested is an asset needs to be tracked in the Asset Management module, you can specify this information on the requisition. By specifying the asset information on the requisition, the information will transfer to the Purchase Order, the Receipt, and finally the Voucher. After that, the information from the Purchasing and Accounts Payable modules can be interfaced into Asset Management.

Items that need to be tracked in Asset Management include any item valued over $3,000. Fixed assets are those items valued at or above $5,000. An item costing less than $5,000, but more than $2,999.99, are considered Small Value Property and must also be tracked in the Asset Management module. Finally, any item that must be tracked through the physical inventory process, such as fire arms, should be entered into the Asset Management module.

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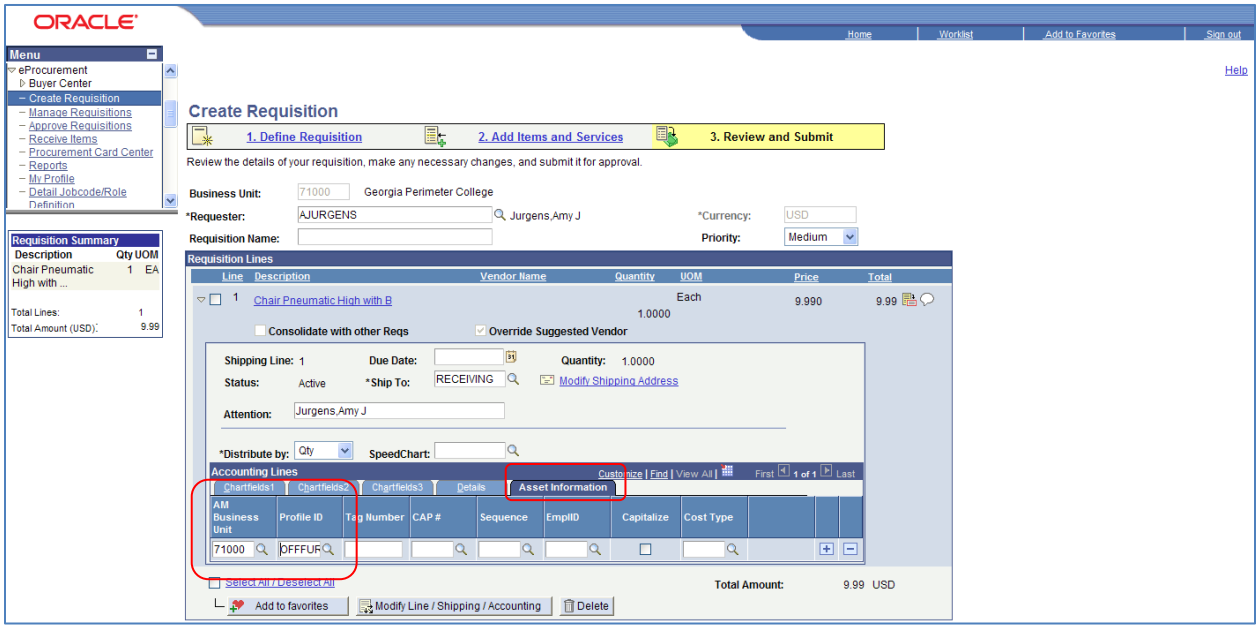

In order to enter the asset information for an item in the Marketplace Requisition, you need to be on **Step 3 – Review and Submit**. You will need to enter the AM Business Unit and Profile ID.

How To: Enter Asset Information for a Requisition Line Item

1. When you have pulled the Georgia*FIRST* Marketplace shopping cart into an eProcurement requisition, you are returned to **Step 3 – Review and Submit**.
2. Expand the line by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Asset Information** tab.
5. In the **AM Business Unit** field, enter or use the look up icon to select your institution's business unit.
6. In the **Profile ID** field, enter or use the look up icon to select the asset's Profile ID (i.e., SVP, AV05YR).
7. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save and Preview Approvals** button.

Inserting Ad Hoc Approvers

The approval path is determined by the department and project charged on a requisition line along with other criteria specified by your institution, which may include line amount, item type, and agency fund. If you have reviewed the approval path and determine that you need to include another approver, you can do that through the Ad Hoc Approver functionality.

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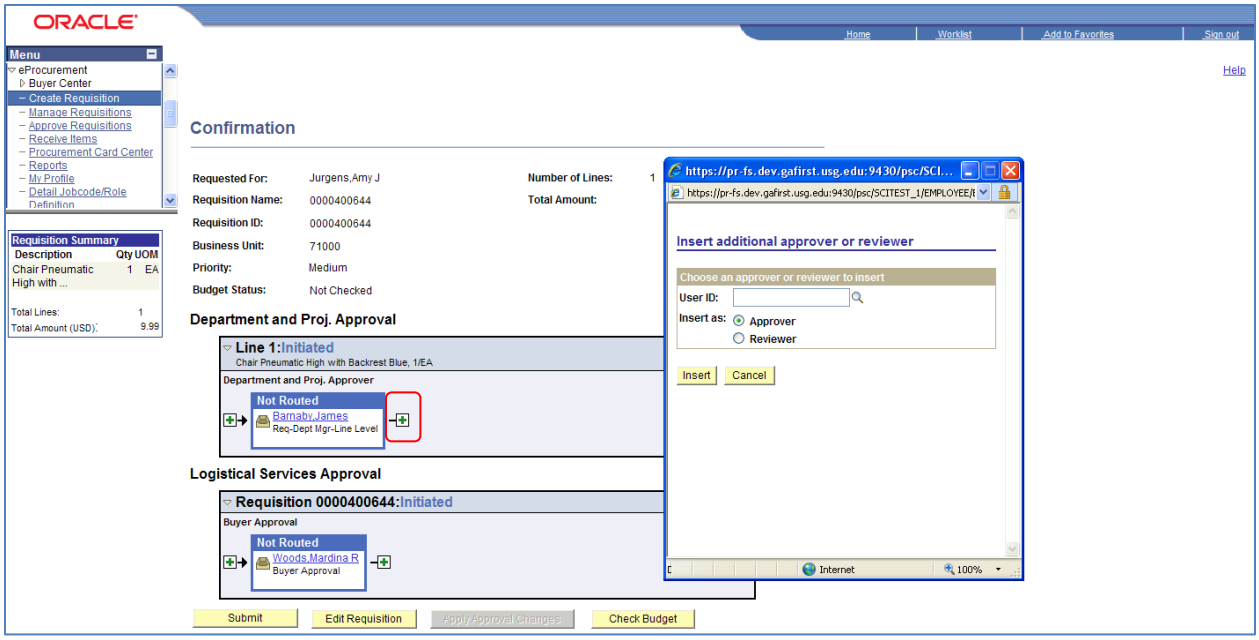

On the approval page, you can insert an ad hoc approver anywhere you see a green plus (+) button. You will need to know the User ID of the additional approver, or you will have to scroll through the list of names. In addition, you can specify the ad ho user as an Approver or Reviewer. Choosing the Approver option will require the user selected to actually approve the requisition for it to progress onto the next step. Selecting the Reviewer option will place the requisition into the selected user's Worklist. However, they will not be required to take action on the requisition for it to move onto the next step. The Reviewer provides visibility only to the ad hoc user.

How To: Insert an Ad Hoc Approver

1. When you have pulled the Georgia*FIRST* Marketplace shopping cart into an eProcurement requisition, you will be returned to **Step 3 – Review and Submit**.
2. Make any necessary changes to the line item information on the requisition.
3. Select the **Save and Preview Approvals** button.
4. To insert an Ad Hoc approver, click the **green** plus (+) button where you want the approver to go.
5. Enter the **User ID** of the Ad Hoc approver, or use the look up button to select the User ID.
6. Select either the **Approver** or **Reviewer** radio button.
7. Click the **insert** button.
8. You should now see the additional approver in the approval chain.
9. To remove the Ad Hoc approver, select the **red** minus (-) button for that approver. Click **OK** when prompted.
10. Submit the requisition for approval by clicking the **Submit** button.

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Chapter 6: Creating a Special Request Requisition

In addition to creating requisitions built from Georgia*FIRST* Marketplace shopping carts, you can also create Special Request Requisitions. Special Request Requisitions are built by entering information directly into the requisition using the Special Request tab – Special Item link. Therefore, you create the individual requisition line items as opposed to originating from the Marketplace Shopping cart.

Outside of how you add the requisition lines to the requisition, much of the steps between a Marketplace Requisition and a Special Request Requisition are the same. In this chapter, we are going to detail how to create a Special Request Requisition.

Creating a Special Request Requisition

To create a Special Request Requisition, you are going to start in the same way as you did with the Marketplace Requisition. You need to select the menu item Create Requisition from the eProcurement module.

Depending on the number of lines you need to add to your requisition, you may or may not find it useful to setup the defaults for your requisition. As we mentioned earlier by selecting the Step 1 – Define Requisition link, you can specify defaults that apply to the entire requisition so that you do not have to add them line by line. This is an optional step though. If you do set up requisition defaults, you should not include anything in the Account field. The item's NIGP code will determine the proper account.

After setting up your requisition defaults, if any, you can proceed to Step #2 – Adding Items and Services. Since this requisition will not be built from contract catalog items in the Georgia*FIRST* Marketplace, you will use the Special Request tab on this page. From the Special Request tab, you should select the Special Item hyperlink. This is how you enter line items directly into a requisition.

For each line item, you need to complete this page. If you entered any defaults in Step 1, that information will carry over to the appropriate fields here. The information that you will need to input is:

- Item Description – this is where you enter the description of the item you are requesting
- Price
- Quantity
- Unit of Measure
- Category – this is the NIGP Code
- Due Date
- Vendor ID – if you know the vendor you wish to use, enter that Vendor ID here; once the Buyer receives the requisition, they can modify the vendor if needed

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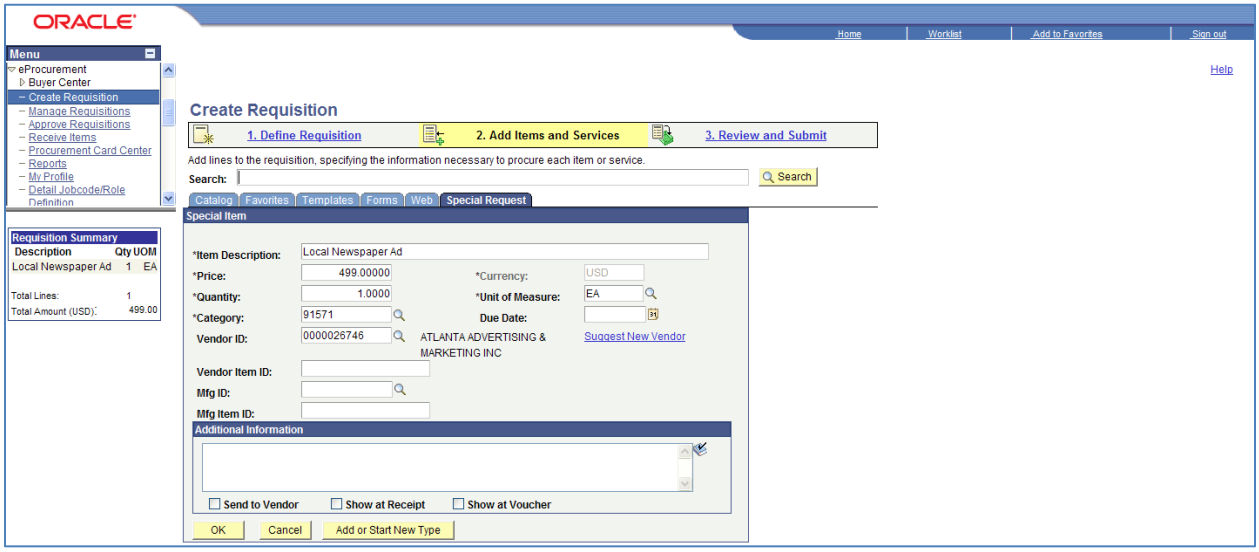
- Additional Information – you can use the text box to enter comments regarding the requisition line item. You can also specify if you want those comments sent to the vendor, shown on the receipt, or shown on the voucher.



When you are finished entering your line item information, you have to select the "**Add Item**" button at the bottom of the page to add it to your requisition. Once you do, you should see the Requisition Summary box on the left side of the page update. To add another line item, simply begin entering the line information again. When you have finished adding all requisition line items, you can go to Step 3 – Review and Submit.

When you get to Step #3, this is where you can update the distribution information for each line, as well as the Ship To information. Just like a Marketplace Requisition, you can update this information for each line individually or multiple lines through the Modify Line/Shipping/Accounting button. If you need to include asset information for a line item, you can also do this on step 3. Finally, you can add comments and attachments to each line, as well as to the overall requisition. When all of your information has been added, you can preview your approvals by selecting the **Save & Preview Approvals** button.

The Confirmation page lists the Requisition ID and the number of lines on the requisition. It also lets you see the approval path for the requisition based on the distribution line and your institution specific Workflow setup. You will see an approval for each Requisition Line. If you need to insert additional approvers, you can do so using the Ad Hoc approver functionality. If you notice an error and need to edit your requisition, select the Edit Requisition button. When you are ready to submit your requisition for approval, click the Submit button. The requisition header is set to a Pending Status until all lines are fully approved.

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How To: Create a Special Request Requisition

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Create Requisition**.
3. To enter Requisition Defaults, click the **1. Define Requisition** link. Otherwise, go to step 4.
    a. If desired, enter a name for your requisition (if left blank, the Requisition ID will be listed here after saving).
    b. Expand the **Line Defaults** section by clicking on the expand button.
    c. To enter a default vendor for all requisition lines, enter the **Vendor ID** or select it using the Look Up icon.
    d. To enter a default Buyer for all requisition lines, enter the **Buyer's User ID** or select it using the Look Up icon.
    e. 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.
    f. If all of your line items will have the same **Unit of Measure**, enter it or select it using the Look Up icon.
    g. To set a default **Ship To Address**, enter it or select it using the Look Up icon.
    h. To enter a default **Due Date** for each line item, enter it or select it using the Calendar icon. The Due Date for a Requisition is typically within 30 days of the current date.
    i. To enter a default "**Attention To**" for each line, enter in the Attention field.
    j. 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.
    k. In the **Accounting Defaults – Asset Information** tab, you can enter the default AM Business Unit field and Profile ID that will appear on each requisition line item. This should only be set if all requisition line items are to be tracked in the Asset Management module, and each line item requires the same Profile ID.
    l. Click the **Continue** button.
4. Click the **2. Add Items and Services** link.
5. Select the **Special Request** tab.
6. Select the **Special Item** link.
7. 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

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f. Enter or select the **Due Date** for the item
g. Enter or select the **Vendor ID** for the item if you have a preferred vendor
h. 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.
i. Select the **Add Item** button.
j. Confirm the **Requisition Summary** updated with your new requisition line.
k. To add an addition requisition line, complete steps 7a through 7k again.

8. Select the **3. Review and Submit** link.
9. To update a requisition line's distribution information, click its **Expand** button and make necessary updates.
10. To update multiple requisition line's information simultaneously, select the lines to update with a check mark and then select the **Modify Line/Shipping/Accounting** button. Make all necessary updates, and apply to all selected lines.
11. 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.
12. Enter any justification or comments you wish to on the requisition header in the **Justification/Comments** field and select the appropriate checkboxes.
13. Click the **Save & Preview Approvals** button.
14. Insert any additional approvers if necessary.
15. Click the **Submit** button.

Once items have been added through the Special Request tab, much of the functionality of a requisition is the same as a requisition created from items pulled from the Georgia*FIRST* Marketplace.

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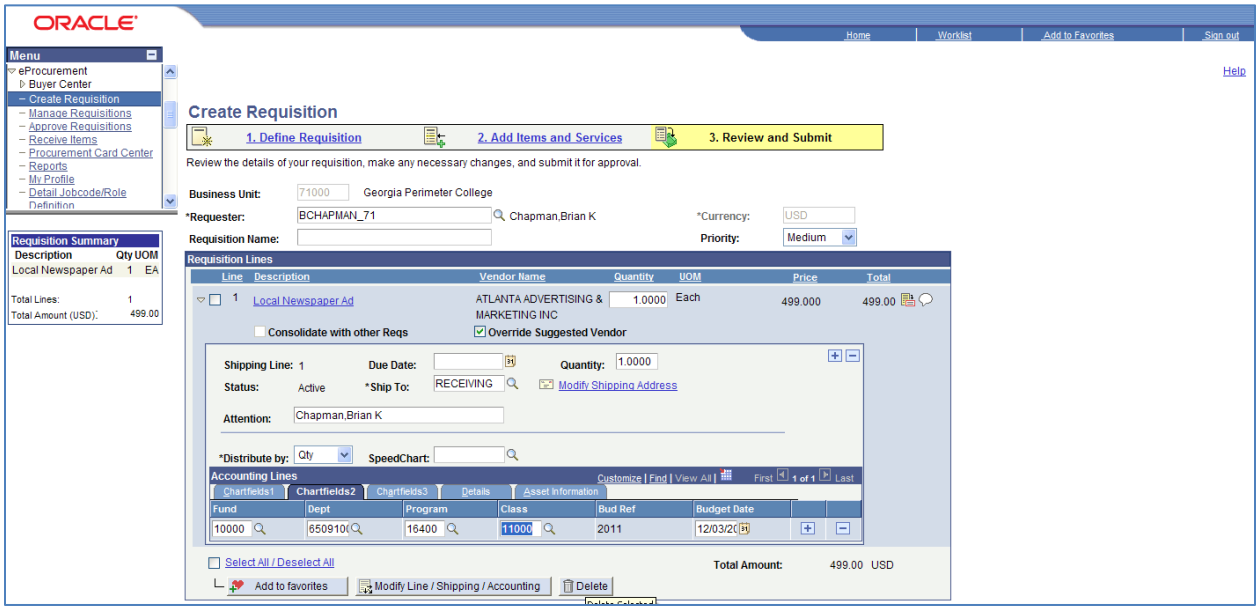
Charging a Requisition Line Item to a Different Chartstring

When building a Special Request requisition, the Chartfields for each line item's distribution is determined by your User ID as the Requester. These default Chartfields, such as Department, are specified in your Requester setup. If you need to adjust the Chartfields for the line items, you can do this on Step 3 – Review and Submit. On this page, you can individually edit each line, or you can edit multiple lines at one time.



How To: Charge a Requisition Line Item to a Different Chartstring

1. After you have added all Special Items to your requisition, go to **Step 3 – Review and Submit** by clicking its link.
2. Expand the line by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Under the **Chartfields 1** tab, update the Account if needed
5. Go to the **Chartfields 2** tab. Additional Chartfield values can be updated if needed:
    a. Fund Code
    b. Department
    c. Program
    d. Class
6. Go to the **Chartfields 3** tab to specify or modify the Project ID field
7. Make any other necessary changes and then continue with the Special Request Requisition by selecting the **Save and Preview Approvals** button.

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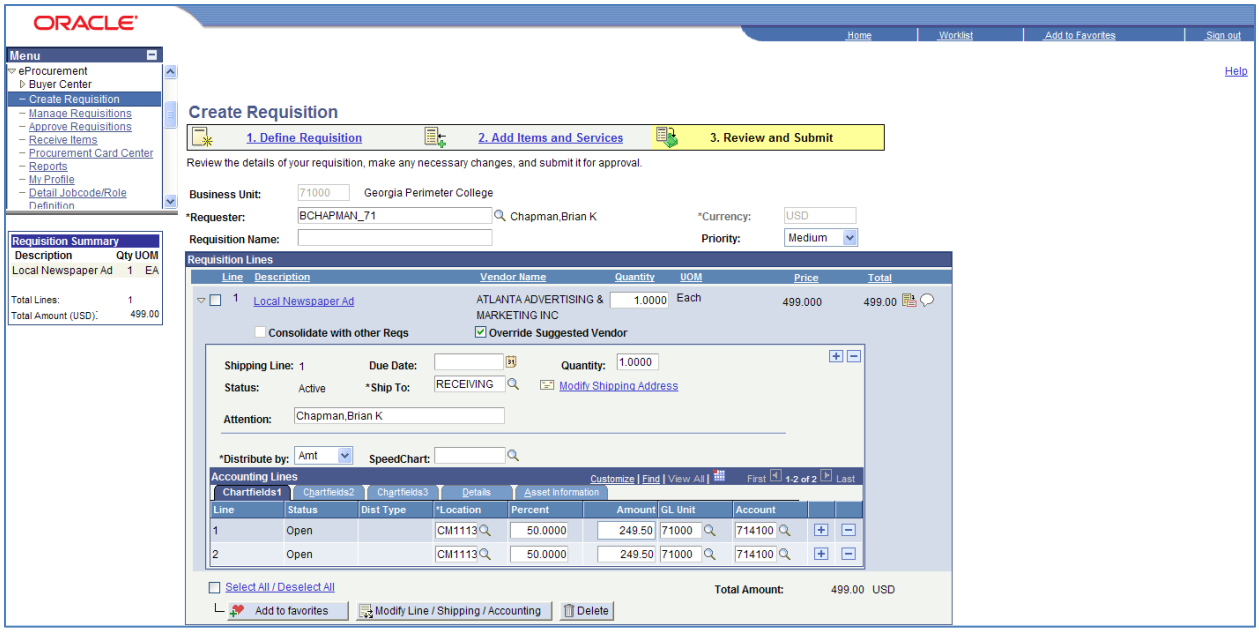
How To: Charge Multiple Requisition Line Items to a Different Chartstring

1. After you have added all Special Items to your requisition, go to **Step 3 – Review and Submit** by clicking its link.
2. Select the lines you wish to change distribution information for by placing a **checkmark** in their **select** boxes.
3. Select the **Modify Line/Shipping/Accounting** button.
4. In the Accounting Information section, enter the new **Chartfields** and then click **Apply**.
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 Special Request Requisition by selecting the **Save and Preview Approvals** button.

Using Multiple Distributions for a Requisition Line

At times, it may be necessary for you to have multiple distributions for a requisition line. After adding Special Request items, you can split the distribution for the line needed.

To set up multiple distributions for a requisition line, you first specify whether you want to distribute by quantity or by amount. Then, you can add a new distribution line. After adding the new distribution line, you will need to update the percentage in the original distribution line first. Then, you can set the distribution quantity or amount for the new distribution line. On the Chartfields tabs, you can specify the new distribution Chartstring.



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How To: Split Distribution for a Requisition Line

1. After you have added all Special Items to your requisition, go to **Step 3 – Review and Submit** by clicking its link.
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.

Entering Asset Information for an Item

If the item being requested is an asset or needs to be tracked in the Asset Management module, you can specify this information on the requisition. By specifying the asset information on the requisition, the information will transfer to the Purchase Order, the Receipt, and finally the Voucher. After that, the information from the Purchasing and Accounts Payable modules can be interfaced into Asset Management.

Items that need to be tracked in Asset Management include any item valued over $3,000. Fixed assets are those items valued at or above $5,000. An item costing less than $5,000, but more than $2,999.99, are considered Small Value Property and must also be tracked in the Asset Management module. Finally, any item that must be tracked through the physical inventory process, such as fire arms, should be entered into the Asset Management module.

In order to enter the asset information for an item in the Marketplace Requisition, you need to be on Step 3 – Review and Submit. You will need to enter the AM Business Unit and Profile ID.

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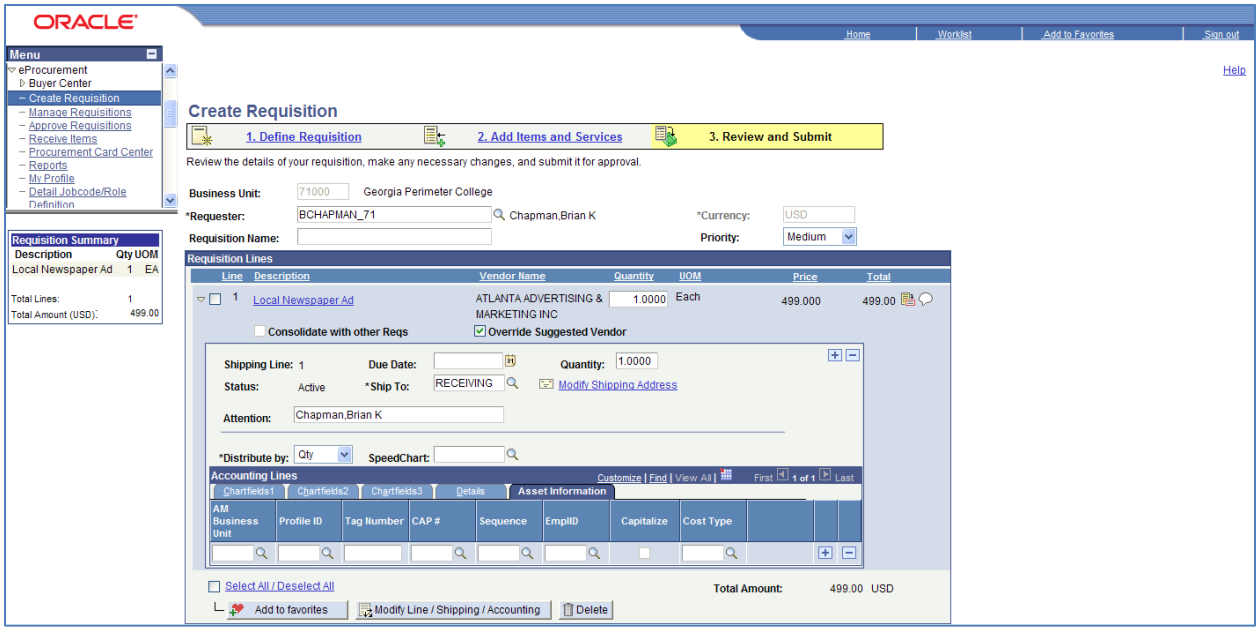

How To: Enter Asset Information for a Requisition Line Item

1. After you have added all Special Items to your requisition, go to **Step 3 – Review and Submit** by clicking its link.
2. Expand the line by clicking on its **Expand Se**ction button.
3. Locate the **Accounting Lines** section.
4. Go to the **Asset Information** tab.
5. In the **AM Business Unit** field, enter or use the look up icon to select your institution's business unit.
6. In the **Profile ID** field, enter or use the look up icon to select the asset's Profile ID (i.e., SVP, AV05YR).
7. Make any other necessary changes and then continue with the Special Request Requisition by selecting the **Save and Preview Approvals** button.

Inserting Ad Hoc Approvers

The approval path is determined by the department and project charged on a requisition line along with other criteria specified by your institution, which may include line amount, item type, and agency fund. If you have reviewed the approval path and determine that you need to include another approver, you can do that through the Ad Hoc Approver functionality.

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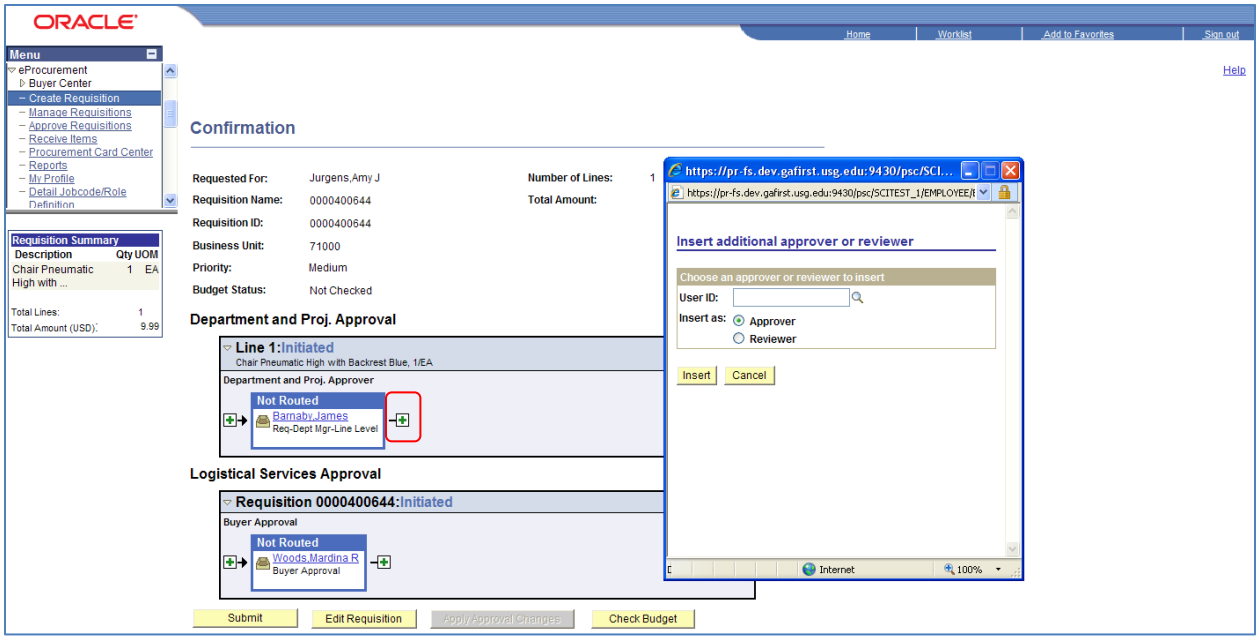

On the approval page, you can insert an ad hoc approver anywhere you see a green plus (+) button. You will need to know the User ID of the additional approver, or you will have to scroll through the list of names. In addition, you can specify the ad ho user as an Approver or Reviewer. Choosing the Approver option will require the user selected to actually approve the requisition for it to progress onto the next step. Selecting the Reviewer option will place the requisition into the selected user's Worklist. However, they will not be required to take action on the requisition for it to move onto the next step. The Reviewer provides visibility only to the ad hoc user.

How To: Insert an Ad Hoc Approver

1. When you have pulled the Georgia*FIRST* Marketplace shopping cart into an eProcurement requisition, you will be returned to **Step 3 – Review and Submit**.
2. Make any necessary changes to the line item information on the requisition.
3. Select the **Save and Preview Approvals** button.
4. To insert an Ad Hoc approver, click the **green** plus (+) button where you want the approver to go.
5. Enter the **User ID** of the Ad Hoc approver, or use the look up button to select the User ID.
6. Select either the **Approver** or **Reviewer** radio button.
7. Click the **insert** button.
8. You should now see the additional approver in the approval chain.
9. To remove the Ad Hoc approver, select the **red** minus (-) button for that approver. Click **OK** when prompted.
10. Submit the requisition for approval by clicking the **Submit** button.

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Chapter 7: Working with Requisitions

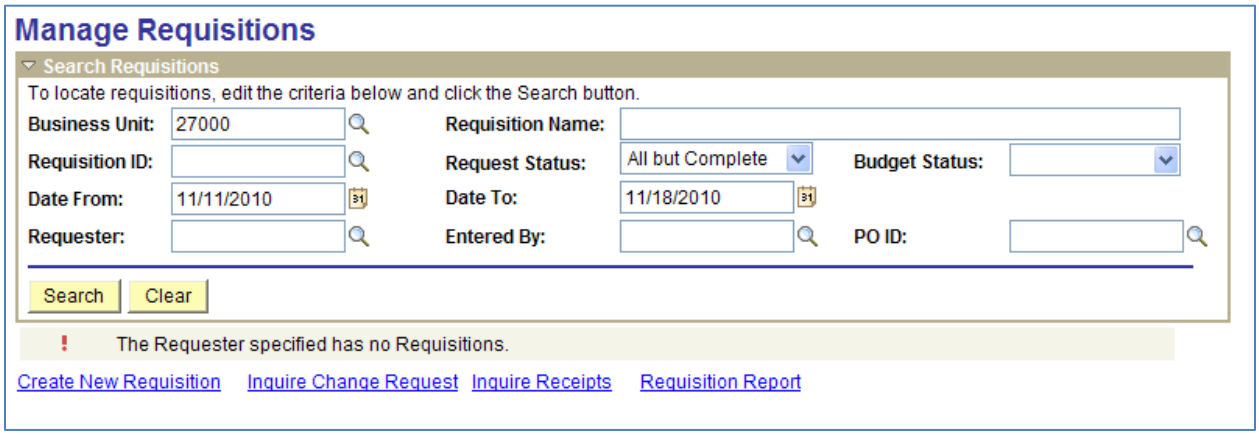
Once your requisitions have been created and submitted, you may find it necessary to track a requisition's progress, edit a requisition, or cancel a requisition. In this chapter, we are going to detail the different ways you can work with your requisitions.

Managing Requisitions

Once you have saved a requisition, it is easy to track what stage it is in by using the Manage Requisitions page. From this page, you can see the requisition status, review requisition details, edit requisitions, and take various actions on requisitions if needed.

To use the Manage Requisitions page, you will first have to search for the requisitions. You can search through the following parameters (leave a field blank to return all values):

- Requisition ID
- Date From/Date To (when was the requisition created)
- Requester (this is the Requester specified on the Requisition)
- Requisition Name
- Request Status (this is the status of the requisition)
- Entered By
- Budget Status (this is the budget checking status)
- PO ID (if the requisition has been sourced to a PO, this is the corresponding PO ID)



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There are many statuses that a Requisition goes through during its lifecycle.

Requisition Status	Explanation
Open	The requisition has been entered and saved in the system, but it has not yet been submitted for approval.
Pending	The Requisition has been submitted and is awaiting approval.
Approved	The requisition has been fully approved and can become a PO.
Denied	The requisition was denied in the approval process.
Canceled	The requisition was entered and saved, but was canceled. A canceled requisition can be reopened within a certain number of days.
PO(s) Created	The requisition has been placed on a Purchase Order.
PO(s) Dispatched	The requisition has been placed on a Purchase Order, and the PO has been dispatched to the vendor.
PO(s) Canceled	The requisition has been placed on a Purchase Order which has been canceled.
Received	The requisition has been placed on a PO. The PO has been dispatched to the vendor, and the goods have been partially or fully received.
Complete	After the requisition is dispatched on a PO, the goods are received, and the vendor is paid. A background process identifies the requisition status as Complete. Canceled requisitions are also identified as Complete.

After a requisition has been approved, it must then go through the Budget Checking process. The possible Budget Statuses include Not Checked, Error, and Valid.

Budget Status	Explanation
Not Chk'd	The requisition has not had budget checking run on it yet.
Error	The requisition has gone through budget checking and failed; the budget checking error must be corrected before the requisition can be sourced into a purchase order.
Valid	The requisition has passed budget checking and is available to be sourced into a purchase order.

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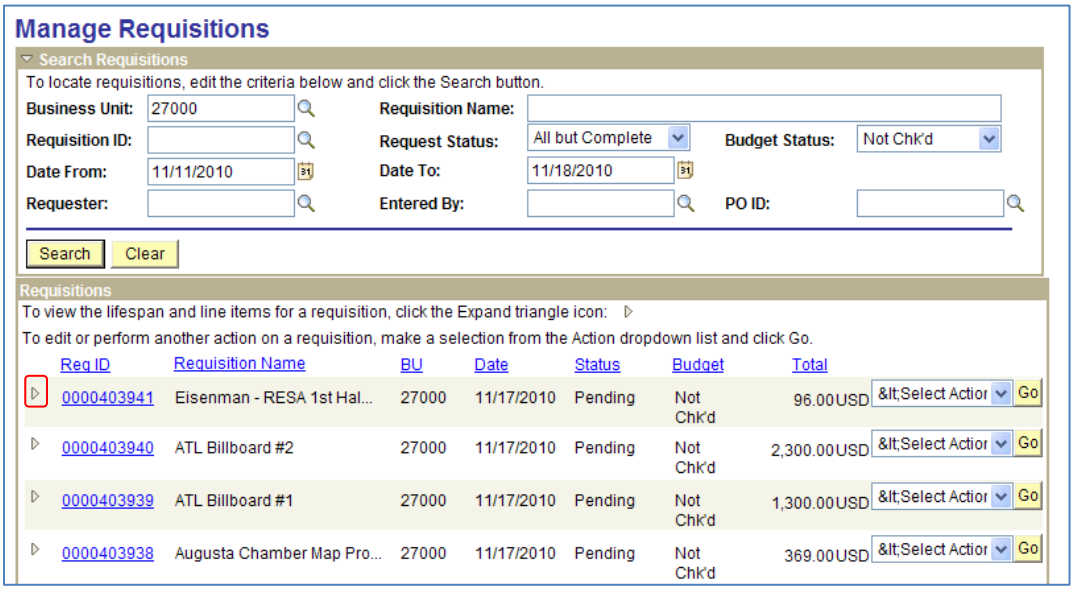
The more search criteria that you enter, the more narrow your search results will be. In your list of search results, you will see the following for each Requisition:

- Requisition ID
- Requisition Name
- Business Unit
- Date
- Status
- Budget
- Total
- Action Drop Down box and Go button



You can sort by a search result, such as Budget, by clicking on the column heading hyperlink. In the results, you can quickly see the status the requisition is in, as well as its budget checking status. To see the lifespan of the requisition, as well as line item information, you can expand the requisition.

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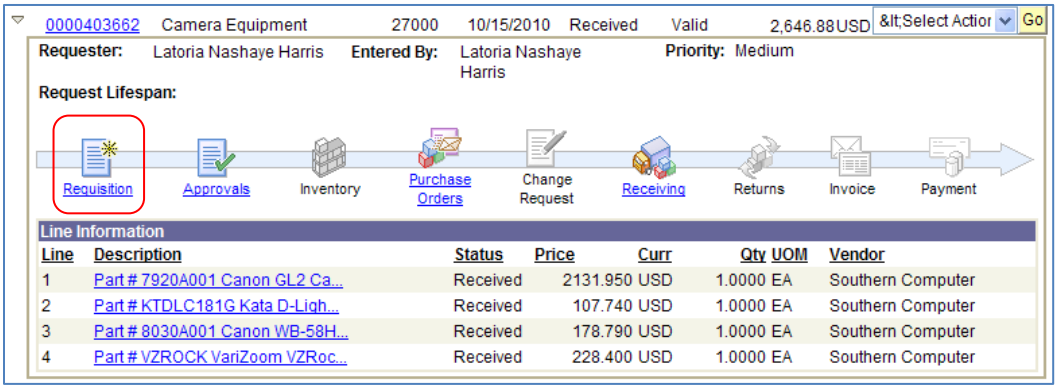

Once you have expanded a Requisition, you can see its lifecycle represented by the lifespan icons. If an icon is in color, the requisition is either currently in or has completed that stage. In this example, you can see that the requisition was sourced into a Purchase Order and dispatched, and the requested items have been received. The items, however, still need to be vouchered and paid for.

From this page, there are many items that you can review. If you select the Requisition ID or the Requisition icon in the lifecycle, you will get a summary of the requisition details.

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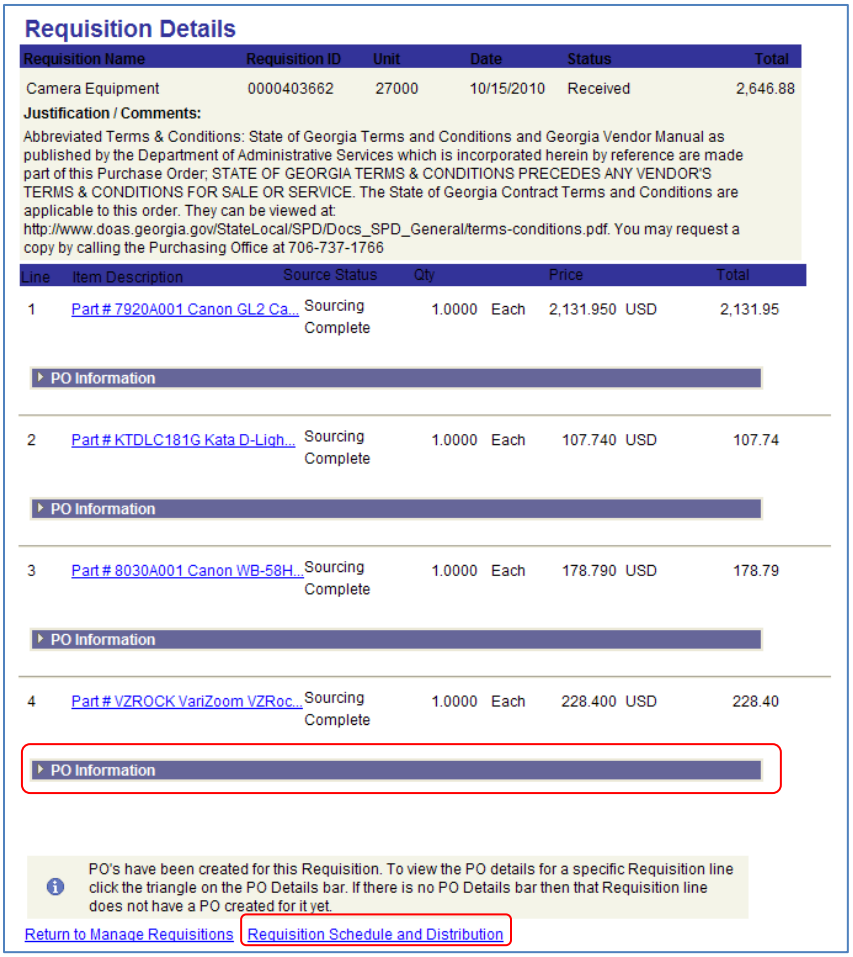

If the requisition has already been sourced to a PO, you will see a "PO Information" bar. To get the PO Information for a sourced requisition line, you can click on this bar and see the PO number, receipt status, and PO line information.

If you want to see a requisition schedule and distribution information, you can select the Requisition Schedule and Distribution link from the Requisition Details page.

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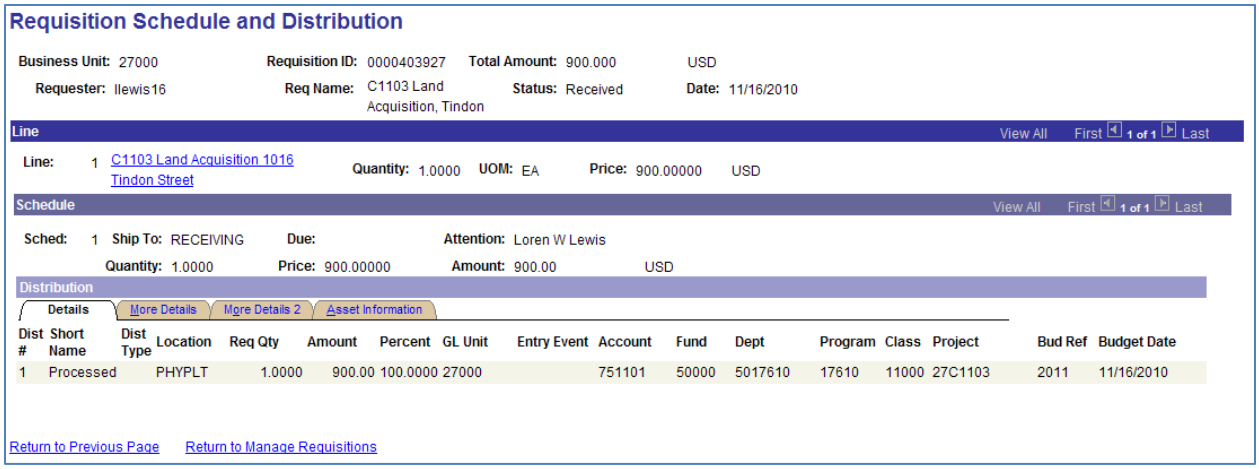

The Line section contains all of the line items on a requisition. The Schedule section displays shipping information for the item, such as where the item is being shipped, when it is due, the quantity, the price, and the total amount of the line.

The Distribution section details the Chartfields and additional information. The Dist # displays the number the system assigned to the distribution. The system uses this numbering to distinguish between multiple distributions for a single requisition line. The distribution statuses include the following:

- Open: The distribution line is open
- Complete: the distribution line is closed
- Processed: the distribution line has been processed and is unavailable for sourcing
- Canceled: the distribution has been canceled

To get the detailed information for a requisition line, you can select the line hyperlink in the Description column under the lifespan or from the Requisition Schedule and Distribution page. Users will see an error when the item description link is selected for items originating from the GeorgiaFIRST Marketplace.

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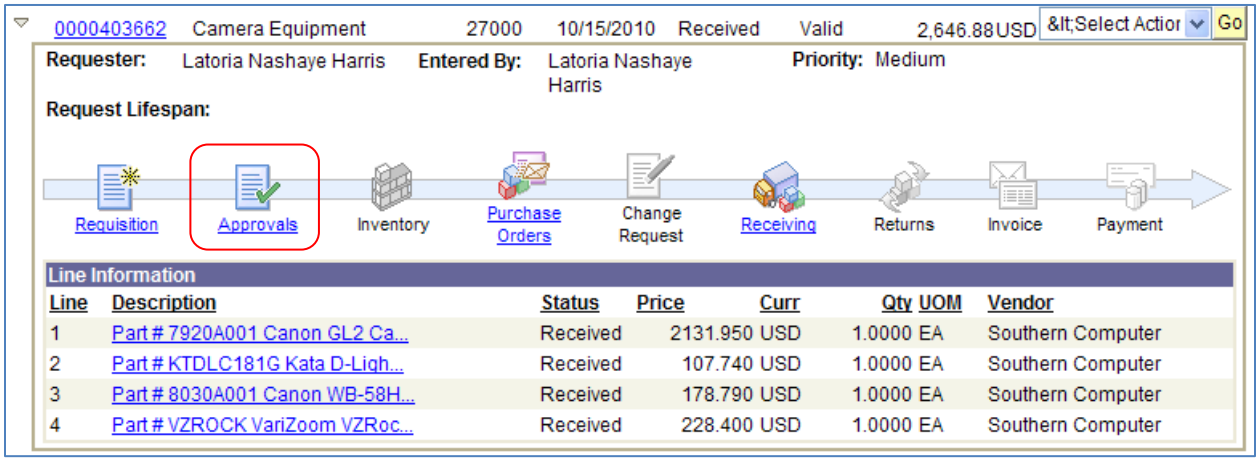
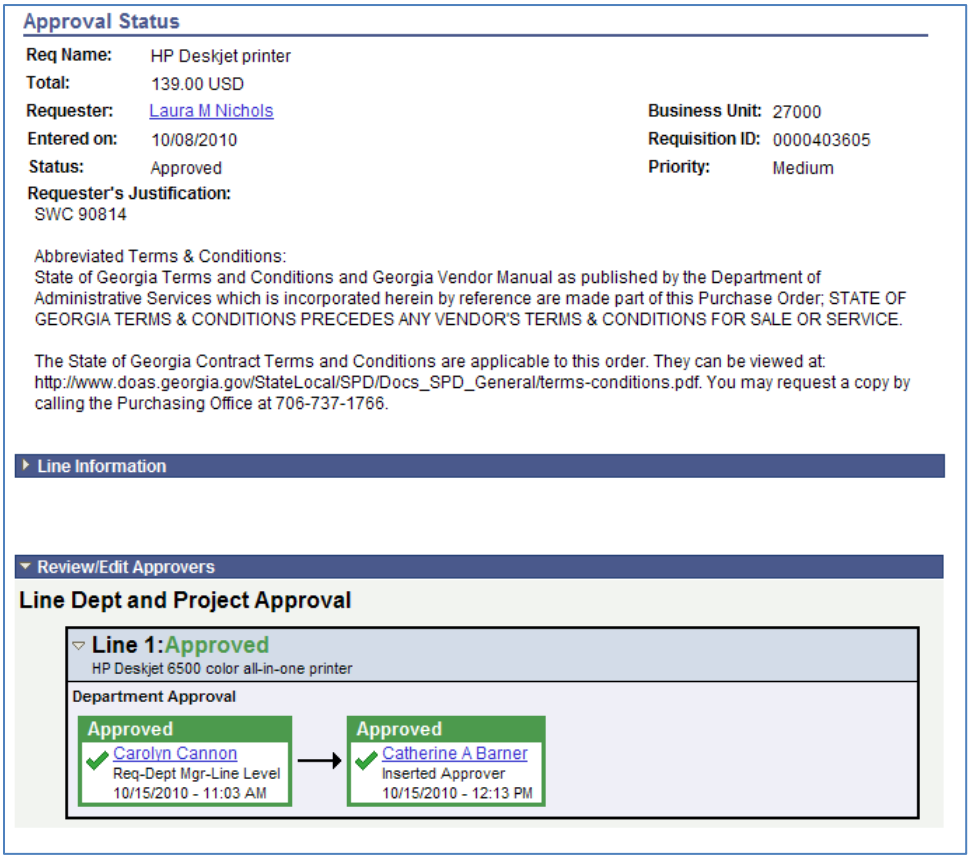


If you select the Approvals icon in the lifespan, you will see the approval status and path of the requisition lines.



Finally, you can select the Purchase Orders, Receipts, Invoices, and Payments icons after they are enabled to get the information regarding those specific documents.

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The choices in the Action drop down box for each requisition will be specific to the stage that requisition is in. The choices that you as a Requester will use the most are "Edit Requisition," "Cancel Requisition," and "Check Budget" (depending on your institution setup). We will talk more about these choices later in this chapter.

How To: Manage Requisitions

1. In PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter **search criteria** for your requisitions.
4. Click the **Search** button.
5. To see a requisition's lifespan, click its **expand** button.
6. To see details about an active or completed stage in the lifespan, click on the lifespan icon.
7. To see the approval path for a requisition, click on the **Approvals** lifespan icon.
8. To see requisition line information, click on the **line description**.
9. To see requisition schedule and distribution information, click on the **Requisition lifespan** icon and then select the **Requisition and Schedule Information** link.

Editing a Requisition

There will be times when you need to edit a requisition. This includes those requisitions that you have created and saved, but not yet submitted, as well as requisitions that have been denied and may need to be corrected. And, there may be a few occasions when you need to edit a requisition that has already been submitted for approval.

In order to edit a requisition, you can go through the Manage Requisitions page and search for the requisition in need of editing. When it is displayed in your search results, there will be the option of "Edit Requisition" in its action drop down list. If the requisition is no longer available for editing, that option will not appear in the drop down list. For example, once a PO is created from a requisition, that requisition can no longer be edited.

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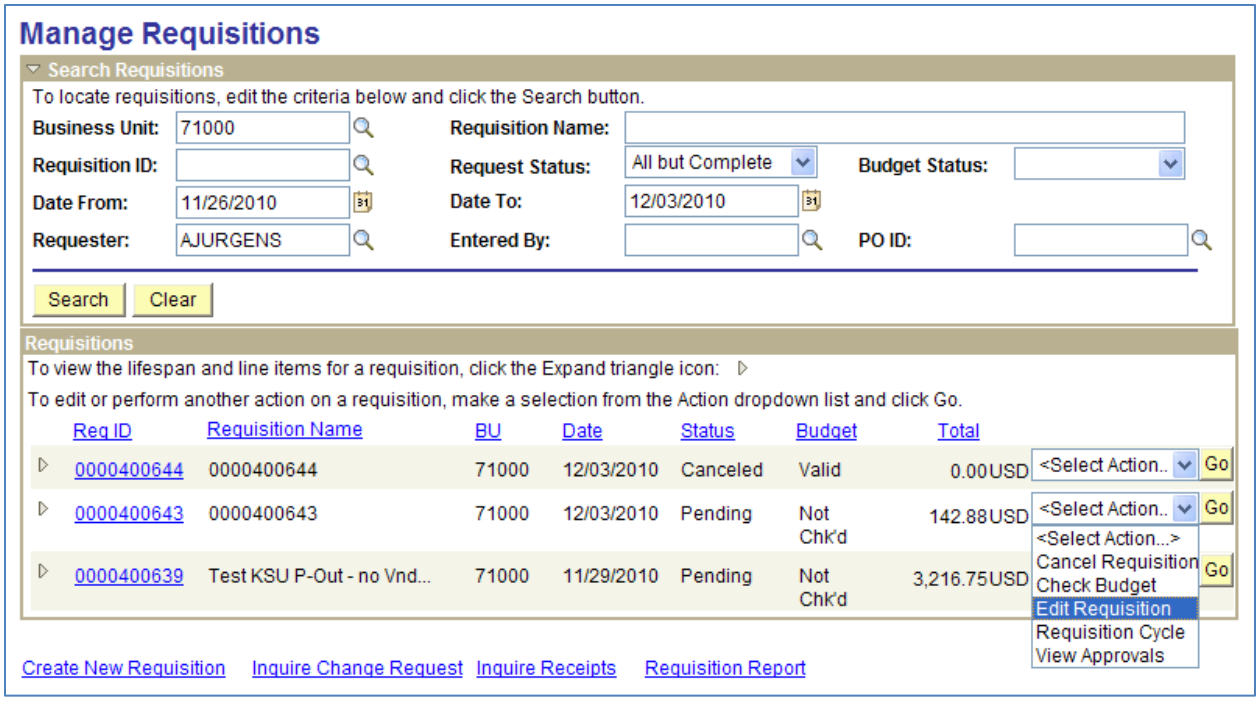
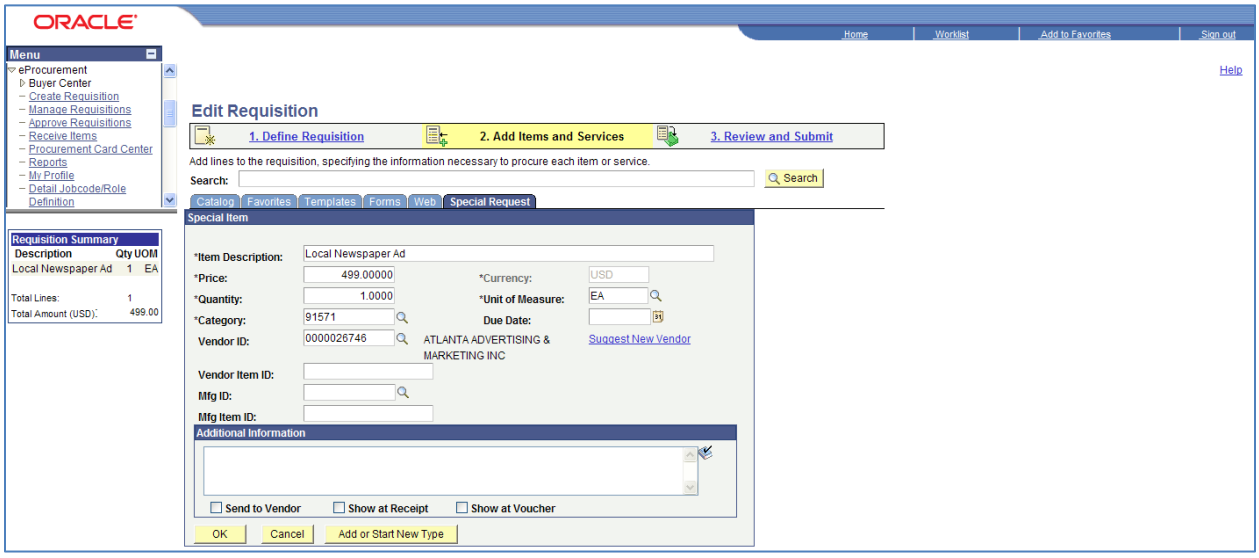


Once you select the choice of "Edit Requisition", the system will take you to the Edit Requisition page. This page is the same type of page used when creating a requisition. From the Review and Submit page, to edit a line, click on the line description (for Special Request Requisitions only). This will bring up the page where you can edit the price, category, unit of measure, etc.



To edit a requisition line's distribution and schedule information, click on the expand link for that line. The shipping information can be updated, and the Chartfields can be updated if necessary. After making

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all of your edits, you can select the Save & Preview Approvals button. If you have made changes to a requisition that is already in the approval process, when you submit the edited requisition, it will reinitiate the approval process. Therefore, it may be helpful to add a comment explaining why an approver may be seeing the same requisition again. After previewing approvals, you can then submit the requisition.

How To: Edit a Requisition

1. In PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. In the search field, enter the **Requisition ID** that needs to be edited (you may need to clear some of the search fields).
4. Click the **Search** button.
5. In the Requisition ID's action drop-down list, select **Edit Requisition**.
6. Click the **Go** button.
7. To update the requisition line information, select the link under **Description**. Make the necessary changes and the return to 3. Review and Submit.
8. To update an individual requisition line Chartfield information, click its **expand** button. Make the necessary changes.
9. To update multiple requisition lines at one time, select the lines to be edited and the select the **Modify Line/Shipping/Accounting** button. Make the necessary edits.
10. Select the **Save & Preview Approvals** button.
11. If reinitiating the approval process, consider adding a **comment** to inform your approvers of this.
12. Insert any **ad hoc approvers** if necessary.
13. Click the **Submit** button.

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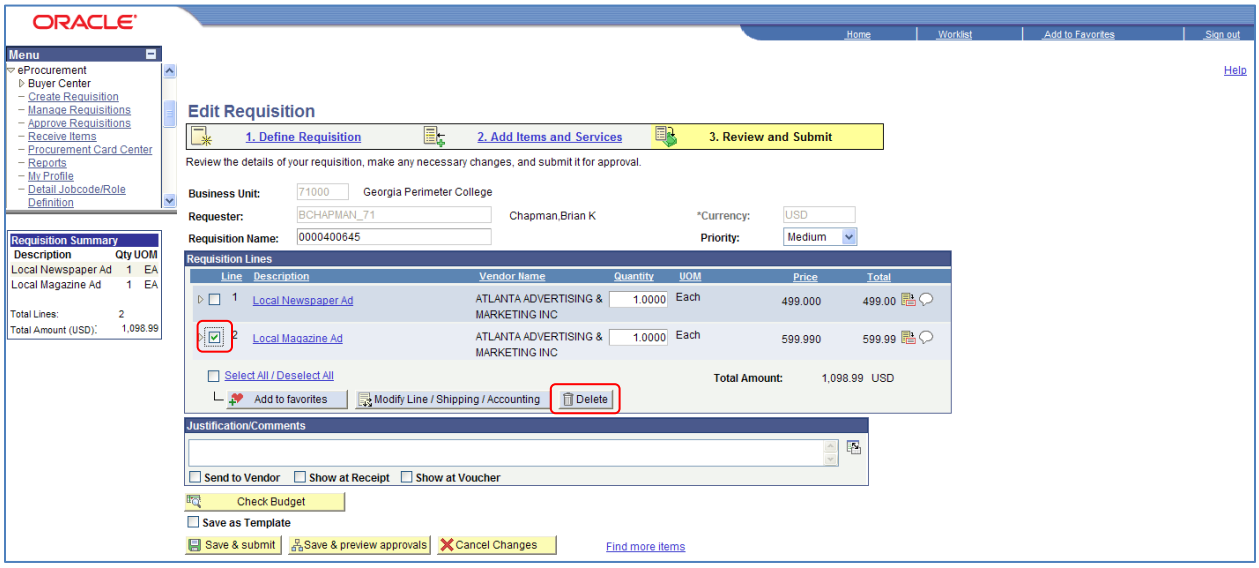
Delete a Requisition Line

You can delete a requisition line if needed, as long as the requisition line has not been budget checked. To delete a requisition line, you will again go through the Manage Requisitions page and select "Edit Requisition." From the "**3. Review and Submit**" page, you can select the line to be deleted by placing a checkmark in its select box. You can select multiple lines at one time if needed. To delete the selected lines, simply click the Delete button. The system will ask you to confirm the deletion before proceeding. Since you have modified the overall requisition, you will need to Save and Submit the requisition again.



How To: Delete a Requisition Line

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter the **Requisition ID** in the Search Criteria (you may need to clear some of the search fields).
4. Click the **Search** button.
5. In the Requisition ID's action drop-down list, select **Edit Requisition**.
6. Click the **Go** button.
7. **Select** the line(s) you want to delete.
8. Click the **Delete** button.
9. To confirm the deletion, click the **OK** button.
10. Click the **Save and Submit** button.

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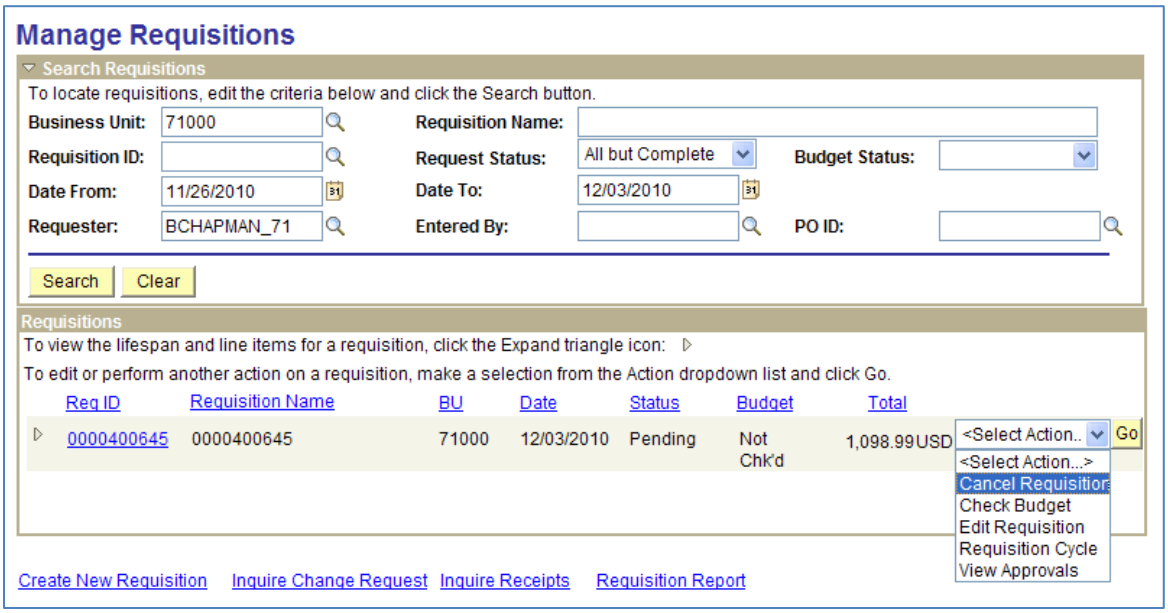
Canceling a Requisition

On occasion, you may find the need to cancel a requisition. If you need to cancel a requisition, you can do so as long as the requisition has not been sourced into a Purchase Order. Once it has been sourced into a purchase order, the requisition can no longer be canceled and you will have to work with the purchase order. To cancel a requisition, you will go through the Manage Requisitions page.



How To: Cancel a Requisition

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter the **Requisition ID** in the Search Criteria (you may need to clear some of the search fields).
4. Click the **Search** button.
5. In the Requisition ID's action drop-down list, select **Cancel Requisition**.
6. Click the **Go** button.
7. On the Requisition Details page, select the **Cancel Requisition** button.
8. On the Manage Requisitions page, the requisition status should change to Canceled.

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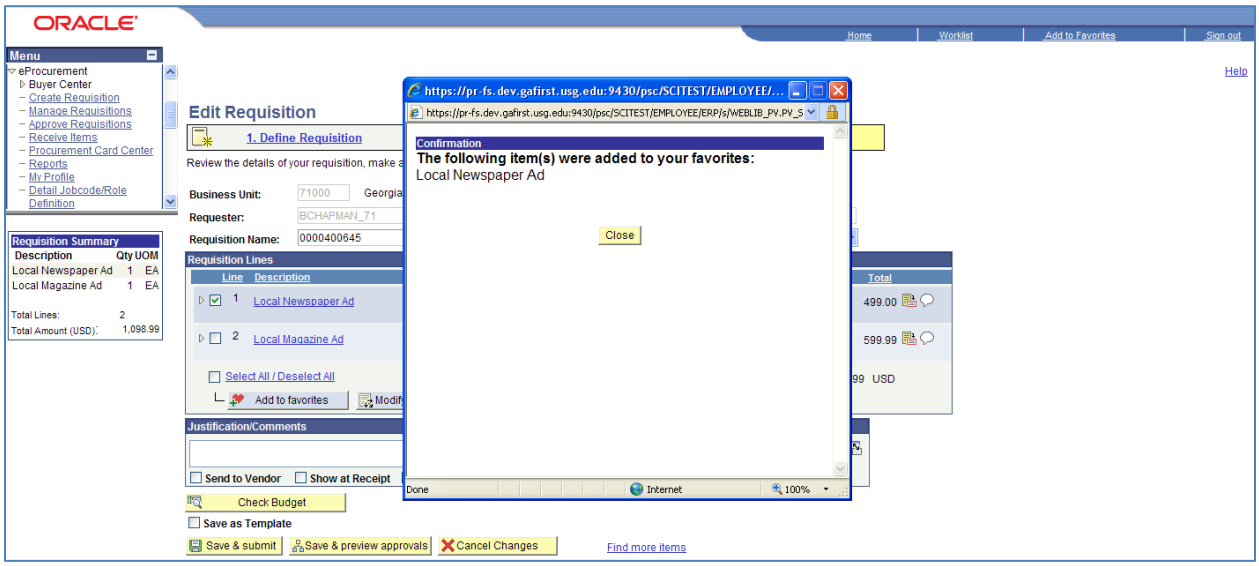
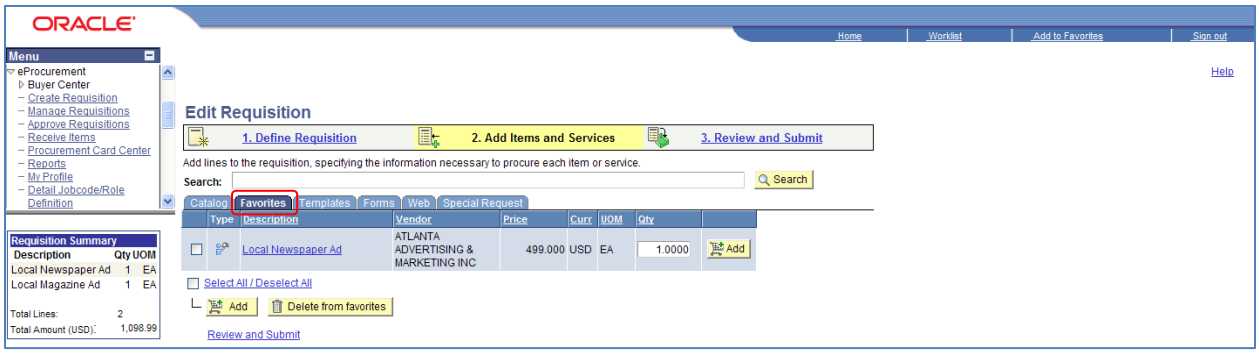
Saving Favorite Items for Special Request Requisitions

If you find that you are constantly creating Special Request Requisitions for the same items, eProcurement gives you the ability to save these items as Favorites. The Favorites should only be saved for Special Request Requisitions. For Georgia*FIRST* Marketplace Requisitions, those items should not be saved as a favorite within eProcurement.



When you save favorites in eProcurement, only you are able to access them since they are saved under your User ID. You can save items as favorites as you are creating a Special Request Requisition. You can also add items to your Favorites list without saving and submitting your requisition. On the Review and Submit page of creating a requisition, you can save your items by selecting them and choosing the Add to Favorites button. You can then access your favorite items under the Favorites tab on the Add Items and Services page.



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How To: Save an Item as a Favorite for Special Request Requisitions

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Create Requisition**.
3. Select the **Special Item** link.
4. 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 Due Date for the item
    g. Enter or select the Vendor ID for the item if you have a preferred vendor
    h. 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.
    i. Select the Add Item button.
    j. Confirm the Requisition Summary updated with your new requisition line.
    k. To add an addition requisition line, complete steps 4a through 4k again.
5. Select the link 3**. Review and Submit**.
6. Select the **line items** you want to save as **Favorite items** with a **checkmark**.
7. Click the **Add to Favorites** button.
8. Click **Close** in the Confirmation popup box.
9. Your favorites are now saved. You can either continue creating the Special Request Requisition, or you can exit the requisition by clicking another link in the menu or clicking the Home link.

How To: Add a Favorite Item to Special Request Requisition

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Create Requisition**.
3. Click the **Favorites** tab.
4. To add an individual favorite item, update the **quantity** and click its **Add** button.
5. To add multiple favorite items, select each favorite item with a **checkmark**, update the quantities if necessary, and select the **Add** button.
6. Verify that the **Requisition Summary** updated with the new items.
7. To edit the information on a favorite added to a requisition, select the **3. Review and Submit** link.
    a. Select the line item description link.

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b. Update the item fields as necessary.
c. Click the **OK** button.

8. Continue creating the requisition.

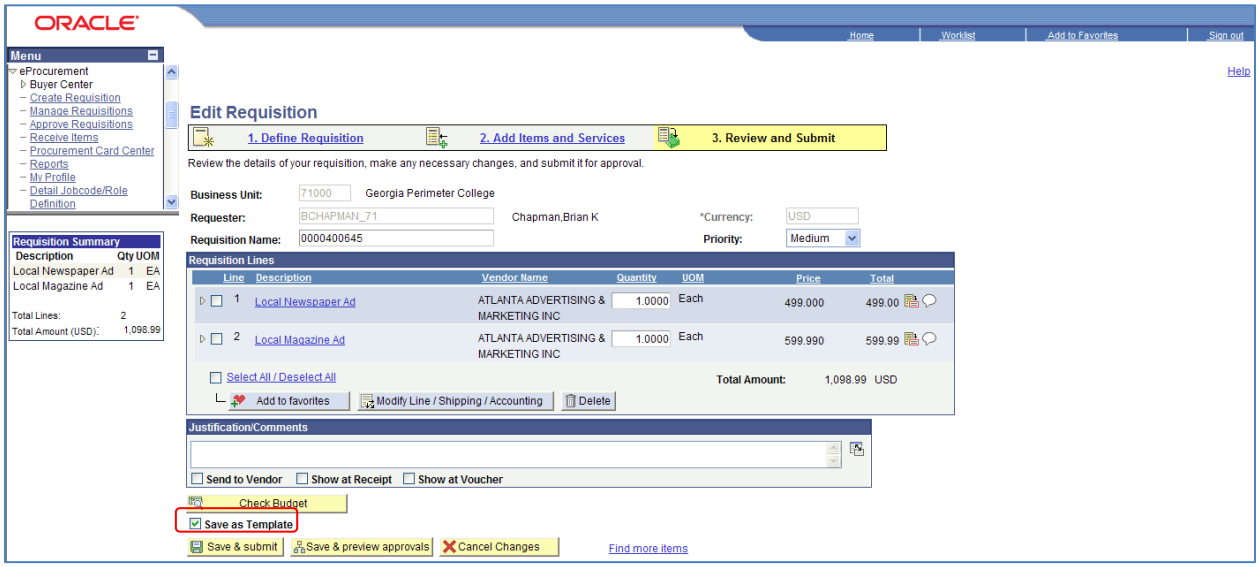
How To: Delete an Item from Your Favorites List

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Create Requisition**.
3. Click the **Favorites** tab.
4. Select the item(s) you want to delete with a **checkmark**.
5. Select the **Delete from favorites** button.

Special Request Requisition Templates

In addition to saving favorite items for Special Request Requisitions, you can also create personal templates for a set of items for Special Request Requisitions. Again, templates should only be created for Special Request Requisitions and not for Georgia*FIRST* Marketplace Requisitions.

After creating a Special Request Requisition, but before saving and submitting it, you can name your requisition. This requisition name will also be used as the Template Name. After providing a name, select the Save as Template checkbox. All information that you entered for the requisition (except Due Date if it is in the past), will be saved under the template. This includes Chartfields.



To apply a Personal Template for a Special Request Requisition, you select the Templates tab. From there, you can indicate the quantity and add the template of items to your requisition. You can then make any necessary changes needed through the Review and Submit page.

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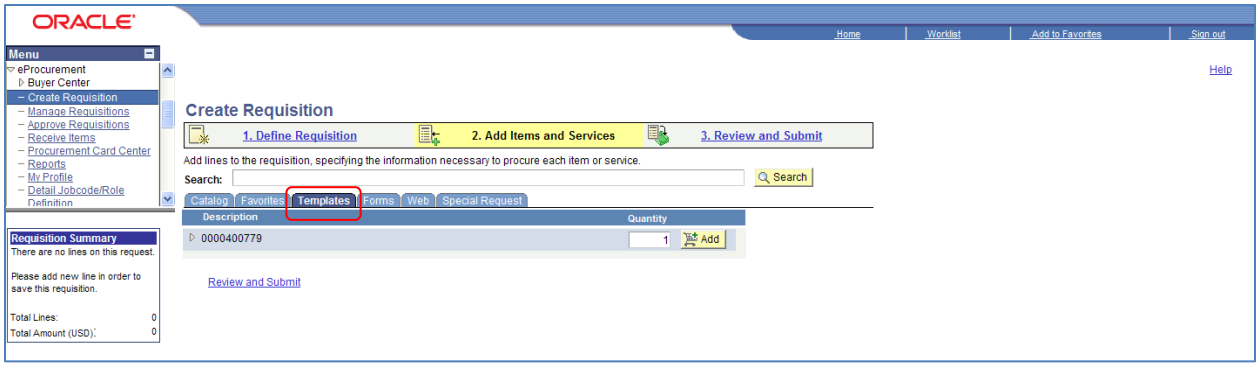

How To: Create a Personal Template for Special Request Requisitions

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Create Requisition**.
3. Select the **Special Request** tab.
4. Select the **Special Item** link.
5. 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 Due Date for the item
    g. Enter or select the Vendor ID for the item if you have a preferred vendor
    h. 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.
    i. Select the Add Item button.
    j. Confirm the Requisition Summary updated with your new requisition line.
    k. To add an addition requisition line, complete steps 7a through 7k again.
6. Select the **3. Review and Submit** link.
7. Input a **requisition name** that will also serve as the **Template** name.
8. To update a requisition line's distribution information, click its **Expand** button and update the information.
9. To update multiple requisition line's distribution information, select the lines to update with a check mark and then select the Modify Line/Shipping/Accounting button. Make the necessary updates, which will update all selected lines.

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10. To enter a comment to an individual requisition line, click that line's call out icon. Enter the comments and select where you want the comment to appear.
11. Enter any justification or comments you wish to attach to the requisition in the Justification/Comments field and select the appropriate checkboxes.
12. Select the **Save as Template** checkbox.
13. Click the **Save & Preview Approvals** button.
14. Your template is now saved. You can continue with the current requisition by submitting it.

How To: Apply a Personal Template to a Special Request Requisition

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Create Requisition**.
3. Select the **Templates** tab.
4. Enter the **quantity** of the template you wish to apply.
5. Click the **Add** button.
6. Select the **3. Review and Submit** link.
7. To update a requisition line's distribution information, click it's Expand button and update the information.
8. To update multiple requisition line's distribution information, select the lines to update with a check mark and then select the Modify Line/Shipping/Accounting button. Make the necessary updates, which will update all selected lines.
9. To enter a comment to an individual requisition line, click that line's call out icon. Enter the comments and select where you want the comment to appear.
10. Enter any justification or comments you wish to attach to the requisition in the Justification/Comments field and select the appropriate checkboxes.
11. Click the **Save & Preview Approvals** button.
12. Insert any ad hoc approvers as necessary.
13. Click the **Submit** button.

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Chapter 8: Desktop Receiving

For many items that are purchased, a receipt will be required before payment is issued by your Accounts Payable department. The receiving requirement is set on purchase orders. By creating a receipt in the system, your Accounts Payable Department can be sure that they are issuing payment for goods that have been received.

Some requesters will have the responsibility of performing Desktop Receiving, which is creating a receipt in the system. This receipt is tied into the Requisition, Purchase Order, and Invoice so that payment can be issued. Without the receipt, the payment cannot be issued.

Not all requesters will have this responsibility. Some shoppers may be responsible for their own desktop receiving. Check with your institution for your applicable business processes. If you do have the Desktop Receiving responsibility, continue with this chapter to learn how to create receipts in the PeopleSoft system.

Desktop Receiving

Desktop Receiving is a function within the eProcurement module. It is a simplified version of what your Central Receiving department does on campus. Your Central Receiving Department will still be responsible for creating receipts in the PeopleSoft system for assets and other items that need to be inventoried. However, this eProcurement Desktop Receiving function will enable you to receive many of the goods ordered through ePro Requisitions. You will need the proper security setup to perform desktop receiving.

Desktop receiving is done through the PeopleSoft Core system, in the eProcurement module. On the Receive Items page, all of your requisitions that have not been fully received will be listed. Through the Receive Items page, you will be able to indicate whether you have received the full quantity requested, or just a partial quantity.

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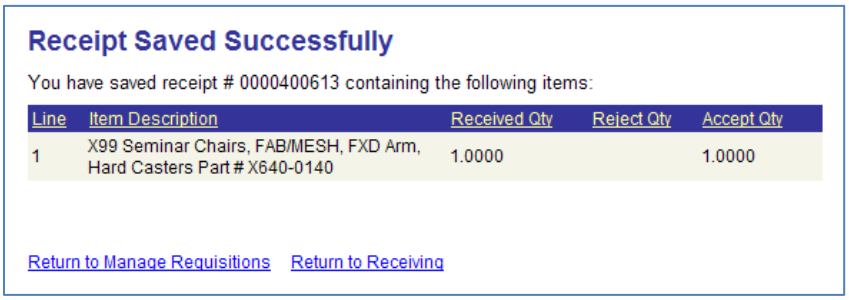
On the Receive Form, you will indicate the Receipt Date and how many you received.

Once you save your receipt, the system will generate a Receipt Number. This Receipt Number will be tied into the Requisition number, Purchase Order number, and Voucher number.



How To: Create a Desktop Receipt

1. Log into the **PeopleSoft Core** system.
2. Select **eProcurement** in the menu.
3. Select **Receive Items** in the menu.
4. Location the **Requisition Line Item** you need to receive.
5. Select the requisition by placing a **checkmark** in its **Select** box (or to receive all line items, choose the Check All button).
6. Select the **Receive Selected** button.
7. If needed, change the **Received Date**. By default, the current date will be listed.
8. In the **Received Qty** field, enter the **quantity** received.
9. To review details about the actual purchase order, select the **Details…** icon.
10. To attach comments to the Receipt, select the **Comments** icon.
    a. Here you can indicate the condition and input a comment if needed.
11. Click the **Save Receipt** button.

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12. Your Receipt Number will be listed on the “Receipt Saved Successfully” page.

If you have a Requisition line item that you previously received a partial quantity for, you will still be able to go back to this same page and receive additional quantities.

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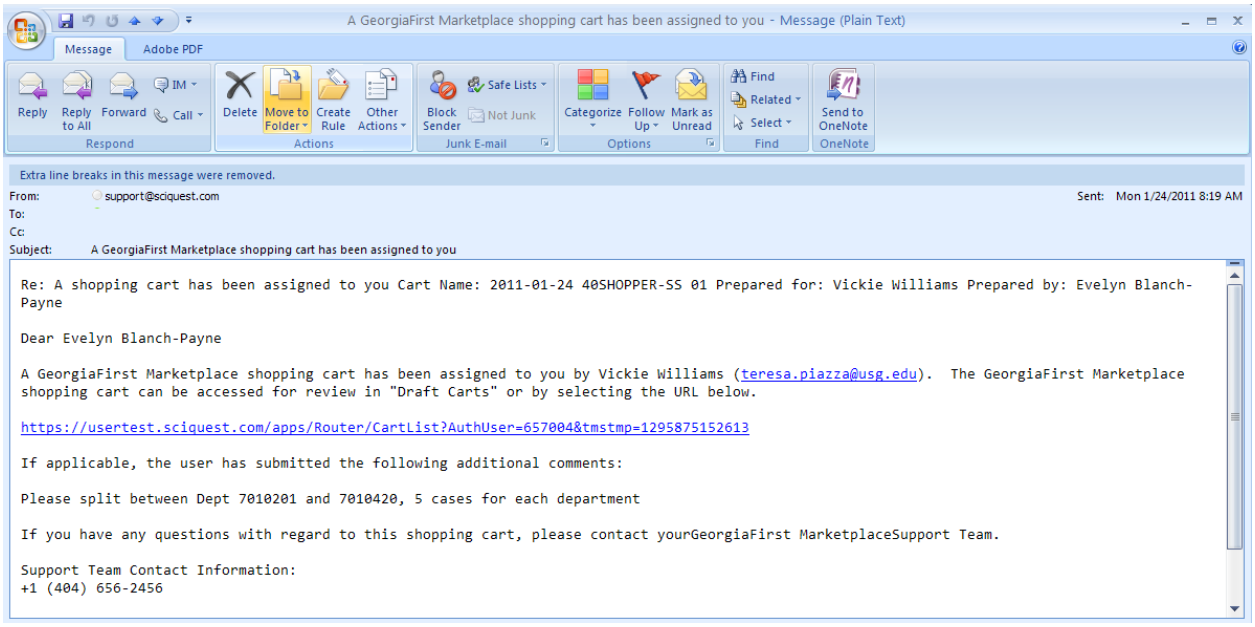
Chapter 9: Requester Notifications

In order to help you manage requests for goods, the eProcurement and Georgia*FIRST* Marketplace systems employ the use of automatic emails to provide notifications to you throughout the process.

Requester Notification #1: You have been assigned a shopping cart

The first notification that you will see is when a shopping cart has been assigned to you. After a Shopper has built a Georgia*FIRST* Marketplace cart and assigned it, the system notifies you via email. In that email, you will also see any comments attached to the shopping cart by the shopper.



Requester Notification #2: Your Requisition Has Been Approved

If you are listed as the Requester on either a Special Request Requisition or a Marketplace Requisition, you will also receive an email notification once your requisition has been approved. Depending on your institutional setup for approvals, your requisition may be approved by one or more individuals. Once the last approver has approved your requisition, the system will notify you via email that your requisition has been fully approved.

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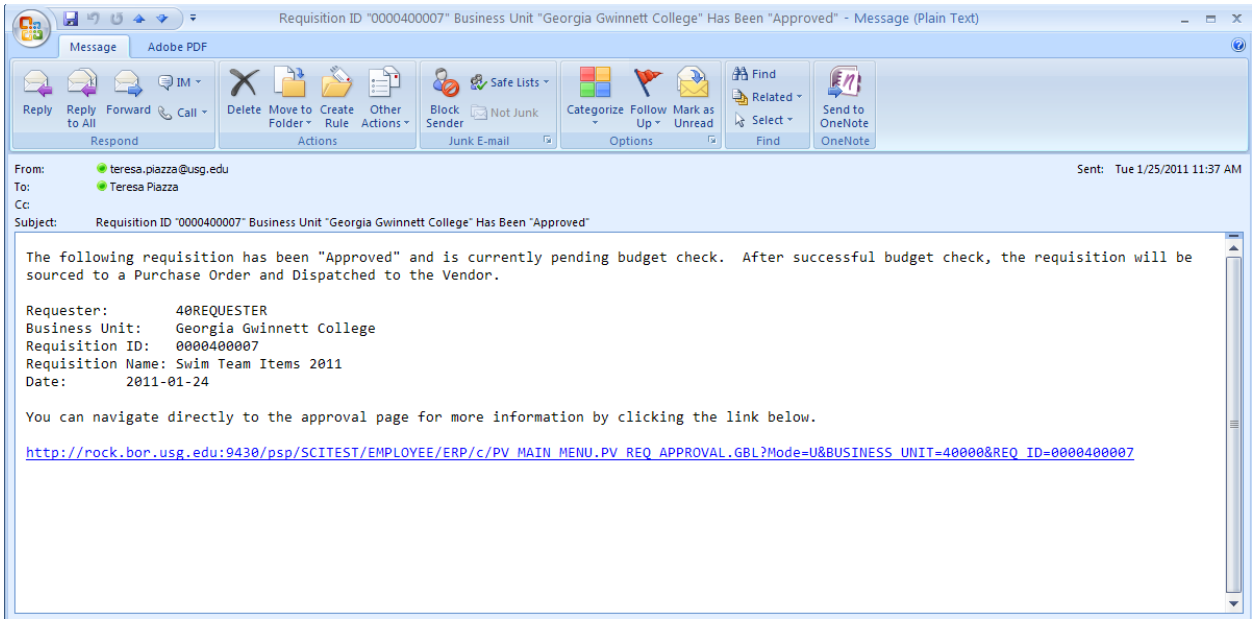

Once your requisition has been approved, it will then be available for further automatic processing such as budget checking and sourcing into a purchase order. It is then dispatched to the vendor for order fulfillment.

Likewise, if your requisition (or a requisition line) is denied, you will also receive an email indicating this. If your Shopper receives notification that a requisition has been denied, they have been instructed to forward the message to you. Denied requisitions can be edited and resubmitted when necessary.

Notification #3: Your Requisition Items Need to be Received

Once your requisition has been turned into a purchase order and dispatched to the vendor, the vendor can then fill your order. In addition to sending you the purchased items, the vendor will send an invoice to your Accounts Payable department for these items. Before Accounts Payable can pay an invoice, it will check to see if the items you purchased require a receipt before payment can be made. If a receipt is required and has not been entered into the system yet, you may receive an email indicating that you need to "receive" your items in the system.

Please note: You should not "receive" an item in the system unless you have actually received it. Do not enter a receipt just because you get this email. This system is in place to ensure that the institution only pays for goods that it receives.

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Chapter 10: Searching for Items in the Georgia*FIRST* Marketplace

As a Requester, there may be times when you need to create your own shopping cart in the Georgia*FIRST* Marketplace to pull into a requisition. In addition, you may need to occasionally edit an assigned shopping cart that you are working with. In order to effectively look for items in the Georgia*FIRST* Marketplace, you need to know how to use its search functions. Within the Georgia*FIRST* Marketplace, there are many ways that you can search or browse for items. In this chapter, we will review most of the search methods. However, after using the marketplace for a while, you will find the way that you are most comfortable.

Before we discuss what search options are available, let's take a minute to review what is available to be searched. First, Georgia*FIRST* Marketplace has "hosted catalogs". A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When you perform a product search, the products in all of the hosted catalogs are searched.

Second, there are "punch-out catalogs". Punch-out catalogs are integrated external links to a supplier's web-based catalog. The Shopper enters the punch-out supplier's website through the Georgia*FIRST* Marketplace to search and select products from that supplier's web catalog (i.e., Dell's Government Catalog). The shopper then returns the items to the Georgia*FIRST* Marketplace shopping cart. Punch-out catalogs still maintain items and pricing specific to the University System of Georgia. In some cases, items and pricing in a punch-out are also specific to each institution.

Third, there are "self-managed" catalogs. These catalogs function very similarly to hosted catalogs, but the items and pricing are managed by the institutions, the University System Office, and the System Admin.

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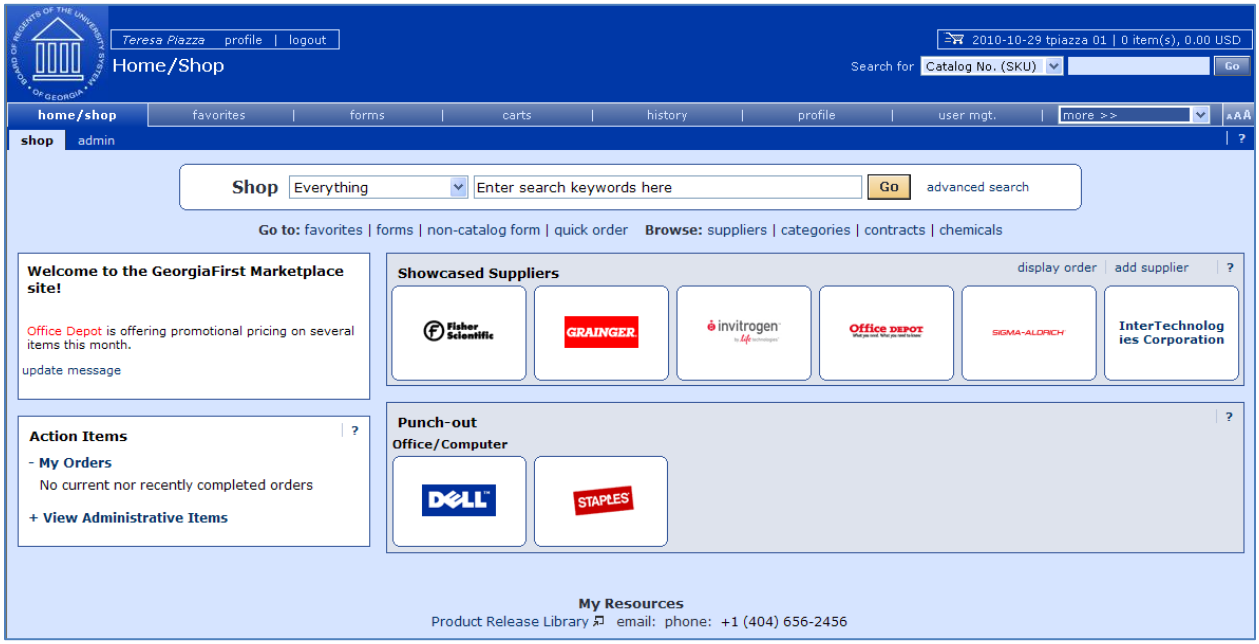
Using Simple (Basic) Search



A simple search is similar to a "Google" search, where you enter a word, phrase, or keyword into a single text box for searching. By using a simple search, you can get results from hosted catalogs, self-managed catalogs, and contracts. Simple Search displays when you enter the Georgia*FIRST* Marketplace. With the Simple Search feature, you can search through everything or you can search by product category. By default, the search will occur across all product categories ("Everything"). All of the words that you enter in the keyword textbox must be found in the items displaying in the product search results. After entering the keywords, click the "Go" button or press "Enter" on your keyboard.

When performing a simple search, the system looks through many different things in order to find the most relevant search results. This includes looking through Keywords and Item information. Georgia*FIRST* Marketplace System Administrators enter keywords to help guide users to the correct contract, supplier and favorite items. Item Information includes the following:

- Product Description
- Product Category/Sub Category
- Supplier (Vendor)
- Manufacturer Name and Manufacturer Part Number
- Unit of Measure/Product Size
- System Packaging and Size
- Alternate Name and Alternate Part Number(s)

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- Client Catalog #
- Color
- Common Name
- MDL Number
- Molecular Formula
- Radionuclide
- UPC

One way to narrow down your search results is to only search in a particular product category. Searching by category helps reduce the number of products from appearing in the search results by filtering out those not in the selected category. When shopping by category, the data being search is limited. Available categories may vary by institution depending on the suppliers and items enabled. The Product Categories that you may see include:

- Lab Supplies: Products used in various research environments (i.e., reagents, glassware, analytical equipment, etc.)
- Medical/Clinical Supplies: Includes medical, surgical, clinical and dental products (i.e., gauze, needles, dental equipment, etc.)
- Office: Office supplies and consumables (i.e., files and folders, desk supplies, writing instruments, etc.)
- MRO/Facilities: Products related to maintenance repair and operation (i.e., tools, hardware, janitorial supplies, etc.)
- Furniture: All furniture products (i.e., desks, chairs, shelving, etc.)
- Services: Service-related items (i.e., lab services, legal services, training services, etc.)
- Manufacturing/Engineering: Major equipment purchases (i.e., Construction equipment, HVAC equipment, Pharmaceutical equipment)
- Books and Publications: Hardcopy documentation spanning all topics and interests (i.e., Books, Manuals, Magazines, etc.)
- Electronics/IT/AV: All electronic or computer-related equipment (i.e., computer hardware/software, AV equipment/accessories, communication equipment/accessories, etc.)
- Specialty: Miscellaneous Products (i.e., Sporting equipment, Clothing materials, Musical instruments, etc.)
- Food/Food Equipment: All food-related items (i.e., Commercial food preparation, storage, and serving equipment, Food consumables and supplies, Kitchen equipment, etc.)

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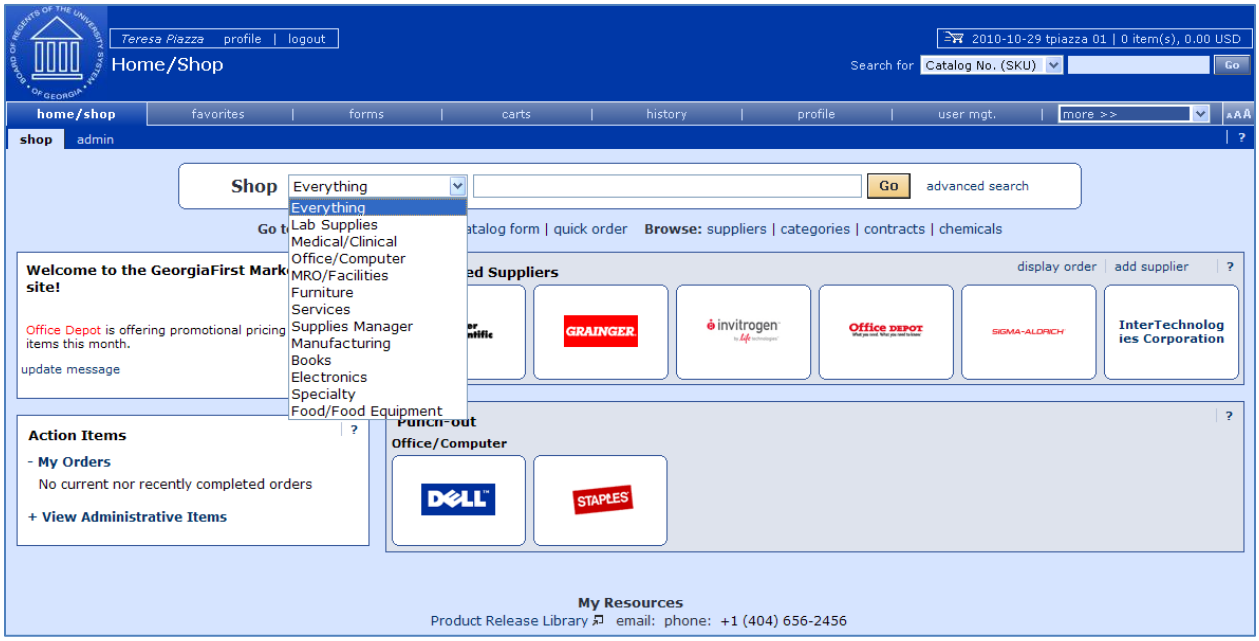

It is recommended that when searching for an item, you first search by product category. If you do not find what you are looking for, then search "Everything."

Once your search results are retrieved, you can use the filter options to further refine your results. Primarily, you can use the filter options for "Custom Attributes" to see those items on a state contract, agency contract, etc.

How To: Perform a Simple Search

1. From the Georgia*FIRST* Marketplace **home/shop** tab, select the **Shop** dropdown list.
2. Select the appropriate **Product Category** (optional).
3. Enter one or more **keywords**.
4. Press the **Go** button.

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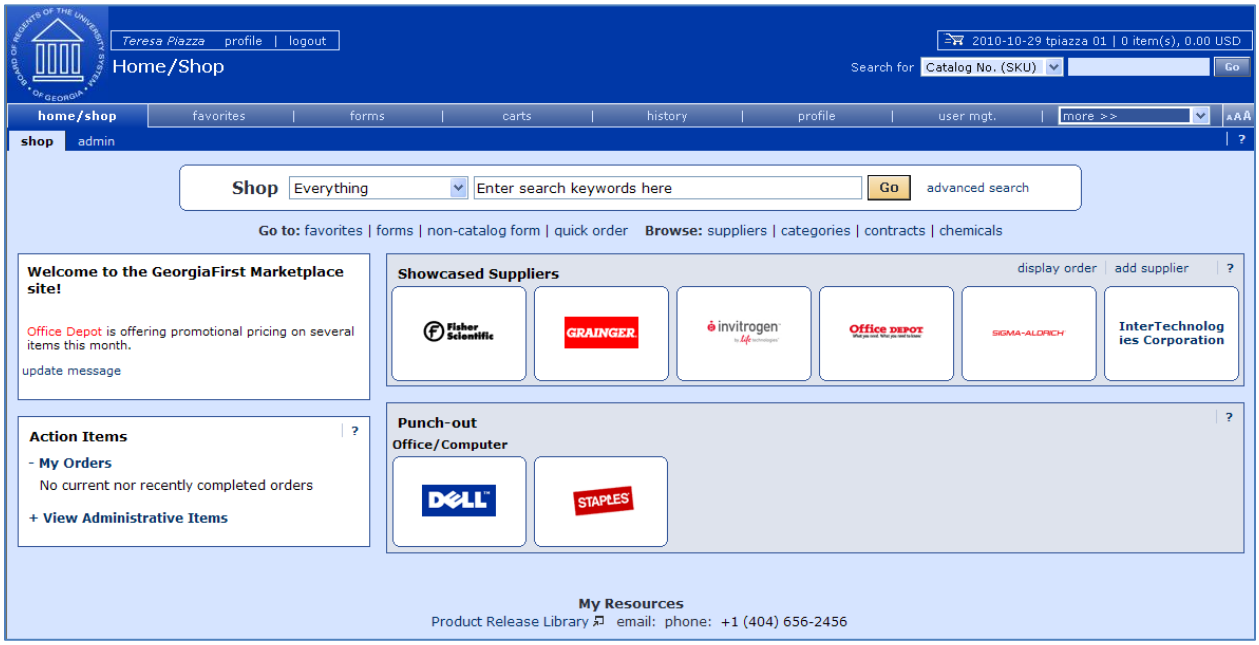
Using Advanced Search

By using Advanced Search, you are able to enter additional criteria to generate more specific search results than with Simple Search. The search criteria available depends on the product category selected and includes custom catalog attributes to identify contract type. By default, once you open the Advanced Search function after entering the Georgia*FIRST* Marketplace, it will remain open for subsequent searches, for the remainder of the shopping session.



To access Advanced Search, select the Advanced Search link from Simple Search (Shop at the Top).

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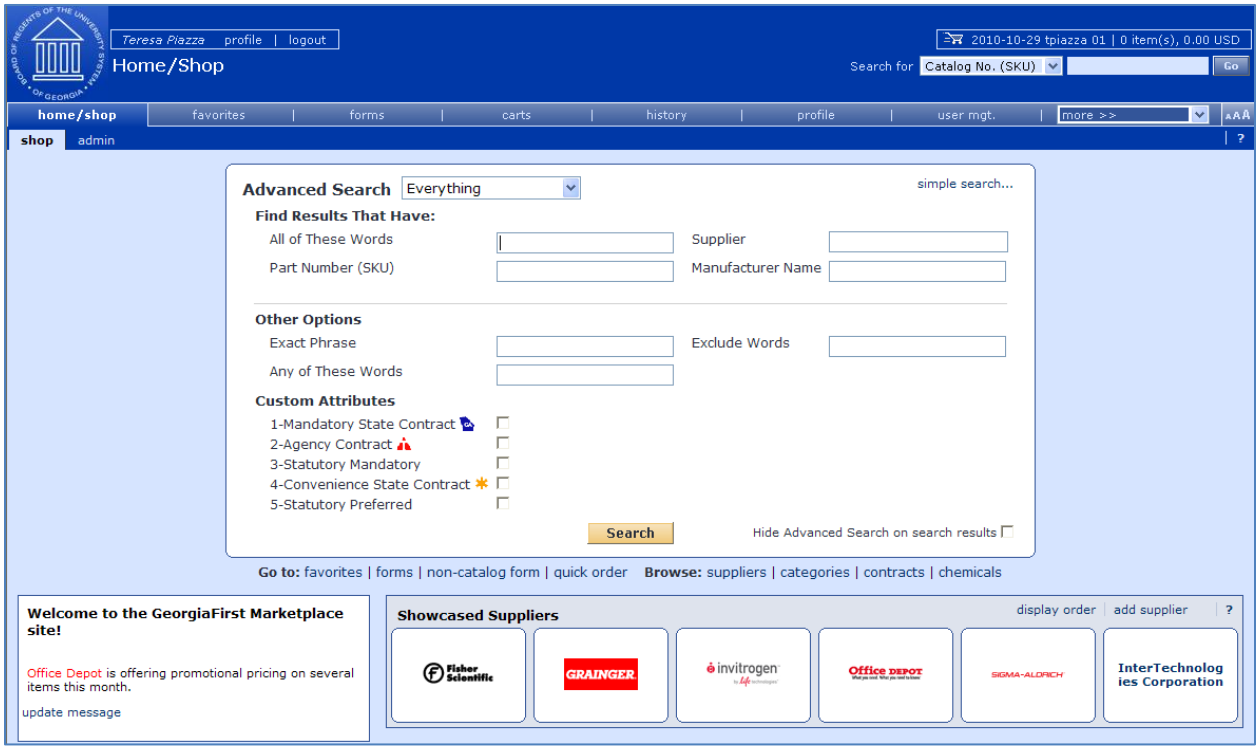

When using Advanced Search, proper usage of the search criteria fields makes a huge difference in terms of the quality of search results. Users should take the time to understand how each of these fields work. Keep in mind that the search criteria fields available in Advanced Search are dependent on the product category selected.

Search Criteria Field	Description
All of These Words	This field functions in the same way that Simple Search does. Only products containing ALL the word entered in this field are returned in search results. The words do not need to be in the same order as listed, but all words must be found in the item data or keyword data.
Part Number (SKU)	Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributor's SKU or the manufacturer SKU. For best results, the entire SKU should be entered. A partial match on part number returns the closest matching or similar results. This is a "begins with" match and at least four characters must be entered. If multiple strings of text are entered (i.e., "123 456 798"), then all components of that string must be present in the part number for the item to be returned. For example, if

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Search Criteria Field	Description
	"123 456 789" is entered into Product Search, the part numbers "123-456-789" and "123-456-789-000" would be returned, and "123-456" would not. When the Part Number field is used as part of the search criteria, only those fields related to the Part Number for items are searched. This includes Supplier Part Number, Manufacturer Part Number, Alternate Part Number, Client Catalog Number, and Custom Catalog Number.
CAS No.	This search field is available in the Laboratory Supplies category only. CAS numbers can be entered in any format using numbers, brackets, braces, parentheses, and dashes (any other characters are stripped). The search engine will convert the entered value to the appropriate format to return only products with the entered CAS number. Enter multiple CAS numbers to find all chemicals with matching CAS numbers. Note: The entered CAS No. is checksum validated to reduce errors.
Product Class	This field is only available for Lab Supplies and provides a more detailed level of categorical search.
Product Size	Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter "500" for units and select "mL" from the pull-down for a product size of 500mL. This is available only in the Lab Supplies category.
Supplier Name	Enter the beginning of a supplier's entire name to find products from all suppliers that include the terms as part of their name, or begin typing and select from the drop-down list of suppliers to see products from a single specific supplier. When the Supplier Name field is used as part of the search criteria, only the supplier name is searched.
Manufacturer Name	To find products from a specific manufacturer, enter the name of that manufacturer here. Search Results will include products from all suppliers who have identified the manufacturer in the product information provided to the Georgia*FIRST* Marketplace. Enter multiple manufacturer names to limit results to a set of certain manufacturers. Only the manufacturer field is searched for matches.
Exact Phrase	Products containing the exact words in the ordered entered are returned. This is a very powerful search strategy if you know the precise way in which a supplier presents its information. If you are unsure – and looking for results from multiple suppliers – it is recommended that you use "All of These Words" option instead.
Exclude Words	Products including any of the words entered in this field are excluded from Search Results. Another search field must be used when using the exclude function. For example, you may be looking for all glove options that are not small or medium. You could enter "latex gloves" in the "must include the words" field and "small medium" in the "exclude the words" field.
Any of These Words	Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one. Keep in mind, the search results will not be as targeted as using the "must include the words" field.

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You can also narrow down your results by using the Custom Attributes. These Attributes include:

- Mandatory State Contract
- Agency Contract
- Statutory Mandatory
- Convenience State Contract
- Statutory Preferred

Once your search results are retrieved, you can use the filter options to further refine your results. Primarily, you can use the filter options for "Custom Attributes" to see those items on a state contract, agency contract, etc.

When executing your search, select the "Hide Advanced Search on search results" checkbox if you would like the advanced search box to collapse and show the Simple Search after displaying results. To go back to using Simple Search, select the "simple search…" link.

How To: Perform an Advanced Search

1. On the Georgia*FIRST* Marketplace **home/shop** page, select the **advanced search** link.
2. Select a **Product Category** in the Advanced Search drop down list.
3. In the **Find Results That Have:** section, use one or more of the following options:
    a. All of These Words
    b. Supplier
    c. Part Number (SKU)
    d. Manufacturer Name
    e. CAS No. (Laboratory Supplies Category only)
    f. Product Class (Laboratory Supplies Category only)
    g. Product Size (Laboratory Supplies Category only)
4. In the **Other Options:** section, use these additional fields as necessary:
    a. Exact Phrase
    b. Exclude Words
    c. Any of the Words
5. To search for items for a particular contract type, select the checkbox next to the appropriate **custom attribute/contract type**.
    a. For example, initially perform the search with **Mandatory State Contract** selected. If the search does not return the required item, repeat the search with **Agency Contract** selected.
6. Click the **Search** button

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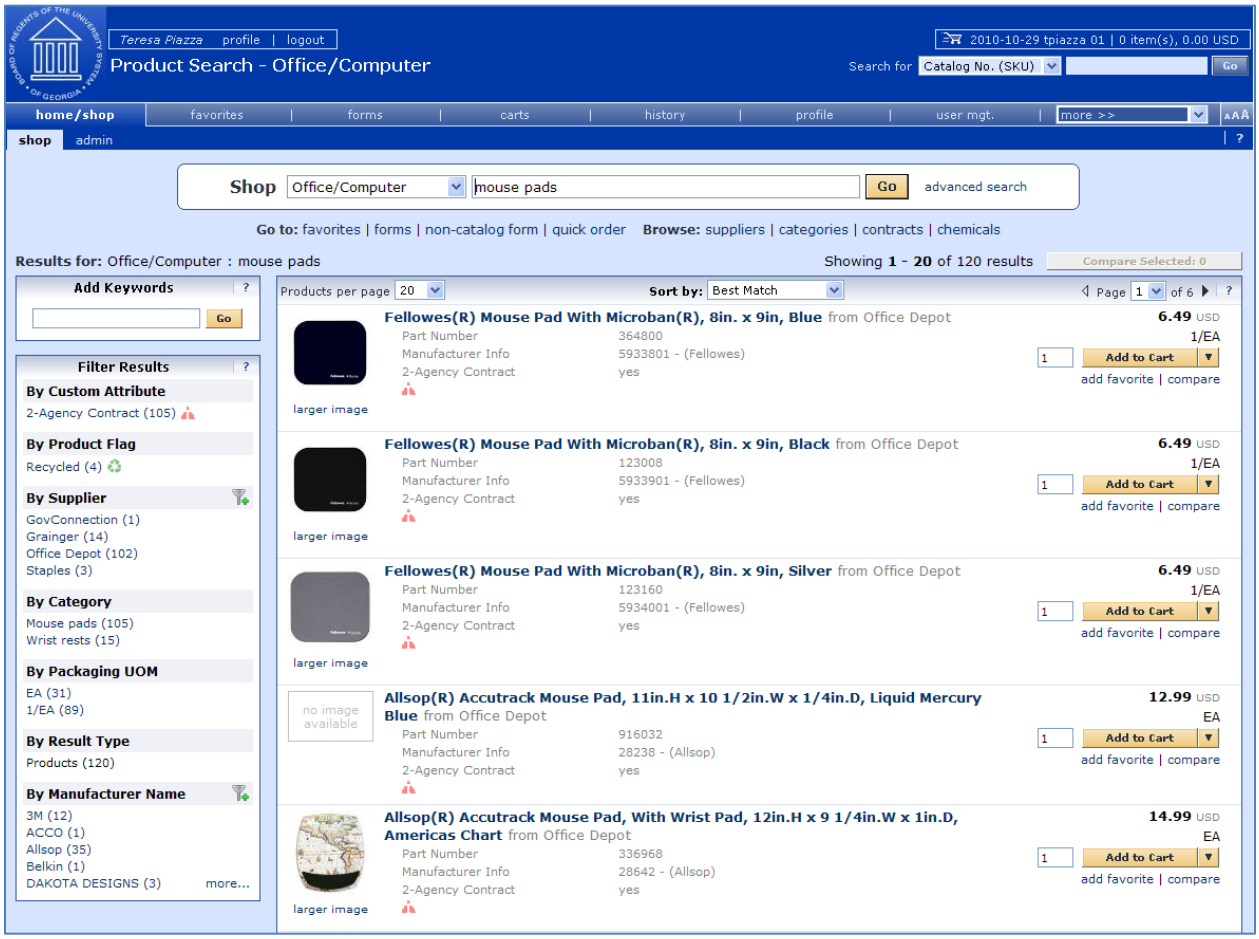
Search Result Details

Search results display below the Simple and Advanced Search.



Here are the detailed explanations for the **Search Results** user interface:

Search Results	Description
Search Listing	By default, items and recommended services, suppliers, etc., are presented in the Best Match "Order". Hosted products are displayed with an image (if available), along with product description and product detail information.
Showing	After the search is performed, you can see how many items are displayed from the overall total of results.
Sort By	After the search is performed, you can choose to re-sort the data by part number, product description, price, etc.,
Refining the Search through Keywords	Georgia*FIRST* Marketplace allows you to filter the search results by adding additional keywords into the "Add Keywords" field, found on the left side of

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Search Results	Description
	the screen.
Refining the Search through Filters	Georgia*FIRST* Marketplace allows you to filter the search results by selecting specific suppliers, product categories, supplier classes, manufacturers, units of measure, product flags, or custom attributes (contract type). These filter options are found on the left side of the screen.
Icon Definitions	Custom Attributes (used for contract type, supplier classes, and product attributes are identified with icons below the product description. An item-specific legend is provided for product flags and supplier classes in the appendix.
Comparing Items in Search Results	From the search results, product details can be compared to determine which one should be ordered. This function is explained more in depth in the next chapter.
Access Additional Pages and Changing Items per Page	To change the number of items displaying per page, select the appropriate option from the "Items per page" drop-down at the top or bottom of the search results. To view items on a different page, use the arrow buttons or select a specific page number. This information is displayed above and below the search results.

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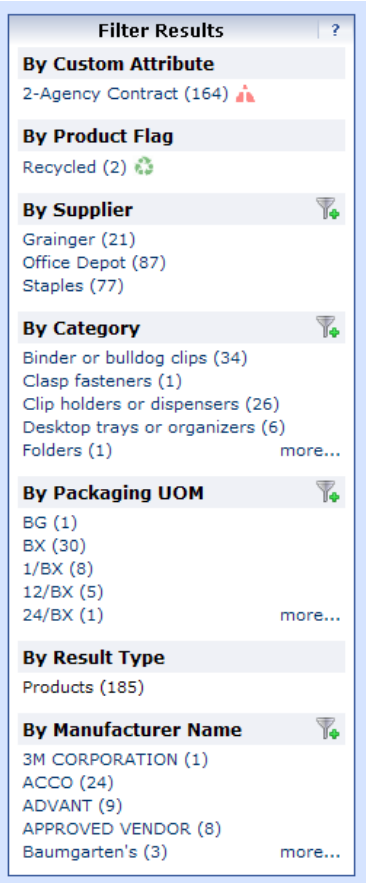
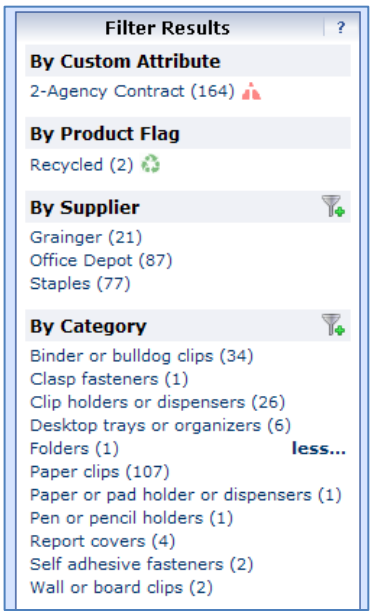


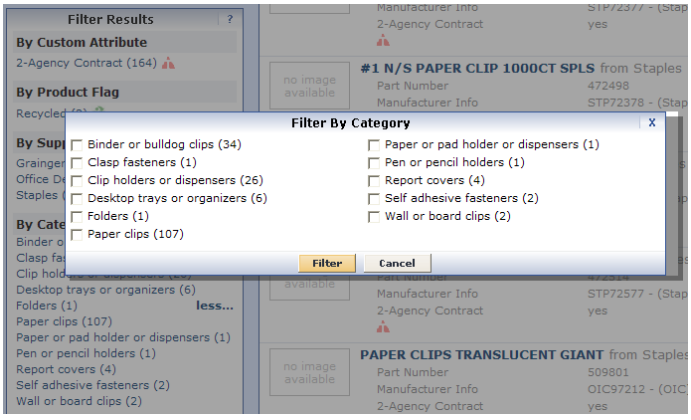
Filtering Results

Once you have searched for an item, you can use the **Filter Results** section on the Search Results page to further narrow down your results. After performing a search, you will see the Filter Results section appear, where you can filter by Custom Attribute (contract type), Product Flag, Supplier, Category, Packaging UOM, Result Type, and Manufacturer Name.

To apply a single filter, simply click on the option. To see additional options under a filter, select the **more…** link.



In addition, you can apply multiple filters under one filter option by selecting the add filter… icon (funnel with green plus sign). By selecting the add filter…icon, you can choose more than one filter option. Simply select the options you want through their checkboxes and then click the **Filter** button.



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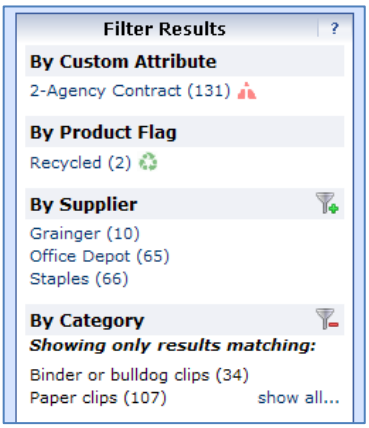

If you want to remove a filter, click the **remove selected filter** icon (funnel with red minus sign).

Over the next few pages, we will detail how to search using other methods.

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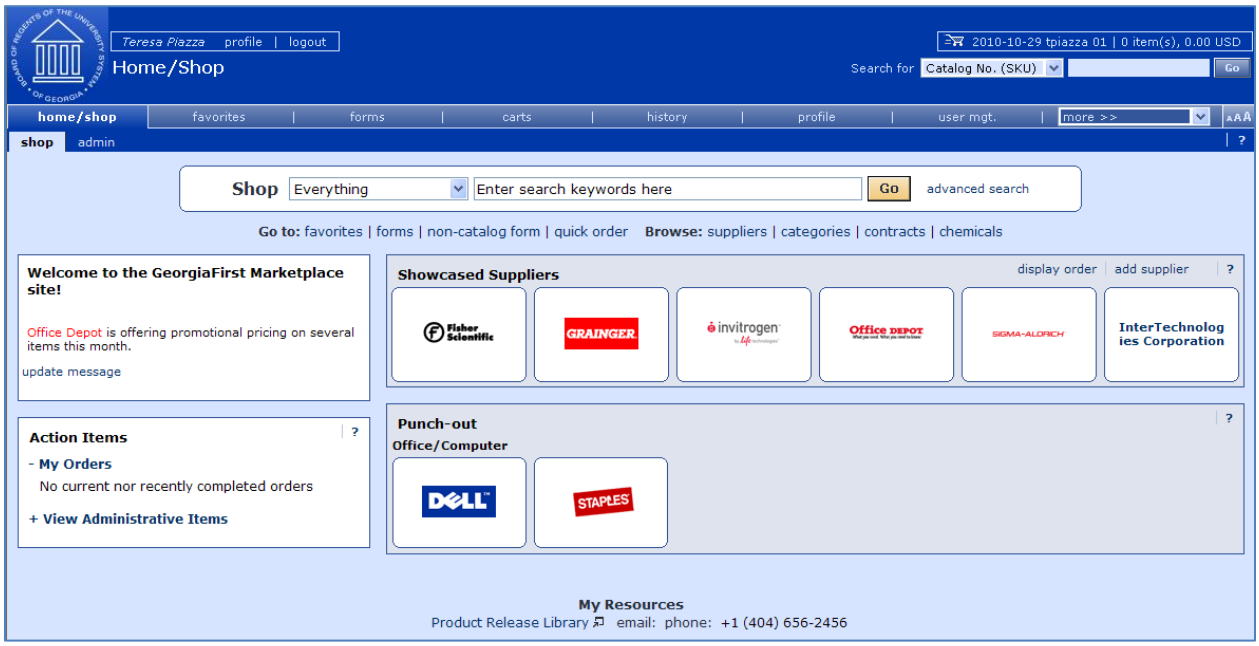
Searching from the Purchasing Showcase

The Purchasing Showcase is an area where specific suppliers are highlighted. Suppliers listed in the Purchasing Showcase may or may not have an icon attached to their name. Additionally, suppliers can have a caption indicating what the supplier offers or what special discounts they have or the contract number.



How To: Search from a Showcased Supplier

1. From the Georgia*FIRST* Marketplace **home/shop** page, click on the **Supplier** name or icon in the Showcased Suppliers section. A pop-up displays that indicates how you can shop from the supplier. The options include a simple search. Depending on the system configuration, search by contract type may be available for some suppliers.

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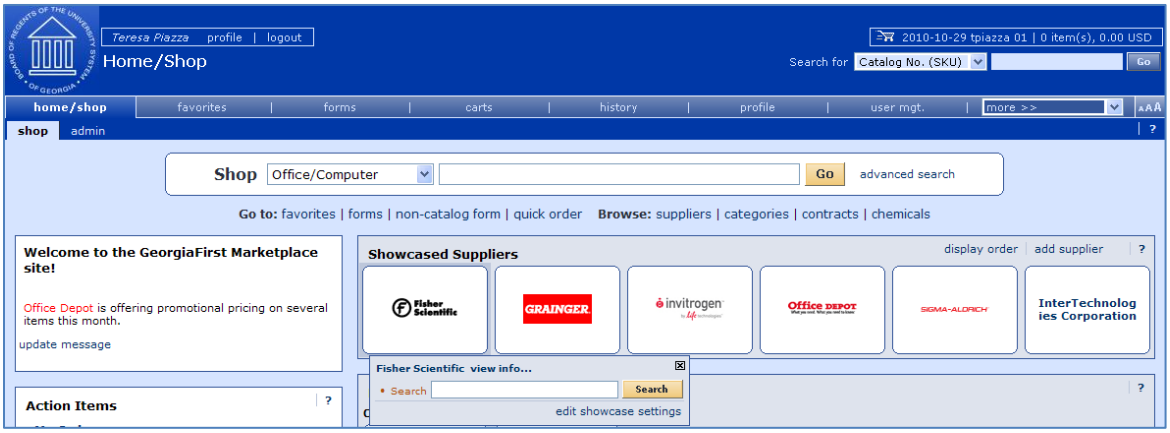
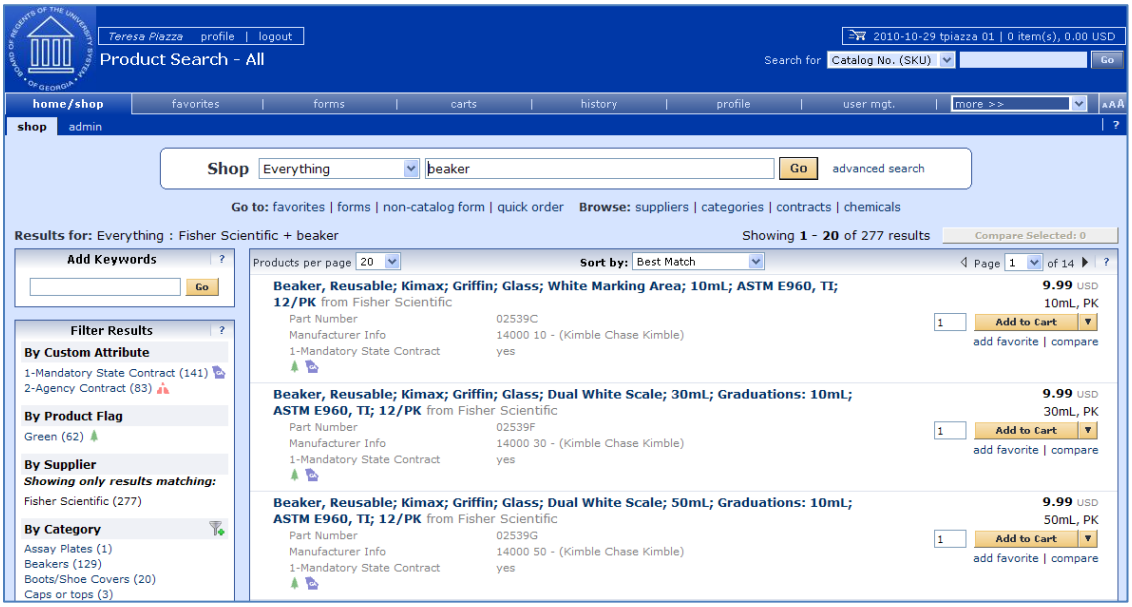


2. Enter **keywords** in the Search field and click the **Search** button.
3. The Search Results will appear and be formatted just how Simple Search and Advanced Search displays.



4. From these search results, you can narrow down your results by using **filter** options, re-sorting the results, or adding additional keywords.

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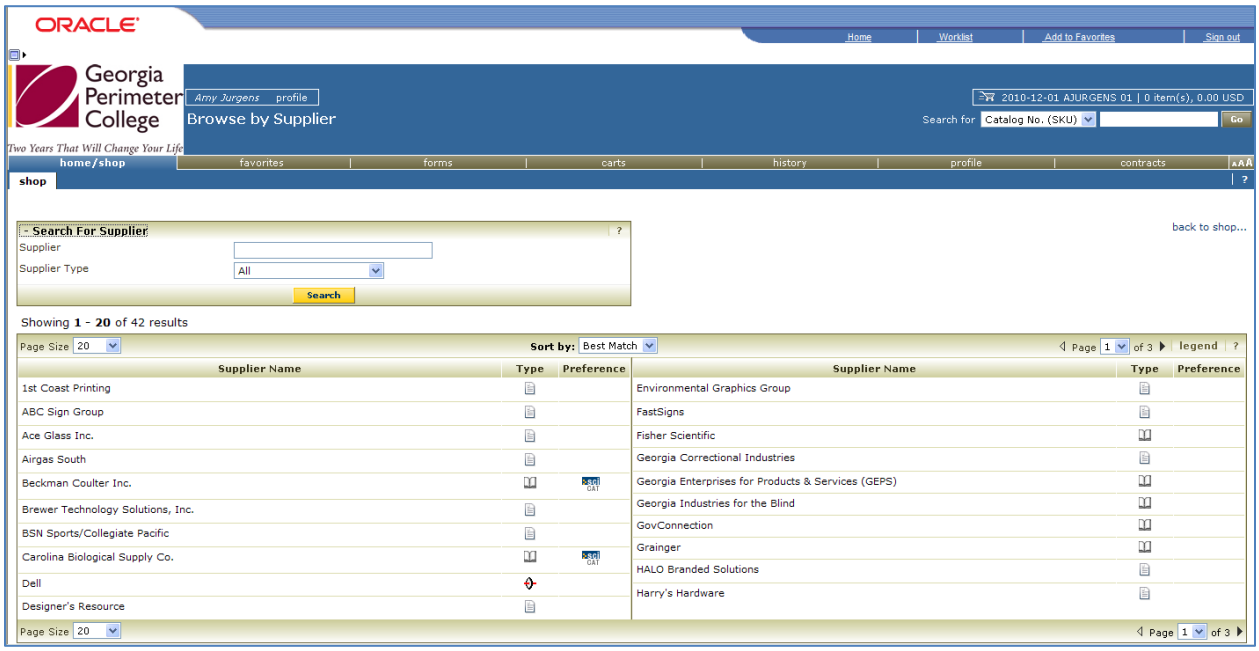
Browse by Supplier

The "Browse by Supplier" functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (product category), a single click takes you to all of the products provided by that supplier in that selected category. This functionality is different than selecting a specific supplier from the Showcase or through Punch-outs.



How To: Browse for Items by Supplier

1. From the Georgia*FIRST* Marketplace **home/shop** page, select the **Browse: suppliers** link.
    a. By default, all suppliers display. Suppliers are listed in alphabetical order with preference suppliers displaying first.
2. To search for a specific supplier, click on the **expand** icon (**+**) to the left of "Click to expand Search for Supplier Filter."
3. To view all suppliers click the **Search** button.
4. To search by supplier name or supplier information, enter the appropriate information in the Supplier Name field. The supplier search allows for a "contains" name search.
5. From the **Supplier Type** drop down list, select to view **Hosted Catalog Suppliers**.
6. Click the **Search** button.
7. Select the supplier from the results by selecting the **Supplier Name**. The supplier information and categories display.

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8. From the supplier category page, select the desired product category by clicking on its name or the **expand** icon (**+**) next to its name.
9. Continue drilling down into the categories until you locate the sub-category that you would like to view.
10. Final sub-categories (with items) are indicated with the word "view" next to it. Click the **view** button to view the items for the supplier in that particular category. You will be taken to the **Search Results** page, which is formatted like all other Search Results pages.

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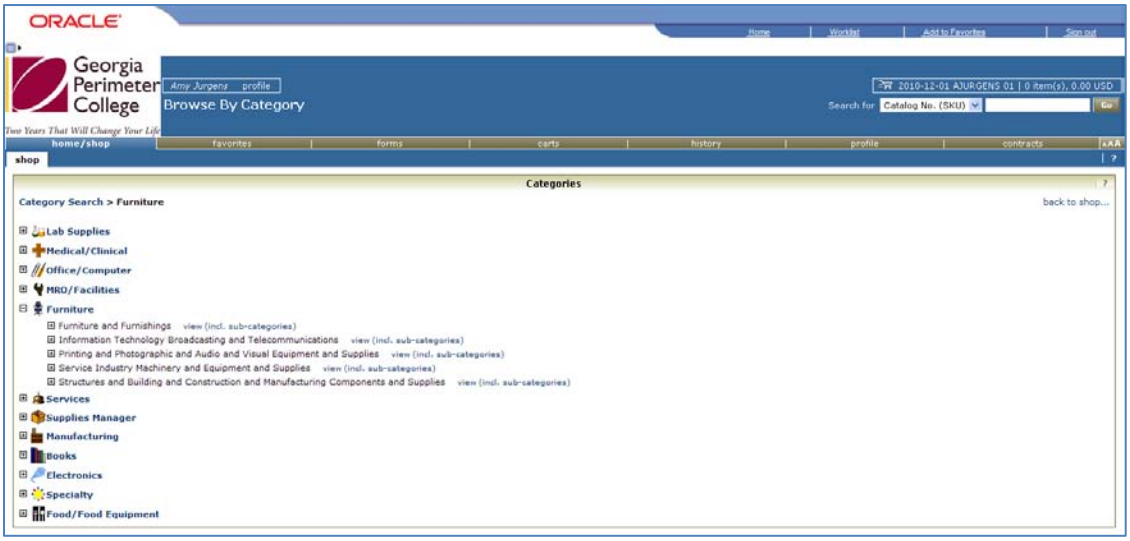
Browse by Category

The "Browse by Category" functionality is similar to the "Browse by Supplier" functionality. The main difference is instead of viewing one supplier's table of contents, all supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section.

Browse by Category provides a quick way to locate all item, across all suppliers, in a certain category.



How To: Browse for Items by Category

1. From the Georgia*FIRST* Marketplace **home/shop** page, select the **Browse: categories** link.
2. A full list of available categories, across all hosted catalogs is presented. This represents your full table of contents.
3. Use the **expand** (**+**) and **collapse** (**-**) buttons to drill down to the category of your choice.
4. Final sub-categories (with items) are indicated with the word "view" next to it. Click the **view** button/link to view the items in that particular category. You will be taken to the Search Results page.
5. On the **Search Results** page, all items in the selected category are displayed from all suppliers. Use the **filter** results to narrow your search results down even further.

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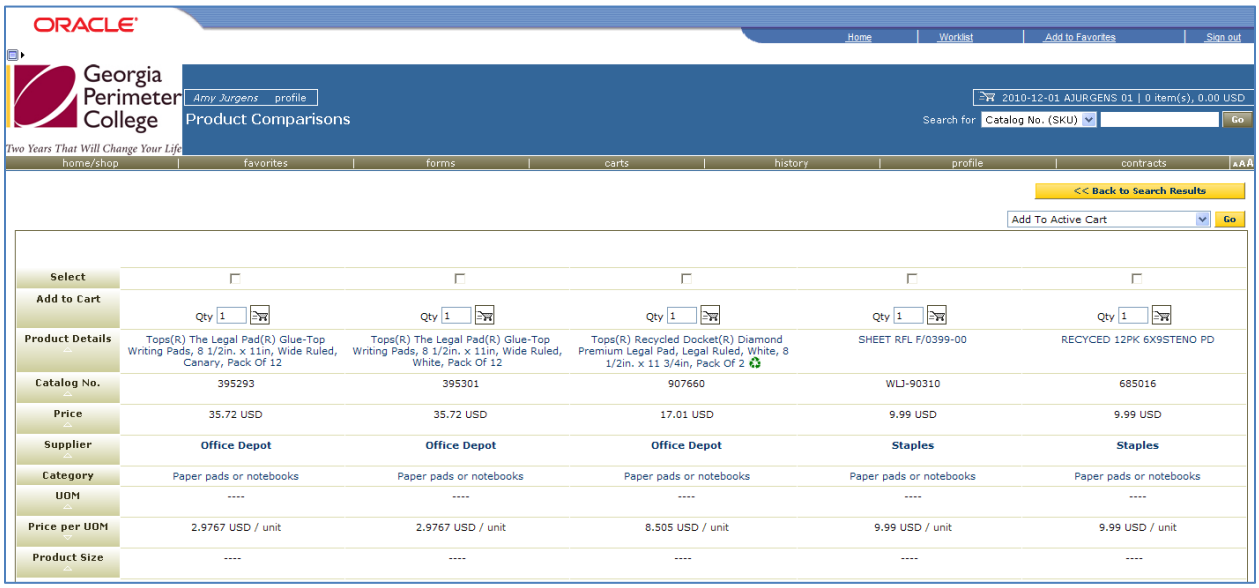
Using Product Comparison

Side-by-side comparisons are a good way to determine which product is best suited for a particular need. The **Compare** function allows the selection of two or more products to do a direct side-by-side comparison of the product attributes of each. Products found across multiple pages of search results can now be compared to one another. Keep in mind that the product comparison feature can only be used to evaluate hosted catalog items. Items from punch-out suppliers do not display in the search results, and therefore cannot be part of the side-by-side comparison.



How To: Compare Products Side-by-Side

1. From the Georgia*FIRST* Marketplace **home/shop** page, search for an item using your preferred search method.
2. From the search results, click the **compare** hyperlink for each item you want to include in the comparison. To remove an item from comparison, while on the **Search Results** page, select the **remove** hyperlink.
3. Note: Items across multiple pages can be selected. Once one or more items are selected, the **Compare Selected** button will activate.
4. Continue to select items for comparison. Once all items are selected, click the **Compare Selected** button at the top of the search results.
5. The **Product Comparison** page lists all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute.
6. To remove a product from the Product Comparison page:

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a. Click the **check box** at the top of the product
b. Select the **Remove** action from drop down list
c. Click the **Go** button

7. Click on the **supplier** hyperlink for an item for more information about that supplier. Here you can see supplier and contract information.
8. Click the **more information URL** to view a detailed product description.
9. Click the **Add to Cart** icon to add the item directly to your shopping cart.
10. Click the **Back to Search Results** button to go back to your original search results and cancel the product comparison. From here, additional products can be selected for comparison.

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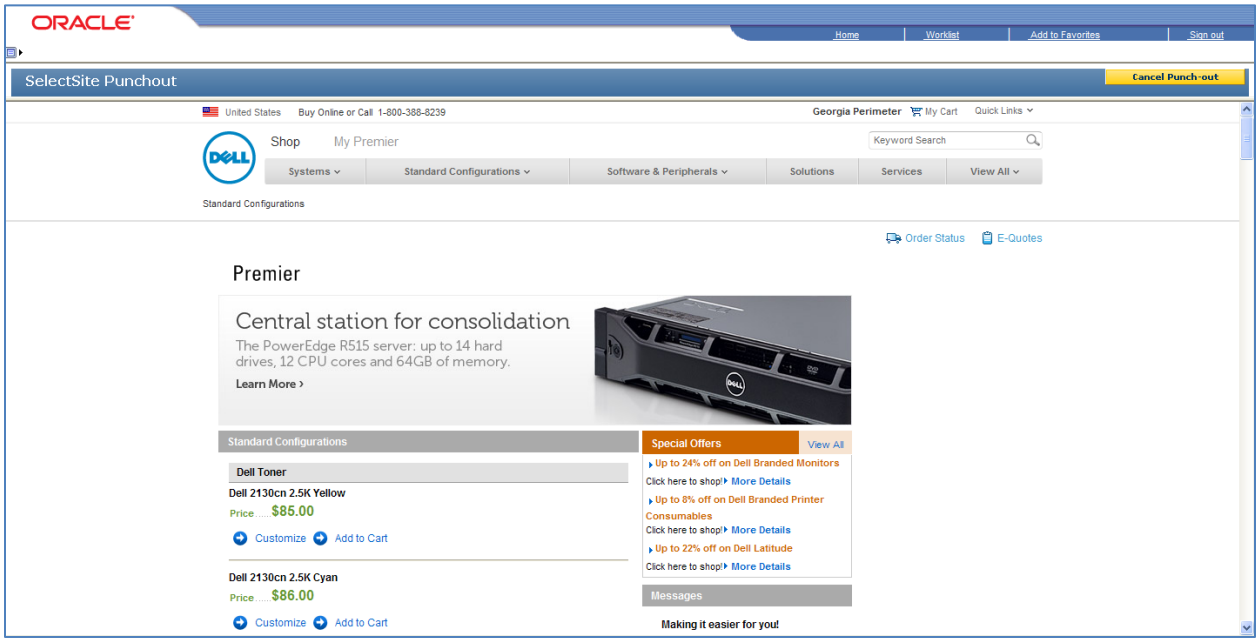
Searching from Punch-Out Suppliers

In addition to searching supplier-hosted catalogs that are loaded into the Georgia*FIRST* Marketplace, you can also search for items via punch-out suppliers. When accessing a punch-out supplier via the Georgia*FIRST* Marketplace, you are automatically authenticated to the supplier, so the supplier's website knows which organization you are from. This enables the supplier to show the appropriate products and pricing.



How To: Search from Punch-Out Suppliers

1. From the Georgia*FIRST* Marketplace **home/shop** page, click on the **Punch-Out supplier** from the Punch-Out section.
2. The system will redirect you to that supplier's web-page.
3. If you decide that you did not want to search from the punch-out supplier, select the **Cancel Punch-out** button in the upper right corner of the screen. This will take you back to the Georgia*FIRST* Marketplace.
4. Search for your items through the Punch-out supplier's website. The specific steps for searching and selecting items will be different for each punch-out supplier.
5. Select your items using the punch-out supplier's tools (i.e., "Add to Cart," "Add Item," etc.).
6. After selecting your items, proceed to the punch-out supplier's checkout. Check out of the punch out site. Checking out will be different for each supplier. For example, in the Dell punch-out site, when you are ready to pull your selected items into your Georgia*FIRST* Marketplace shopping cart, you select the "Create Order Requisition" button within the Dell punch-out site,

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and then choose “Submit Order Requisition”. This action places the items you selected into your Georgia*FIRST* Marketplace shopping cart. An order is NOT placed with the supplier when checking out of a punch-out site.

7. After checking out of the punch-out supplier’s website, you are returned to the Georgia*FIRST* Marketplace where you can add additional products to your shopping cart from other punch out vendors, as well as hosted catalog vendors.

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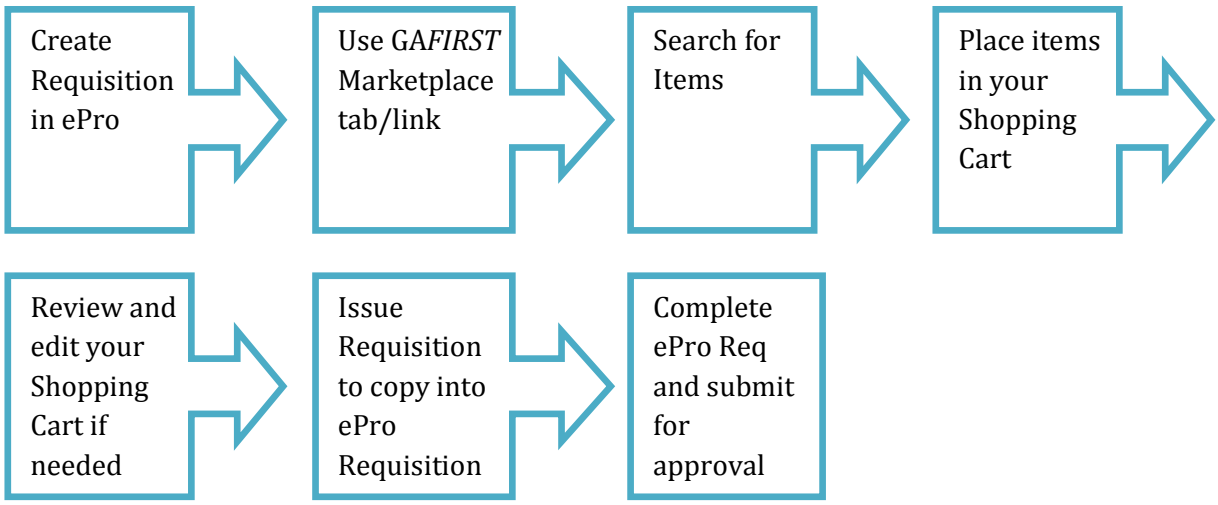
Chapter 11: Creating Your Own Marketplace Requisition

As a Requester, you most often create Marketplace requisitions from the shopping carts that Shoppers have assigned to you. On occasion, you may be creating your own Marketplace Requisitions. Now that you know how to search for items, you are ready to begin building your shopping cart in the Georgia*FIRST* Marketplace.

The process that you will follow is shown here:



Active vs. Draft Carts

There are two types of carts you can have in the Georgia*FIRST* Marketplace: Active Cart and Draft Cart. An Active Cart is the shopping cart you are currently working with or editing. A Draft Cart is a cart that you have created, but are not currently working with.

If you have started creating a cart, you can locate it under the Carts tab, and then under the "active cart" sub-tab. You can locate all of your carts under the Carts tab, and then under the "draft carts" sub-tab. Even your active cart will be listed here. The current active cart will have a colored background with its shopping cart icon.

You can create new carts whenever necessary. Additionally, draft carts can be created for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later. Initially, we will only work with one cart. Later in this chapter, we will talk about working with additional draft carts. Remember, your active cart is the shopping cart you are actively working with when adding or removing items, and either assigning or issuing a requisition from.

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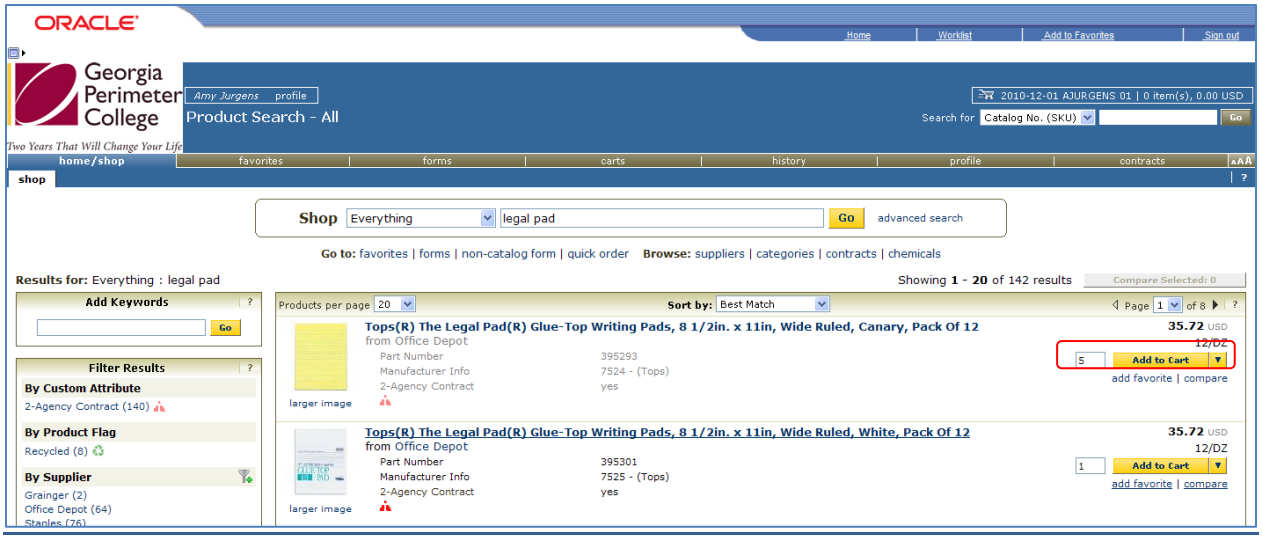
Adding an Item to a Cart

Shopping carts represent items selected that you wish be purchase. Shopping carts contain line items that represent goods or services being requested through the Georgia*FIRST* Marketplace. There are multiple ways to add an item to your shopping cart depending on where you are in the Marketplace. You can add items to your shopping cart from the search results page, product description pop-up, product comparison, etc.

How To: Add Items to your Shopping Cart from the Product Search Results Page



1. From the Georgia*FIRST* Marketplace home page, **search** for the item using your preferred search method.
2. From the search results, locate the item you wish to add.
3. For that item, enter the **quantity** you wish to request.
4. Select that item's **Add to Cart** button.

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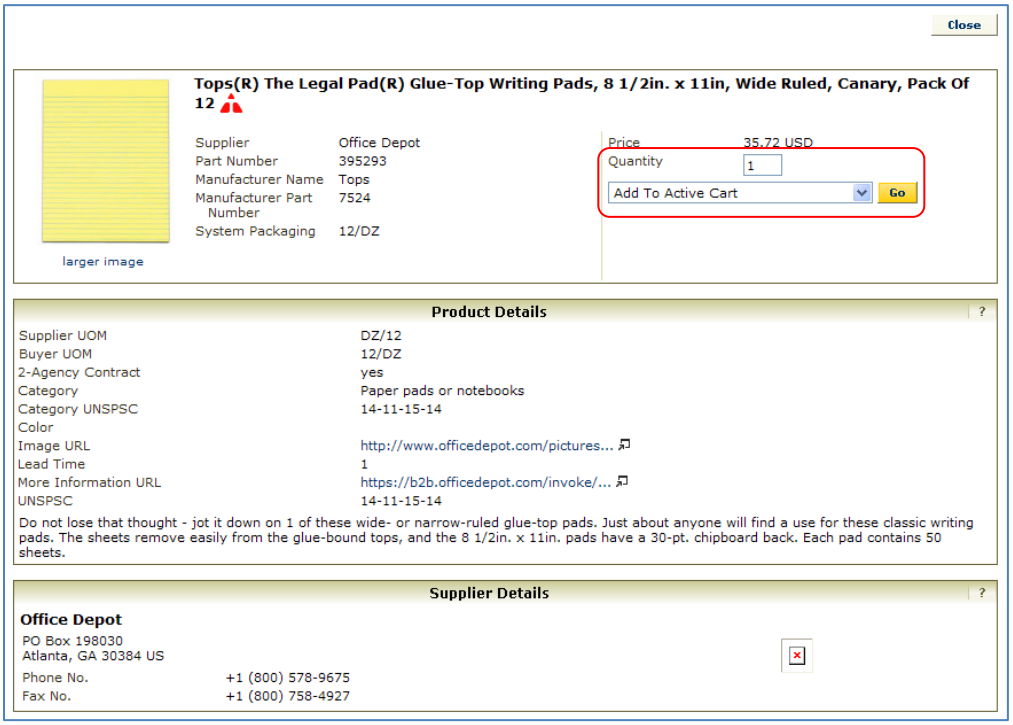
How To: Add Items to your Shopping Cart from the Product Description Pop-Up



1. From the Georgia*FIRST* Marketplace home page, **search** for the item using your preferred search method.
2. Click on an item's **Product Description** (item description hyperlink) to open its Product Details Pop-Up.
3. Enter the desired **quantity**.
4. In the drop down list, select **Add to Active Cart** and click the **Go** button.
5. Click the **Close** button after receiving the "Added Successfully" message.

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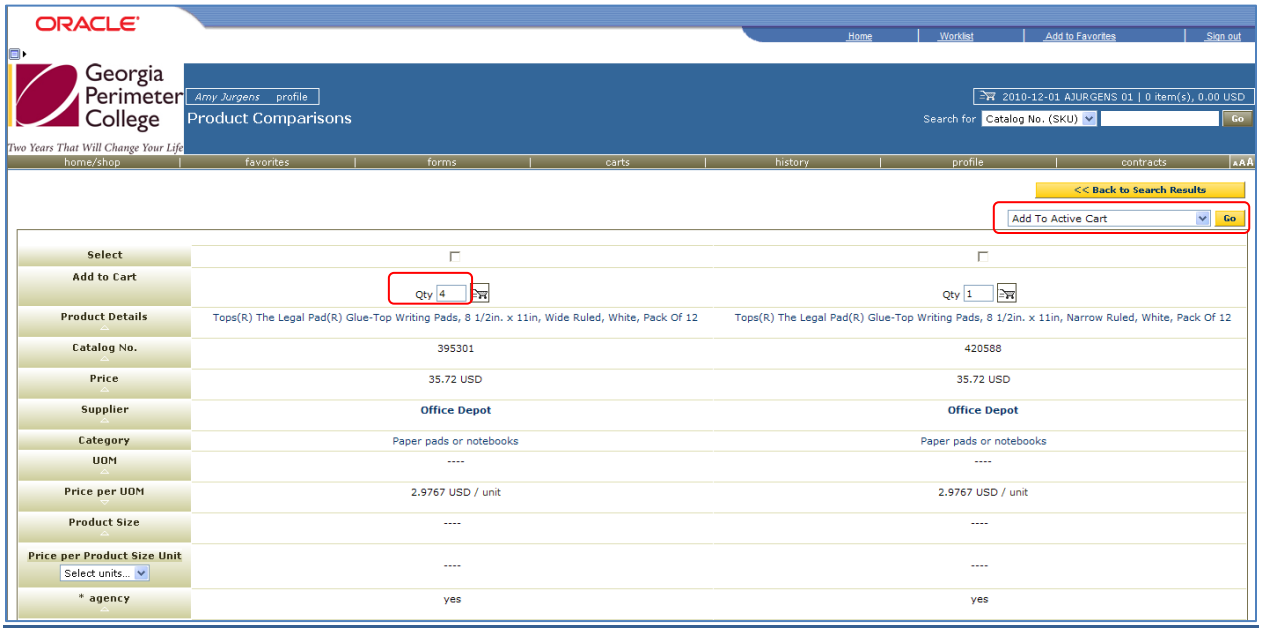
How To: Add Items to your Shopping Cart from Product Comparison



1. After searching for items and selecting items for comparison, open the Product Comparison page by selecting the **Compare Items** button.
2. From here, you can add items to your shopping cart in one of two ways:
    a. Enter the **Quantity** and click the **shopping cart** icon, or
    b. Place a **check** in the desired items Select checkboxes, and choose **Add to Active Cart** in the **Action** Dropdown list.

How To: Add Items from a Punch-Out Supplier

1. From the Georgia*FIRST* Marketplace home page, select the **Punch-Out supplier** by clicking on its name or icon in the Punch Out section.
2. The marketplace redirects you to the supplier's punch-out site.
3. Search for products and add products to the cart in the supplier's punch-out (this process varies from punch-out to punch-out).
4. Use the supplier's mechanism to return products to the Georgia*FIRST* Marketplace (this process again varies from punch-out to punch-out).
5. Upon returning to the Georgia*FIRST* Marketplace, the selected items will have been placed in the active shopping cart and you will be on the Shopping Cart page.

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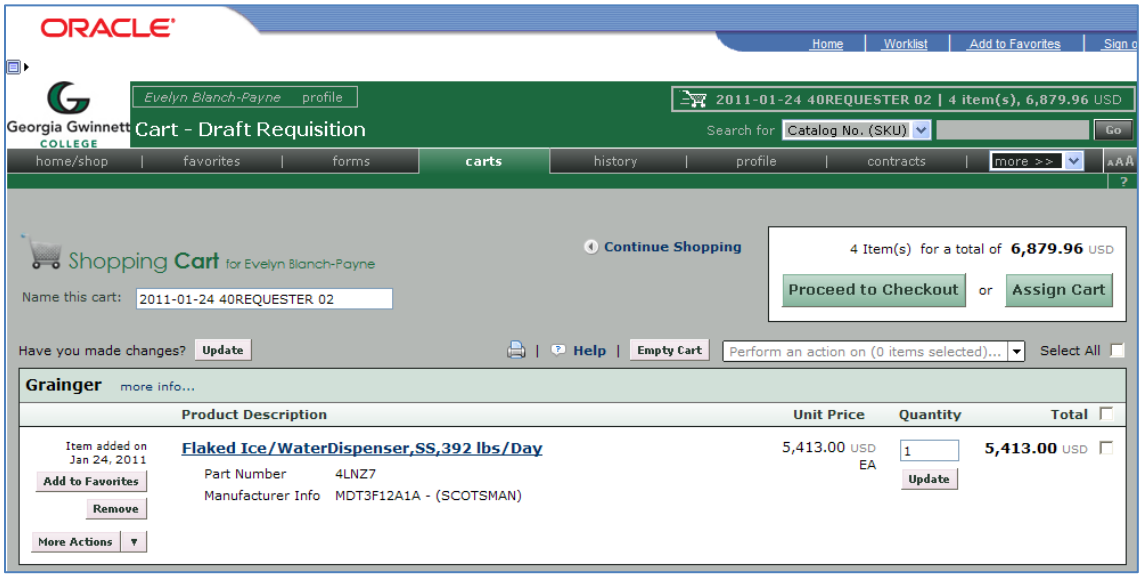
Shopping Cart Page

From anywhere in the Marketplace, when you are ready to review your shopping cart, you can select the Cart Summary link in the upper right corner of the screen. You should see your active cart name (by default, this is your user name, the date, and sequential order number for the day), the number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where the cart details can be reviewed and updated.



Shopping Cart Name

Once you begin adding items to your shopping cart, the system gives your shopping cart a default name. This default name is a combination of your user name, the date, and the sequential order number for that date. For example, a shopper with the user name of MJones, creates her first cart of the day on March 23, 2011. This cart is given a default name of "2011-03-23 MJones 01." If this user creates another cart on March 23rd, then the second cart is named "2011-03-23 MJones 02."

You can easily rename your cart though. To do so, simply retrieve your Shopping Cart.

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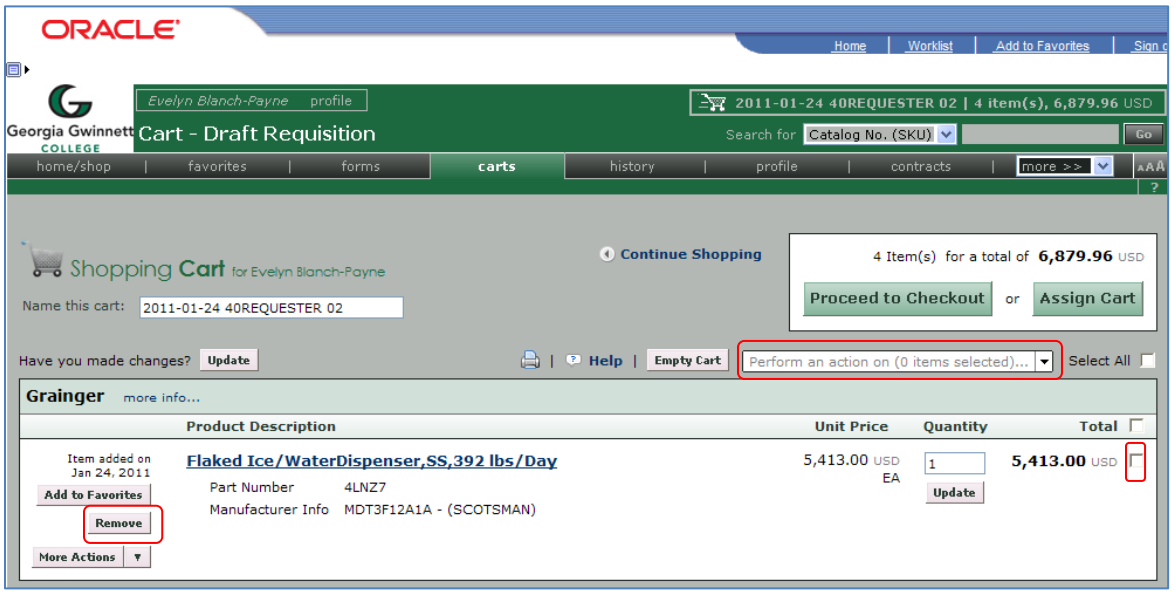
How To: Rename Your Shopping Cart

1. Retrieve your shopping cart.
2. On the **active cart** sub tab, input your new shopping cart name.
3. Click the **Update** (or Save) button directly below the cart name.

Removing Items from the Cart

You can remove items from a shopping cart either individually or all at once. Georgia*FIRST* Marketplace allows the removal of items from the cart, regardless if the item is from a punch-out supplier or hosted catalog item.



How To: Remove Selected Items from a Cart

1. Go to the **Shopping Cart**.
2. To remove multiple items:
    a. In the cart, select one or more items to remove by placing a checkmark in its **Select** checkbox.
    b. Click in the **action** drop down list.
    c. Select **Remove Selected Items**.
3. To remove a single item:
    a. On the item line, select the **Remove** button.
4. The selected items are then removed from your shopping cart.

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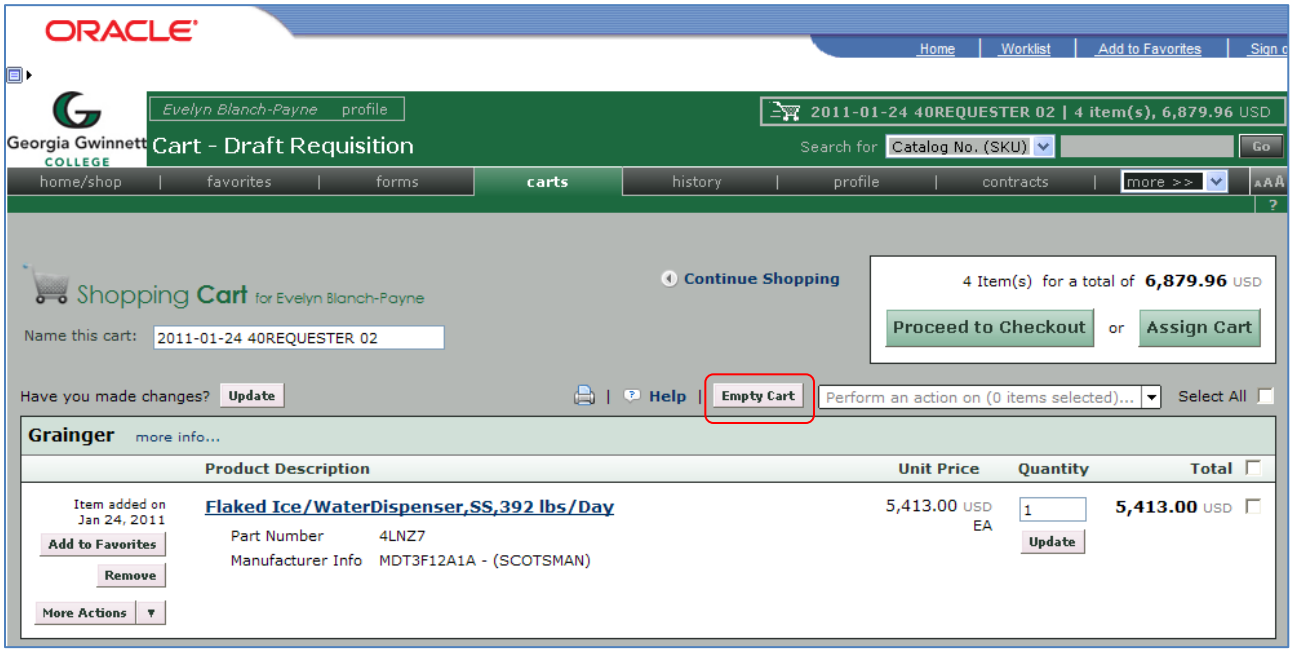
How To: Remove All Items from a Shopping Cart



1. Go to the **Shopping Cart**.
2. Select the **Empty Cart** button.
3. To remove all items, click the **OK** button to proceed.
4. Your active shopping cart should now be empty.

Updating the Quantity of Items in a Cart

Once you have added items to your shopping cart, you may find it necessary to change the quantity requested. You can update the quantity when adding an item to your shopping cart or after the item has been added to your shopping cart.

How To: Update Quantity of Items in a Cart

1. Go to the **Shopping Cart**.
2. For the item you want to update, go to the **Quantity** field in that row.
3. Enter the desired quantity.
4. Click the **Update** (or Save) button directly under the Quantity field.
5. If you are making updates to more than one item, you can enter the desired quantity for all items and the select the **update** (or save) button directly below the Shopping cart name to update all quantities at one time.

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Selecting the Applicable Contract for an Item

Some items that you select will be listed on multiple contracts. For example, you may have an item that is listed on a mandatory statewide contract, as well as on an convenience state contract. If you are unsure as to the correct contract being selected, you can select the appropriate contract while in the Shopping cart.

How To: Select a Contract for an Item

10. Go to the **Shopping Cart**.
11. For the item you want to select a different contract for, select the **change…** hyperlink next to the contract name.
12. A pop-up box will appear with the contract choices. Select the appropriate contract by using the **radio button**.
13. Click **OK**.

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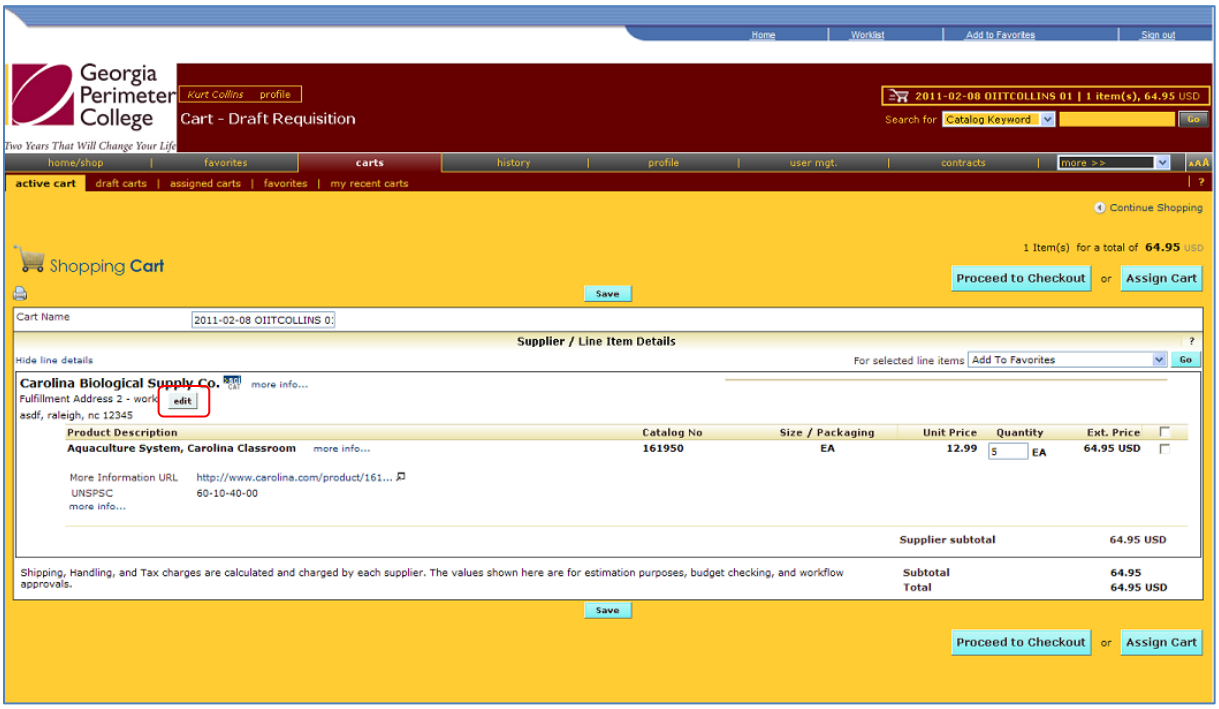
Selecting Fulfillment Addresses (applies only to fax or email suppliers)

In instances where a supplier has multiple fax numbers or email addresses, for example by region, the Georgia*FIRST* Marketplace will have multiple fulfillment addresses for that supplier. When an item from a supplier with multiple fulfillment addresses is added to the shopping cart, an **edit** button is displayed next to the current default fulfillment address.



By clicking on the **edit** button, the user may select a different fulfillment address for this item. Note also that a user may click the **save as my preferred** checkbox to update this as the default fulfillment address.

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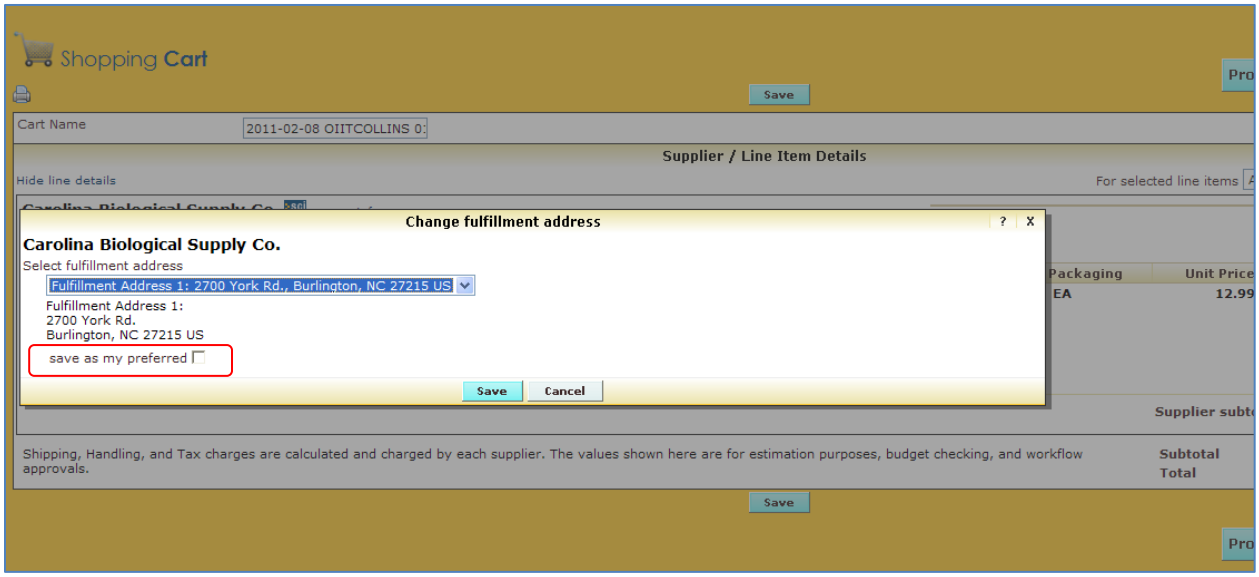

How To: Select Fulfillment Address

1. Go to the **Shopping Cart**.
    a. Note: If a supplier has multiple fulfillment addresses, an **edit** button will appear below their name on the Shopping Cart. If there is no **edit** button, there is only one fulfillment address for the supplier.
2. Select the **edit** button below the supplier name.
3. Using the drop down list, select the fulfillment address you wish to use.
4. To save the supplier's fulfillment address as the preferred address you always want to use, select the **save as my preferred** checkbox.
5. Click the **Save** button.

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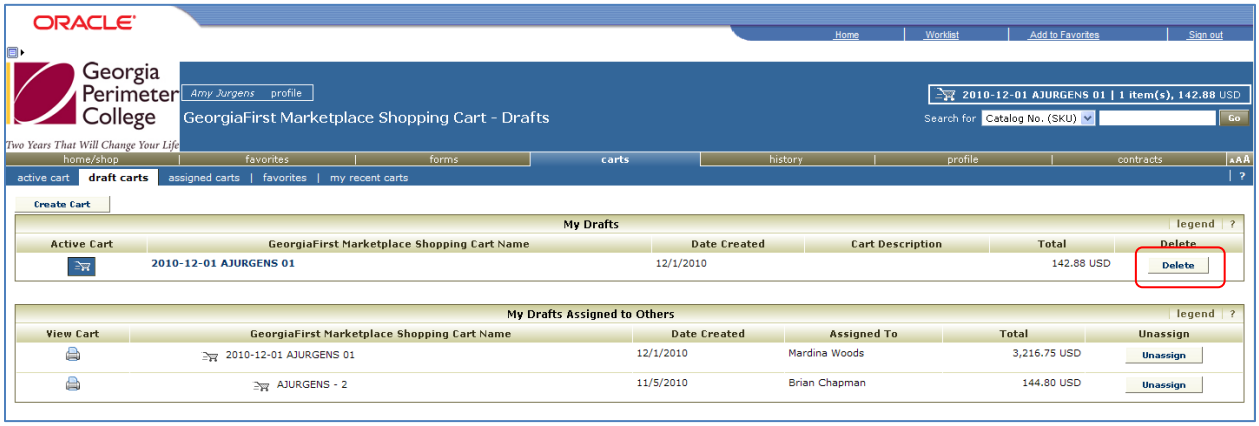
Deleting a Shopping Cart

On occasion, you may find it necessary to delete your shopping cart. You can delete entire shopping carts with one click. Once you delete a shopping cart, it is permanently removed.



How To: Delete a Shopping Cart

1. Select the **Carts** tab.
2. Select the **draft carts** sub-tab.
3. Locate the cart you want to delete.
    a. Your current (or active) cart will have an icon with a colored background.
    b. Draft carts have an icon with a white background.
4. Press the **Delete** button on the right side of the screen.
5. After selecting Delete, the system deletes the cart immediately. Once a cart is deleted it is permanently removed and it cannot be restored.

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Creating ePro Requisition from Your Cart

As you have seen, because you are a Requester, you can build your cart in the Georgia*FIRST* Marketplace. You will have the same access to the Marketplace as a shopper does. The primary difference is that you will not need to assign your cart to a Requester. You can pull your shopping cart directly into eProcurement by selecting the "Issue Requisition" button.

How To: Create an ePro Requisition from Your Own Shopping Cart

1. Log into PeopleSoft Financials Core System.
2. Select **eProcurement** in the menu.
3. Select **Create Requisition**.
4. Select the **Georgia*FIRST* Marketplace** tab.
5. Select the **Georgia*FIRST* Marketplace** link.
6. Build your **shopping cart** (or retrieve one that you built and saved earlier) by searching for and adding items.
7. Select the **Proceed to Checkout** button.
8. 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.
9. Select the **Issue Requisition** button.
10. Confirm the **Requisition Summary** within ePro has the same number of line items as the Georgia*FIRST* Marketplace cart.
11. Name the requisition if desired.
12. For each requisition line item, edit **Chartfields** and **Ship To** Location if necessary.
13. Add a comment on each requisition line if needed by clicking the "**call out**" (**comment**) icon at the end of the line.
14. Add a **header comment** to be attached to the requisition if needed within the **Justification/Comment** box.
15. Click the **Save and Preview Approvals** button.
16. Review the approval path. Insert additional ad hoc approvers if necessary.
17. Click the **Submit** button to submit the requisition.

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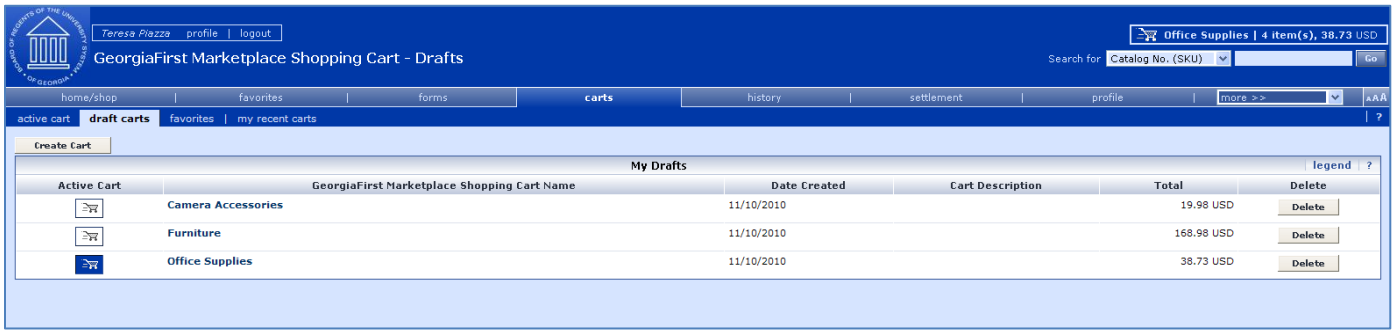
More about Draft Carts

Earlier, we discussed the difference between an active cart and a draft cart. Remember, an active cart is the shopping cart you are actively working on. You can however, create additional carts whenever necessary. Additionally, draft carts can be created for future use. Creating draft carts may be useful for setting up order that are similar or that might be used later. For example, you can have draft carts for different pending orders that you are not ready to build a requisition for within PeopleSoft.

Under the Carts tab, you will see a tab for "Active Cart" and a tab for "Draft Carts." Under the "active cart" tab will be the current shopping cart that you are working with. Under the "draft carts" tab are all of the carts you have created. The shopping cart that you are current working with, or your active cart, will have a colored background in its shopping cart icon. Draft carts will have a white background.

Let's imagine that we have three draft carts – one for office supplies, one for furniture, and one for camera accessories.



As you can see in the picture above, our current active cart is Office Supplies because its icon has a colored background. If we were to select the active cart tab, we would see the Office Supplies cart.

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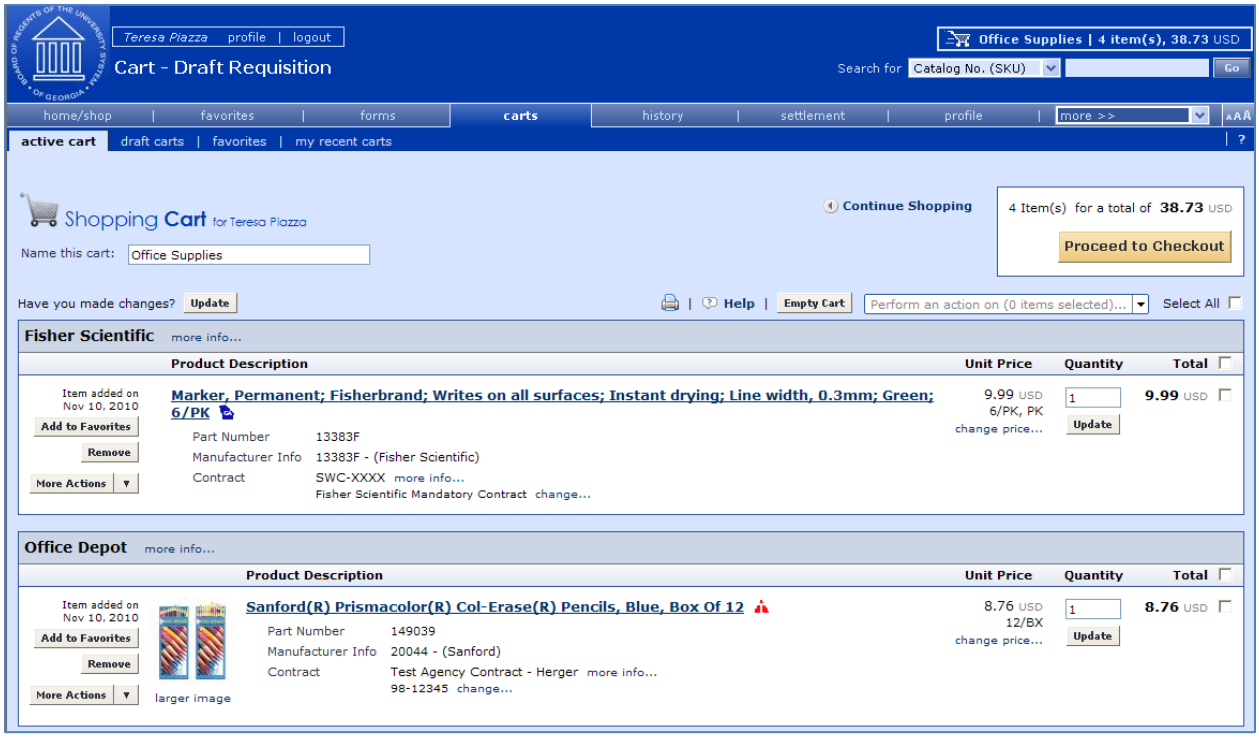

Whenever needed, you can create a new draft cart. To make a different draft cart active, simply click on that cart's icon so that it has the blue background. Your active cart will always be listed in the Cart Summary in the upper right corner of the screen.

How To: Create a New Cart

1. Select the **Carts** tab.
2. Select the **draft carts** sub-tab.
3. Select the **Create Cart** button.
4. In the **Name this cart** field, you can replace the system default cart name with a different one if desired. Then click the **Update** button.

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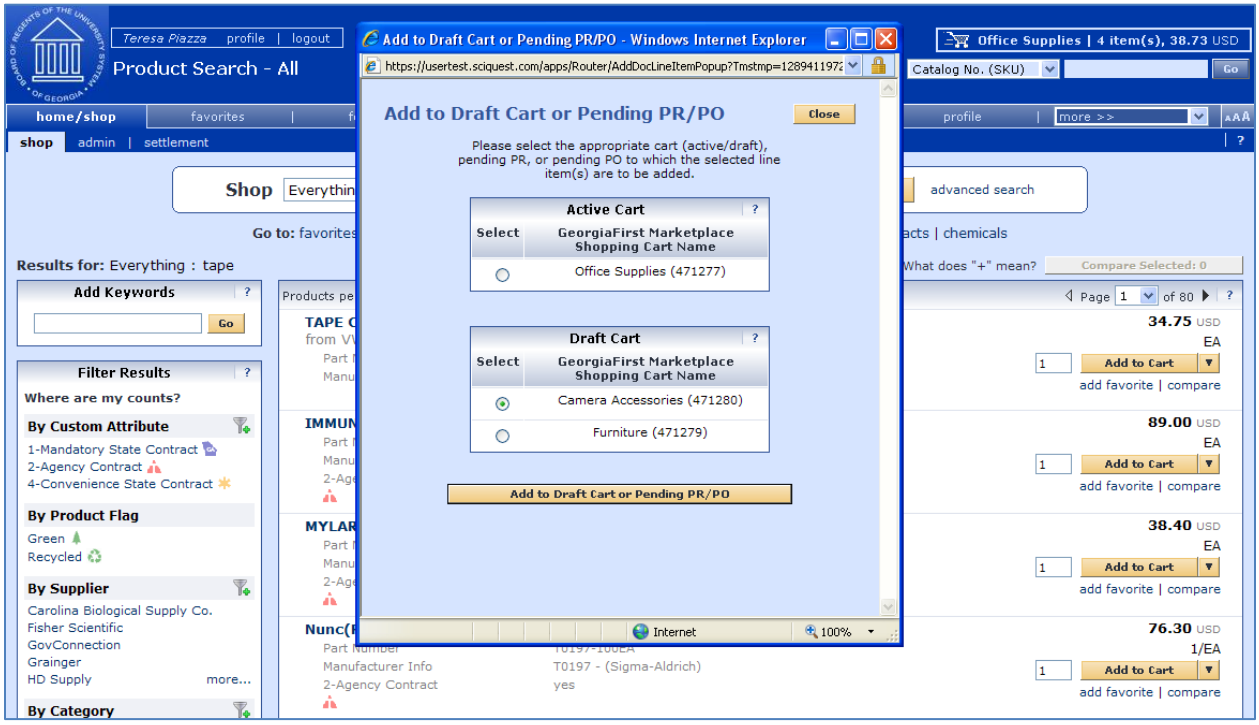
Adding Items to a Draft Cart

Generally, when you add an item to a cart as we explained earlier, that item is added to your active cart. If you want to add an item to a draft cart without making that cart active, you can do so.

- To add an item to a draft cart from the Product Search Results page, select the arrow next to the Add to Cart button. Choose "Add to Draft Cart". You will then get a pop-up box asking which draft cart you want to add the item to. Select the appropriate cart by clicking its radio button. Then select the Add to Draft Cart button.
- This can also be accomplished by selecting the item description link, then selecting the "**Add to Draft Cart**" option in the drop down menu.



- You will then see an "Added Successfully" message. You have not changed which cart is currently active though.

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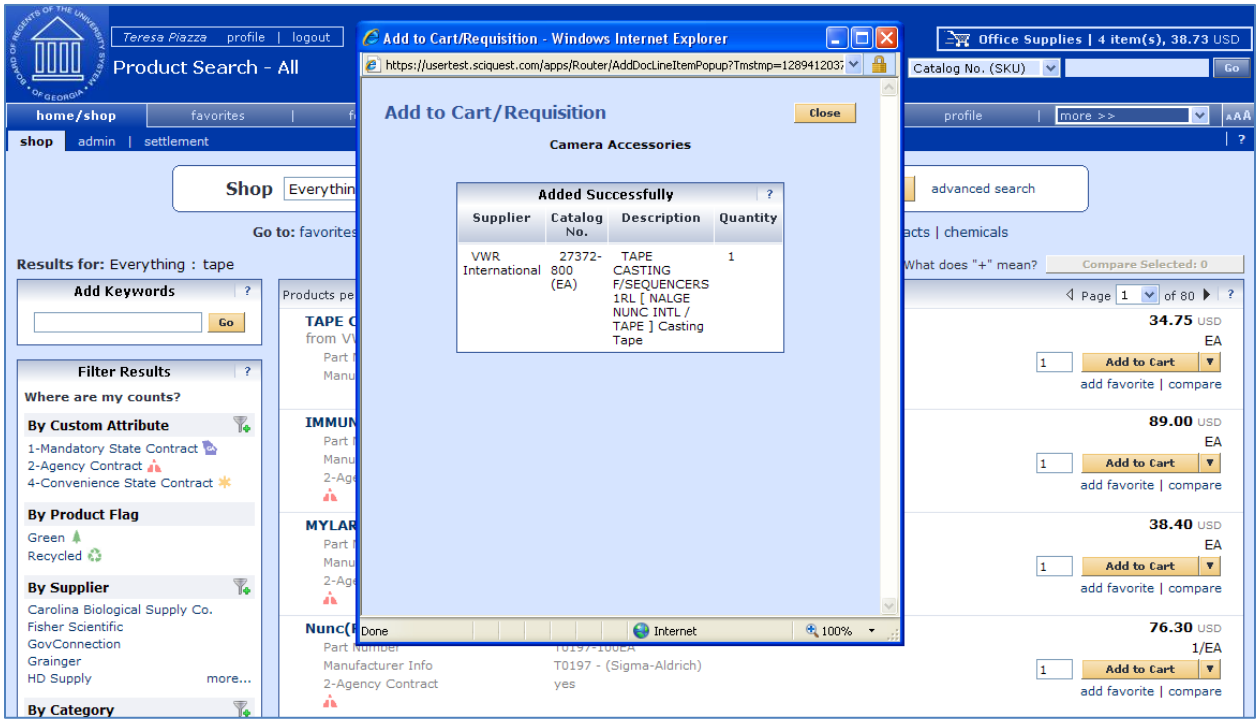

You will follow this same procedure whenever you want to add an item to a draft cart without making it your active cart. Wherever you add an item, there will be some sort of drop down allowing you to select "Add to Draft Cart".

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Reviewing Line Item History

The Line Item History feature allows users to view all purchases of the same item within a date range specified by the organization. Having the ability to see other recent purchases may prevent unnecessary external purchases. To perform this task, you must have the "View Line Item History" permission assigned.

How To: Review Line Item History

1. In order to review line item history, you must first **add the item** to your cart.
2. Access your **shopping cart**.
3. For the item you want to review history for, select the **More Actions** drop down list.
4. Select **Line Item History** and then click **Go**.
5. The Line Item History pop-up box appears.
    a. Previous Purchases Found: An item having previous purchases that fall within the search criteria will display the item's description and details regarding those previous purchases, including quantity, date, User ID, and User email address.
    b. No Previous Purchases Found: An item having no previous purchases meeting the organization's timeframe, department, and custom field criteria (if any) will display the item's description and a message that no items were found.

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Chapter 12: GeorgiaFIRST Marketplace Favorites

As a Requester who creates your own shopping carts, you can set up favorites in the Georgia*FIRST* Marketplace to easily retrieve items that you order frequently. By setting up favorites, you spend less time searching for items that you will order again in the future.

Favorites

There are two types of 'favorites' in the Georgia*FIRST* Marketplace. There are Personal Favorites and Shared Favorites. Personal favorites are those items that you identify as a favorite. Only you can see your personal favorites. With personal favorites, you create folders and sub-folders to manage these items. You have full control over the items in your personal favorites.

Shared favorites and folders are set up by administrators and can be set up for viewing and use for your institution or department. Shared favorites typically represent frequently ordered products or suggested products for purchase. Your institution will notify you of any shared favorites available for your use.

Each institution has a "Custom Configuration" shared favorites folder which can be used to highlight or specify particular items and configurations standard or recommended by the institution procurement department.

Recommendation: Only save items from hosted catalogs as favorites. Punch-out Items can be saved as a favorite, however, the pricing tied to the favorite will not be updated when the supplier updates that item's price.

Creating Favorites Folders

Folders and sub-folders are used to house favorite items. There are two types of folders – personal and shared. Personal folders are only viewable by the user and are most commonly used. Shared folders are used to house favorite items to be used for the institution or department.

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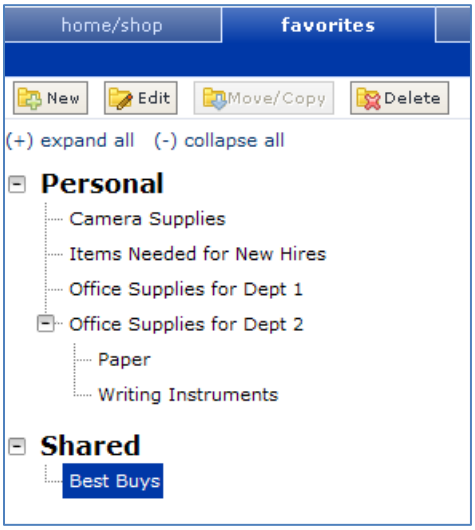
You can create any kind of folder structure. You can create a structure as simple as one folder named "favorites" to creating several folders to separate favorite item types. In order to save a favorite item, you will need to create at least one personal folder. Below is an example of a folder structure:



How To: Create a Personal Folder or Sub-Folder

1. From the Georgia*FIRST* Marketplace, go to the **Favorites** tab.
2. On the left side of the window, the Personal and Shared headings display, as well as any existing folders. For new users, you should start be creating at least one Personal folder.
3. To add a top-level folder, click the **New** button.
    a. Select the option **Top level personal folder**
    b. Enter a folder name and description.
    c. Click **Save**.
4. To add a sub-folder, select the **top-level folder** you want to add the sub-folder to by clicking on it.
    a. Click the **New** button.
    b. Select the option **Subfolder of selected folder**.
    c. Enter a folder name and description.
    d. Click **Save**.

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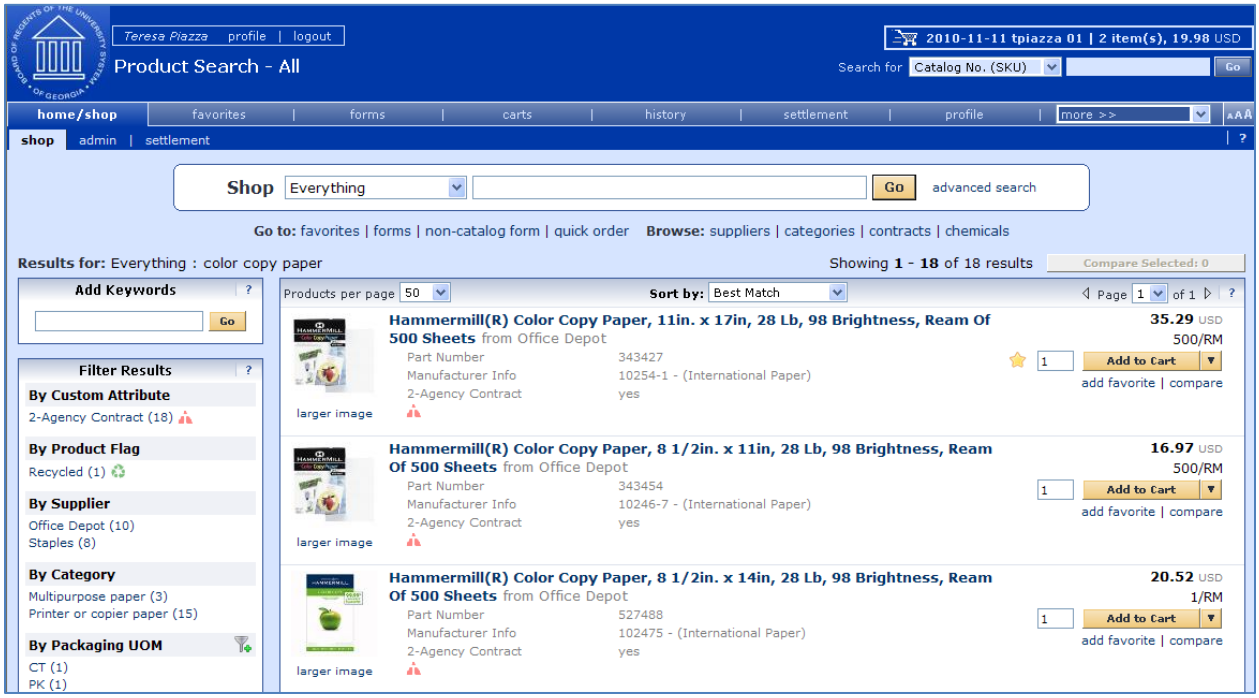
Adding Items as Favorites

You can add personal favorites from the Product Search Results page or from a cart. Adding favorites is a fairly simple process. Once an item is saved as a favorite, it is identified in search results by a star icon.



How To: Add an Item as a Personal Favorite

1. **Search** for items using your preferred method in the Georgia*FIRST* Marketplace.
2. From the search results, locate the item you want to add as a favorite.
3. Directly under that item's "Add to Cart" button, click on the **add favorite** hyperlink. The **Add to Favorites** popup displays.
4. In the **Item Nickname** field, you can enter a name to reference the item. If you do not enter a nickname here, the supplier's description will remain.
5. In the **Quantity** field, you can enter the standard quantity that will be ordered for this item. Once you add a favorite item to your cart, the quantity can be updated there as well.
6. Select the **Destination Folder**.
    a. If you already have folders created, you will see your Personal Folders listed.
        i. Select the **folder** you want to add your favorite item to, so that it is highlighted.
        ii. Click the **Submit** button.
        iii. Click the **Close** button.
    b. If you do not have any Personal folders created, you will need to create at least one personal folder in order to save an item as a Favorite.

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i. Click the **New** button.
ii. Select the option **Top level personal folder**.
iii. Enter a folder name and description. Click **Save**.
iv. The new folder displays in the list and is automatically selected for the favorite item.
v. Click **Submit** to save the item.
vi. Click **Close**.

7. After an item is added as a favorite, it can be accessed via the **favorites** tab.
8. To add an item as a Favorite from a cart, select the **Add to Favorites** button on the item line within the cart.
    a. Give the item a nickname and update the quantity if desired.
    b. Select a **folder**.
    c. Click **Submit**.
    d. Click **Close**.

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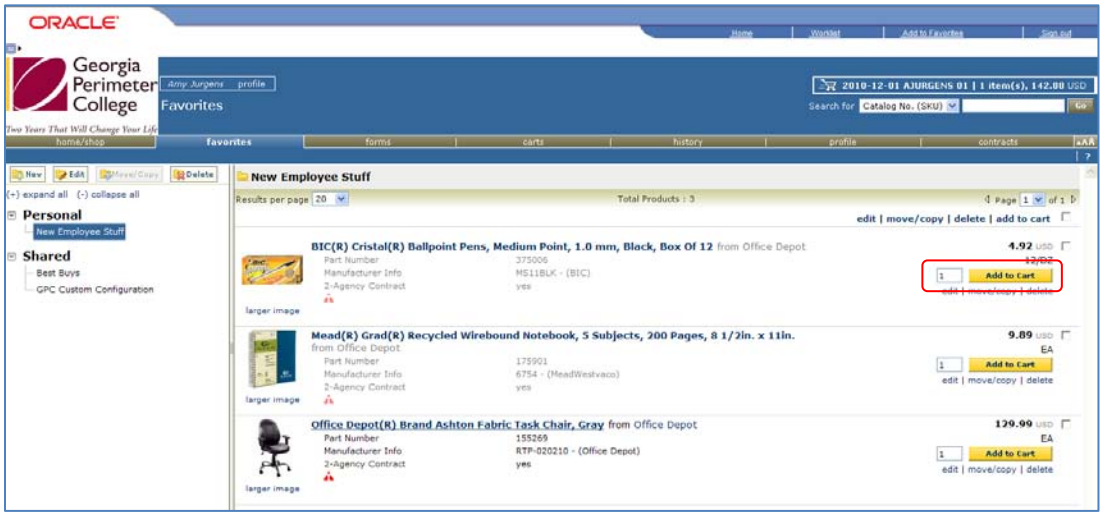
Adding Favorite Items to Your Cart

The Favorites functionality allows shoppers to store items that are referenced or ordered on a regular basis. Once items are added to Favorites, they can be added to a shopping cart from either of two places: from the Favorites tab or from the Product Search results page (if favorite items are listed in the search results). Favorite items are designated with a star icon on the search results and can be added like any other item.



How To: Adding Favorite Items to Your Cart from the Favorites Tab

1. From the Georgia*FIRST* Marketplace, select the **favorites** tab.
2. Select the appropriate **folder**.
3. The items for the selected folder will display on the right side of the screen.
4. To add an individual item to your cart, select its **Add to Cart** button.
5. To add multiple items to your cart, select the items with a **checkmark**, and then click **add to cart** at the top of the list.
6. Your selected favorite items are now in your cart.

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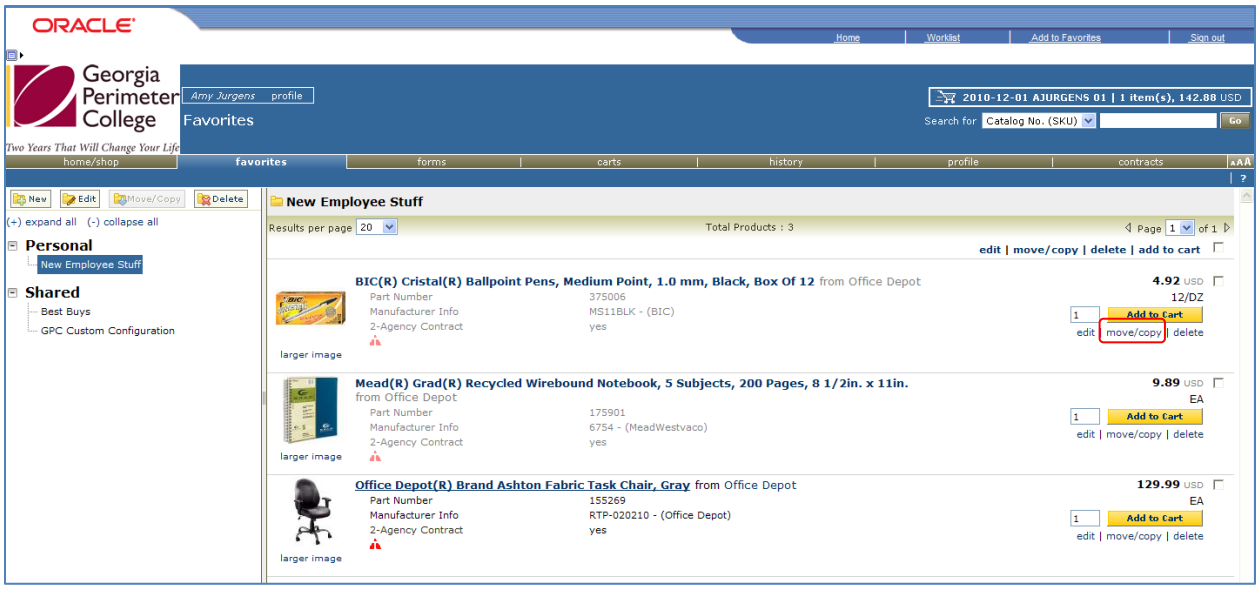
Moving and Copying Items Between Folders

Within GeorgiaFIRST Marketplace, you can move items from one folder to another, as well as copy items from one folder to another. These features may be useful if you create a sub-folder for a specific type of item and need to move favorites added earlier, or when creating "repeat" items for multiple folders.



How To: Move and Copy Items Between Folders

1. From the GeorgiaFIRST Marketplace, select the **favorites** navigation tab.
2. Select the appropriate **folder** from the left pane and locate the item(s) on the right pane.
3. To move or copy one item to a different folder, click the **move/copy** link directly under its "Add to Cart" button.
    a. Select the **folder** (so that it is highlighted) that you want to move or copy the item to.
    b. Select either the **move** or the **copy** button.
    c. Click **Close** in the confirmation window.
4. To move or copy multiple items to a different folder, select the items with a **checkmark**.
    a. Click the **move/copy** link at the top of the list.
    b. Select the **folder** (so that it is highlighted) that you want to move or copy the items to.
    c. Select either the **move** or the **copy** button.
    d. Click **Close** in the confirmation window.

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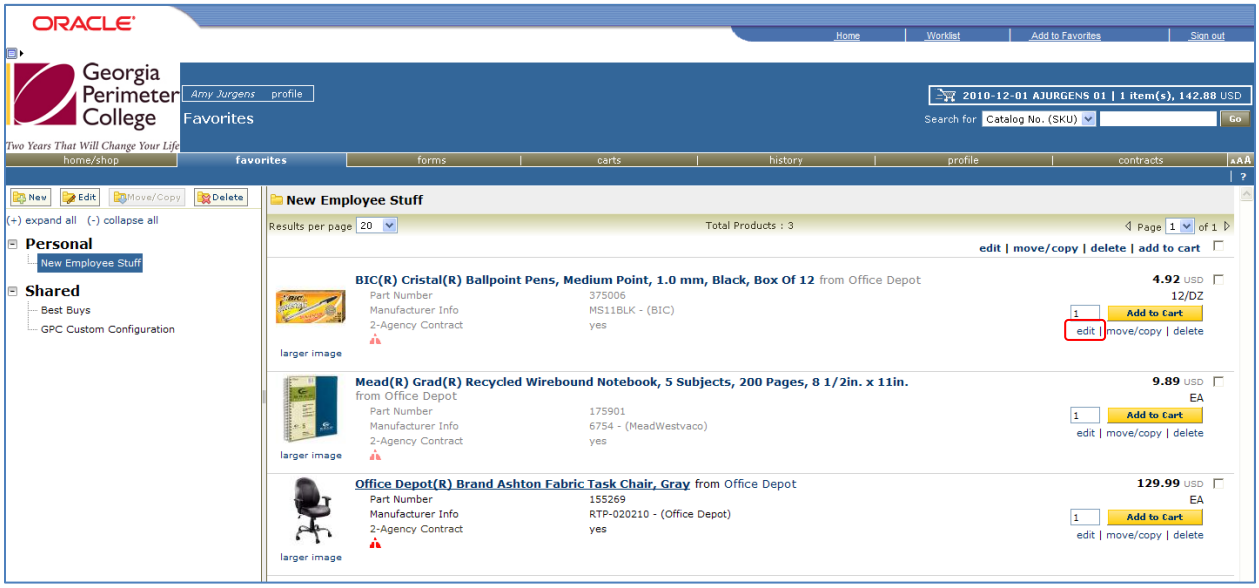
Editing Favorite Items

After adding a favorite item to a Personal Folder, you may need to update the item periodically. This includes the item's nickname and quantity.



How To: Editing Favorite Items

1. From the Georgia*FIRST* Marketplace, select the **favorites** tab.
2. Select the appropriate **folder** from the left pane, and locate the item on the right pane.
3. Click the **edit** link directly under the "Add to Cart" button.
4. Make any necessary changes to the item and click the **Submit** button.
5. Click the **Close** button.

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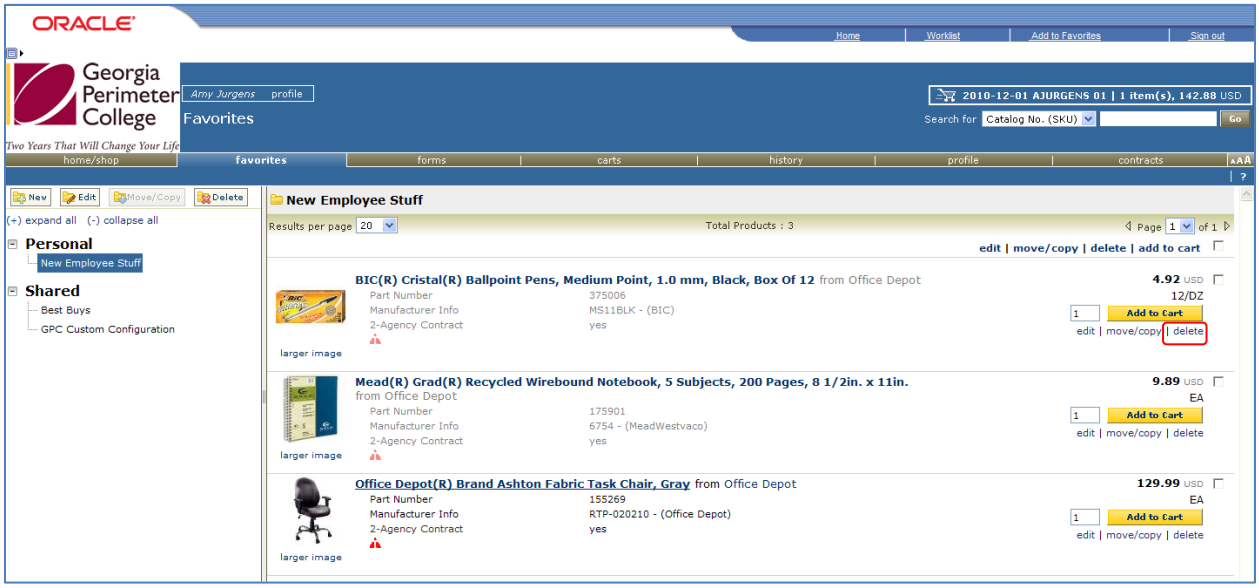
Deleting Favorite Items and Folders

In Favorites, items and folders can be deleted as necessary. When you delete a folder, you delete those items saved in that folder as favorites also.



How To: Delete an Item from Favorites

1. From the Georgia*FIRST* Marketplace, select the **favorites** tab.
2. Select the appropriate **folder** from the left pane, and locate the item(s) in the right pane.
3. To delete one item, click the **delete** hyperlink directly under its "Add to Cart" button.
    a. Click the **OK** button to confirm the deletion.
4. To delete multiple items, select the items with a **checkmark**.
    a. Click the **delete** link at the top of the list.
    b. Click the **OK** button to confirm the deletion.

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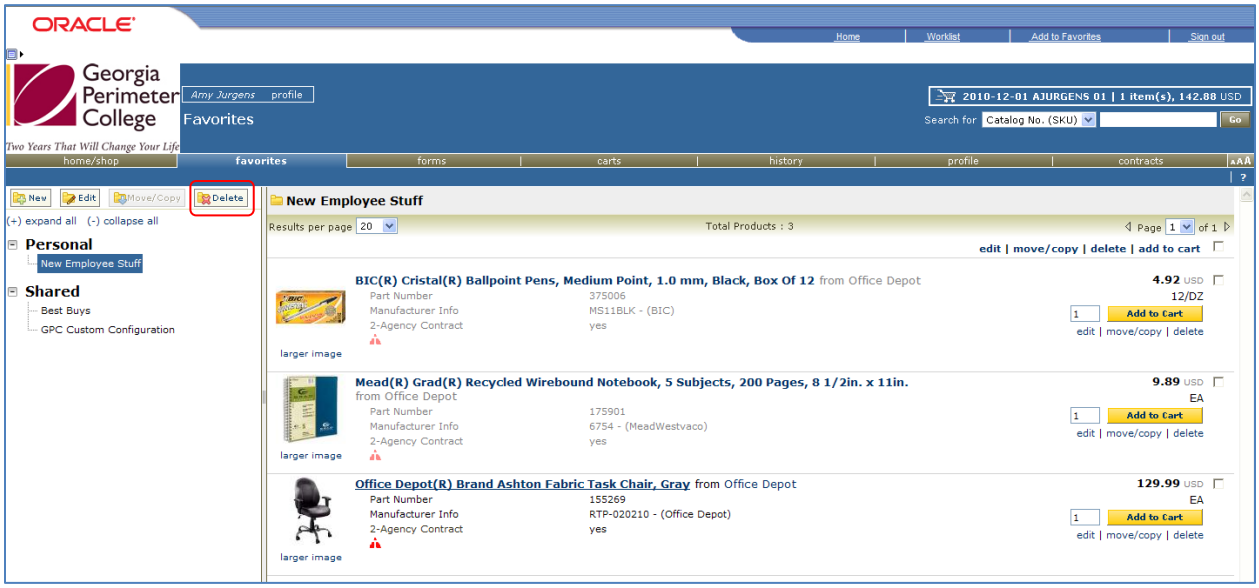
How To: Delete a Folder from Favorites



1. From the Georgia*FIRST* Marketplace, select the **favorites** tab.
2. Select the appropriate **folder** from the left pane.
3. Click the **Delete** button at the top of the folder list.
4. Click **OK** to confirm the deletion.

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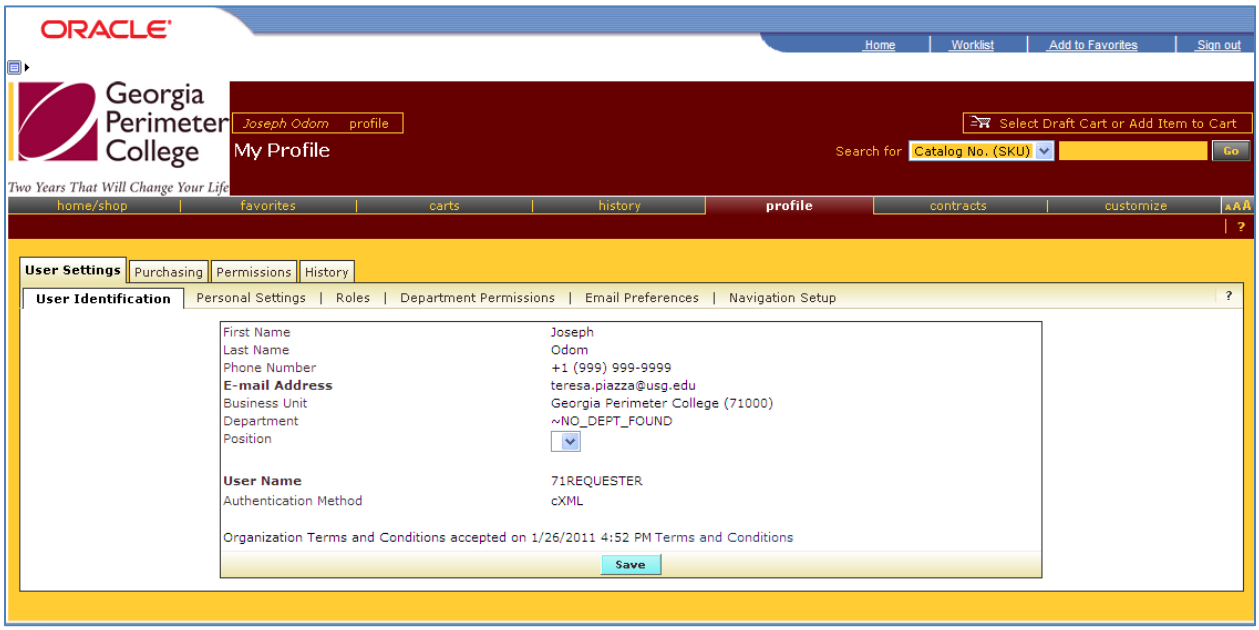
Chapter 13: User Profile in GeorgiaFIRST Marketplace

Your User Profile in the GeorgiaFIRST Marketplace includes identification, purchasing abilities, and site accessibility. Almost every item in your User Profile will be read-only. For those items that are editable, you want to be very careful before making any changes to your user profile. Changing your settings may have a direct impact on receiving notifications, access to certain catalogs, and access to view contracts.

The first time you enter the GeorgiaFIRST Marketplace, you will need to verify some information on your User Profile. Make sure that your email address, phone, Business Unit, and Department are correct. If they are not, inform your ePro Administrator.



When you enter the GeorgiaFIRST Marketplace for the first time, you may notice that the color scheme in the Marketplace doesn't match your institution's logo. You can change this by going through the Profile – User Settings – Personal Settings. To change the color, select your institution in the Color Theme drop down list.

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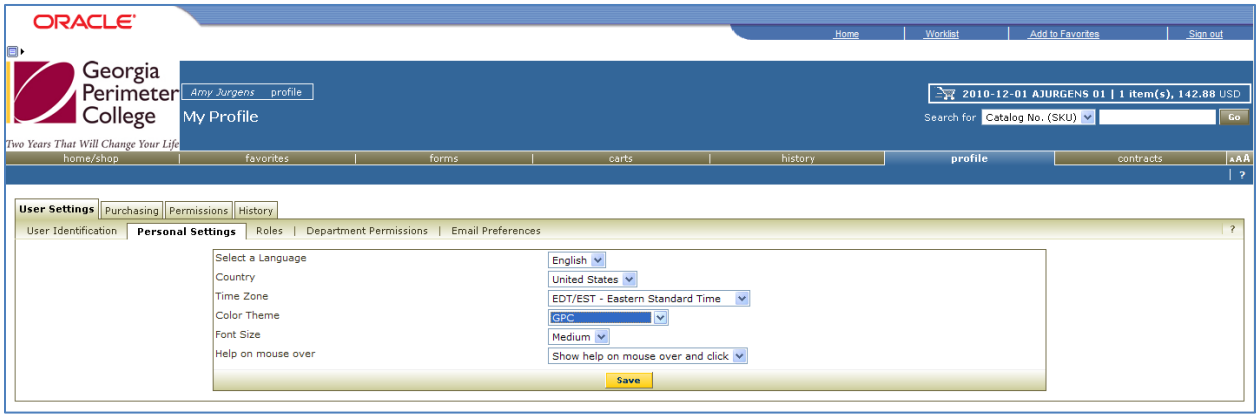
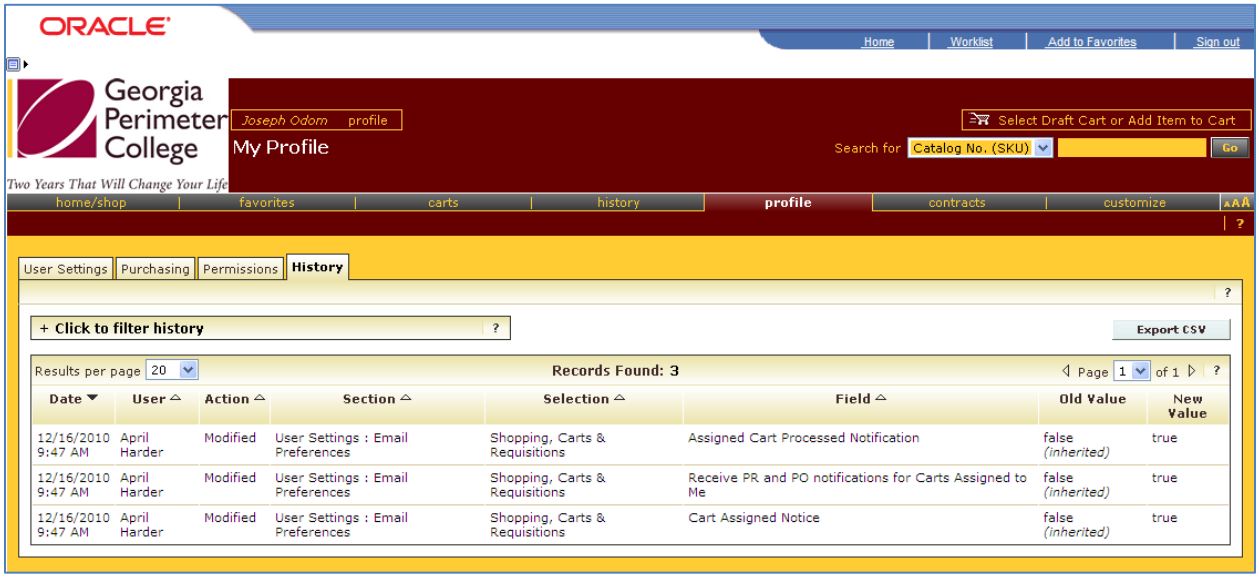


How To: Update Color Theme to Match School Logo

1. In the Georgia*FIRST* Marketplace, select the **Profile** tab.
2. Under the **User Settings** tab, select the **Personal Settings** sub-tab.
3. Select your institution in the **Color Theme** drop down list.
4. Click the **Save** button.

History Tab

The History tab is simply an audit trail that tracks changes made to your profile. This is an information-only screen that provides detailed information about potentially important changes, such as changes to roles and permissions, approvers, and more. The History screens are used to track changes, additions, and deletions.



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