

ePro/GeorgiaFIRST Marketplace Train-the-Trainer Toolkit Contents

	Lesson	Materials	Audience	Comments	Suggested Activities
1	Introduction to ePro and the GeorgiaFIRST Marketplace	LP01_Intro to ePro and GAFirst Marketplace_With Shoppers PPT01_Intro to ePro and GAFirst Marketplace_With Shoppers	All users for schools deploying the SHOPPER role	Basic intro lesson	N/A
2	Introduction to ePro and the GeorgiaFIRST Marketplace	LP02_Intro to ePro and GAFirst Marketplace_Without Shoppers PPT02_Intro to ePro and GAFirst Marketplace_Without Shoppers	All users for schools NOT deploying the SHOPPER role	Basic intro lesson	N/A
3	Being a Shopper in the GeorgiaFIRST Marketplace	LP03_Being a Shopper in the GAFirst Marketplace PPT03_Being a Shopper in the GAFirst Marketplace	Shoppers	This is an introduction to being a shopper; the searching and shopping functionality is covered in LP09	Suggested Activities include: <ul style="list-style-type: none"> • Verifying User Profile • Assigning Default Requester • Setting Color Theme • Follow Home Page navigation
4	Requester Responsibilities in ePro and the GeorgiaFIRST Marketplace	LP04_Requester Responsibilities in ePro and GAFirst Marketplace PPT04_Requester Responsibilities in ePro and GAFirst Marketplace	Requesters	Will also cover responsibilities of requesters that do not have assigned shoppers; Differences are noted within the lesson plan	Suggested Activities include: <ul style="list-style-type: none"> • Entering Marketplace through correct method • Verifying User Profile • Setting Color Theme • Follow Home Page navigation

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5	ePro Approvals	LP05_ePro Approvals PPT05_ePro Approvals	All	Designed to provide the entire approval chain – each institution can remove the stages/paths they do not use	N/A
6	Approving/Denying a Requisition	LP06_Approving a Requisition PPT06_Approving a Requisition	All Approvers	For all approvers, including Buyer Approvers	Suggested Activity: <ul style="list-style-type: none"> Stage 3 requisitions for each approver to work following the Approving Requisitions Job Aid; details on page 5 of lesson plan
7	Editing a Requisition in your Worklist	LP07_Editing a Requisition in Your Worklist PPT07_Editing a Requisition in Your Worklist	All Approvers with authority to edit requisitions	For approvers with the authority to edit a requisition (i.e., Asset Approvers, Buyer Approvers)	Suggested Activity: <ul style="list-style-type: none"> Stage a requisition for the approver to edit Ship To location or Chartfields
8	Assigning an Alternate Approver	LP08_Assigning an Alternate Approver PPT08_Assigning an Alternate Approver	Approvers who need back-up approvers while out of the office	Generally for approvers who are not part of a pool	Suggested Activity: <ul style="list-style-type: none"> Have approvers assign each other as Alternate Approvers
9	Searching and Selecting Items in the GeorgiaFIRST Marketplace	LP09_Searching and Selecting Items in the Marketplace PPT09_Searching and Selecting Items in the Marketplace	Shoppers & Requesters	Anyone who has the ability to create shopping carts	Suggested Activity: <ul style="list-style-type: none"> Have users shop for various items Have users write down their cart name for use with LP10 or LP12 (depending on their role)

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10	Assigning a Cart to a Requester	LP10_Assigning a Cart to a Requester PPT10_Assigning a Cart to a Requester	Shoppers	Use in conjunction with LP09	Suggested Activity: <ul style="list-style-type: none"> Have users assign the cart they created in LP09 to their default user
11	Building a Marketplace Requisition from an Assigned Cart	LP11_Building a Requisition from an Assigned Cart PPT11_Building a Requisition from an Assigned Cart	Requesters	For schools who are using SHOPPERS	Suggested Activity: <ul style="list-style-type: none"> Have Requesters create Marketplace Requisitions from carts created and assigned to them from Shoppers in LP10
12	Building a Marketplace Requisition from a Personal Cart	LP12_Building a Marketplace Requisition from a Personal Cart PPT12_Building a Marketplace Requisition from a Personal Cart	Requesters	Build off of lesson 09 for Requesters	Suggested Activity: <ul style="list-style-type: none"> Have Requesters create requisition from cart they created in LP09
13	Building a Special Request Requisition	LP13_Building a Special Request Requisition PPT13_Building a Special Request Requisition	Requesters		Suggested Activity: <ul style="list-style-type: none"> Have Requesters create multiple Special Request Requisitions Include lines for assets and split distribution lines

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	Lesson	ⁱMaterials	Audience	Comments	Suggested Activities
14	Managing Requisitions	LP14_Managing Requisitions PPT14_Managing Requisitions	Requesters/Buyers		Suggested Activities: <ul style="list-style-type: none"> • Have users review requisitions in various statuses • Have users edit requisitions and cancel a requisition
15	Desktop Receiving	LP15_Desktop Receiving PPT15_Desktop Receiving	Shoppers/Requesters/Buyers	This lesson is for anyone who is responsible for creating desktop receipts	Suggested Activities: <ul style="list-style-type: none"> • Have users create a receipt for full quantity received and one for partial quantity received

ⁱ Materials include lesson plans (LP) and PowerPoint presentation (PPT); all items are customizable