

eProcurement and GeorgiaFIRST Marketplace

User's Guide

for

Approvers

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Introduction

This User's Guide is designed for Approvers who will be responsible for approving Requisitions coming from the eProcurement module in PeopleSoft Financials.

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 also learn the responsibilities you have as an Approver.

Topics Covered in this User's Guide Include:

- Overview of eProcurement and the GeorgiaFIRST Marketplace •
- Approving and Denying Requisitions in your Worklist •
- Setting up an Alternate Approver •
- **Basic Procurement Policies** •

Chapter 1: eProcurement and Georgia*FIRST* Marketplace Overview

What are eProcurement and the GeorgiaFIRST 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, your institution may have used paper requisitions, or some other format, to request an item to be purchased. That hardcopy requisition then had to be routed for approval signatures and 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 electronically routed for approval. The approval chain is dependent on the department 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 GeorgiaFIRST 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
- One login to shop from multiple vendors
- Request for goods from multiple vendors through one shopping cart
- All items contractually approved when using GeorgiaFIRST Marketplace
- Faster routing for approvals

eProcurement and GeorgiaFIRST 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.
- Browsers: Users without any Georgia*FIRST* Marketplace roles assigned will default to a Marketplace Browser. Browsers can view the items, contracts, and prices in the Marketplace but cannot shop or create requisitions.
- 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 others users in their appropriate roles.

As an Approver, you are primarily responsible for approving or denying ePro requisition lines that are assigned to you. For items that are purchased from the Georgia*FIRST* Marketplace (called Marketplace Requisitions), you can be assured that they come from approved pricing lists and contracts. For items that are not purchased from the Georgia*FIRST* Marketplace (called Special Requisitions), the Purchasing Office will be the final approver to ensure that the requested goods meet all purchasing requirements.

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.



Chapter 2: eProcurement Approvals

A critical component to the whole eProcurement process is the ability to submit requisitions for approval electronically. Because approvals are handled online within the PeopleSoft Financials system, each institution can customize the approval process to their own specifications.

How Do Approvals Work?

As mentioned earlier, a Requester builds a requisition in ePro. Each item on a requisition is actually placed on its own requisition line. Theoretically, each line in a requisition can be charged to a different set of Chartfields (though, as a best practice, these scenarios should be limited). Therefore, there may be different approval paths for each line on a requisition.

Once the Requester submits the requisition for approval, each line has its own approval path. This approval path is determined by a number of factors. At a minimum, each requisition line will go to the Department Manager and Project Manager (if a Project is to be charged). These are the managers that are tied into the Department and Project Chartfields on that requisition line.

Depending on how your institution has set up approvals for eProcurement, the requisition line may go to many additional approvers as well. This includes approvers for assets, IT items, and items above a certain amount. Below is a summary of all of the approval stages and paths available for eProcurement. To determine what stages and paths your institution is using, check with your Purchasing Department or Local Security Administrator.

Approval Stages

Overall, there are five approval stages that can be used for eProcurement requisitions. They include:

- Stage 1: Department and Project Approval
- Stage 2: Fund Approval (Agency, Grant, Technology Fee)
- Stage 3: Amount Approval (for requisitions built from the Georgia*FIRST* Marketplace)
- Stage 4: Item Type Based Approvals
- Stage 5: Buyer Approval (for requisitions not built from the Georgia*FIRST* Marketplace)

Here is a summary of each stage:

Stage 1: Department and Project Approval

This is a mandatory approval stage for all requisition lines. Each requisition line must be charged to a Department. In addition, requisition lines can be charged to a Project. The requisition line is routed to

the Department Manager (as entered in PeopleSoft) for approval. If the Project Chartfield is used on the requisition line, the system also routes it to the Project Manager.

Stage 2: Fund Approval

This approval stage is an optional one for institutions.

Agency Fund Approval:

Agency Fund Approval is set up so that any requisition line charged to an Agency Fund Code must go to an individual specified for Agency Fund Approvals. Agency funds are used to account for resources held by an institution as custodian or fiscal agent for individual students, faculty, staff members, or other organizations. Agency Fund Codes include 60000, 61000, and 62000.

Grant Fund Approval:

Grant Fund Approval is set up so that any requisition line charged to fund 20000 must go to an individual specified for Grant Fund Approvals.

Tech Fee Fund Approval:

Tech Fee Fund Approval is set up so that any requisition line charged to fund 16000 must go to an individual specified for Tech Fee Fund Approvals.

If your institution chooses to employ the Fund Approval stage, there may be multiple Agency Fund Approvers, Grant Fund Approvers, and Tech Fee Fund Approvers. Each Agency Fund Approver will have the role BOR_AGENCY_FUND_APPR, each Grant Fund Approver will have the role BOR_GRANT_APPR, and each Tech Fee Fund Approver will have the role BOR_TECH_FEE_APPR. The institution will determine whether all fund approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. If any of the above mentioned fund codes are not used on a requisition line, the system bypasses this approval stage.

Stage 3: Amount Approval

The Amount Approval stage is also an optional one. This stage is for all requisitions that were built from the Georgia*FIRST* Marketplace, although you can choose to have it implemented for your Special Request requisitions as well. Institutions have the following options when using Amount Approval and may select either option or both:

- If the monetary amount is \$10,000 or more per line, route to Amount Approver.
- If the total monetary amount of the requisition is \$10,000 or more, route to Amount Approver and have a monetary amount of \$10,000 or more per line.

Again, your institution may set up multiple approvers to serve as the Amount Approver. Each Amount Approver will have the role BOR_CAT_AMOUNT_APPR. The institution will determine whether all amount approvers must approve the requisition or whether only one from a group of multiple approvers has to approve it. The institution does not have to use the \$10,000 threshold and can edit this if needed.

If the requisition was not generated from the Georgia*FIRST* Marketplace, it will bypass this approval stage (this can be changed by the institution). If the requisition is below the set threshold and was generated from the Georgia*FIRST* Marketplace, it will also bypass this approval stage.

Stage 4: Item-Type Based Approvals

In Approval Stage 4, approvals are based upon the type of item being requested. Within this stage, there are eleven potential approval paths. Each path is optional for the institutions.

• Stage 4, Path 1: Asset Approval

If the item on a Requisition line is an asset and charged to an Asset Account, it will be routed to the person set up as the Asset Approver. The accounts included in this path are 743200, 744200, and 800000 through 899999.

An Asset Approver must have the role "BOR_ASSET_APPR". If your institution chooses to use the Asset Approver path, there can be multiple asset approvers. The institution will determine whether all asset approvers must approve the requisition or whether only one from the group of multiple approvers has to approve it. In addition, institutions may identify additional account codes for asset approval, and they may add monetary amount criteria (i.e., asset item unit price greater than \$5,000).

• Stage 4, Path 2: Audio Visual Approver

This is an optional approval path and is for any item on a requisition line that contains an NIGP code related to Audio Visual items or services. NIGP stands for National Institute of Governmental Purchasings Commodity Services Code. The NIGP Code is a coding classification used primarily to classify products and services procured by state and local governments.

In PeopleSoft, the Category ID is tied into the NIGP Code. In the Georgia*FIRST* Marketplace, the NIGP code is already tied into items. For requisition line items not generated from the Marketplace, the Requester enters the proper Category ID. For those line items that have an NIGP Code related to Audio Visual items and services, the system will route the requisition line to the Audio Visual Approver.

An Audio Visual Approver must have the role "BOR_AUDIO_VIS_APPR". If your institution chooses to use the Audio Visual (AV) Approver path, there can be multiple AV approvers. The institution will determine whether all AV approvers must approve the requisition or whether only one from the group of multiple approvers has to approve it. In addition, institutions may identify additional NIGP codes for audio visual approval, and they may add monetary amount criteria (i.e., item has an NIGP code of 06400 and is greater than \$1,000).

• Stage 4, Path 3: Chemical Approver

This path is also an optional one and is for any requisition line with an NIGP code associated with chemicals. If the NIGP code for the requisition line is associated with a chemical purchase, the line will route to the Chemical Approver.

A Chemical Approver must have the role "BOR_CHEMICAL_APPR". If your institution chooses to use the Chemical Approver path, there can be multiple Chemical Approvers. The institution will determine whether all chemical approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for chemical approval, and they may add monetary amount criteria.

• Stage 4, Path 4: Facilities Planning and Design Approver

This optional path is for any requisition line with an NIGP code associated with facilities planning and design.

A Facilities Planning and Design Approver must have the role "BOR_FACILITIES_APPR". If your institution chooses to use the Facilities Planning and Design Approver path, there can be multiple approvers in this path. The institution will determine whether all Facilities Planning and Design approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for facilities planning and design approval, and they may add monetary amount criteria.

• Stage 4, Path 5: IT Approver

This approval path is for any IT hardware or software approvals and is also optional. For any requisition line that is for a computer hardware or software purchase or service (based on NIGP Code), the system routes the line to the IT Approver.

An IT Approver must have the role "BOR_IT_APPR". If your institution chooses to use the IT Approver path, there can be multiple approvers in this path. The institution will determine whether all IT Approvers must approve the requisition or whether only one from the group of

approvers must approve it. In addition, institutions may identify additional NIGP codes for IT approval, and they may add monetary amount criteria.

• Stage 4, Path 6: University Relations Approver

The sixth approval path in stage 4 is also optional and is for the University Relations Approver. For any requisition line that relates to media contact, logo use or copyright items (based on NIGP code), the system routes it to the University Relations Approver.

The University Relations Approver must have the role "BOR_UNIVREL_APPR". If your institution chooses to use the University Relations Approver path, there can be multiple approvers in this path. The institution will determine whether all University Relations Approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for University Relations approval, and they may add monetary amount criteria.

• Stage 4, Path 7: Default NIGP Code – 00000

The seventh approval path in stage 4 will route to a Buyer Approver in the event that a Georgia*FIRST* Marketplace Requisition line does not have an NIGP code. If the line item does not have an NIGP code, it will default to the "00000" NIGP code. This requisition line will automatically route to a Buyer Approver for correction.

• Stage 4, Path 8: Furniture Approver

This path is optional. The Furniture Approver must have the role "BOR_FURNITURE_APPR". If your institution chooses to use the Furniture Approver path, there can be multiple approvers in this path. The institution will determine whether all Furniture Approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for Furniture approval, and they may add monetary amount criteria.

• Stage 4, Path 9: Human Resource Approver

This path is optional. The Human Resource Approver must have the role "BOR_Human_RES_APPR". If your institution chooses to use the Human Resource Approver path, there can be multiple approvers in this path. The institution will determine whether all Human Resource Approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for Human Resource approval, and they may add monetary amount criteria.

• Stage 4, Path 10: Pharmaceutical Drug Approver This optional path is for any requisition line with an NIGP code associated with pharmaceutical drugs. The Pharmaceutical Drug Approver must have the role "BOR PHARM DRUG APPR". If

your institution chooses to use the Pharmaceutical Drug Approver path, there can be multiple approvers in this path. The institution will determine whether all Pharmaceutical Drug Approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for Pharmaceutical Drug approval, and they may add monetary amount criteria.

• Stage 4, Path 11: Budget Reference Approver

This optional path of approval will route to a Budget Reference approver for any requisition line where the Budget Reference does not equal the Fiscal Year. The Budget Reference approver must have the role "BOR_EP_BUD_REF_APPR".

If your institution chooses to use the Budget Reference Approver path, there can be multiple approvers in this path. The institution will determine whether all Budget Reference Approvers must approve the requisition or whether only one from the group of approvers must approve it.

Stage 5: Buyer Approval

In Approval Stage 5, the system will route all special request requisitions (those requisitions not built from the Georgia*FIRST* Marketplace) to the person designated to give buyer approval. This stage is primarily used for Special Request Requisitions since they are not built from contract-approved catalogs. The Buyer Approver can then ensure the line item meets all procurement policies.

Institutions may choose to have multiple Buyer Approvers. In addition, the Institution can choose whether all Buyer Approvers must approve the requisition or if only one needs to act on it. Finally, the institution may choose to inactivate this stage or include it for all requisitions.

Approver's Worklist

As an approver, when a requisition is routed to you for approval, it will appear in your Worklist in PeopleSoft Financials. You must access the PeopleSoft Financials Core system to work requisitions in your Worklist. The system will also notify you with an email indicating that you have a requisition awaiting your action. This email will contain a hyperlink to the approval page. If you are not signed into PeopleSoft, you will first be required to sign into the system.

The Worklist is a queue which holds items waiting for approval. Once an approver works a transaction, it is removed from their Worklist. Once a requisition has been placed in your Worklist, you have a limited time in which to act upon it. After three days of inactivity on a requisition, the system will send you a reminder notification that the requisition must be worked. After four days without approving or denying a requisition, that transaction will escalate to another level and be removed from your Worklist. The ePro Administrator will then need to reassign that transaction to another approver. Individual institutions can customize the number of days before escalating or reassignment to the ePro Admin.

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After approving or denying a requisition line, the system removes it from your Worklist. However on rare occasions, a requisition line may be distributed to multiple Chartfields. If you feel that a requisition that you have already worked should have left your Worklist and still remains, contact your ePro Admin for assistance.

As you are reviewing a requisition, you have the ability to either approve or deny it. When you approve it, it moves onto the next approver. If you are the last approver for a requisition, it will then be made available for budget checking and processing into a purchase order. If you deny the requisition, the system will notify the Requester of this. The system will require you to input a comment before denying it so that the Requester will know why it was denied. If the requisition just needs to be adjusted, you can indicate this in the comments and then deny it. The Requester can make the necessary adjustments and resubmit it for approval.

Chapter 3: Approving and Denying Requisitions

In this lesson, we will walk you through the details of how to approve or deny a requisition line assigned to you.

Retrieving Your Worklist

When a requisition line has been routed to you for approval, it will appear in your Worklist. You will also be notified via email that a requisition is awaiting your action. You can access your Worklist from the home page in PeopleSoft Financials Core system. Keep in mind that to approve requisitions, you must be in the Core system and not the Self Service system (used for Expenses).



After entering your PeopleSoft User ID and Password, you can sign into the system. Remember, your User ID and Password are case sensitive. Also, if you attempt to sign-in five times with the incorrect login information, the system will lock you out. To unlock your account, notify your Local Security Administrator.



You can access the Worklist through either the link in the upper right corner of the page or in the Main Menu.

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Reviewing Your Worklist

DRACLE		All - Search	1	Advanced Search			
Worklist							
Worklist for jban	naby: Barnaby,	James					
Detail View			Worklist Filters		✓ S Feed ✓		
Worklist Items					Personalize Find View	v 100 🖾 🔠 🛛 First	🖪 1-25 of 245 🕑 La
From	Date From	Work Item	Worked By Activity	Priority	Link		
Cody,Susan	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition, 3345800, 71000, 1906-01-01.N. 0, BUSINESS_UNIT:71000 REQ. ID:0000502647.	Mark Worked	Reassign
Whitaker,Julius E	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition, 3332588, 71000,	Mark Worked	Reassign
Bryant,Robert G	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition, 3340320, 71000,	Mark Worked	Reassign
Johnson,Sonya L.	11/06/2015	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 385268, 71000,	Mark Worked	Reassign
Williams,Aprille J	11/06/2015	Approval Routing	Approval Workflow	2-Medium	Requisition, 3346160, 71000,	Mark Worked	Reassign
Johnson,Sonya L.	11/06/2015	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder, 384435, 71000,	Mark Worked	Reassign

Your Worklist is separated into different columns. First, the person who submitted the requisition is listed in the "From" Column. The "Date From" column indicates when the requisition was submitted. The "Work Item" column indicates what action is required. The "Priority" column is not used. And the "Link" column displays the link to the Requisition needing approval. Note that the "Reassign" button has been inactivated on this page.

On your Worklist, you can sort the page by clicking on a column heading. For example, if you wanted to sort your Worklist by the Requester, you would click the "From" column heading.

In each Requisition link, there are certain pieces of information used to identify it. The link begins with the type of transaction needing approval, "Requisition" in the example below. Your institution's Business Unit and the transaction ID is also listed. In the example, the Requisition ID is 0000502647. To go to the Requisition Approval page, simply click on that Requisition link.

Requisition, 3345800, 71000,
1906-01-01, N. 0.
BUSINESS UNIT:71000
REQ_ID:0000502647,

11/10/2015

Requis	sition Appro	val							
Re Requis	equisition ID sition Name Requester Entered on Status Priority dget Status	0000 FY20 Brow 11/00 Penc Medi	5502647 016 GVargis Order #3 /n,Mary Nancy 6/2015 ding	Requisition Alert •Special Request Requisit	tion Total Amount			18,	2.46 USD
	ter's Justific d by Novemb		n 0 for final exams.						
	Edit Requis						View print:	able ver	sion
	e Informatio	n (2)						
Line Ir	nformation				P	ersona	lize Find 🖾	First	💶 1-3 of 3 🕨 Last
	Line		Item Description	Supplier Name	Quantity	UOM	Price		Requester's Com
	1	P	882-E Scantron Answer Sheet;	SCANTRONCO-001	1.0000	PKG	65.95000	USD	>
	2	P	X-101864-PAR-L ParScore Comb	SCANTRONCO-001	2.0000	PKG	52.00000	USD	>
	3	P	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000	USD	>
				III	·				•
L ► Rev	lect All / Deso View Li view/Edit Ap er Approver (ine D oprov	Details						
	Approve		Deny Deny						کی ت ر اند
Return	to Worklist								

Here's a brief description of what is on the **Requisition Approval** page:

- If the Requester gave the requisition a specific name, it will be listed. If not, the Requisition ID will be listed next to Req Name.
- The Requisition total amount is listed.
- The Requester is listed. If you select the Requester's Name link, the system will display the Requester's Name, Employee ID and Department.
- The date the Requisition was entered in the system is listed.
- The Requisition Status is listed.
 - Pending: The requisition is pending approval
- If the Requester entered any comments about the whole requisition, they will be listed next to Requester's Justification.

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- The Business Unit, Requisition ID, and Priority are also listed.
- For some approvers, the "Edit Requisition" button will be available above the Line Information section so that they can modify the requisition. After an approver modifies and saves the requisition, Workflow approvals may need to be restarted, depending on their role action security.

Re Requis	siness Unit 7 equisition ID (sition Name p Requester ¹	0000	-	Requisition Alert •Special Request Re	quisition				
	Entered on Status Priority dget Status	11/0 Peno Medi	6/2015 Jing um		Total Amount	182.46 USD			
	ter's Justific								
	d by Novemb Edit Requis e Informatior	ition					View print	table ver:	sion
	nformation				Pe	ersona	lize Find 🖄	First	💶 1-3 of 3 🕨 Last
	nformation Line		Item Description	Supplier Name	Quantity	ersona UOM	lize Find 🖓 Price	First	1-3 of 3 Last Requester's Com
	Line	P*		Supplier Name SCANTRONCO-001		иом		First	
Line Ir	Line 1	• * *	Item Description 882-E Scantron Answer		Quantity	UOM PKG	Price		Requester's Com
Line Ir	Line 1		Item Description 882-E Scantron Answer Sheet, X-101864-PAR-L ParScore	SCANTRONCO-001	Quantity	UOM PKG PKG	Price 65.95000	USD	Requester's Com

In the **Line Information** section, the system will display all requisition lines that you are required to act upon. The 'clock' icon indicates that the line is pending your approval.

ine In	formation				P	ersona	lize Find 🖓	First	💶 1-3 of 3 🗈 Last
	Line		Item Description	Supplier Name	Quantity	UOM	Price		Requester's Com
	1	2	882-E Scantron Answer Sheet;	SCANTRONCO-001	1.0000	PKG	65.95000	USD	9
	2	P	X-101864-PAR-L ParScore Comb	SCANTRONCO-001	2.0000	PKG	52.00000	USD	P
	3	2	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000	USD	P
•		1.11					1		,

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If you select the Item Description's hyperlink in a line, the **Item Description** page is displayed.

882-E Scantron Answer Sheet; 100Q 5 Chc Alph	a (500/PKG
No Image Available Req Price	65.95000
Item ID	
Category	Examination and Testing
Supplier	SCANTRON CORPORATION
Supplier Item ID	N/A
Manufacturer	N/A
Mfg Itm ID	N/A
Long Description	See attachment for price quote.
Return to Previous Page	ii.

The **Item Description** page will list the item **price**, **category**, and **supplier** if listed. Select the "**Return to Previous Page**" link to return to the Requisition Approval page.

To see the **line details**, select the requisition line through its **checkbox** and then select the **View Line Details** button. You can select multiple lines at one time to view those line details simultaneously.

Header Commo See attached pr	000502647 ame: FY2016 GVar	ntron.	Re	quester: mn quested By: tered Date: 1	Brown,Mary Na	ıcy		Status: Pend Currency: U Requisition	SD
Line Comment	Alpha (500/PKG	882-E Scantron Ansi	ver Sheet; 100	DQ 5 Chc	Quantity: 1.00		Jom: Pkg	Price: 65.95	Line Total: 65.95 Line Status: Pending
Ship Line: 1 Attention: Mar Ship Via: VENI		Due Da	o: CB2200 nte: 11/30/15 t Terms:FOB:I	DEST	Geo 555 Buil Cla	Iress: Irgia Perimeter North Indian C ding CB Room Ikston GA 3002 ed States	reek Dr. 2200		Shipping Quantity: 1.0000 Shipping Total: 65.95
Dist	Status	Location	Qty	РСТ	Amoun	t GL Unit	A	count	
1	Open	CB2200	1.0000	100.00	65.9	5 71000	7	51110	
Dept	Fund	Program	Class	Budget Ref					
0101100	10000	11100	11000	2016					
Open QTY 1.0000	Open Amt 0.000			_					
GL Base Am									
65.95	USD	0							

A new window will open and the **shipping and distribution** information will be displayed. You will be able to see the **Chartfields** that are charged for that requisition line. When you are done reviewing the line details, you can close the pop-up window.

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The "Requester's Comments" call-out icon appears for those lines that have line comments or attachments. To review these comments, you can select the call-out icon.

≂ Lin	e Informat	ion (3)						
Line I	nformation	1			P	ersona	lize Find 🖓	🛛 First 🗹	1-3 of 3 🗈 Last
	Line		Item Description	Supplier Name	Quantity	UOM	Price		Comments
☑		1 😭	882-E Scantron Answer Sheet;	SCANTRONCO-001	1.0000	PKG	65.95000	USD	9

Here, you can review the line comments and attachments. To return to the line information, select the "Return to Previous Page" link.

Line	Information					
ines				Personalize Find	12	First 🗹 1 of 1 🕨 Last
	Line	Item Description	Supplier Name	Quantity	UOM	Price
V	1	882-E Scantron Answer Sheet;	SCANTRONCO-001	1.0000	PKG	65.95000 USD
commo		for price quote.>>		F	Find \	/iew All First 🖪 1 of 1 🛽
		for price quote.>>		F	Find \	
< <see< td=""><td></td><td>for price quote.>></td><td></td><td>Personalize </td><td></td><td></td></see<>		for price quote.>>		Personalize		
< <see< td=""><td>attachment</td><td>for price quote.>></td><td></td><td></td><td></td><td></td></see<>	attachment	for price quote.>>				

To see the approval path for a requisition, select the "expand" icon next to Review/Edit Approvers.

Line In	formation				P	ersona	lize Find	First I	1-3 of 3 🖿 Las
	Line		Item Description	Supplier Name	Quantity	UOM	Price		Comments
			882-E Scantron Answer Sheet;	SCANTRONCO-001	1.0000	PKG	65.95000	USD	9
	2 8	9	X-101864-PAR-L ParScore Comb	SCANTRONCO-001	2.0000	PKG	52.00000	USD	9
	3 9	9	Shipping/Freight Cost	SCANTRONCO-001	1.0000	FEE	12.51000	USD	9
4				III					•

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partment and Proj. Approval		
 Line 1:Awaiting Further Approvals 882-E Scantron Answer Sheet; 100Q 5 Chc Alpha (500/F 	Start New Path	
Department and Proj. Approver		
Approved		
Cody,Susan Req-Dept Mgr-Line Level		
11/06/15 - 3:49 PM		
 Line 2: Awaiting Further Approvals X-101864-PAR-L ParScore Combo 8000/888P (500/PKG) 	Start New Path	
Department and Proj. Approver		
Approved		
Req-Dept Mgr-Line Level		
11/06/15 - 3:49 PM		
Line 3:Awaiting Further Approvals	_	
Shipping/Freight Cost	Start New Path	
Department and Proj. Approver		
Approved		
Cody,Susan		
Req-Dept Mgr-Line Level 11/06/15 - 3:49 PM		
11/00/13 - 3.43 PM		
gistical Services Approval		
FY2016 GVargis Order #3:Pending FY2016 GVargis Order	Request Information	
Purchasing Manager Approval	Istant New Path	
Pending		
Multiple Approximate		
Buyer Approval		
A		
er Approver Comments		

The **Review/Edit Approvers** section expands and lists all approvers that have acted or need to act on a requisition. In addition, there will be an approval path for each requisition line, since each line can have a different set of approvers depending on their Chartfields and item type.

Under the approval path, you can enter any comments that you wish to attach to the requisition. Do not include any slashes (/) in your comments.

When you are ready to act on the requisition, you can select your requisition lines and then click the **Approve** or **Deny** button.

Once approved, the **Requisition Approval** page should update indicating that you have completed your approval action.

onfirmation			
FY2016 (GVargis Order	#3 has been approved.	
leview/Edit App	101/010		
teview.Luit App	lovers		
epartmen	t and Proj. A	pproval	
	1:Approved Scantron Answer She	et; 100Q 5 Chc Alpha (500/PKG	
Department	and Proj. Approver		
Approved			
Req	ly,Susan -Dept Mgr-Line Level 6/15 - 3:49 PM		
	2:Approved 64-PAR-L ParScore C	ombo 8000/888P (500/PKG)	
Department	and Proj. Approver		
Approved			
Req	ly,Susan -Dept Mgr-Line Level 6/15 - 3:49 PM		
	3:Approved		
Department	and Proj. Approver		
Approved			
Req.	ly,Susan -Dept Mgr-Line Level 6/15 - 3:49 PM		
ogistical S	Services Ap	proval	
	016 GVargis O	der #3:Approved	
Purchasing I	Manager Approval		
Approved			
	naby,James er Approval		
	0/15 - 9:54 AM		

A requisition line will go to "**approved**" once all approvers have acted on it. Until then, the Requisition Status is still **Pending**.

To return to your Worklist to work another requisition, select the Return to Worklist link.

How to Access your Worklist

- 1. Log into PeopleSoft Financials Core System with your User ID and Password.
- 2. Click the **Worklist** hyperlink in the upper right corner of the home page.
- 3. Click a **Requisition link** under the "link" column to display a requisition.

How to Approve a Requisition

- 1. Select the **requisition** from your **Worklist**.
- 2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
- Review each line item's details by selecting them with a checkmark and clicking the View Line Details button.
- 4. Review the **approval path** if desired. You can insert additional approvers if needed (see lesson #).
- 5. Enter any **comments** you wish to add to the requisition. Do not include any slashes (/) in the comments field.
- 6. Select the lines you want to approve with a **checkmark** and then click the **Approve** button.
- 7. After receiving the approval confirmation, click the **Return to Worklist** link.

How to Deny a Requisition

- 1. Select the **requisition** from your **Worklist**.
- 2. Review each line item's descriptions by clicking on the **Item Description** hyperlinks.
- 3. Review each line item's details by selecting them with a **checkmark** and clicking the **View Line Details** button.
- 4. Review the **approval path** if desired.
- 5. Enter **comments** explaining why you are denying the requisition. Do not include any slashes (/) in the comments field.
- 6. Select the **lines** you want to deny with a **checkmark** and then click the **Deny** button.
- 7. After receiving the denial confirmation, click the **Return to Worklist** link.

Ad Hoc Approvers

eProcurement gives you the ability to insert additional approvers if you feel it is necessary. After reviewing a requisition's approval path, you can insert additional approvers if you have the BOR_AD_HOC_APPROVE security role.

While you are reviewing the approval path for a requisition, you can insert the ad hoc approver wherever you see a green plus sign (+).

OR,	ACLE			All 👻 S	learch		>> Advanced	Search			
Requi	isition Appr	oval									
	Business Unit 71000 Requisition Alert Special Request Requisition										
	isition Name	PTK/	SGA MY-Cam vood,Randi L	pus Cafe							
D	Entered or Status Priority	Pend Medi	ling um				Total Amou	nt			192.50 USD
Reque	udget Status ster's Justif	icatio		r.							
Ľ	Edit Requ								View	printab	le version
≂ Li	ine Informati	on 🌀)								
Line	Information					Personalize F					💶 1-2 of 2 🕨 Last
	Line		Item Descrip	otion	Supplier Name		Quantity	иом	Price		Requester's Comments
		1 🥐	Organic Apples (case)		CAMPUSCAFE-00	1	2.0000	EA	90.00000	USD	P
		2 🥐	Ice water w/l (Gallon)	emon	CAMPUSCAFE-00	1	5.0000	EA	2.50000	USD	
S	elect All / De: View			1							
- L	Review/Edit A]							
			nd Proj. /	Approv	al						
	▶ Line	• 1:A	waiting Fu			•Start New F	Path				
	Line 2:Awaiting Further Approvals lee water w/lemon (Gallon)										
Lo	-		vices Ap	-							
	⇒ PTł	(/SG	A MY-Cam	pus Caf	e:Pending 🕕 R	equest Informa tart New Path	tion				
	Pending		ger Approval	ŧ							

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Start new approval path								
Choose a	Choose an approver or reviewer to insert							
User ID:	A							
Insert as:	Approver							
	Reviewer							
Insert	Cancel							

If you select the User ID look up icon, you will be able to search for the approver by User ID or by name. After selecting the additional approver, you can specify whether you want that approver to be inserted as an **Approver** or a **Reviewer**.

- Approver: If you select another person to be an approver, that person will be required to approve the requisition before it can move onto the next step.
- Reviewer: If you select another person to be a reviewer, that person will see the requisition in their Worklist, but they will not need to approve the requisition line.

If you have inserted an approver and then decide to remove them, you must do this before you approve the requisition.

Review	/Edit Approvers					
par	ment and Proj. Approval					
₽	Line 1:Awaiting Further Approvals Organic Apples (case)					
₽	Line 2: Awaiting Further Approvals Ice water w/lemon (Gallon)					
gist	ical Services Approval					
PTK/SGA MY-Campus Cafe:Pending ● Request Information ● Start New Path						
Pe	hasing Manager Approval mding Multiple Approvers Buyer Approval Multiple Approval Multiple Approval Mu					
opply A	pproval Changes					

To remove a user you added as an Ad Hoc approver, select the **red minus sign** (-) in that person's approval box.

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When you insert another person in the approval path for a requisition, that user will need to proper 'approver' security setup in the system to work the requisition. If you unsure if the user has the correct security setup, contact that user and your Local Security Administrator.

How to Insert Ad Hoc Approver

- 1. Select the **requisition** from your **Worklist**.
- 2. Review each line item's descriptions by clicking on the Item Description hyperlinks.
- 3. Review each line item's details by selecting them with a checkmark and clicking the View Line Details button.
- 4. Review the **approval** path.
- 5. Click the green plus sign (+) where you want to insert the ad hoc approver.
- 6. Click the **User ID** look up icon in the pop-up window.
- 7. Search for the name or User ID of the approver you want to add. Click on that person's name.
- 8. Select either Approver or Reviewer.
- 9. Click the **Insert** button.
- 10. Click the Apply Approval Changes button.
- 11. Enter any comments you wish to add to the requisition. Do not include any slashes (/) in the comments field.
- 12. Select the lines you want to approve with a checkmark and then click the **Approve** button.
- 13. After receiving the approval confirmation, click the **Return to Worklist** link.

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Requisition Push Back

All approvers can approve or deny a requisition that is submitted to them. Some approvers also have the ability to push a requisition back to the previous approver. This may be necessary if an approver has additional questions about a requisition. Initial approvers for a requisition will be unable to push back a requisition since there are no previous approvers in the approval path. Project approvers and inserted ad hoc approvers can use the push back function.

When you push back a requisition, it places that requisition back into a Pending status for that approval step. If you receive a requisition that was pushed back, you will be required to approve it again or deny it.

quisi	tion Approv	/al								
Business Unit 71000				Requisition Alert ·Special Request Requisition						
Requisition ID 0000502603			- spe	colar nequest ner	quisition					
equisit	tion Name F lequester	TK/S	GA MY-Campus Cafe							
E	ntered on 1 Status p					Total Amou	at			192.50 USD
	Priority					Total Amou	in.			192.50 050
Budg	get Status									
eques	ter's Justif	icatio	on							
No ju	stification er	ntered	d by requester.							
	Edit Requisi	tion						View	printabl	e version
- Line	e Informatio	n (j	0							
_ine Ir	nformation						Persona	lize Find 🖾	First	💶 1-2 of 2 🕨 Last
	Line		Item Description	Supplier Name		Quantity	иом	Price		Requester's Comments
		-	Organic Apples (case)	CAMPUSCAFE-00	н	2.0000	EA	90.0000	USD	Ŷ
	2	۶	Ice water w/lemon (Gallon)	CAMPUSCAFE-00	11	5.0000	EA	2.50000	USD	
Sek	ect All / Dese	lect /	All							
	View Li	ne De	etails							
< Ker	view/Edit Ap	prov	ers							
Depa	artment	anc	l Proj. Approva	I						
				pprovals	Start New Pa	ath				
Ī			waiting Further A	pprovals	Start New Pa	ath				
Logi			ces Approval							
	─ PTK/	SG/	A MY-Campus Caf	e:Pending 🚯	Request Informat Start New Path	ion				
			ger Approval		olarchon rath					
	Approved		Pendi	ng						
	Buy	er Ap	proval - 2:20 PM	Jackson, Vagillia Inserted Approver	-+					
Enter			monto							
	r Approver (Sound	nems							
Enter										74
Enter										
Enter										
Enter	Approve		O Denv		Fi P	ushback				

In the example above, you can see the **Pushback** button. As the approver Vagillia Jackson, you could push the requisition back to the first approver. When you push back a requisition, you will be required to enter **comments** explaining why you are pushing the requisition back. Do not include any slashes (/) in the comments field. After pushing it back, you will receive confirmation the requisition has been pushed back to the previous approver.

Requisition A	Approval
Confirmat	ion
	ISGA MY-Campus Cafe has been pushed back to the previous rover.
Review/Ec	lit Approvers
Departm	ent and Proj. Approval
	Line 1:Awaiting Further Approvals Organic Apples (case)
Depar	tment and Proj. Approver
App	roved
~	Bryant,Robert G Rec-Dept Mgr-Line Level 11/08/15 - 3:22 PM
~	Line 2:Awaiting Further Approvals loe water wilemon (Gallon)
Depar	tment and Proj. Approver
App	roved Bryan Robert G Req-Dept Mgr-Line Level 11/00/15 - 3:22 PM
Logistic	al Services Approval
$\overline{\nabla}$	PTK/SGA MY-Campus Cafe:Pending View/Hide Comments
Purch	asing Manager Approval
Pen	
C	Multiple Approvers Buyer Approval
P	Comments
Return to Work	-lint
Noturn to Work	MOL

As the approver who receives a pushed back requisition, you will easily be able to see that it was pushed back and you can review the comments to determine why it was pushed back.

equisit	tion Appro	oval		(
Requi quisitio Re	equester ^H	0000 PTK/ Hegw	502603 SGA MY-Campus Cafe lood,Randi L	Requisition Alert -Special Requestion -This requisition was pushed back to you. Review previous approver comments for detail						
	tered on 1 Status p Priority M et Status M	^p end Medi	ing um		Total Amount 192.50 1					192.50 USD
No just	er's Justifie tification e dit Requisi	enter	n ed by requester.					View	/ printab	le version
Line I	Informatio	n (j								
ine Inf	ormation					Pe	rsonalia	ze Find 🗇	First	1-2 of 2 🕨 Last
	Line		Item Description	Supplier Nam	e	Quantity	UOM	Price		Requester's Comments
	1	8 ⁰	Organic Apples (case)	CAMPUSCAP	E-001	2.0000	EA	90.00000	USD	9
	2	ea.	loe water w/lemon (Gallon)	CAMPUSCAP	E-001	5.0000	EA	2.50000	USD	
	Approve Bry Rec	d ant,i g-Dep	Proj. Approver Robert G It Mgr-Line Level - 3:22 PM							
			Awaiting Further A	Approvals	Start N	lew Path				
	Approve	and d ant,i g-Dep	Proj. Approver Robert G It Mgr-Line Level - 3:22 PM							
ogis	tical Se	erv	ices Approval							
-			GA MY-Campus Ca	fe:Pending	View/Hide Co	mation				
	Pending	Itiple	ager Approval	Ushed Back Jackson, Inserted / 11/10/15	Vagillia					
	 ⊂ Corr 	nme	ents							

You can then perform the necessary actions and either approve or deny the requisition. If you approve it, it will proceed on the approval path.

Confirmat	ion
РТИ	USGA MY-Campus Cafe has been routed for further approval.
Review/E	dit Approvers
epartr	nent and Proj. Approval
P	Line 1:Awaiting Further Approvals Organic Apples (case)
P	Line 2:Awaiting Further Approvals loe water w/lemon (Gallon)
ogistic	al Services Approval
~	PTK/SGA MY-Campus Cafe:Pending View/Hide Comments
Purc	hasing Manager Approval
Ap	Pending Pending Jackson,Vagillia Inserted Approver
D	Comments

How to Push Back a Requisition to the Previous Approver

- 1. Select the **requisition** from your **Worklist**.
- 2. Review each line item's descriptions by clicking on the Item Description hyperlinks.
- 3. Review each line item's details by selecting them with a checkmark and clicking the View Line Details button.
- 4. Review the approval path if desired.
- 5. Enter comments as to why you are pushing the requisition back to the previous approver. Do not include any slashes (/) in the comments field.
- 6. Select the lines you want to push back with a checkmark and then click the **Push Back** button.
- 7. After receiving the Push Back confirmation, click the **Return to Worklist** link.

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Chapter 4: Worklist Maintenance

As a requisition approver, you are responsible for approving the purchase of items. If you are unable to perform this task due to the fact you may be out of the office on leave or out of town, you can assign an alternate approver while you are away.

Assigning an Alternate Approver

When you assign an alternate approver, you are telling the system that whenever your Worklist receives new requisitions to work, you want them routed to the alternate approver during the time frame specified. The system will then automatically forward any new Worklist items to your Alternate User during that specified time. You will not be able to reassign the items already in your Worklist.

When you specify the start and end dates for your alternate approver, the times that those dates go into effect begin at midnight. For example, imagine that you set up an alternate approver to take your requisitions from May 2, 2015 through May 7, 2015. Any new requisitions after 12:00 a.m. on May 2nd will automatically be routed to your alternate approver's worklist. This will continue for all requisitions until 11:59 p.m. on May 7th. After that, the new requisitions will again route to your worklist.

You will need to work with your Local Security Administrator to ensure that the alternate approver you wish to assign has the proper security setup needed to work the requisitions. They will need the same approval authority that you have. Otherwise, they will not be able to access the requisition.

You set up your alternate approver through eProcurement > My Profile.

My Profile	
Manage Personal Templates Manage Favorites Groups	Request Procurement Card
Password	
Change password	
Change or set up forgotten password help	
Preferences	
Edit Email Addresses	
You are currently logged in using	English
Language for reports and email	English -
Currency	,
Alternate User	
If you will be temporarily unavailable, you can select an alternation	ate user to receive your routings.
Alternate User ID	
Effective Date From	(example:12/31/2000)
Effective Date To	(example:12/31/2000)
R Save E Notify	

How to Assign an Alternate Approver

- 1. In PeopleSoft Financials Core System, select **eProcurement** in the menu.
- 2. Select My Profile.
- 3. Select the Alternate User ID look up icon.
- 4. Search for your alternate user by either **User ID** or name (Description).

- 5. Select your alternate user by clicking on their User ID.
- 6. Enter the Effective Date From.
- 7. Enter the Effective Date To.
- 8. Click the **Save** button.

Chapter 5: Contract Types

Even though the suppliers and items in the GeorgiaFIRST 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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