UNIVERSITY SYSTEM OF GEORGIA
Information Technology Services

eProcurement and Georgia*FIRST* Marketplace

User's Guide

for

Shoppers

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Introduction

This User's Guide is designed for Shoppers in 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 also learn how to use the Georgia*FIRST* Marketplace to create a shopping cart of items you want purchased, how your requested goods are approved, and how to customize your experience in the marketplace.

Topics covered in this user's guide:

- Overview of eProcurement and the Georgia*FIRST* Marketplace
- Accessing and Navigating the Georgia*FIRST* Marketplace
- Basic Procurement Policies
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Chapter 1: eProcurement and Georgia*FIRST* Marketplace Overview

What is eProcurement?

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. The hard copy requisition had to be routed for approval signatures and then sent to the purchasing department. The purchasing department had to re-key the information into the system to create a purchase order to send to the supplier.

With ePro, much of this process is automated. A requisition is created within ePro and electronically routed for approval. The approval workflow is dependent on the department charged and item type, among other things. Finally, after the last electronic approval is made, the requisition can be sourced into an official purchase order that is dispatched to a supplier.

What is the Georgia*FIRST* Marketplace?

The Georgia*FIRST* Marketplace takes the use of ePro to another level. The Georgia*FIRST* Marketplace is an online shopping site accessed from PeopleSoft Financials. Through this online shopping site, users can shop online for contract items from a variety of state- and institution-approved suppliers. 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.

Because users are shopping from approved suppliers with contract prices, very little buyer intervention is required. After a requisition built from the Georgia*FIRST* Marketplace is approved, it is designed to be picked up for batch processing, which will budget check it, source it into a purchase order, and dispatch that purchase order. These batch processes are designed to run at different times throughout the day.

Types of Requisitions

With the implementation of the Georgia*FIRST* Marketplace into the eProcurement module, there are now two types of requisitions: Georgia*FIRST* Marketplace Requisitions and Special Request Requisitions.

- **Georgia*FIRST* Marketplace Requisition (CAT Origin requisition)**: Shoppers build a requisition from items in the Georgia*FIRST* marketplace.
- **Special Request Requisition (ONL Origin requisition)**: Requesters build a requisition by manually entering items directly into the requisition. This type of requisition is not built from the contractually-approved items in the Marketplace.

Within ePro, users will not be able to combine items from the Georgia*FIRST* Marketplace with items from a Special Request Requisition into one requisition. Each requisition must be completely either from the Marketplace (CAT) or from a Special Request Requisition (ONL).

Benefits of ePro and the Georgia*FIRST* Marketplace

With this 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
- Request goods from multiple suppliers through one shopping cart
- Items in the Georgia*FIRST* Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as 'favorites' in the Georgia*FIRST* Marketplace
- Automatic batch processing of approved requisitions

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:

- **Marketplace Browser**: User without any Georgia*FIRST* Marketplace roles assigned will default to a Marketplace Browser. A Browser can view items, contracts, and pricing in the Marketplace but cannot add items to a cart or create requisitions.
- **Shopper**: User can select items to purchase, add them to a cart, and assign that cart to a Requester for further processing. This type of user cannot create a requisition in PeopleSoft.
- **Requester**: User can perform all functions that a Shopper can, with the added permissions to be able to create the actual requisition in PeopleSoft.
- **Approver**: User with the permissions and roles necessary to approve ePro requisitions.
- **Buyer**: User responsible for ensuring approved requisitions are sourced into a purchase order and dispatched to the supplier.
- **Accounts Payable**: Responsible for building electronic invoices that are sent from GeorgiaFIRST Marketplace suppliers.
- **ePro Administrator**: User monitors approval workflow to ensure requisitions are worked in a timely fashion.
- **Local Security Administrator**: Responsible for setting up other users with the appropriate roles, permissions, and user preferences. Please see the *Local Security Administrator User's Guide* for more on the responsibilities of this user.

As a Shopper, you will use the Georgia*FIRST* Marketplace to shop for goods from contracts. Once you create a shopping cart within the GFM, you are responsible for assigning that cart to a Requester, the

user in your organization who will be responsible for turning that shopping cart into an eProcurement requisition.

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.

Shoppers use the Georgia*FIRST* Marketplace to select goods they request to have purchased	Shoppers assign their completed shopping carts to their assigned Requester	The Requester is notified by email of this newly assigned cart
The Requester logs into the system and pulls the Shopper's cart into a Requisition	The Requester finishes the requisition and submits it for approval	The Approvers (determined by various factors) either approve or deny the requisition lines
Once fully approved, the PeopleSoft Financials system automatically budget checks the requisition	Once the requisition has a valid budget check status, the PeopleSoft Financials system automatically sources the requisition into a purchase order and dispatches it to the supplier	
The supplier fulfills the order and sends the item and invoice to the Institution	The institution receives the item	The AP Office pays the invoice

How does PeopleSoft pass along user information to the 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 suppliers. In addition, your PeopleSoft User ID can be used to store a set of default ChartFields that can be charged for your requested goods, unless otherwise specified.

How Do Approvals Work?

As mentioned earlier, a Requester creates a requisition in ePro. Each item on a requisition is placed on its own requisition line. Each distribution line on a requisition may be charged to a different set of ChartFields. Therefore, there may be different approval paths for each line on a requisition, depending on a variety of elements.

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 who 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, if desired. Below is a summary of all of the approval stages and paths available for eProcurement. To determine which stages and paths your institution is currently 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 Approvals (Agency, Grant, Technology Fee)
- Stage 3: Amount Approval (for requisitions built from the Georgia*FIRST* Marketplace)
- Stage 4: Item Type-Based Approvals
- Stage 5: Federal Fund Approval
- Stage 6: Buyer Approval (for requisitions not built from the Georgia*FIRST* Marketplace)

Note: A new approval stage, Federal Fund Approval, was added in 2018. If an institution chooses to implement this stage it will become Stage 5 and buyer approval will move to Stage 6.

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 may choose to have it implemented for your Special Request requisitions as well. Institutions have the following options when using Amount Approval and may select **one** of the options below:

- 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_EP_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 seven 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 if 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. An NIGP code is the National Institute of Governmental Purchasing's 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 if 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 of 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 if 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 if 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 if 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 if 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_HR_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 if 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 if 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 if only one from the group of approvers must approve it.

Stage 5: Federal Fund Approval

The Federal Fund Approval stage is an optional one. The system will route all requisitions that have a class code of 61000 defined. The purpose of this stage is to assist institutions in identifying requisitions where federal funds have been used.

If your institution chooses to employ the Federal Fund Approval stage, the approver must have the role BOR_FEDERAL_FUND_APPR.

Stage 6: Buyer Approval

In Approval Stage 6, 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.

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).

- 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 must 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 that 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.

Chapter 2: Accessing and Navigating the Georgia*FIRST* Marketplace

As mentioned earlier, Shoppers access the Georgia*FIRST* Marketplace through the PeopleSoft Financials system. Once you have access to PeopleSoft, you are ready to log into the PeopleSoft Self Service site.

Logging into PeopleSoft Financials Self Service

Most Shoppers will access the Georgia*FIRST* Marketplace via Self Service. There may be some Shoppers who will log into the main PeopleSoft Financials database. These Shoppers will also have additional roles, requiring them to have access to the core system. The URL that your local Security Administrator provides you will take you to the correct location.

How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Self Service

1. Log into GeorgiaFIRST Self-Service via Single Sign On.
2. Click on the GFM Shopper Access tile.

    3/14/2023
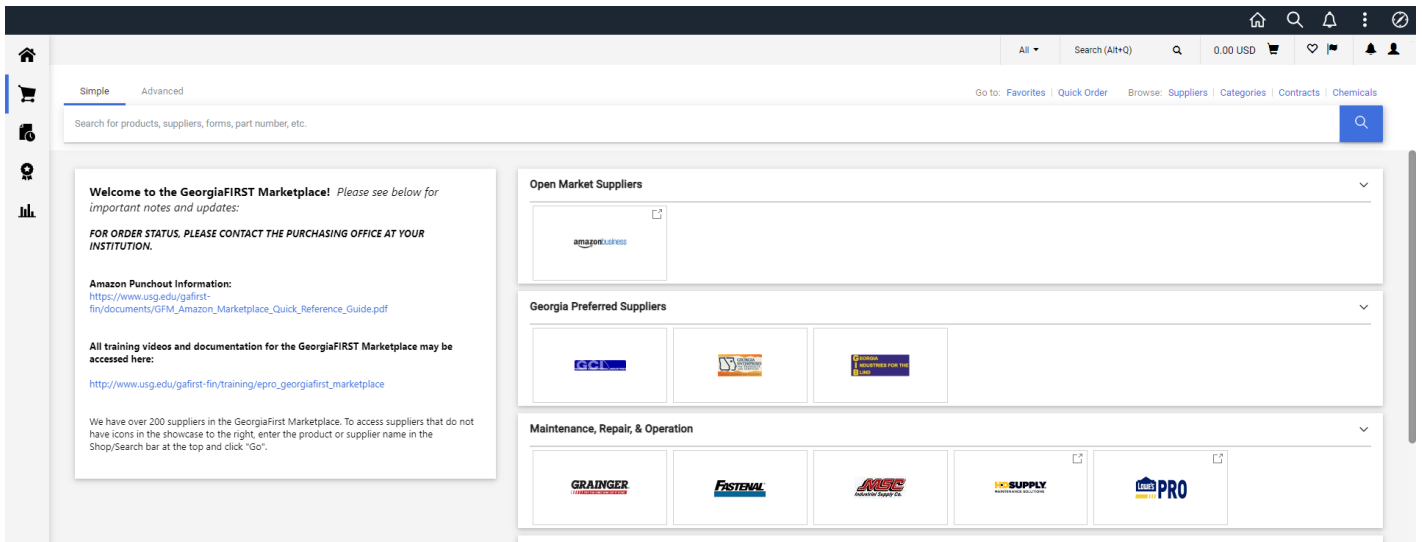
3. Notice that the Georgia*FIRST* Marketplace is now displayed in your main window. You are now able to start navigating through the Marketplace.

Logging in through PeopleSoft Financials Core System

For Shoppers who have access to the core system, access to the Georgia*FIRST* Marketplace is slightly different.

How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Core System

1. Log into GeorgiaFIRST Financials via Single Sign On.
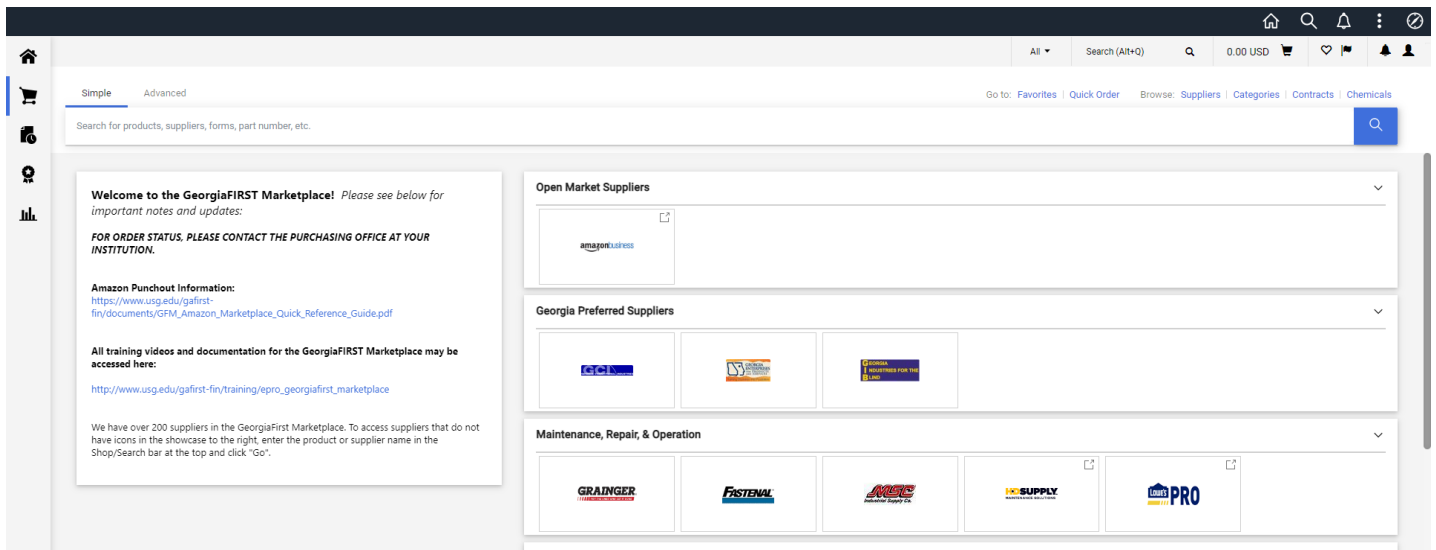
2. Notice that the Georgia*FIRST* Marketplace is now displayed in your main window. You are now able to start navigating through the marketplace. You should see your institution logo in the top left corner of the Georgia*FIRST* Marketplace.

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, click on the Home icon. You can also click on your institution's logo in the upper left corner to return to the home page.
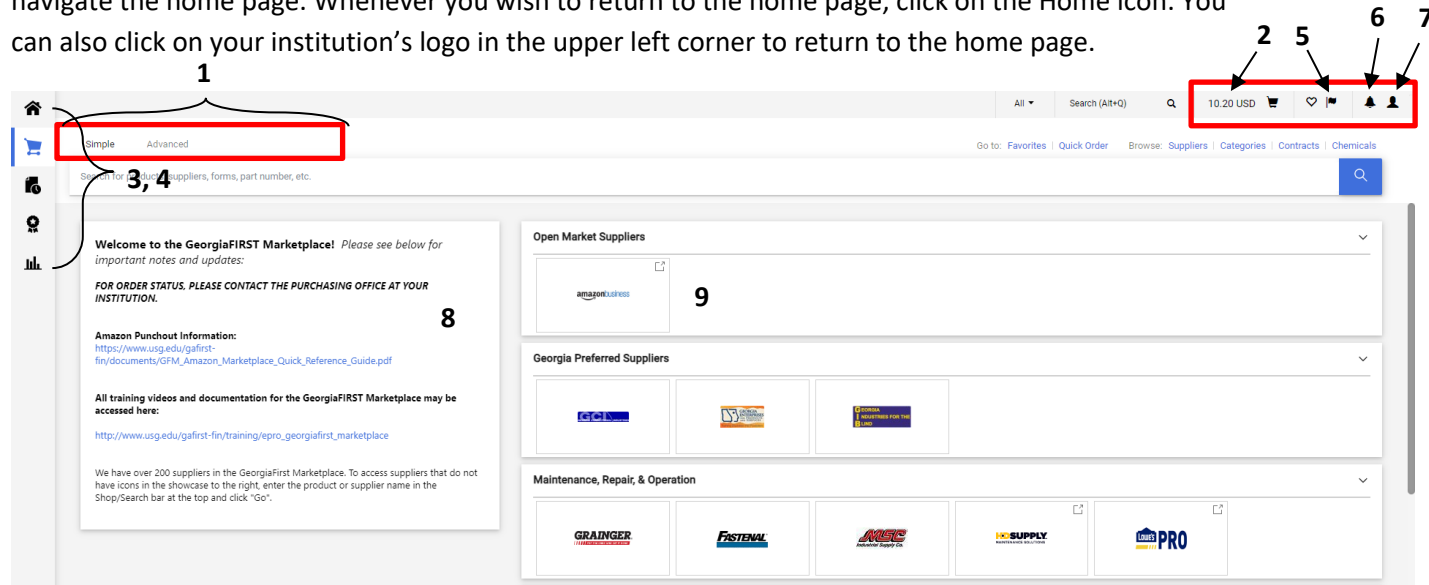
1. **Search Options:** users can use the Quick Search or Advanced Search from this section. The quick search feature allows for a variety of searches to be executed anywhere in the marketplace. With the Advanced Search, users are able to enter additional criteria to generate more specific search results than with Quick Search.
2. **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.
3. **Navigation Icons:** Down the left side of the Georgia*FIRST* Marketplace are the primary navigation icons. By clicking on an icon, the screen refreshes to display sub-links for the topics or functions covered in that particular part of the Marketplace. The links that you see are dependent on your permissions.
    o   Home: This icon returns you to the Home page from any other parts of the application.
    o   Shop: This icon is used for shopping and provides quick access to other parts of the application. You can also View and modify the current shopping cart, create new carts, delete existing carts, and prepare the active cart for processing.
    o   Orders: This icon allows you to search for documents that you have created.

- o Contracts: This icon allows you to look up statewide contracts.
- o Accounts Payable: : This icon allows you to search for e-Invoices related to Purchase Orders
- o Reporting: While this icon appears in the menu, there are no reports available for Shoppers to run.

4. **Navigation Sub-Links:** Once you select a link, additional sub-links may be available. If sub-links are available, they will be located just beneath the primary navigation links.

5. **Action Items:** Action Items are items that require some sort of action by the user logged in. The number of action items will be displayed in red to the right of the Action Item menu.

6. **Notifications:** Certain action items will trigger Notification messages informing the user that action is needed. Notifications are clickable and take you to the appropriate area of the application, so that action can be taken. The number of notifications will be displayed in red to the right of the Notifications menu.

7. **User Profile:** This icon lets you review your user profile information and settings. The dropdown arrow by your name provides a link to your user profile, where you may verify your user preferences and settings, including changing your color theme and setting up your cart assignees.

8. **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.

9. **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.

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.

Chapter 3: 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 Georgia*FIRST* 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

Chapter 4: Searching for Items in the Georgia*FIRST* Marketplace

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 with which 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.

Using Simple (Basic) Search
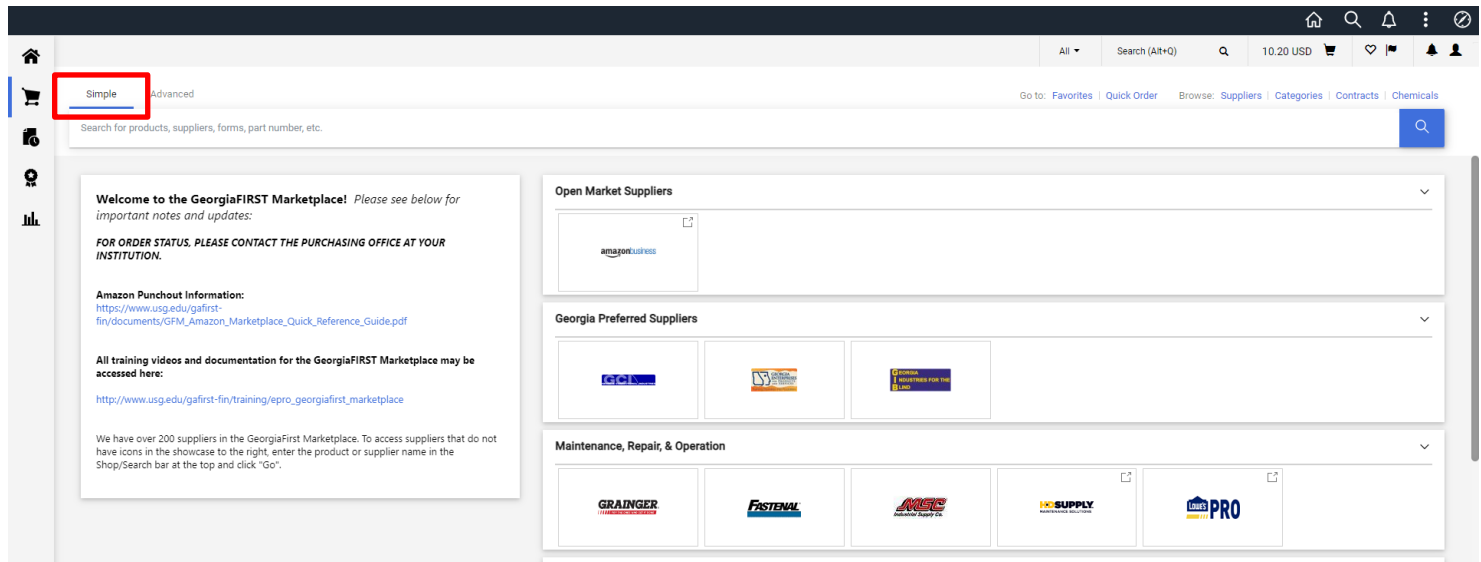
A simple search is similar to a Google search, where you enter a word, phrase, or keyword into a single text box for searching. By using a simple search, you can get results from hosted catalogs, self-managed catalogs, and contracts. Simple Search displays when you enter the Georgia*FIRST* Marketplace. 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. 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 magnifying glass icon 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. Item Information includes the following:

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

- Color
- Common Name
- MDL Number
- Molecular Formula
- Radionuclide
- UPC

Once ePro retrieves your search results, you can use the filter options to refine them. 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. Start from the Georgia*FIRST* Marketplace homepage.
2. Enter one or more **keywords**.
3. 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.

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.

One way to narrow down your search results is to search only in a particular product category. To navigate to the product category, first select the Advanced tab. Next, select the product category from the Advanced Search dropdown menu. 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 searched 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.)

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 "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

Search Criteria Field	Description
	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	This search field is available in the Laboratory Supplies category only. 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.
Vendor 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.

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
- 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 homepage, select the **Advanced Search** tab.
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. Vendor
   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, perform the search with **Mandatory State Contract** selected.
6. Click the **Search** button

Search Result Details

The system navigates to the search results page.

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 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.

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), Supplier, Category, Commodity Code, Packaging UOM, Result Type, and Manufacturer Name.

To apply a single filter, simply click the checkbox next the filter option. To see additional options under a filter, select the **Show All** link. To select more than one filter at a time, click the **Select Multiple Filters** link.

If you want to remove a filter, click the green checkmark to uncheck the checkbox next the filter option.

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

Browse by Supplier

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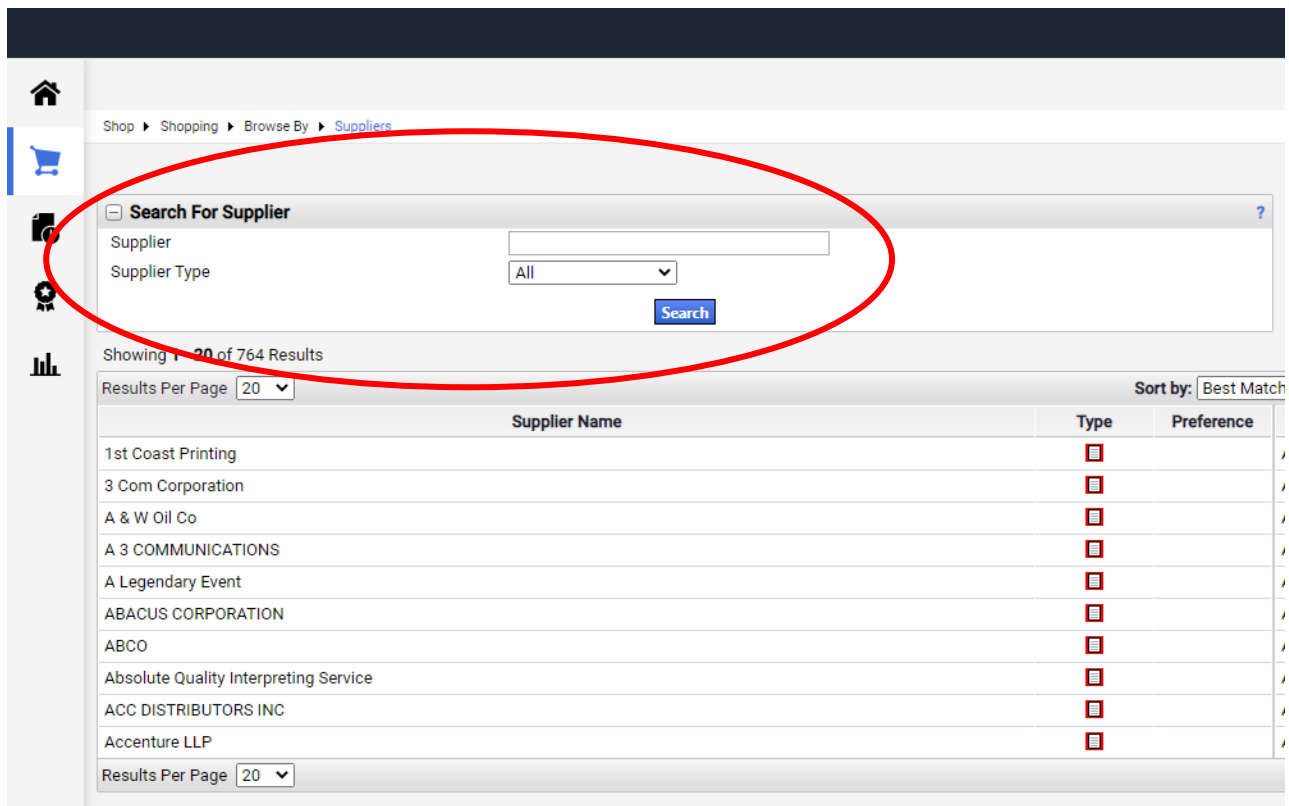
How To: Browse for Items by Supplier

1. From the Georgia*FIRST* Marketplace homepage, 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 Vendor 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 Vendor Name field. The supplier search allows for a "contains" name search.
5. From the **Vendor Type** drop down list, select to view **Hosted Catalog**.
6. Click the **Search** button.
7. Select the supplier from the results by selecting the **Vendor Name**. The supplier information and categories display.
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.

Browse by Category

The "Browse by Category" functionality is similar to the "Browse by Supplier" functionality. The main difference is that, instead of viewing one supplier's table of contents, you view all supplier tables of contents. 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 items, across all suppliers, in a certain category.
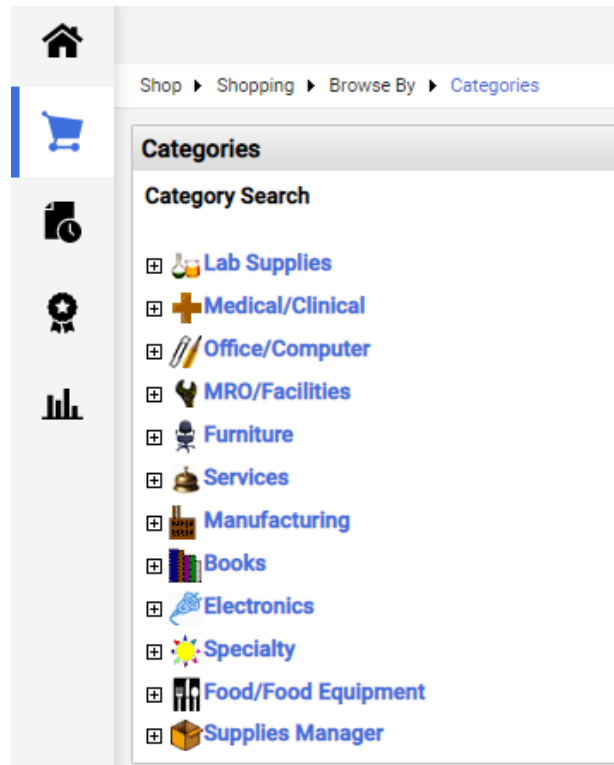
How To: Browse for Items by Category

1. From the Georgia*FIRST* Marketplace homepage, 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.

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 homepage, search for an item using your preferred search method.
2. From the search results page, click the list view (≣) in the top right of the search results.
3. 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 'x' next to each item.

   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 up to a maximum of four (4) items for comparison.
5. Once all items are selected, the Compare box will display the number of items selected for comparison. Click the **Compare** button at the top of the search results.

   Note: if needed, you can remove any or all of the items by hovering over the Compare button and clicking Remove next to the item(s).

6. The **Product Comparison** page appears and it 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.
7. You can remove a product from the Product Comparison page in one of two ways:
   a. Click the **X** icon next to the check box to remove item immediately.
   b. Click the **check box** at the top of the product, click the **Actions For Selected Items** link, and select the **Remove** action from drop down list.
8. Click the **Add to Cart** icon to add the item directly to your shopping cart.
9. Close **Product Comparison** window once comparison is completed.

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.
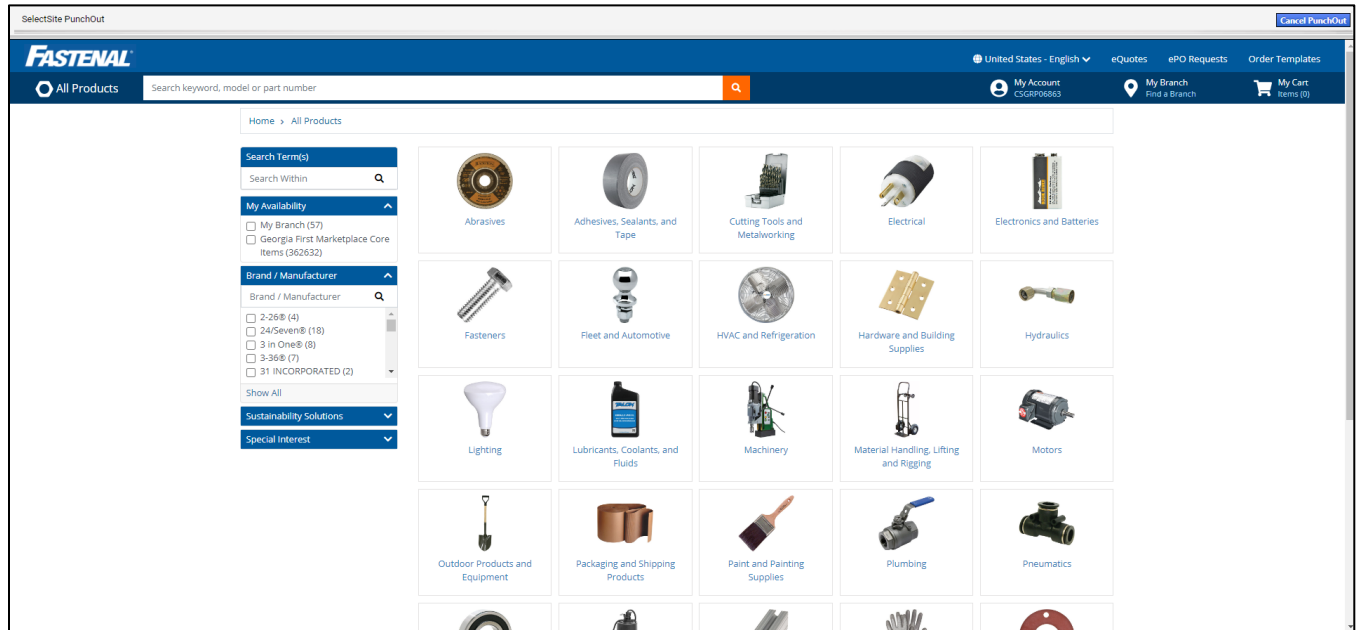
How To: Search from Punch-Out Suppliers

1. From the GeorgiaFIRST Marketplace homepage, click on the **Punch-Out supplier** of your choice.
2. The system will redirect you to that supplier's webpage. (If you decide that you do not want to search from the punch-out supplier, select the **Cancel PunchOut** button in the upper right corner of the screen. You will return to the GeorgiaFIRST Marketplace.)
3. 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.
4. Select your items using the punch-out supplier's tools (i.e., "Add to Cart," "Add Item," etc.).
5. After selecting your items, check out of the punch-out site. Checking out will be different for each supplier. For example, to check out of the Fastenal punch-out site, you select the "Check Out" button within your shopping cart and then choose "Complete Checkout." This action places the items you selected into your GeorgiaFIRST Marketplace shopping cart. (An order is placed with the GeorgiaFIRST Marketplace, NOT the supplier, when you check out of a punch-out site.)
6. After checking out of the punch-out supplier's website, you return to the GeorgiaFIRST Marketplace where you can add additional products to your shopping cart from other punch-out suppliers, as well as hosted catalog suppliers.

Chapter 5: Shopping for Items in the Georgia*FIRST* Marketplace

Now that you know how to search for items, you are ready to begin building your shopping cart in the Georgia*FIRST* Marketplace.

Here is the process to follow when you are a Shopper in the GFM:

| Search for Items | → | Place items in your Shopping Cart | → | Review and edit Shopping Cart if needed | → | Assign your Shopping Cart to your Requester |

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 a cart, you can locate it by clicking the **Shopping Cart** icon, then clicking **My Carts and Orders** and **Open My Active Shopping Cart**. You can locate all of your carts under the "View Carts" sub-link in **My Carts and Orders**. 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 to the one you are setting up or that you might wish to finish later. Initially, we will work with only one cart. Later in this chapter, we will discuss working with additional draft carts. Remember, your active cart is the shopping cart to which you are actively adding items and assigning to a requester.

Adding an Item to a Cart

Shopping carts represent items that you have selected to purchase. Shopping carts contain line items that represent items or products being requested through the Georgia*FIRST* Marketplace. There are multiple ways to add items 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.

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How To: Add Items to your Shopping Cart from the Product Search Results Page
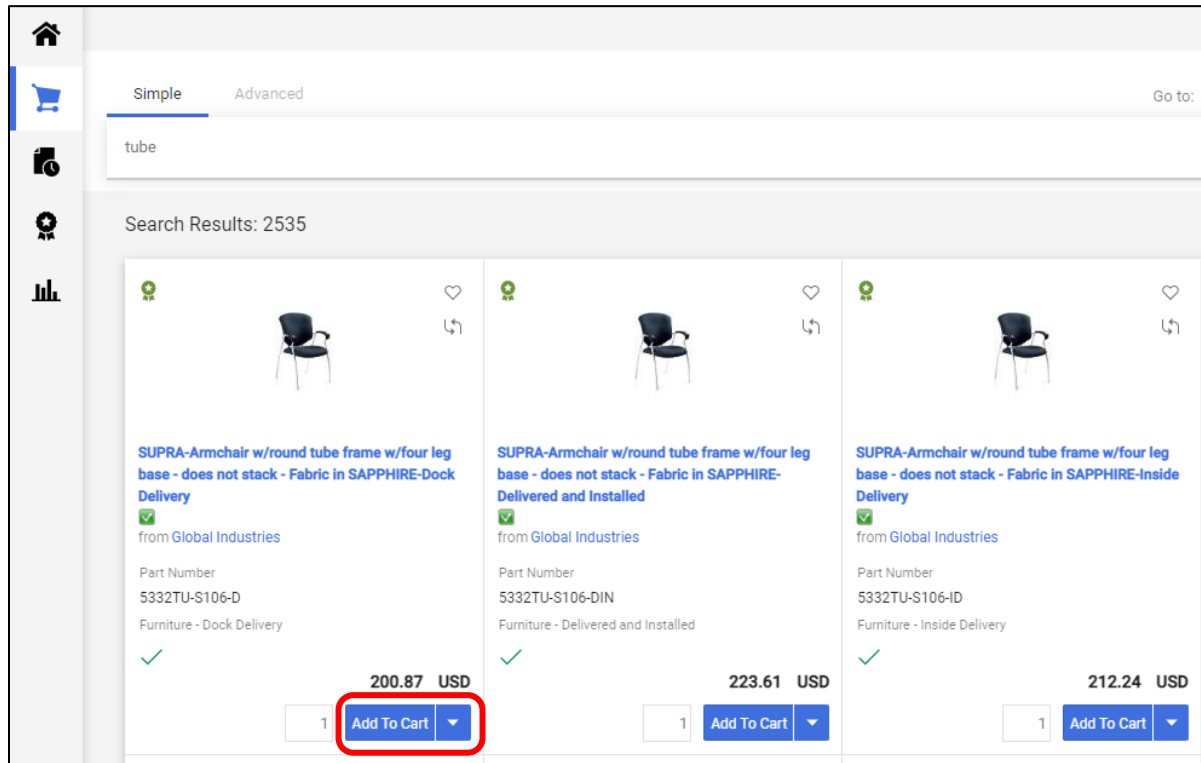
1. From the Georgia*FIRST* Marketplace homepage, **search** for the item using your preferred search method.
2. From the search results, locate the item you wish to add.
3. For that item, enter the **quantity** you wish to request.
4. Select that item's **Add to Cart** button which will add the item to your Active Cart. Alternatively, you can add the item to a draft cart by clicking the dropdown arrow and selecting Add to Draft Cart or Pending PR/PO.

   Note: users can also add an item to an active cart by selecting the dropdown arrow and selecting Add and Checkout.

How To: Add Items to your Shopping Cart from the Product Description Pop-Up
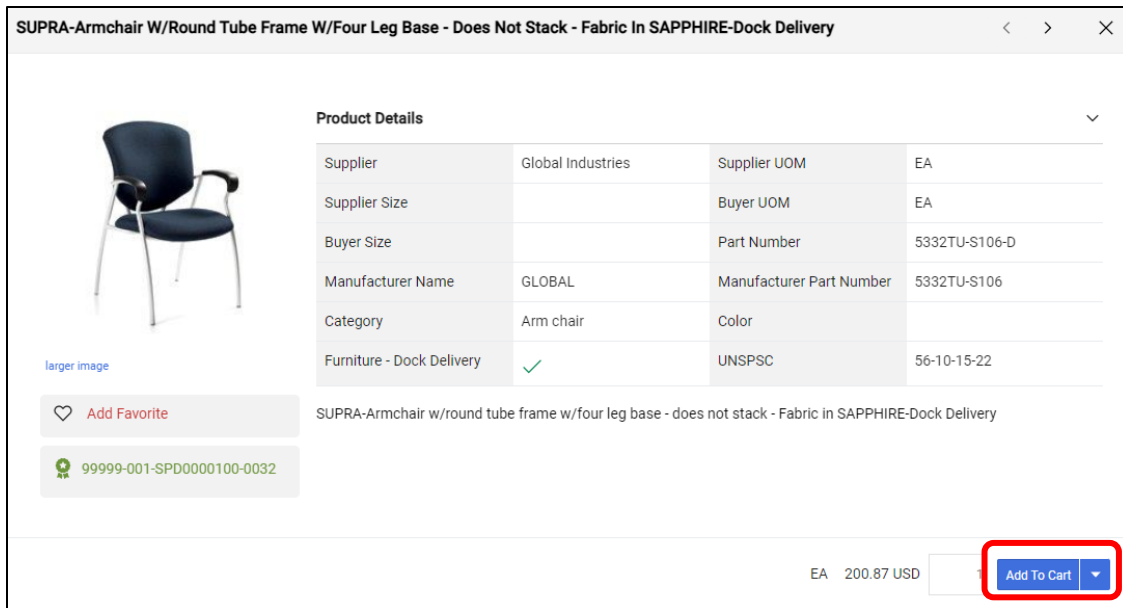
1. From the Georgia*FIRST* Marketplace homepage, **search** for the item using your preferred search method.
2. Click on an item's product description (item description hyperlink) to open its **Product Details** Pop-Up.
3. Enter the desired **Quantity**.
4. Select that item's **Add to Cart** button which will add the item to your Active Cart.

   Note: *users can also add an item to an active cart by selecting the dropdown arrow and selecting Add and Checkout.*

5. To close the window, click the **x** after receiving the "Added Successfully" message.

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** button.
2. From here, you can add items to your shopping cart in one of two ways:
   a. Enter the **Quantity** and click the **Add To Cart** icon, or
   b. Place a **check** in the desired items Select checkbox(es) and click the Actions For Selected Items link, then select **Add to Active Cart**.
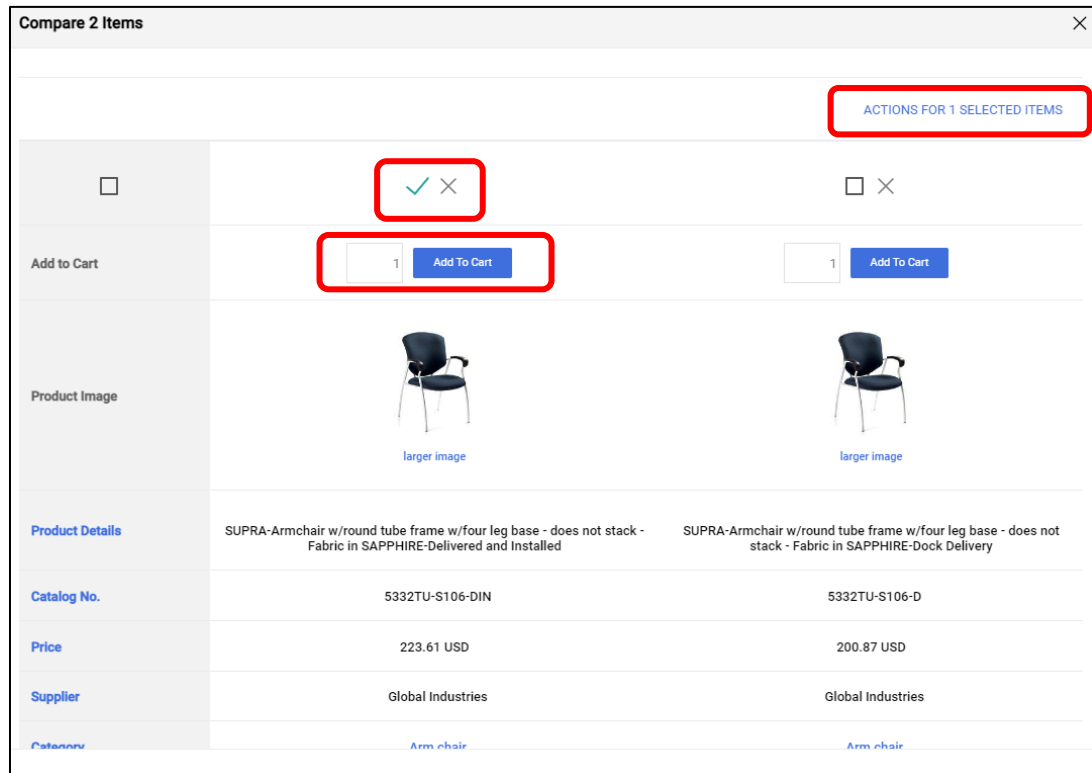
How To: Add Items from a Punch-Out Supplier

1. From the Georgia*FIRST* Marketplace homepage, 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 be in the active shopping cart and you will be on the Shopping Cart page.

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 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.
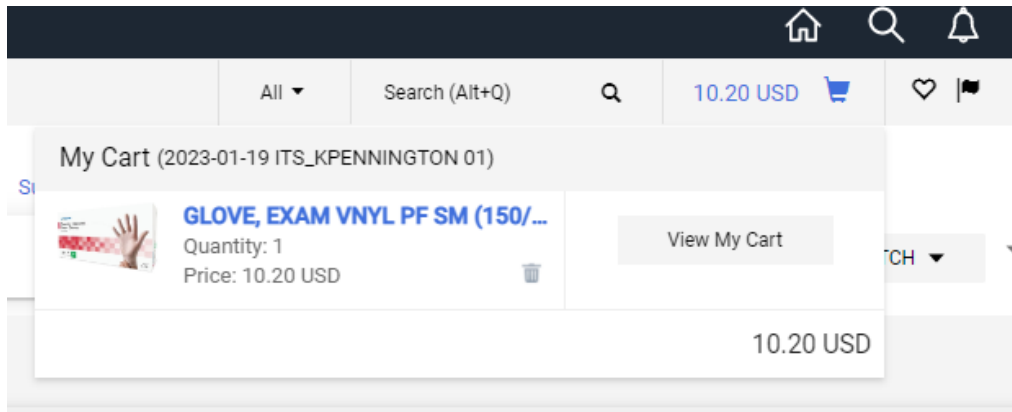
Shopping Cart Name

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 username of MJones creates her first cart of the day on March 23, 2022. This cart is given a default name of "2022-03-23 MJones 01." If this user creates another cart on March 23rd, then the second cart is named "2022-03-23 MJones 02."

You can easily rename your cart. To do so, simply retrieve your Shopping Cart by clicking the View My Cart button.

How To: Rename Your Shopping Cart

1. Retrieve your shopping cart.
2. Input your new shopping cart name in the Name box of the Details section.
3. Tab out of the box. The change will be saved automatically.

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 of whether 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. Option 1:
   a. Select the 3 dots icon (More Options) between the Ext. Price field and the checkbox. Select the **Remove** option.

3. Option 2:
   b. In the cart, select one or more items to remove by placing a checkmark in its **Select** checkbox.
   c. Click in the **Actions for Selected Items** dropdown menu.
   d. Select **Remove Selected Items**.

4. The selected items are then removed from your shopping cart.

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. You can update the quantity when adding an item to your shopping cart or after the item has been added to your shopping cart, if the supplier allows it.

How To: Update Quantity of Items in a Cart

1. Go to the **Shopping Cart**.
2. Go to the **Quantity** field in the row of the item you want to update.
3. Enter the desired quantity.
4. Tab out of the box. The change will be saved automatically.

Selecting the Applicable Contract for an Item

Some items that you select may be listed on multiple contracts. The Marketplace will always default to the lowest price. If you wish to change to a different contract (for example, the Dell Software Contract to the Dell Networking Contract), you can select the appropriate contract while in the Shopping Cart. **If you are unsure which contract to use, contact your institution's Procurement Lead.**

How To: Select a Contract for an Item

1. Go to the **Shopping Cart**.
2. For the item you want to select a different contract for, select the **dropdown arrow** next to the contract number/name.
3. Select the **Change** option.
4. The Change Price pop-up box will appear. Click on the **dropdown arrow** next to the contract number/name.
5. Another pop-up box appears which lists all available contracts for the Supplier. Select the appropriate contract from the result list.
6. Verify the selected contract populates in the Change Price pop-up box.
7. Click Save.

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 **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Carts** sub-link.
4. The current (or active) cart will be marked with an Active label. Locate the any active and/or draft cart you want to delete.
5. In the Action column click the View down arrow and select **Delete**.
6. After selecting Delete, the system deletes the cart immediately. Once a cart is deleted, it is permanently removed and cannot be restored.

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. However, you can create additional carts whenever necessary. Draft carts can be created for a variety of reasons: they can be saved for future use, used for setting up orders that are similar to your active cart, or used for standing orders you make on a regular basis.

Under the **Shopping Cart** icon, you will see a menu item called **My Carts and Orders**. When you click on that item, you will see: **Open My Active Shopping Cart** and **View Carts**. The current shopping cart that you are working with will be under the **Active cart** link. All of the carts you have created will be under the **View Carts** link. The shopping cart that you are current working with, or your active cart, will have a colored background in its shopping cart icon. Other carts will have a white background.

Shown below are two carts. As you can see in the picture below, our current active cart is Office Supplies because it has an Active label.

If we were to select the View button, we would see the Office Supplies cart.

Note: Users can also select View from the dropdown menu next to the View button.
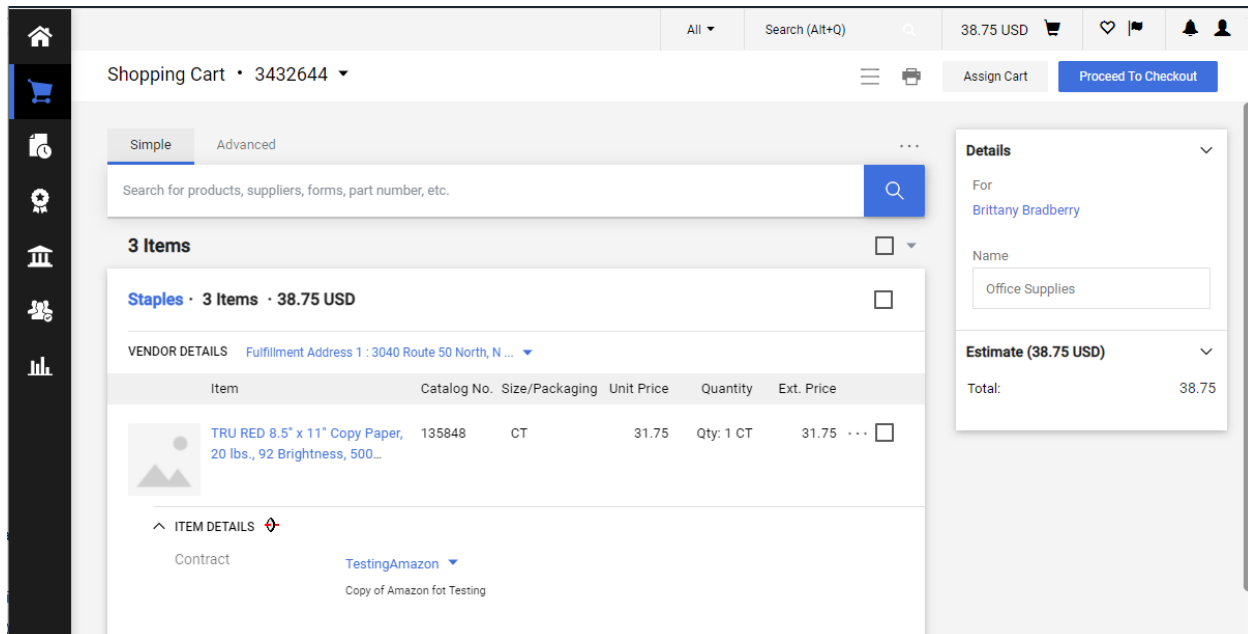
Whenever needed, you can create a new cart. To make a different cart active, simply click on that cart's icon so that it has the colored background. Your active cart will always be listed in the Cart Summary in the upper right corner of the screen.

How to: Change Active Cart

1. Select the **Shopping Cart** icon.
2. Select **My Carts and Orders**.
3. Select **View Carts**.
4. Locate the cart you wish to make the Active Cart button.
5. Click the Action drop down and select Activate. This is now your Active cart – notice that the Active label moves to this cart.

How To: Create a New Cart

1. Select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Draft Shopping Carts** sub-link.
4. Select the **Create Cart** button.
5. 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.

Adding Items to a Draft Cart

Generally, when you add an item to a cart, 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 or PendingPR/PO." You will then get a pop-up box asking to which draft cart you want to add the item. Select the appropriate cart by clicking its radio button. Then select the Add to Draft Cart button.
- Note: If your browser is set to block pop-ups, you will have to allow pop-ups temporarily to add to a draft cart.
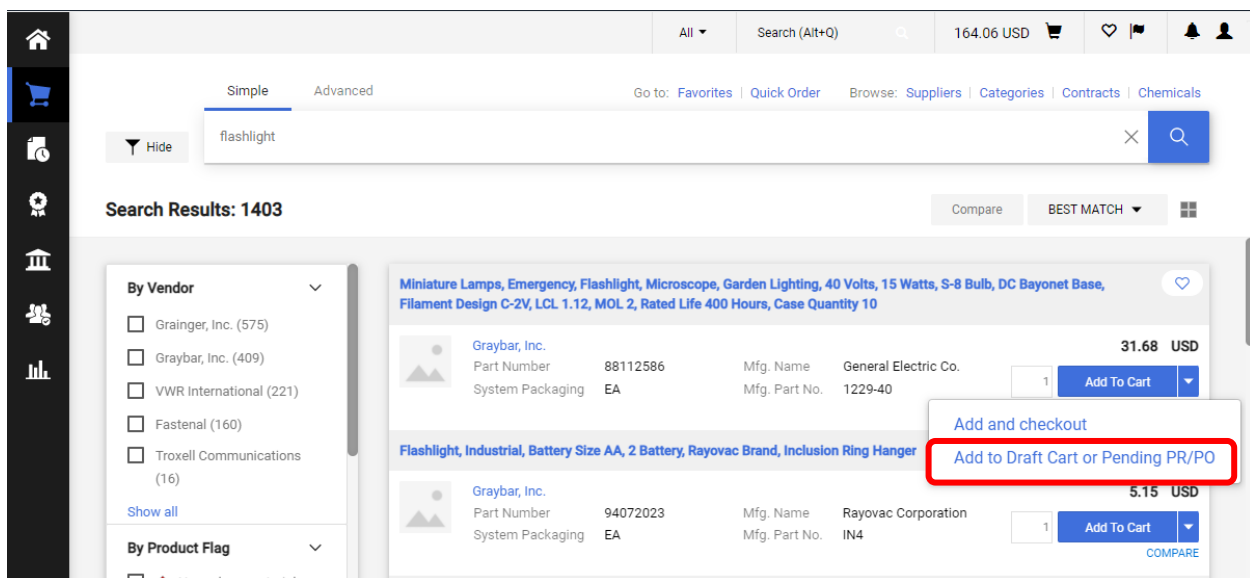
- You will then see a "Success" message. You have not changed which cart is currently active, though.

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."

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 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 for which you wish to review history, select the **More Actions** drop down list.
4. Select **Line Item History**.
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.

Note: *this functionality exists for Catalog Items only, but not items that originate from a Punchout.*

Chapter 6: Assigning a Cart to a Requester

Now that you have searched for and added items to your shopping cart, you can then assign your shopping cart to your Requester. By assigning your cart to a Requester, you are enabling that Requester to create a Requisition for your items and submit them for approval.

Specifying a Default Requester

One of the first steps that you need to complete in the Georgia*FIRST* Marketplace is to identify who your requesters are. Your institution will provide you with that information. You should have a Default Requester and a back-up Requester. Your back-up Requester should be used whenever you know that your default requester is unavailable (i.e., out on leave).

Before you can specify a default requester or assign a requisition to any requester, that requester must have logged into PeopleSoft and entered the Georgia*FIRST* Marketplace at least once. The first time a Requester logs into PeopleSoft and enters the Marketplace, all of their critical information is passed over to the Marketplace, which allows you to select them.

Your institution may set up your default requester for you. However, if they do not, we will list the steps below.

How To: Specifying a Default Requester

1. Select the **Profile** icon from the top right hand menu.
2. **Down Arrow** next to your name.
3. Select **View My Profile**.
4. Select the **Default User Settings** option, within the **User Profile and Preferences** section.
5. Select the **Cart Assignees** option.
6. Click the **Add Assignee...** button.
7. Confirm your **Business Unit** appears in the Business Unit box.
8. Click the **Search** button.
9. Select your **Requester** by clicking on the Name.
10. Repeat steps 4 – 9 to add additional Requesters.
11. To specify your default Requester, select the **Set as Preferred** button.
12. Your **default Requester** should be in bold.

Shopper ChartField Defaults

As a shopper, you have a set of default ChartFields that will be charged when you request goods through the Georgia*FIRST* Marketplace. In other words, you have a defined default account code that is charged

for the items that you request. This way, if you are a shopper for the Biology Department, the Biology Department is charged.

Your institution set these up for you in the PeopleSoft system when they added you as a Shopper. As a result, you do not need to input your ChartFields each time you create a shopping cart. They are already tied to your Requester ID. (Every Shopper has a Requester ID in PeopleSoft where certain default information is stored.)

The ChartFields tied into your Requester ID are:

- Fund Code
- Department
- Program Code
- Class Field
- Project (if applicable)

The Account Code that will be charged will default based on the item. Each item in the Georgia*FIRST* Marketplace belongs to an NIGP code (or product category). For example, pencils belong to one category, while office furniture belongs to another. Therefore, when you request office supplies through the Georgia*FIRST* Marketplace, the correct Account Code is charged.

Note: When you assign your shopping cart to a Requester, you can add a note in the **Note to Assignee** section specifying that a different ChartField should be charged. You should include the name of the ChartField or set of ChartFields in your note. When you assign your shopping cart to your Requester, the system automatically emails that Requester with a notification, including your comments. Whenever a Requester enters the Georgia*FIRST* Marketplace, they will also be able to see any shopping carts assigned to them.

Recommendation: Keep all items in one shopping cart assigned to one set of ChartFields. Comments are added per shopping cart, not per line.

Assigning a Cart

When you finish adding items to your cart and are ready to assign it to a Requester, you should be in your shopping cart. If you do not want your default ChartFields charged for these items, you should include instructions in the **Note to Assignee** section. The information you enter here before clicking the **Assign** button will be included in the email notification sent to the Requester.

How To: Assign a Cart

1. Pull up your **shopping cart**.
2. Review your shopping cart to ensure that everything is correct. Make any necessary updates to the items in your cart.
3. When you are ready to assign your cart, click the **Assign Cart** button.
4. If you have a Default Requester in your profile, that Requester's name should appear next to "**Assign Cart To"**

a. If you want to assign your cart to another Requester set up in your User Profile, select the "**SELECT**" link.
   i. Using the drop down list, select the appropriate Requester.

b. If you do not have a Default Requester in your profile and need to search for your requester, select the "**SEARCH**" link.
   i. In the User Search box, confirm that your **Business Unit** appears in the Business Unit drop down list.
   ii. Enter criteria into fields or simply click the **Search** button.
   iii. Find the **Requester** you want to assign your shopping cart to and click the **plus sign** link.

5. If you wish to add the selected requester to your profile, check the Add to Profile box.

6. In the **Note to Assignee** section, enter any instructions about charging ChartFields that are not your default. This note is included in the email notification to the Requester.

7. Click the **Assign** button. A shopping cart notification displays. Your shopping cart has now been assigned to your Requester.

Unassigning a Cart

On occasion, you may have a reason to unassign a shopping cart. For example, imagine that you have assigned a shopping cart to your Requester. After assigning it, you realize that you ordered the wrong item and wish to correct it. If your Requester has not pulled your shopping cart into a requisition yet (you will receive an email notification when this happens), then you can unassign your cart. If your shopping cart has already been pulled into a requisition, you will need to contact your Requester to determine the best corrective action.

How To: Unassign a Cart

1. Select the **Shop** icon.
2. Select the **My Carts and Orders** link.
3. Select the **View Carts** link.
4. Locate the cart you want to unassign under the section "Assigned Carts" and click the dropdown in the Action column. Select Unassign.
5. Edit your cart as needed and then reassign it back to your Requester.

Reviewing Cart History

You can review your cart's history after you have selected the "Proceed to Checkout" button to perform your final review of your shopping cart. The History tab is located right next to the Comments tab. The cart history provides a listing of the current line items in the cart. As you add items, a line in History is added, and as you remove items from the cart, the line is removed. A "delete" line is not created in the history. Cart history also indicates the following:

- Whether an item was selected from a favorite.
- Details about cart assignment, including what Requester was assigned the cart and when the assignment occurred.
- Whether the cart was created from a previous cart.
- When items were added and by whom, the product name, and line number.

Once the cart is pulled into a requisition, the cart history is removed and a snapshot of the requisition at that point is taken.

How To: Review the History for a Cart

1. Select the **Shop** icon.
2. Select the **My Carts and Orders** link.
3. Select either View My Orders (Last 90 Days) or View My Orders (Last 5 Orders).
4. Locate the cart you want to view and select it by clicking on the cart number.
5. Click on the History tab to review the cart history.

Chapter 7: Shopper Notifications

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

Notification #1: Shopping Cart Has Been Pulled into a Requisition

The first notification that you may see is when the Requester that you assigned your cart to has pulled your cart into a requisition in the eProcurement system. When the Requester does this, the system will automatically send you an email notifying you of this step. This way, you are aware that your shopping cart has been picked up and is being processed by your Requester.

Notification #2: Your Requisition Has Been Approved

Once the Requester has pulled your shopping cart into a requisition, he/she submits the requisition for approval. 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.

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 supplier for order fulfillment.
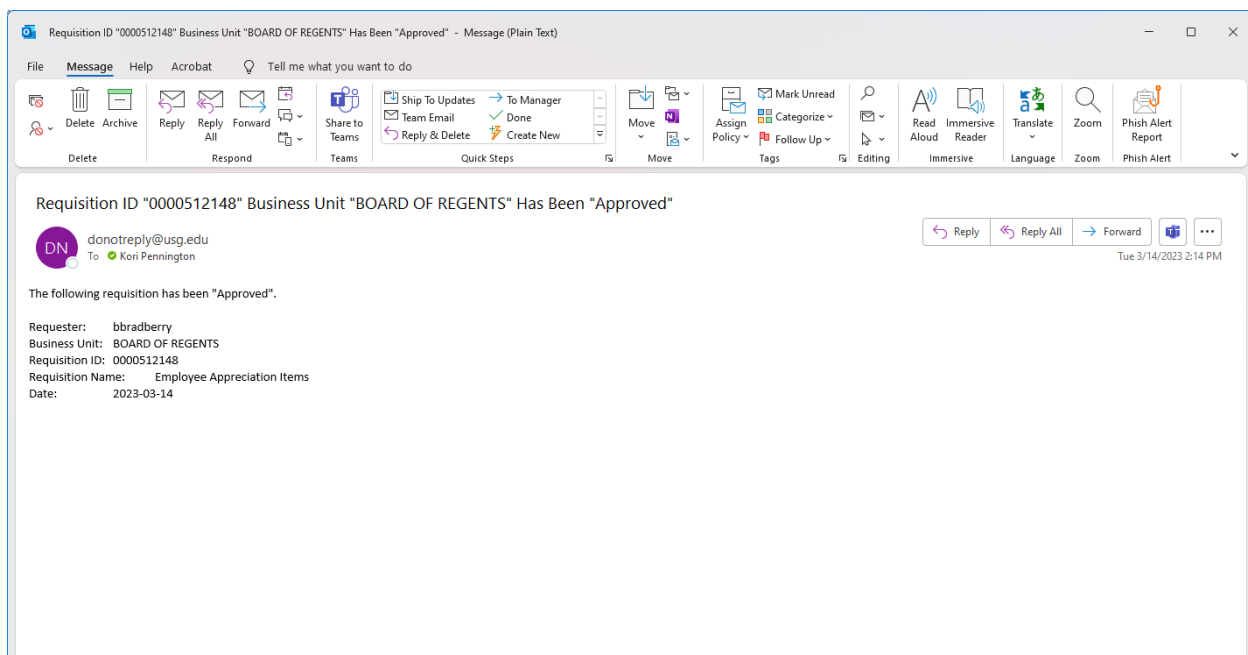
Likewise, if your requisition (or a requisition line) is denied, you will also receive an email indicating this. When you do, you should notify your Requester to determine the best course of action. We recommended that if you receive a "Denied Requisition" email, you forward it to your Requester. Only your Requester can go into the system and correct your requisition for resubmission.
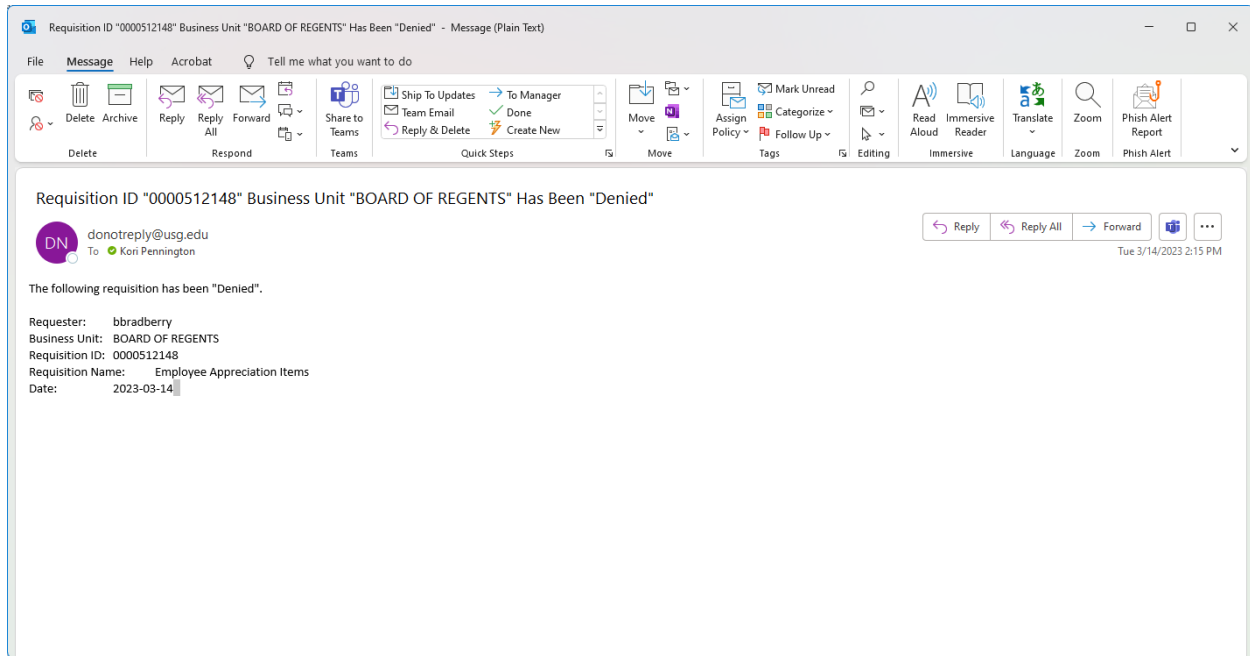
Notification #3: Your Requisition has Failed Budget Checking

Once your requisition is approved, the next step is for the system to verify whether budget checking is required and, if so, whether funds are available. If your requisition fails budget checking, an email is sent to the shopper. If you receive an email indicating that your requisition has failed budget checking, you should contact either the Department Manager responsible for that budget or your default Requester if an error was made in the budget/ChartField information.

Notification #4: Your Requisition Items Need to be Received

Once your requisition has been turned into a purchase order and dispatched to the supplier, the supplier can then fill your order. In addition to sending you the purchased items, the supplier 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.

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.

Chapter 8: Georgia*FIRST* Marketplace Favorites

As a Shopper, you can set up favorites in the Georgia*FIRST* Marketplace to 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: Personal Favorites and Shared Favorites. Personal favorites are items that you identify as a favorite and that only you can see. You manage these items by creating folders and sub-folders and have full control over the items in your personal favorites.

Administrators set up shared favorites and folders for your institution or department. Shared favorites represent frequently ordered or suggested products for purchase. Your institution will notify you about any shared favorites available for your use.

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

Recommendation: Save only 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 viewable only by the user and are most commonly used. Shared folders are used to house favorite items to be used for the institution or department.

You can create a structure with only one folder named "favorites" or you can create several folders in which you separate favorite item types. In order to save a favorite item, you need to create at least one personal folder. Below is an example of a folder structure:
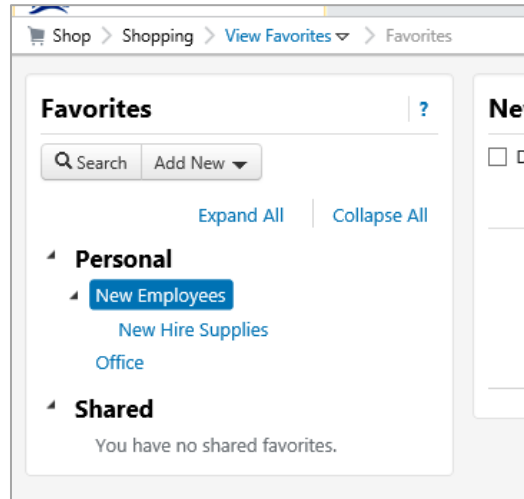
How To: Create a Personal Folder or Sub-Folder

1. Select the **Shop** icon.
2. Select **Shopping**.
3. Select **View Favorites** in the Go To section.
4. On the left side of the window, the Personal and Shared headings display, as well as any existing folders. New users should start by creating at least one Personal folder.
5. To add a top-level folder, click the **Add New** button.
   a. Select the option **Top-level personal folder**.
   b. Enter a folder name and description.
   c. Click **Save Changes**.
6. 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 Changes**.

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 grey heart icon.

Note: *If an item is not saved as a favorite, it appears as a white heart with a grey outline.*
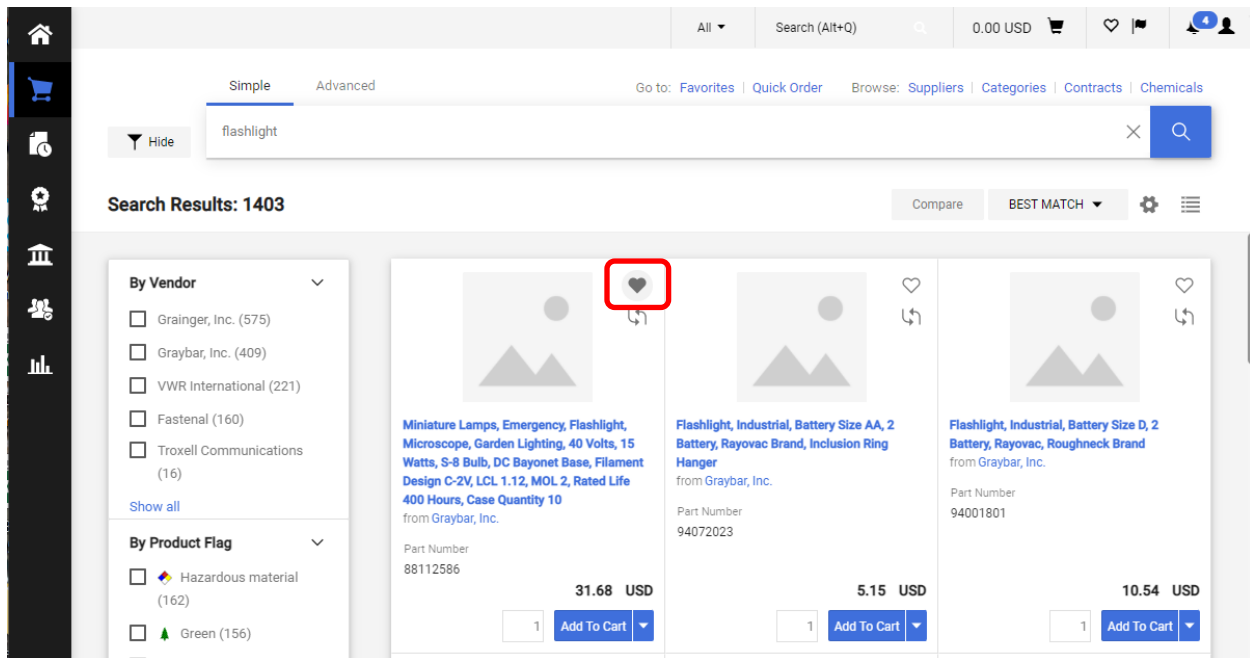
How To: Add an Item as a Personal Favorite

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. Click on the "Favorite" heart icon. The **Add Favorite** popup displays.
4. In the **Item Nickname** field, you can enter a name to reference the item. If you do not enter a nickname, 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 **Save Changes** 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.
   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 Changes** to save the item.
7. After an item is added as a favorite, it can be accessed via the **favorites** link.
8. To add an item as a Favorite from a cart, select the **More Option** icon **(3 dots)** 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 **Save Changes**.

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 page 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.
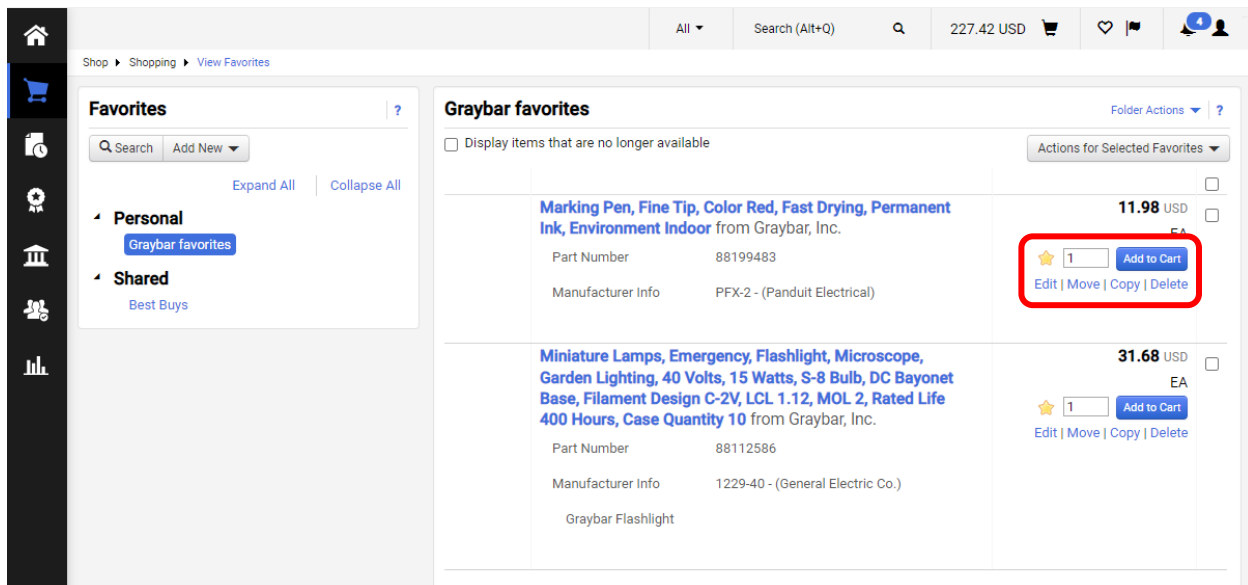
How To: Adding Favorite Items to Your Cart using the Favorites Link

1. From the Georgia*FIRST* Marketplace, select the **Favorites** link.
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 the **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.

Moving and Copying Items Between Folders

Within Georgia*FIRST* 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 to create "repeat" items for multiple folders.
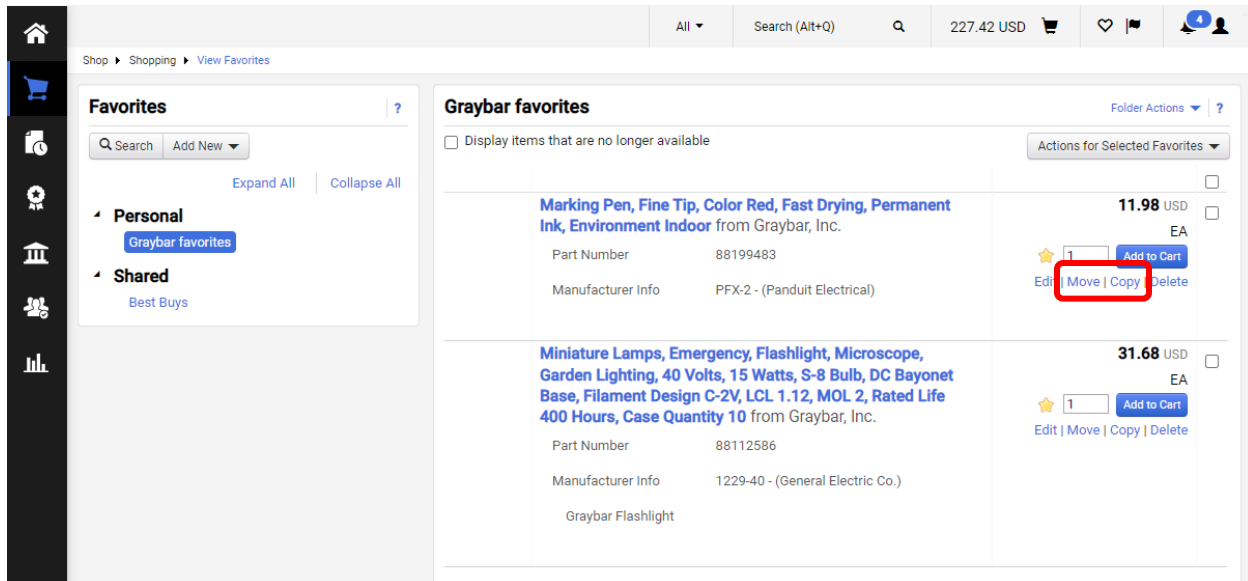
How To: Move and Copy Items Between Folders

1. From the Georgia*FIRST* Marketplace, select the **Favorites** link.
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 either the Move or 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. Click **Save Changes** in the confirmation window.
4. To move or copy multiple items to a different folder, select the items with a **checkmark**.
   a. Click either the **Move or 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. Click **Save Changes** in the confirmation window.

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 F**avorites** link.
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 **Save Changes** button.

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 GeorgiaFIRST Marketplace, select the **Favorites** link.
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 **Yes** 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 **Yes** button to confirm the deletion.

How To: Delete a Folder from Favorites
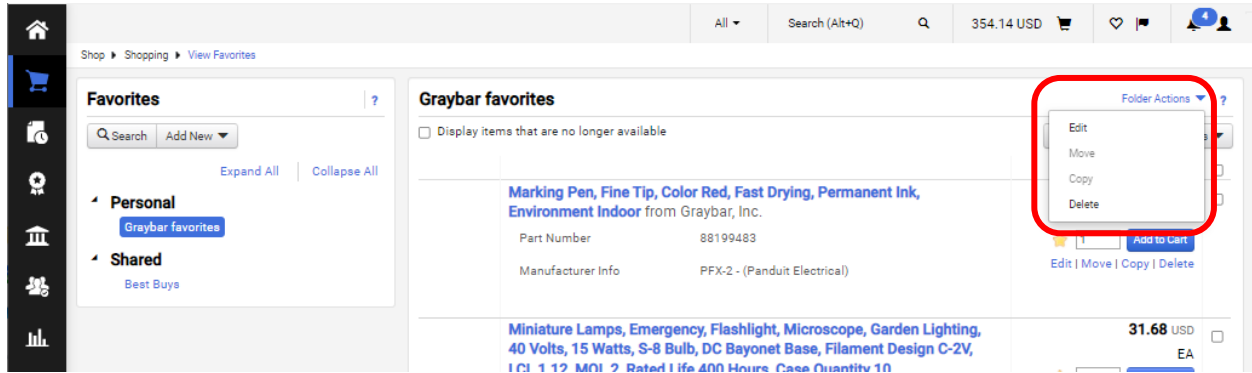
1. From the Georgia*FIRST* Marketplace, select the **Favorites** link.
2. Select the appropriate **folder** from the left pane.
3. Click the **Folder Actions** drop-down list in that folder.
4. Click **Delete**.
5. Click **Yes** to confirm the deletion.

Chapter 9: User Profile in Georgia*FIRST* Marketplace

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

It is through your User Profile that you select your Requesters. Therefore, you will need to access your profile on occasion. Below are some brief descriptions of what makes up your User Profile.

User Information and Settings

In the User Information and Settings section, you can see how your individual information is set up (i.e., name, phone number, email address, etc.).

When you enter the Georgia*FIRST* 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 to **Profile > View My Profile > Language, Time Zone and Display Settings**. To change the color, select your institution in the Color Theme drop down list.
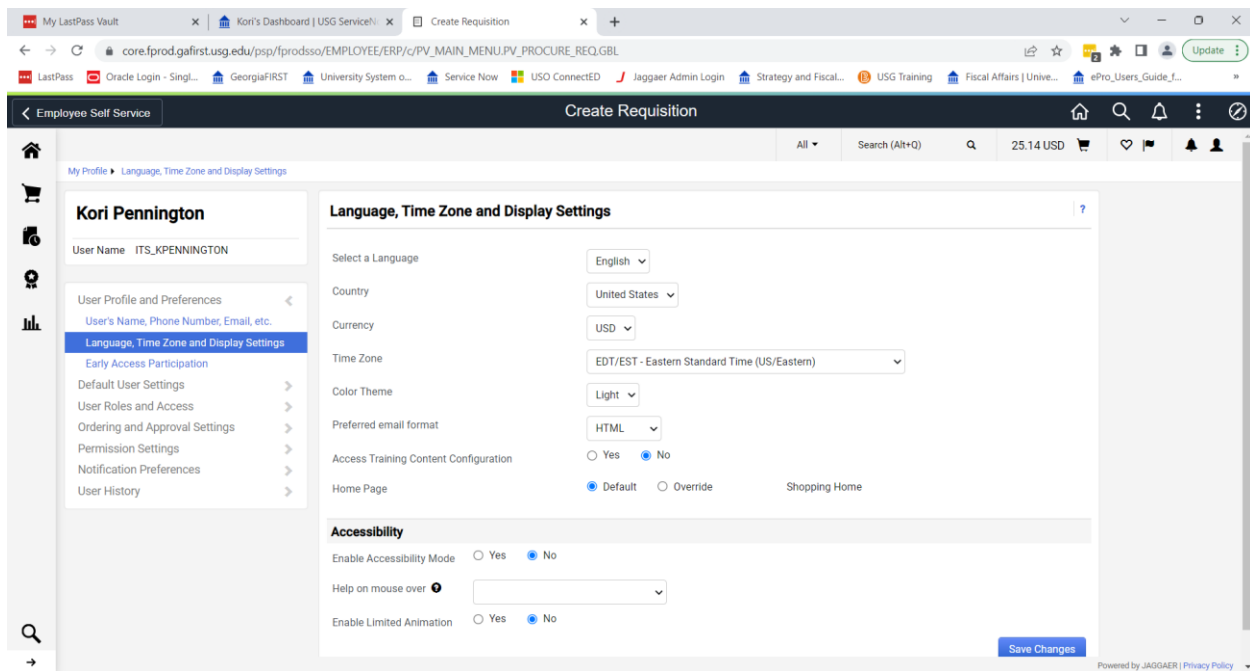
How To: Update Color Theme to Match School Logo

1. In the Georgia*FIRST* Marketplace, click on your **Name**, found in the banner at the top of the page.
2. Under the **User Profile and Preferences** section, select the **Language, Time Zone and Display Settings** link.
3. Select your institution in the **Color Theme** drop down list.
4. Click the **Save Changes** button.

You can also set up your default cart assignee (Requester) in the Default User Settings section. Select the Cart Assignees link from the Default User Settings sub-section to add or delete requesters and specify your default requester.

How To: Set up Your Default Cart Assignee (Requester)

1. In the Georgia*FIRST* Marketplace, click the **Profile icon**.
2. Click **View My Profile.**
3. Click **Default User Settings**.
4. Select **Cart Assignees**.
5. Click the **Add Assignees** button to open the User Search box.
6. Add the last name of the requester you wish to choose or click the Search button to see a list of all requesters.
7. Click select in the Action column by the requester that you wish to choose.

Chapter 10: 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 the actual requisition that is approved and turned into a purchase order. 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 shoppers will have the ability to perform their own 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 shoppers will have this responsibility. 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 you order through the Georgia*FIRST* Marketplace. You will need the proper security setup to perform desktop receiving.

Desktop receiving is done through the PeopleSoft Core system. You cannot access it through the Self Service site. Once you have logged into the system, navigate to **eProcurement > Receive Items**.

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.

On the Receive Form, which you open by checking the box by the requisition you want to receive and clicking the **Receive Selected** button, you indicate the Receipt Date and how many you received.

Once you save your receipt, the system will generate a Receipt Number, which 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. Locate 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.
    b. Do not include any slashes (/) in your comments.
11. Click the **Save Receipt** button.
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.