

# eProcurement and GeorgiaFIRST Marketplace

User's Guide

for

Requesters

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## Introduction

This User's Guide is designed for Requesters who will be using the eProcurement module in the PeopleSoft Financials system, as well as the GeorgiaFIRST 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 GeorgiaFIRST Marketplace is. You will learn how to create an ePro Requisition from a GeorgiaFIRST Marketplace shopping cart, as well as how to create a Special Request Requisition. You will also learn how to create your own Shopping Carts in the GeorgiaFIRST Marketplace.

Topics covered in this user's guide:

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



## Chapter 1: eProcurement and GeorgiaFIRST Marketplace Overview

### **What are eProcurement and the GeorgiaFIRST Marketplace?**

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

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

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

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

### **Benefits of ePro and the GeorgiaFIRST 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
- You only need one login to shop from multiple suppliers
- You can request goods from multiple suppliers through one shopping cart
- All items in the GeorgiaFIRST Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as 'favorites' in the GeorgiaFIRST Marketplace



### **Types of Roles Involved**

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

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

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

### **Role Setup**

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



### Security Roles

Your Local Security Administrator assigns specific security roles to each user. These Security Roles authorize you to access certain pages within PeopleSoft. When assigned to a GeorgiaFIRST marketplace user, they also allow the user to inherit certain permissions within GeorgiaFIRST Marketplace. For this reason, users may be able to see eProcurement in the menu but not see Accounts Payable, or they can assign a cart within GeorgiaFIRST Marketplace but not issue a requisition, for example.

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

### Requester Assignment

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

The screenshot shows the Oracle Requester Setup interface. At the top, there is a search bar and navigation options. The main section is titled "Requester Setup" and includes a status dropdown set to "Active". Below this, the "Requisition Defaults" section contains various input fields for requisition parameters such as Ship To, Location, PO Origin, Currency, and Phone. There are also checkboxes for "Override Auto Item Substitute", "Use Only Assigned Catalogs", "Consolidate with other Reqs", "Price Can Be Changed on Order", and "Defaults Inventory BU". The "Requisition Status" section has radio buttons for "Open" and "Pending Approval". The "ChartFields" section features a table with columns for GL Unit, Account, Fund, Dept, Program, Class, Project, and Bud Ref, with values like 71000, 10000, 2001200, 11100, and 2016. The "Catalog Information" section at the bottom shows a table with columns for Default, \*SetID, \*Catalog ID, and Description, with a checked entry for SHARE and NIGP\_TREE. At the bottom of the form are buttons for Save, Return to Search, Notify, Add, and Update.



### User Preferences

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

Requisition Authorizations Help

User Oll T.I

**Allowed Requisition Actions**

<input checked="" type="checkbox"/> Approval	<input checked="" type="checkbox"/> Can Work Approved Req's
<input checked="" type="checkbox"/> Cancel	<input checked="" type="checkbox"/> Full Auth for All Requesters
<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Override Preferred Supplier
<input checked="" type="checkbox"/> Close	<input checked="" type="checkbox"/> Override RFQ Required Flag
<input checked="" type="checkbox"/> Reopen	<input type="checkbox"/> View/Override VAT Details
	<input checked="" type="checkbox"/> Override Non-Qualified Requisitions for Close

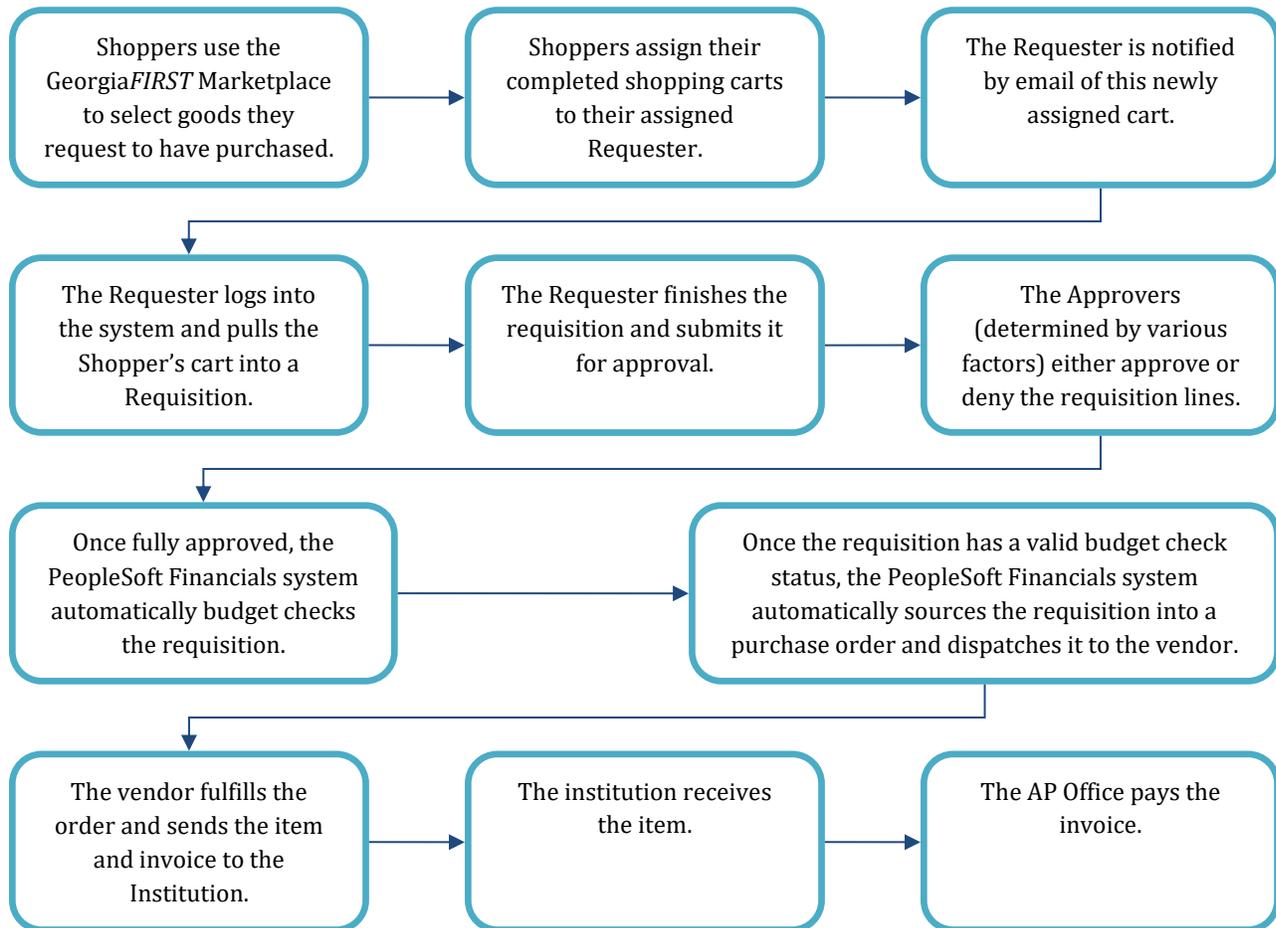
**Requesters User Authorization** Personalize | Find | View All | First 1 of 1 Last

Requesters User Auth For	Description	Add	Update	Cancel	Delete	Close	Reopen	
<input type="text"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	+ -



**Process Flow**

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



**How does PSFIN pass along user information to GeorgiaFIRST Marketplace?**

To begin using the GeorgiaFIRST 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 GeorgiaFIRST Marketplace through a hyperlink.

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



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

### **How Do Approvals Work?**

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

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

For Special Requisitions (created for non-catalog/non-contract items not in the GeorgiaFIRST 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 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 GeorgiaFIRST Marketplace.

Once requested items have been placed on a requisition and routed for approvals, there are time limits in place by 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 within PeopleSoft Financials. The Worklist is a queue that holds items waiting for approval. Once an approver works a transaction, the system removes it from their Worklist.

Once the requisition hits an Approver's Worklist, the approver has three 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 four 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: Contract Types

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

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

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



## Chapter 3: eProcurement Requisition Basics

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

Remember, there are two types of requisitions:

- Marketplace Requisition that is built from selected contract/catalog items in the GeorgiaFIRST Marketplace – usually referred to as a CAT (Catalog) Requisition
- Special Request Requisition that is built from non-contract/catalog items without accessing the GeorgiaFIRST Marketplace – usually referred to as an ONL (Online) requisition

### Creating a Requisition

To begin creating an eProcurement Requisition, you will need to access eProcurement through the PeopleSoft Financials core system. Once in eProcurement, select Requisition. Once you are on the Create Requisition page, you will need to decide whether you want to create a Special Request Requisition or a Marketplace Requisition.

### Requisition Settings

**This is an optional step.** On the Create Requisition page, you may select the **Requisition Settings** link at the top of the page. Here you can specify defaults that will apply to all lines of the entire requisition so that you don't have to enter information into certain fields on each line manually.

You *can* set up defaults on a Marketplace Requisition; however, once your cart in the Marketplace is pulled into ePro, the following fields will be overwritten:

- Supplier;
- Supplier Location;
- Category; and
- Unit of Measure.

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

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



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

Therefore, if you need to make changes to either the Department or Account on requisition lines, you will need to update those fields on the Checkout – Review and Submit page and not on the Requisition Settings page.

**Requisition Settings**

Business Unit: 71000 Georgia Perimeter College Requisition Name:

\*Requester: vgtaylor Jackson, Vagillia Priority: Medium

\*Currency: USD Custom Fields

**Line Defaults**

Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Supplier:  Category:

Supplier Location:  Unit of Measure:

Buyer:

**Shipping Defaults**

Ship To: RECEIVING Add One Time Address

Due Date:  Attention:

**Accounting Defaults**

Personalize | Find | First 1 of 1 Last

Chartfields1	Chartfields2	Chartfields3	Details	Asset Information
Percent	Location	GL Unit	Account	
	CM1114	71000		

OK Cancel Refresh

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

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



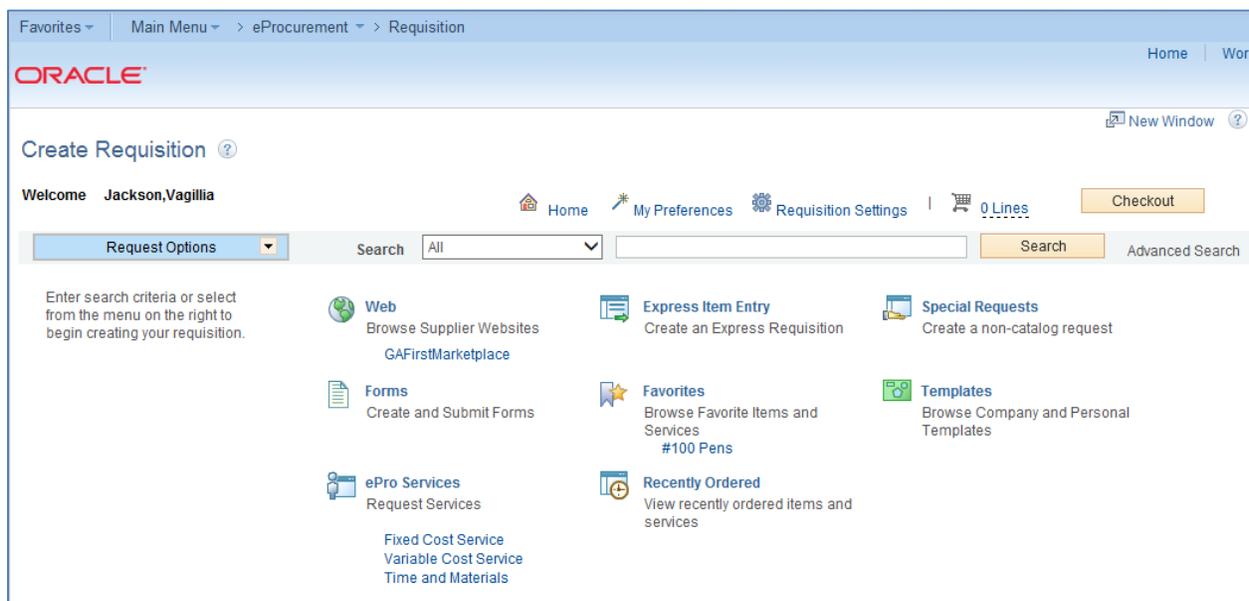
- Attention To
- ChartFields

Once you have finished specifying defaults for the Special Request Requisition (remember, this is optional), you can proceed to the next step, which is Adding Items and Services, by selecting OK.

### Add Items

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

When creating a Marketplace Requisition, you will select the GAFIRST Marketplace link INSTEAD of selecting the Special Requests link. When creating a Special Request Requisition, you will select the Special Requests link. We will go into the details of each type of requisition later in this user guide. Here, we will just provide an overview.



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



**Checkout – Review and Submit**

On the Review and Submit page, you can review all of your requisition lines and make any necessary changes. You can make changes manually to individual lines or to multiple lines through the “Mass Change” button. You can also enter comments or attach documents on requisition lines. Do not include any slashes (/) in the Comments field.

**ORACLE**

Checkout - Review and Submit

Review the Item information and submit the req for approval.

My Preferences Requisition Settings

**Requisition Summary**

Business Unit: 71000 Georgia Perimeter College Requisition Name: [ ]

\*Requester: vgtaylor Jackson, Vagillia Priority: Medium

\*Currency: USD

**Cart Summary: Total Amount 10.00 USD**

Expand lines to review shipping and accounting details Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	File Folder		Staples	1.0000	Each	10.0000	10.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 10.00 USD

**Shipping Summary**

Edit for All Lines

**Requisition Comments**

Enter requisition comments

Send to Supplier Show at Receipt Shown at Voucher

**Approval Justification**

Enter approval justification for this requisition

Check Budget

Save & submit Save for Later Add More Items Preview Approvals

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

Once you submit the requisition for approval, the requisition line status changes to “Pending” and the requisition is routed to the first approver’s Worklist.



## Chapter 4: Accessing and Navigating the GeorgiaFIRST Marketplace

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

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

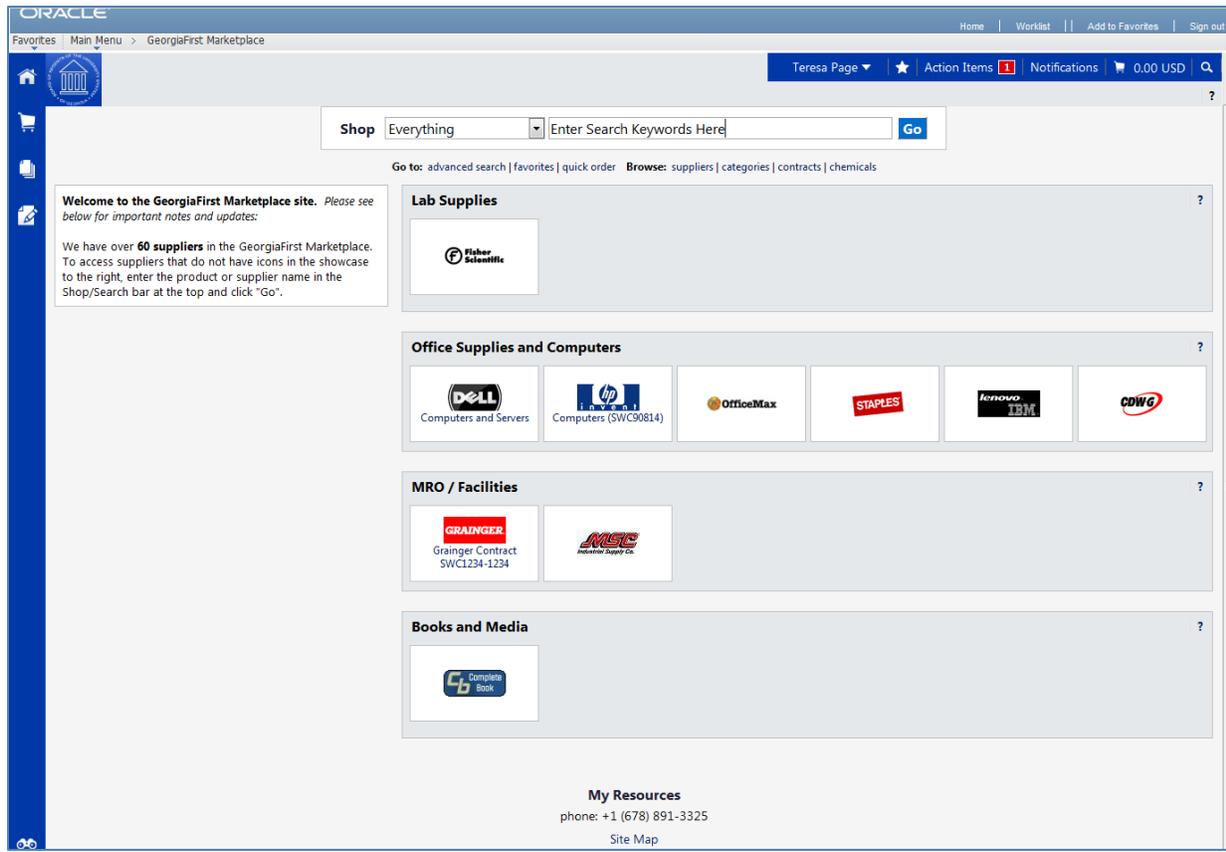
Because the GeorgiaFIRST Marketplace plays such a prominent role in the creation of requisitions, we are going to begin by explaining how to access and navigate the GeorgiaFIRST Marketplace.

### **Logging into PeopleSoft Financials Core System**

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

### **How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Core System**

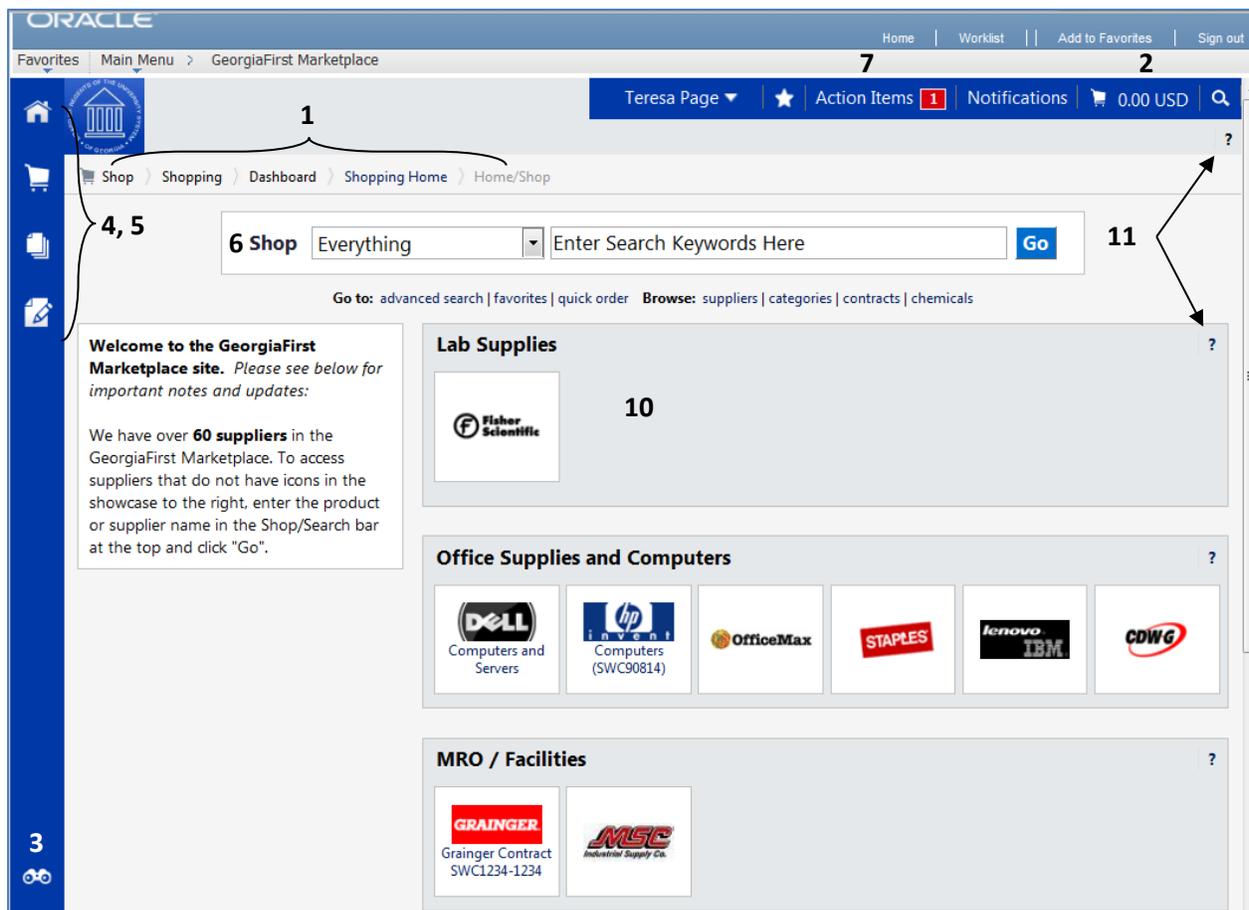
1. On the PeopleSoft Financials login page, enter your **User ID** and **Password**. Remember, both of these items are case sensitive. If you try to log in more than five times with an incorrect User ID and/or password, the system will lock you out.
2. Click the **Sign In** button.
3. Select **eProcurement**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



6. Notice that the GeorgiaFIRST Marketplace is displayed in your main window. You are now able to start navigating through the marketplace.

## GeorgiaFIRST Marketplace Home Page

The first step in using the GeorgiaFIRST Marketplace is knowing where things are located and how to navigate the home page. Whenever you wish to return to the home page, click either the Home icon or the Institutional logo in the upper left corner. It is important to be able to navigate through the GeorgiaFIRST Marketplace so that you can build and process your own shopping carts, as well as edit shopping carts that have been assigned to you by other shoppers.



1. **Navigation Breadcrumbs and Screen Title:** The screen title indicates the title of the current page that you are on.
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. **Quick Search:** This quick search feature allows for a variety of searches to be executed anywhere in the marketplace.
4. **Navigation Icons:** Down the left side of the GeorgiaFIRST 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.
  - Home: This icon returns you to the Home page from any other parts of the application.
  - Shopping Cart: 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.



- Orders & Documents: This icon allows you to search for documents that you have created.
  - Catalogs and Contracts: This icon contains a repository of various documents within the application.
5. **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.
  6. **Shop at the Top/Shop Quick Search:** You can access simple and advanced search from this feature. This is the primary area to perform item searches. We will cover search features later in this chapter.
  7. **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.
  8. **Notifications:** Certain action items 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.
  9. **Organization Message:** This box is an important tool system administrators use to communicate with the GeorgiaFIRST Marketplace community. This message box is available to all users and is a common way to communicate important upcoming dates, information about new suppliers, links to training, and more.
  10. **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.
  11. **Online Help:** Online Help is accessed by clicking on the question mark anywhere in the application or by clicking on hyperlink text. Text with associated Help is indicated by text that changes colors when mousing-over the text. Much of the text in the application can be selected and a secondary Help window displays.

### Leaving the GeorgiaFIRST Marketplace

When you are ready to leave the GeorgiaFIRST 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 GeorgiaFIRST 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.

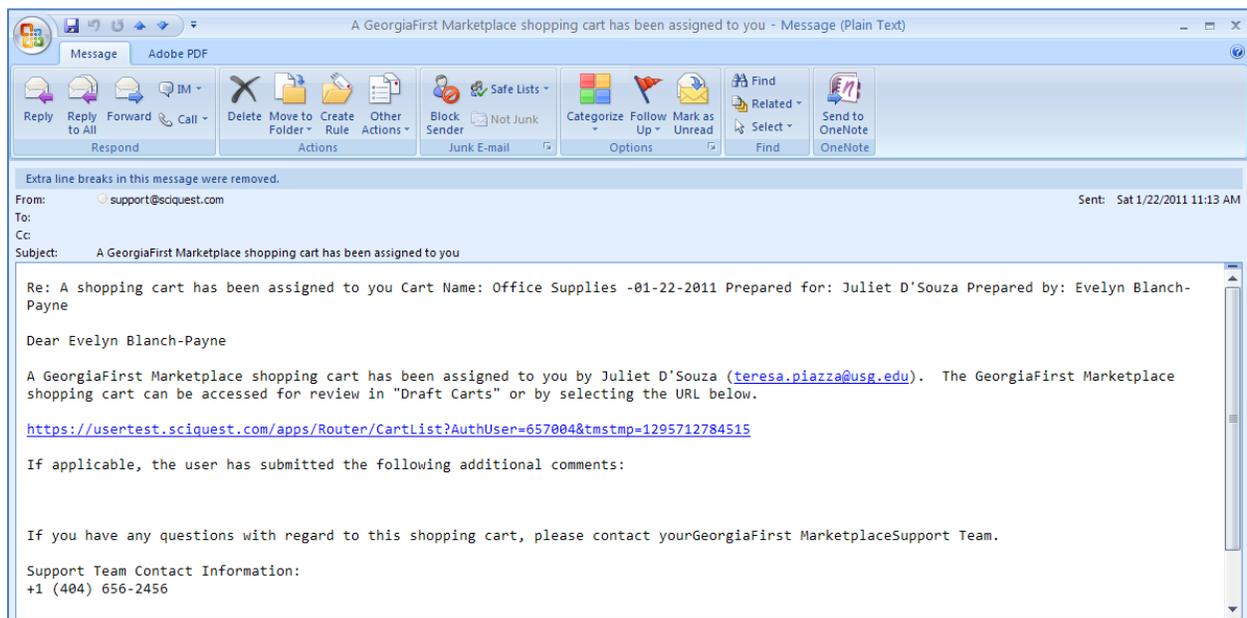


## Chapter 5: Retrieving an Assigned Cart and Creating a Marketplace Requisition

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

### **Notification**

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



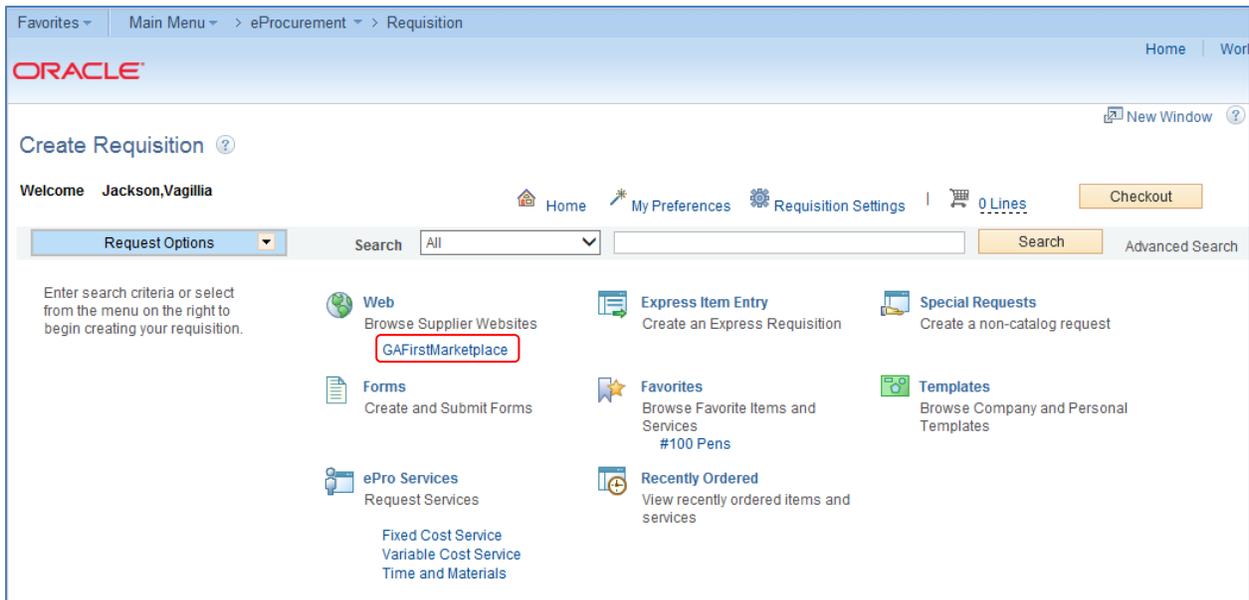
Once you are notified of your assigned shopping cart, you can begin the process of building the Marketplace Requisition.

### **Create a Basic Marketplace Requisition**

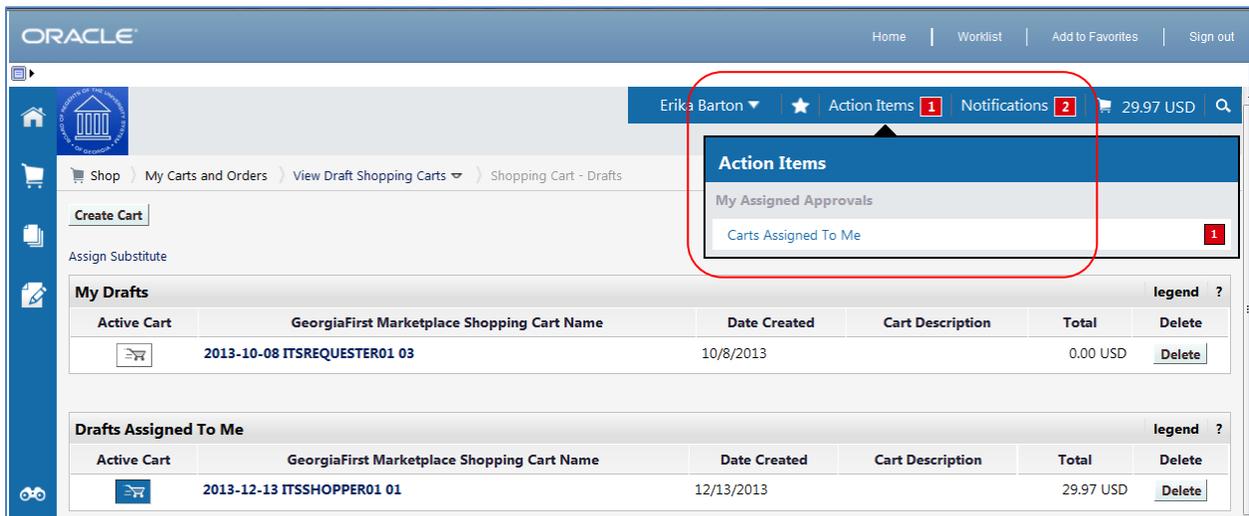
To begin a Marketplace Requisition, you are going to start in the eProcurement module and create a new requisition.

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

Next, select the **GAFIRST Marketplace** link. By doing this, you will be creating this requisition from a GeorgiaFIRST Marketplace shopping cart.



Once you get into the GeorgiaFIRST Marketplace, there are two additional ways to see if any carts have been assigned to you. First, on the **home/shop** page, you can see in the Action Items section if you have any pending Action Items. Also, note that the Notifications section may also show pending messages.



Second, if you go to the **Shopping Cart** icon and select the **My Carts and Orders** link, then **View Draft Shopping Carts** link, you will see an area titled “**Drafts Assigned to Me**” if you have any carts assigned to you. If you select the link in the **Action Items** box, the system will bring you to this draft carts page.



ORACLE Home | Worklist | Add to Favorites | Sign out

Erika Barton | Action Items 1 | Notifications 2 | 29.97 USD

Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts

Create Cart

Assign Substitute

**My Drafts** legend ?

Active Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2013-10-08 ITSREQUESTER01 03	10/8/2013		0.00 USD	Delete

**Drafts Assigned To Me** legend ?

Active Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2013-12-13 ITSSHOPPER01 01	12/13/2013		29.97 USD	Delete

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

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



ORACLE Home | Worklist | Add to Favorites | Sign out

Erika Barton | Action Items 1 | Notifications 2 | 29.97 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Cart - Draft Requisition

Shopping Cart for Joshua Adams | Return Cart | Continue Shopping | 3 Item(s) for a total of 29.97 USD

Proceed to Checkout or Assign Cart

Have you made changes? Update | Help | Empty cart | Perform an action on (0 items selected)... | Select All

**Fisher Scientific** more info...  
Fulfillment Address 1 Edit  
3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US

Product Description	Unit Price	Quantity	Total
Item added on Dec 13, 2013 Add to Favorites Remove More Actions <b>Pouch, Webbed; Small Flashlight; Accessory to MSA ForceField Tango Tactical Body Armor; Webbed Molle-style pocket-type module: 1/EA</b> ⚠️ Part Number 191500337 Manufacturer Info 10066774 - (Mine Safety Appliances Company) Contract SWC30747-5 more info... Biological Supplies and Laboratory Equipment change...	9.99 USD 1/EA, EA change price...	1 Update	9.99 USD
Item added on Dec 13, 2013 Add to Favorites Remove More Actions <b>Pouch, Webbed; Small Flashlight; Accessory to MSA ForceField Tango Tactical Body Armor; Webbed Molle-style pocket-type module: 1/EA</b> ⚠️ Part Number 191500337 Manufacturer Info 10066774 - (Mine Safety Appliances Company) Contract SWC30747-5 more info... Biological Supplies and Laboratory Equipment change...	9.99 USD 1/EA, EA change price...	1 Update	9.99 USD

ORACLE Home | Worklist | Add to Favorites | Sign out

Erika Barton | Action Items 1 | Notifications 2 | 29.97 USD

Shop | My Carts and Orders | Open My Active Shopping Cart | Summary - Draft Requisition

General Final Review

Issue Requisition or Assign Cart

Return to shopping cart | Continue Shopping

**All done! The required information has been completed and this request is ready to be submitted.**  
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Cart | Comments | History

**Summary**

Hide header | Hide value descriptions

**General** ?

Cart Name 2013-12-13 ITSSHOPPER01 edit  
PO Clauses edit clauses...  
Business Unit Georgia Gwinnett College (40000)

**Vendor / Line Item Details** ?

Hide line details | For selected line items Add To Favorites Go

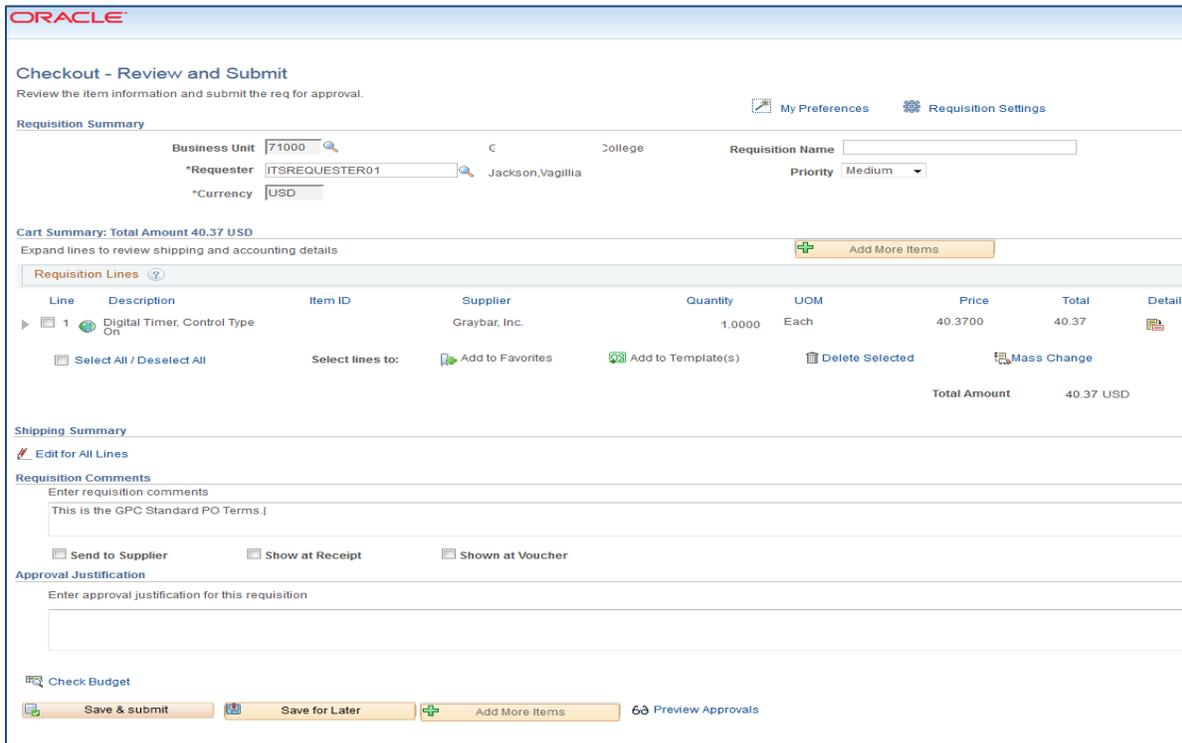
**Fisher Scientific** more info...  
Fulfillment Address 1 Edit  
3970 Johns Creek Court, Suite 500, Suwanee, GA 30024 US  
Contract SWC30747-5 more info...

Once your shopping cart has been pulled into eProcurement, the original Shopper is notified via email that their shopping cart is now being worked in ePro. From here, you should see your Requisition



Summary box on the left side of the screen populate with your Marketplace line items. You will not be able to select the Special Request tab to add additional items.

The system automatically returns you to the Checkout – Review and Submit page. On this page, if you are creating a Shopper’s requisition, you will insert the shopper’s User ID in the Requester field. Completing this step enables the system to tie the requisition to the shopper so that they will receive all future notifications regarding the requisition. In addition, the shopper’s defaults, including ChartFields, will be assigned to each requisition line item, which is used in the approval process.



It is also here that you can update the requisition line distribution if needed. For example, if the Shopper indicates in their cart comments that a different department or project needs to be charged, you would update this information here. This page is also where you can indicate whether the item needs to be identified as an asset. Finally, if you need to submit any header comments regarding this requisition, you can do so at the bottom of the page. You can also enter comments individually on the requisition lines. Do not include any slashes (/) in your comments.

After making any necessary edits, you will need to select the “**Save for Later**” button, then the **Preview Approvals** link. Here you will see the approval path this requisition will follow. The exact approval path depends upon the department and project charged, as well as other criteria specified by your institution. If you need to insert an additional ad hoc approver, you will do so on this page. When you



are ready to submit your requisition for approval, you click the **Submit** button. At this point the system routes the requisition lines to all required GeorgiaFIRST approver's Worklist.

**ORACLE** Home | Worklist

**Menu**

- eProcurement
  - Buyer Center
    - Create Requisition
    - Manage Requisitions
    - Approve Requisitions
    - Receive Items
    - Procurement Card Center
    - Reports
    - Administer Procurement
    - My Profile
    - Detail Jobcode/Role Definition
    - Requester Integration Defaults
  - Sourcing
  - Grants
  - Program Management

**Requisition Summary**

Description	Qty	UOM
Light, Task; Salisbury; Ar...	1	EA
Light, Pulsator; Strobo...	1	EA
FT24 Timer, Digital; Coope...	1	EA

Total Lines: 3  
Total Amount (USD): 29.97

**Confirmation**

Requested For: ITS Requester #1  
Requisition Name: 0000400711  
Requisition ID: 0000400711  
Business Unit: 40000  
Priority: Medium  
Budget Status: Not Checked

Number of Lines: 3  
Total Amount: 29.97 USD

**Department and Proj. Approval**

**Line 1: Pending**  
Light, Task; Salisbury; Arc flash; Task light kit; For use with 5YGK1 or 5YGK2; Standards NFPA 70E; Includes Clip; Tested to ASTM F2178 and NFPA standards; Black/orange; 1/EA FLKIT  
Department and Proj. Approver: Pending (Schneider, Terrance W) Multiple Department Approval

**Line 2: Pending**  
Light, Pulsator, Strobe beacon; Federal Signal Corp; Amber light; 2 flashes; 10 joules; 12-48 VDC; 80 flashes per minute; 1.2 at 12 volts to 0.3 at 48 volts; 13.3 watts  
Department and Proj. Approver: Pending (Schneider, Terrance W) Multiple Department Approval

**Line 3: Pending**  
FT24 Timer, Digital; Cooper-Atkins; 24 Hr. timer; Large LCD display; With alarm and an additional red flash light; w/Built-in memory  
Department and Proj. Approver: Pending (Schneider, Terrance W) Multiple Department Approval

**Buyer Approval - NonCatalog**

**Requisition 0000400711: Awaiting Further Approvals**  
Buyer Approval: Not Routed (Multiple Approvers) Buyer Approval

Submit | Edit Requisition | Apply Approval Changes

[View printable version](#) | [Manage Requisitions](#) | [Create New Requisition](#)

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

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

1. Log into PeopleSoft Financials Core System.
2. In the menu, select **eProcurement**.
3. Select **Requisition**.
4. Select the **GAFIRST Marketplace link**.
5. In the GeorgiaFIRST Marketplace, select the **Shopping Cart** icon.
6. Select the **My Carts and Orders** link.
7. Select the **View Draft Shopping Carts** link.



8. Under the **Drafts Assigned to Me** section, click on a cart to activate it.
9. Review the shopping cart and perform any necessary edits.
10. Select the **Proceed to Checkout** button.
11. Select the **Issue Requisition** button.
12. Confirm the Requisition Summary has the same number of line items as the requisition.
13. On the **Check Out – Review and Submit** page, insert the Shopper’s User ID in the **Requester** field.
14. Name the requisition by populating the Requisition Name field if desired.
15. For each requisition line item, edit **Chartfields, Ship To Location, and Asset information** if necessary.
16. Add a comment on each requisition line if needed by clicking the “**call out**” (comment) icon at the end of the line.
17. Add a header comment to be attached to the requisition if needed, using the Justification/Comments section. Do not include any slashes (/) in your comments.
18. Click the **Save for Later** button and the **Preview Approvals** link.
19. Review the approval path. Insert additional ad hoc approvers if necessary.
20. Click the **Submit** button to route the requisition for approval.

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

### **Editing an Assigned Marketplace Shopping Cart**

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

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



To update a cart created from Hosted content, you can change the Quantity in the field shown below and then select the update button. If you need to delete a line, take that action and then select the Update button.

The screenshot shows the Oracle eProcurement interface for a shopping cart. The cart contains two items from Fisher Scientific. The first item is "Pouch, Webbed; Medium Flashlight; Accessory to MSA ForceField Tango Tactical Body Armor; Webbed Molle-style pocket-type module: 1/EA". The quantity field for this item is set to 1 and is highlighted with a red box. Below the quantity field is an "Update" button, also highlighted with a red box. The total for the cart is 19.98 USD.

Product Description	Unit Price	Quantity	Total
Pouch, Webbed; Medium Flashlight; Accessory to MSA ForceField Tango Tactical Body Armor; Webbed Molle-style pocket-type module: 1/EA	9.99 USD	1	9.99 USD
Pouch, Webbed; Small Flashlight; Accessory to MSA ForceField Tango Tactical Body Armor; Webbed Molle-style pocket-type module: 1/EA	9.99 USD	1	9.99 USD

To update a cart created from Punch Out content, you will see different options, depending on the supplier. An example is below:

The screenshot shows the Oracle eProcurement interface for a shopping cart. The cart contains two items from CDWG and Belkin. A message indicates that the items were retrieved from the supplier's website. A red box highlights the "Need to make changes?" link and the "MODIFY ITEMS" button. The total for the cart is 7.73 USD.

Product Description	Unit Price	Quantity	Total
CDW 10 CAT5e or CAT5 RJ45 Patch Cable Blue	1.50 USD	1	1.50 USD
BELKIN 6FT CAT6 SHIELDED PATCH GREY	6.23 USD	1	6.23 USD



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

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

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

### How To: Change a Contract for an Item

1. After entering the GeorgiaFIRST Marketplace from ePro – Requisitions, select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** link.
3. Select the **View Draft Shopping Carts** link.
4. Under the **Drafts Assigned to Me** section, click on a cart to activate it.
5. For the item you want to select a different contract for, select the **change...** hyperlink next to the contract name.
6. A pop-up box will appear with the contract choices. Select the appropriate contract by using the **radio button**.
7. Click **OK**.
8. After finishing all edits, select the **Proceed to Checkout** button.
9. Select the **Issue Requisition** button and then continue with creating the Marketplace Requisition within PeopleSoft.

### Charging a Requisition Line Item to a Different Chartstring

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

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



The screenshot shows the Oracle eProcurement interface. At the top, the Oracle logo is on the left, and navigation links for Home, Worklist, Add to Favorites, and Sign out are on the right. Below this, the user's name 'Erika Barton' is displayed along with notification counts for Action Items (4) and Notifications (7), and a shopping cart icon with '2.71 USD'. The main navigation bar includes 'Shop', 'My Carts and Orders', 'Open My Active Shopping Cart', and 'Comments - Draft Requisition'. A progress bar shows 'General' and 'Final Review' steps, both with green checkmarks. On the right, there are buttons for 'Issue Requisition' and 'Assign Cart'. Below the progress bar, there are links for 'Return to shopping cart' and 'Continue Shopping'. A prominent yellow message box contains the text: 'All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.' Below this, there are tabs for 'Cart', 'Comments (1)', and 'History'. The 'Comments (1)' tab is active, showing a comment from 'Joshua Adams' with the text: 'Applies To: Requisition - 1076701 Requisition assigned - 1/8/2014 11:07 AM Please charge Dept 6509200 instead of default.' A red box highlights this comment.

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



### Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

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**Requisition Summary**

Business Unit: 71000 Georgia Perimeter College Requisition Name:

\*Requester: vgtaylor Priority: Medium

\*Currency: USD

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**Cart Summary: Total Amount 133.59 USD**

Expand lines to review shipping and accounting details + Add More Items

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**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details												
1	Sticky Notes Cnry 90 Shts Pkg		HD Supply Facilities Maintenance Ltd.	1.0000	Package	16.5900	16.59													
<p><b>Shipping Line 1</b></p> <p>*Ship To: RECEIVING Quantity: 1.0000</p> <p>Address: Jackson, V. Price: 16.5900</p> <p>Attention To: Add One Time Address</p> <p>Due Date: <input type="text"/></p>																				
<p><b>Accounting Lines</b></p> <p>*Distribute By: Qty SpeedChart: <input type="text"/></p>																				
<p><b>Accounting Lines</b></p> <p>Chartfields1   <b>Chartfields2</b>   Chartfields3   Details   Details 2   Asset Information   Asset Information 2   Budget Information</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Account</th> <th>Fund</th> <th>Dept</th> <th>Program</th> <th>Class</th> <th>Budget Reference</th> </tr> </thead> <tbody> <tr> <td>714100</td> <td>10600</td> <td>1001100</td> <td>16400</td> <td>11000</td> <td>2015</td> </tr> </tbody> </table>									*Account	Fund	Dept	Program	Class	Budget Reference	714100	10600	1001100	16400	11000	2015
*Account	Fund	Dept	Program	Class	Budget Reference															
714100	10600	1001100	16400	11000	2015															
2	PAD J. LEGAL WE PK6 MARKET SO		VWR International	15.0000	Package	7.8000	117.00													

[Select All / Deselect All](#)   
 Select lines to:   
 [Add to Favorites](#)   
 [Add to Template\(s\)](#)   
 [Delete Selected](#)   
 [Mass Change](#)

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

1. When you have pulled the GeorgiaFIRST Marketplace shopping cart into an eProcurement requisition, you are returned to **the Checkout - Review and Submit page**.
2. Expand the line you want to modify by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Chartfields 2** tab to update the following if needed:
  - a. Account
  - b. Fund Code
  - c. Department
  - d. Program
  - e. Class
5. Go to the **Chartfields 3** tab to update the following if needed:
  - a. Project
6. Make other necessary changes and then continue with the Marketplace Requisition by selecting **the Save & Submit** button.



**Checkout - Review and Submit**  
Review the item information and submit the req for approval.

My Preferences Requisition

Requisition Summary

Cart Summary: To  
Expand lines to re  
Requisition Line  
Line De  
1 Stic  
PK  
2 PAD  
MA  
Select All

Shipping Summary  
Edit for All Lines  
Requisition Comm  
Enter requisit  
This is the G  
Send to Suppl  
Approval Justification

**Edit Lines/Shipping/Accounting for Selected Lines** Help

**Line Information** ?

**Note:** The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.

Supplier ID  Supplier Location   
 Buyer  \* Category

**Shipping Information**

Ship To Location  Add One Time Address  
 Due Date  Attention   
 SpeedChart

**Accounting Lines**

Please enter GL Business Unit before selecting other chartfield values

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Percent	Location	GL Unit	Account
1	<input type="text"/>	71000	<input type="text"/>

Load Values From Defaults

OK Cancel Refresh

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

1. When you have pulled the GeorgiaFIRST Marketplace shopping cart into an eProcurement requisition, you are returned to the **Checkout - Review and Submit page**.
2. Select the lines you want to change distribution information for by placing a **checkmark** in their **select** boxes.
3. Select the **Mass Change** button.
4. In the Accounting Information section, enter the GL Unit (your business unit), then select the ChartFields 2 tab and enter the new **ChartFields Values**, then click **Apply**.
5. On the **Distribution Change Options**, to apply changes to all selected lines, select the option “**All Distribution Lines**” and click **OK**.
6. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save & Submit** button.



## Using Multiple Distributions for a Requisition Line

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

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

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: 71000 Georgia Perimeter College Requisition Name: [ ]

\*Requester: ITS Requester #1 Priority: Medium

\*Currency: USD

Cart Summary: Total Amount 806.18 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Avery - Economy Binders with L		OfficeMax North America, Inc.	5.0000	Each	16.2000	81.00		Add	
2	Dell - 27 Black LED Monitor -		OfficeMax North America, Inc.	2.0000	Each	362.5900	725.18		Add	

Shipping Line 1

\*Ship To: RECEIVING Address Attention To: ITS Requester #1 Due Date: [ ]

Quantity: 2.0000 Price: 362.5900

Price Adjustment Pegging Inquiry Pegging Workbench

Accounting Lines

\*Distribute By: Qty SpeedChart: [ ]

Accounting Lines Personalize | Find | View All | First 1-2 of 2 Last

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		CM1114	1.0000	50.0000	362.59	71000	[+] [-]
2	Open		CM1114	1.0000	50.0000	362.59	71000	[+] [-]

## How To: Split Distribution for a Requisition Line

1. When you have pulled the GeorgiaFIRST Marketplace shopping cart into an eProcurement requisition, you will be returned to the **Checkout - Review and Submit page**.
2. Expand the line by clicking on its **Expand Section** button.
3. Choose whether to **Distribute by Amount** or **Quantity** through the drop down list.
4. Locate the **Accounting Lines** section.
5. At the end of the line under the **Chartfields1** tab, click the **Add a New Row** button (+).
6. If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.



- a. In the original distribution line, edit the **quantity** for the revised distribution.
  - b. **Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
  - c. In the new distribution line, enter the **quantity** for the second Chartstring.
  - d. **Tab** out of the **Quantity** field. The **Percent** field will adjust accordingly.
  - e. Make the necessary **changes** to the second string of ChartFields on the ChartFields 1, ChartFields 2, and ChartFields 3 tabs.
7. If distributing by **Amount**, continue. Otherwise, go to step 8.
- a. In the original distribution line, edit the **amount** for the revised distribution.
  - b. **Tab** out of the Amount field. The **Percent** field should adjust accordingly.
  - c. In the new distribution line, enter the **amount** for the second Chartstring.
  - d. **Tab** out of the Amount field. The **Percent** field will adjust accordingly.
  - e. Make the necessary **changes** to the second string of ChartFields on the ChartFields 1, ChartFields 2, and ChartFields 3 tabs.
8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save and Preview Approvals** button.

### Entering Asset Information for an Item

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

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



**Checkout - Review and Submit**  
Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

**Requisition Summary**

Business Unit: 71000 Georgia Perimeter College Requisition Name:

\*Requester: ITS Requester #1 Priority: Medium

\*Currency: USD

Cart Summary: Total Amount 806.18 USD  
Expand lines to review shipping and accounting details [Add More Items](#)

**Requisition Lines**

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Avery - Economy Binders with L		OfficeMax North America, Inc.	5,000	Each	16.2000	81.00		Add
2	Dell - 27 Black LED Monitor -		OfficeMax North America, Inc.	2,000	Each	362.5900	725.18		Add

**Shipping Line 1**

\*Ship To: RECEIVING Quantity: 2,0000  
Address: Add One Time Address Price: 362.5900  
Attention To: ITS Requester #1  
Due Date:

**Accounting Lines**

\*Distribute By: Qty SpeedChart:

**Accounting Lines** Personalize | Find | View All | First 1 of 1 | Last

Chartfields1	Chartfields2	Chartfields3	Details	Details 2	Asset Information	Asset Information 2	Budget Information
AM Business Unit	Profile ID	Tag Number	CAP #	Sequence	Empl ID		
71000	OTHEQ05YR						

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

### How To: Enter Asset Information for a Requisition Line Item

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



## Inserting Ad Hoc Approvers

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

The screenshot displays the Oracle Requisition Approval interface. At the top, it shows requisition details: Business Unit 71000, Requisition ID 0000419339, Requisition Name CAR RENTAL/A. MADDOX, and Requester Allen.U. The status is Pending, and the total amount is 224.00 USD. Below this is a table with one line item: Line 1, Item Description CAR FOR APPA CONFERENCE/ 1/1..., Quantity 1.0000, UOM EA, Price 224.00000, and Currency USD. The 'Review/Edit Approvers' section shows two approval stages: 'Department and Proj. Approval' (Line 1: Awaiting Further Approvals) and 'Logistical Services Approval' (CAR RENTAL/A. MADDOX: Pending). A red box highlights a green plus (+) button in the 'Logistical Services Approval' section. A dialog box titled 'Insert additional approver or reviewer' is overlaid on the right, containing a 'User ID' search field, radio buttons for 'Approver' (selected) and 'Reviewer', and 'Insert' and 'Cancel' buttons.

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



### How To: Insert an Ad Hoc Approver

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



### Chapter 6: Creating a Special Request Requisition

In addition to creating requisitions built from GeorgiaFIRST Marketplace shopping carts, you can also create Special Request Requisitions. Special Request Requisitions are built by entering information directly into the requisition using the Special Request tab – Special Item link. Therefore, you create the individual requisition line items rather than having them originate from the Marketplace Shopping cart.

Other than the process to add requisition lines to the requisition, many of the steps in Marketplace Requisitions and Special Request Requisitions are the same. In this chapter, we are going to explain how to create a Special Request Requisition.

#### Creating a Special Request Requisition

To create a Special Request Requisition, you begin just as you did with the Marketplace Requisition. You select the menu item Requisition from the eProcurement module.

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

After setting up your requisition defaults, you can add your line items. Since this requisition will not be built from contract catalog items in the GeorgiaFIRST Marketplace, you will use the Special Request tab on this page. From the Special Request tab, you should select the Special Item hyperlink. This is how you enter line items directly into a requisition.

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

- Item Description: You enter the description of the item you are requesting.
- Price
- Quantity
- Unit of Measure
- Category: This is the NIGP Code.
- Due Date
- Supplier ID: If you know the supplier you wish to use, enter that Supplier ID here; once the Buyer receives the requisition, they can modify the supplier if needed.



- **Additional Information:** You can use the text box to enter comments regarding the requisition line item. You can also specify if you want those comments sent to the supplier, shown on the receipt, or shown on the voucher. Do not include any slashes (/) in the Additional Information field.

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

When you get to the Checkout - Review and Submit page, you can update the distribution information for each line, as well as the Ship To information. Just like a Marketplace Requisition, you can update this



information for each line individually or multiple lines through the Mass Change option. If you need to include asset information for a line item, you can also do this here. Finally, you can add comments and attachments to each line, as well as to the overall requisition. When you have added all of your information, you can preview your approvals by selecting the **Save for Later button & Preview Approvals** link.

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

### How To: Create a Special Request Requisition

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisition**.
3. Select **Special Requests**.
4. To enter Requisition Defaults, click the **Requisition Settings** link. Otherwise, go to Step 4.
  - a. If desired, enter a name for your requisition (if left blank, the Requisition ID will be listed here after saving).
  - b. Expand the **Line Defaults** section by clicking on the expand button.
  - c. To enter a default supplier for all requisition lines, enter the **Supplier ID** or select it using the Look Up icon.
  - d. To enter a default Buyer for all requisition lines, enter the **Buyer's User ID** or select it using the Look Up icon.
  - e. If all of your line items will have the same NIGP code, enter it in the **Category** field or select it using the Look Up icon.
  - f. If all of your line items will have the same **Unit of Measure**, enter it or select it using the Look Up icon.
  - g. To set a default **Ship To Address**, enter it or select it using the Look Up icon.
  - h. To enter a default **Due Date** for each line item, enter it or select it using the Calendar icon. The Due Date for a Requisition is typically within 30 days of the current date.
  - i. To enter a default "**Attention To**" for each line, enter in the Attention field.
  - j. In the **Accounting Defaults – Chartfields 1** tab, the Location, GL Unit, and Department originally default from your User ID. If needed, you can change the Fund Code, Department, Program, Class, and Project that are to be charged for each line item.
  - k. In the **Accounting Defaults – Asset Information** tab, you can enter the default AM Business Unit field and Profile ID that will appear on each requisition line item. This



should only be set if all requisition line items are to be tracked in the Asset Management module, and each line item requires the same Profile ID.

- I. Click the **OK** button.
5. For each line that you want to enter, complete the following steps (Some fields may have been completed through the requisition defaults; these defaults can be overwritten on this page if needed.):
  - a. Enter an **Item Description**.
  - b. Enter the **Price** of the item.
  - c. Enter the **Quantity** requested.
  - d. Enter or select the **Unit of Measure**.
  - e. In the **Category** field, enter or select the NIGP Code for the item.
  - f. Enter or select the **Due Date** for the item.
  - g. Enter or select the **Supplier ID** for the item if you have a preferred supplier.
  - h. If you have any information that needs to be sent to the supplier, shown on the receipt, and/or shown on the voucher, enter it in the **Additional Information** field and select the appropriate checkboxes.
  - i. Select the **Add to Cart** button.
  - j. Confirm the **Requisition Summary** updated with your new requisition line.
  - k. To add an addition requisition line, complete steps 7a through 7k again.
6. Select the **Checkout** button.
7. To update a requisition line's distribution information, click its **Expand** button and make necessary updates.
8. To update multiple requisition line's information simultaneously, select the lines to update with a check mark and then select the **Mass Change** link. Make all necessary updates, and apply to all selected lines.
9. To enter a **comment** on an individual requisition line, click that line's **call out** (comment) icon. Enter the comments and select where you want the comment to appear.
10. Enter any justification or comments you wish to on the requisition header in the **Justification/Comments** field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
11. Click the **Save for Later** button, then the **Preview Approvals** link.
12. Insert any additional approvers if necessary.
13. Click the **Submit** button.

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



## Charging a Requisition Line Item to a Different Chartstring

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

**ORACLE**

Checkout - Review and Submit  
Review the item information and submit the req for approval.

Requisition Summary

Business Unit: 71000 Georgia Perimeter College Requisition Name: [ ]  
 \*Requester: [ ] Priority: Medium  
 \*Currency: USD

Cart Summary: Total Amount 1,700.00 USD  
 Expand lines to review shipping and accounting details [Add More Items]

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Local Newspaper Ad		THE ATLANTA JOURNAL-CONSTITUTION	4.0000	Each	425.0000	1700.00		
Shipping Line 1		*Ship To	RECEIVING	Quantity		4.0000			
		Address Attention To	Smith, Jackson	Price		425.0000		Price Adjustment	
		Due Date	02/26/2015					Pegging Inquiry	
								Pegging Workbench	
		Accounting Lines							
		*Distribute By	Qty	SpeedChart					
		Accounting Lines		Personalize   Find   View All   First   1 of 1   Last					
		Chartfields1	Chartfields2	Chartfields3	Details	Details 2	Asset Information	Asset Information 2	Budget Information
		*Account	Fund	Dept	Program	Class	Budget Reference		
		751110	10600				2015		

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

1. After you have added all Special Items to your requisition, go to the **Checkout - Review and Submit** page by clicking its link.
2. Expand the line by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **ChartFields2** tab. Additional Chartfield values can be updated if needed:
  - a. Account
  - b. Fund Code
  - c. Department
  - d. Program
  - e. Class
5. Go to the **ChartFields 3** tab to specify or modify the Project ID field.



6. Make any other necessary changes and then continue with the Special Request Requisition by selecting the **Save for Later** button and **Preview Approvals** link.

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

1. After you have added all Special Items to your requisition, go to the **Checkout - Review and Submit** page by clicking its link.
2. Select the lines you wish to change distribution information for by placing a **checkmark** in their **select** boxes.
3. Select the **Mass Change** link.
4. In the Accounting Information section, enter the new **ChartFields** and then click **Apply**.
5. On the Distribution Change Options, to apply changes to all selected lines, select the option "**All Distribution Lines**" and click **OK**.
6. Make any other necessary changes and then continue with the Special Request Requisition by selecting the **Save for later button and Preview Approvals** link.

### **Using Multiple Distributions for a Requisition Line**

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

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



**ORACLE**

Requisition Summary

Business Unit: 71000 Georgia Perimeter College Requisition Name:

\*Requester:  Priority: Medium

\*Currency: USD

Cart Summary: Total Amount 1,700.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Local Newspaper Ad		THE ATLANTA JOURNAL-CONSTITUTION	4.0000	Each	425.0000	1700.00			

Shipping Line 1

\* Ship To: RECEIVING

Address: Smith, Jackson

Attention To:

Due Date: 02/26/2015

Quantity: 4.0000

Price: 425.0000

Price Adjustment

Pegging Inquiry

Pegging Workbench

Accounting Lines

\*Distribute By: Qty

SpeedChart:

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		CM1113	2.0000	50.0000	850.00	71000	
2	Open		CM1113	2.0000	50.0000	850.00	71000	

## How To: Split Distribution for a Requisition Line

- After you have added all Special Items to your requisition, go to the **Checkout - Review and Submit** page by clicking its link.
- Expand the line by clicking on its **Expand Section** button.
- Choose whether to **Distribute** by **Amount** or **Quantity** through the drop down list.
- Locate the **Accounting Lines** section.
- At the end of the line under the **ChartFields1** tab, click the **Add a New Row** button (+).
- If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.
  - In the original distribution line, edit the **quantity** for the revised distribution.
  - Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
  - In the new distribution line, enter the **quantity** for the second Chartstring.
  - Tab** out of the Quantity field. The **Percent** field will adjust accordingly.
  - Make the necessary changes to the second string of ChartFields on the ChartFields 1, ChartFields 2, and ChartFields 3 tabs.
- If distributing by **Amount**, continue. Otherwise, go to step 8.
  - In the original distribution line, edit the amount for the revised distribution.
  - Tab** out of the Amount field. The **Percent** field should adjust accordingly.
  - In the new distribution line, enter the **amount** for the second Chartstring.
  - Tab** out of the Amount field. The **Percent** field will adjust accordingly.



- e. Make the necessary changes to the second string of ChartFields on the ChartFields 1, ChartFields 2, and ChartFields 3 tabs.
- 8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save for Later button and Preview Approvals link**.

### Entering Asset Information for an Item

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

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

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

The screenshot shows the Oracle Requisition Summary page. At the top, it displays 'Requisition Summary' with fields for Business Unit (71000), Georgia Perimeter College, Requisition Name, \*Requester, \*Currency (USD), and Priority (Medium). Below this is a 'Cart Summary: Total Amount 1,700.00 USD' and an 'Add More Items' button. The main section is 'Requisition Lines', showing a table with columns: Line, Description, Item ID, Supplier, Quantity, UOM, Price, Total, Details, and Comment. The first line is 'Local Newspaper Ad' with a quantity of 4.0000 and a price of 425.0000. Below the table, there are sections for 'Shipping Line 1' and 'Accounting Lines'. The 'Accounting Lines' section has a 'Distribute By' dropdown set to 'Qty' and a 'SpeedChart' field. At the bottom, there are tabs for 'Chartfields1', 'Chartfields2', 'Chartfields3', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Asset Information' tab is highlighted with a red box. Below the tabs is a table with columns: AM Business Unit, Profile ID, Tag Number, CAP #, Sequence, and Empl ID. The 'AM Business Unit' and 'Profile ID' cells in the first row are also highlighted with a red box.



### How To: Enter Asset Information for a Requisition Line Item

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

### Inserting Ad Hoc Approvers

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



**ORACLE**

Requisition Approval

Business Unit 71000  
Requisition ID 0000419339  
Requisition Name CAR RENTAL/A. MADDOX  
Requester Allen.U  
Entered on 12/16/2014  
Status Pending  
Priority Medium  
Budget Status Not Checked

Requisition Alert  
-Special Request Requisition

Total Amount 224.00 USD

Requester's Justification  
https://www.hertz.com/rentacar/reservation/#/vehicles

Edit Requisition View printable version

Line Information

Line	Item Description	Supplier Name	Quantity	UOM	Price	
1	CAR FOR APPA CONFERENCE/ 1/1...		1.0000	EA	224.00000	USD

Review/Edit Approvers

Department and Proj. Approval

Line 1: Awaiting Further Approvals  
CAR FOR APPA CONFERENCE/ 1/17-1/23/15

Department and Proj. Approver

Approved  
Hardy.S  
Req-Dept Mgr-Line Level  
12/18/14 - 9:58 AM

Logistical Services Approval

CAR RENTAL/A. MADDOX: Pending

Purchasing Manager Approval

Pending  
Multiple Approvers  
Buyer Approval

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:

Insert as:  Approver  Reviewer

Insert Cancel

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

### How To: Insert an Ad Hoc Approver

1. When you have pulled the GeorgiaFIRST Marketplace shopping cart into an eProcurement requisition, you will be returned to the **Checkout - Review and Submit** page.
2. Make any necessary changes to the line item information on the requisition.
3. Select **Save for Later, then Preview Approvals** buttons.



4. To insert an Ad Hoc approver, click the **green** plus (+) button where you want the approver to go.
5. Enter the **User ID** of the Ad Hoc approver, or use the look up button to select the User ID.
6. Select either the **Approver** or **Reviewer** radio button.
7. Click the **insert** button.
8. You should now see the additional approver in the approval chain.
9. To remove the Ad Hoc approver, select the **red** minus (-) button for that approver. Click **OK** when prompted.
10. Submit the requisition for approval by clicking the **Submit** button.



## Chapter 7: Working with Requisitions

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

### Managing Requisitions

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

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

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

**ORACLE** All Search >> Advanced Search

### Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 71000  
 Requisition ID:   
 Date From: 11/01/2015  
 Date To: 11/08/2015  
 Requester: OITPAGE  
 Requisition Name:   
 Request State: All but Complete  
 Budget Status:   
 Origin: Special Request  
 PO ID:

Search Clear Show Advanced Search

! The Requester specified has no Requisitions.

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report



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

Request State	Explanation
<b>All but Complete</b>	Displays all requisitions except those with the status <i>Complete</i> .
<b>Approved</b>	The requisition has been approved and is ready for sourcing.
<b>Canceled</b>	The requisition was entered and saved, but was canceled. A canceled requisition can be reopened within a certain number of days.
<b>Complete</b>	After the requisition is dispatched on a PO, the goods are received, and the supplier is paid, a background process identifies the requisition status as Complete. Canceled requisitions are also identified as Complete.
<b>Denied</b>	The requisition was denied in the approval process.
<b>Open</b>	The requisition has been entered and saved in the system, but it has not yet been submitted for approval.
<b>PO(s) Partially Canceled</b>	The requisition contains some lines that have been placed on purchase orders and these purchase orders have subsequently been canceled. For this status to display, the purchase orders must all have the same status, Canceled. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to supplier.
<b>PO(s) Partially Completed</b>	The purchase order has been closed for some of the requisition lines; however, the requisitions are not yet closed.
<b>PO(s) Partially Created</b>	The requisition contains some lines that have been sourced to an approved purchase order. For this status to display, the purchase orders must all have the same status, Approved. This status indicates that some of the requisition lines have not been sourced to a purchase order and it also indicates that none of the lines have been received or returned to a supplier.
<b>PO(s) Canceled</b>	The requisition has been placed on a Purchase Order that has been canceled.
<b>PO(s) Completed</b>	The purchase order has been closed for all of the requisition lines; however, the requisitions are not yet closed.
<b>PO(s) Created</b>	The requisition has been placed on a Purchase Order.
<b>PO(s) Dispatched</b>	The requisition has been placed on a Purchase Order, and the PO has been dispatched to the supplier.
<b>Partially Dispatched</b>	The requisition contains some lines that have been placed on purchase orders and these purchase orders have been dispatched to the supplier. For this status to display, the purchase orders must all have the same status, Dispatched. This status indicates that some of the requisition lines have not been sourced to a purchase



	order and it also indicates that none of the lines have been received or returned to a supplier.
<b>Partially Received</b>	The requisition contains some lines that have been placed on a purchase order, the purchase order has been dispatched to the supplier, and the goods have been fully or partially received. This status indicates that some of the requisition lines have not been received.
<b>Pending</b>	The Requisition has been submitted and is awaiting approval.
<b>Received</b>	The requisition has been placed on a PO. The PO has been dispatched to the supplier, and the goods have been partially or fully received.
<b>See Lines</b>	The lines of this requisition are in various stages of the approval process and the lines have different statuses (i.e. pending, approved, denied, and so on); however, none of the lines have been sourced to a purchase order.

After a requisition has been approved, it must then go through the Budget Checking process. The possible Budget Statuses include Not Checked, Error, and Valid. (GeorgiaFIRST does not use Document in Processing and Provisionally Valid.)

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



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

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

**ORACLE**

### Manage Requisitions

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 71000  
 Requisition Name:   
 Requisition ID:   
 Request State: All but Complete  
 Budget Status:   
 Date From: 02/15/2015  
 Date To: 02/20/2015  
 Origin: Special Request  
 Requester:   
 Entered By:   
 PO ID:

Search Clear Show Advanced Search

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
 To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000500012	0000500012	71000	02/20/2015	PO(s) Created	Valid	20.00 USD [Select Action] Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

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



0000500012 0000500012 71000 02/20/2015 PO(s) Created Valid 20.00 USD [Select Action] Go

Requester Barnaby,James Entered By Barnaby,James Priority Medium  
Pre-Encumbrance Balance 0.00 USD

Request Lifespan:  
 Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Line	Description	Status	Price	Quantity	UOM	Supplier
1	Test Item #1 - Asset	PO Canceled	10.00000 USD	1.0000	EA	HEWLETT-PACKARD
2	Test Item #2	PO Created	10.00000 USD	1.0000	EA	HEWLETT-PACKARD

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

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

ORACLE All Search Advanced Search

### Requisition Details

**Requisition Summary**

Business Unit	71000	Requisition Name	Canon Repair Media Spot
Date	10/23/2015	Requisition ID	0000502478
Request State	PO(s) Dispatched	Total Amount	204.00 USD
Requested For	sriley	Pre-Encumbrance Balance	0.00 USD

Header Comments  
Comment 1: Repair ID # RN903790 for quote

Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
1	Out Of Warranty Standard	Complete	No	1.0000 Each	190.00000USD	Approved	190.00
2	2 Day Shipping and Handling...	Complete	No	1.0000 Each	14.00000 USD	Approved	14.00

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



If you want to see a requisition’s shipping and distribution information, you can select the ‘Expand Section’ icon to view the Shipping and Accounting Line information.

ORACLE All  >> Advanced Search

### Requisition Details

**Requisition Summary**

<b>Business Unit</b> 71000	<b>Requisition Name</b> Canon Repair Media Spot
<b>Date</b> 10/23/2015	<b>Requisition ID</b> 0000502478
<b>Request State</b> PO(s) Dispatched	<b>Total Amount</b> 204.00 USD
<b>Requested For</b> sriley	<b>Pre-Encumbrance Balance</b> 0.00 USD

**Header Comments**  
Comment 1: Repair ID # RN903790 for quote

Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Item Description	Source	Status	Amount Only	Quantity	Price	Status	Total
1	Out Of Warranty Standard		Complete	No	1.0000 Each	190.000000USD	Approved	190.00

PO information

**Shipping Line 1** **Ship To** RECEIVING  
Georgia Perimeter College  
555 North Indian Creek Dr  
Central Receiving  
Clarkston, GA 30021

**Quantity** 1.0000  
**Price** 190.00000 **Price Adjustment**

**Attention To** Sharon Elaine Riley  
**Due Date**

**Accounting Lines**

Distribute By Qty      Liquidate By Amt

**Accounting Lines** Personalize First 1 of 1 Last

Dist #	Status	Location	Req Qty	Merchandise Amt	Percent	GL Unit	Entry Event	Account
1	Processed	LAKESIDE	1.0000	190.00	100.0000	71000		715132

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

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

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



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

**Item Description**

**Part # 7920A001 Canon GL2 Camcorder - 410 Kpix - optical zoom: 20 x - Mini DV - black, silver**

Requisition Price: 2131.95000  
 Item ID:  
 No image for this item  
 Category: Video Camera-Recorders, Access  
 Vendor: Southern Computer  
 Vendor Item ID: N/A  
 Manufacturer: N/A  
 Mfg itm ID: N/A

[Return to Previous Page](#)

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000502478	Canon Repair Media Spot	71000	10/23/2015	PO(s) Dispatched	Valid	204.00 USD

Requester: Sharon Elaine Riley  
 Pre-Encumbrance Balance: 0.00 USD  
 Entered By: Sharon Elaine Riley  
 Priority: Medium

Request Lifespan: Requisition → **Approvals** → Inventory → Purchase Orders → Change Request → Receiving → Returns → Invoice → Payment

Line	Description	Status	Price	Quantity	UOM	Supplier
1	Out Of Warranty Standard	PO Dispatched	190.00000 USD	1.0000 EA		Canon Solutions America, Inc.
2	2 Day Shipping and Handling...	PO Dispatched	14.00000 USD	1.0000 EA		Canon Solutions America, Inc.

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



**Approval Status**

Business Unit	71000	<b>Requisition Alert</b>	
Requisition ID	0000502478	•Special Request Requisition	
Requisition Name	Canon Repair Media Spot		
Requester	Sharon Elaine Riley		
Entered on	10/23/2015		
Status	Approved	Total Amount	204.00 USD
Priority	Medium		
Budget Status	Valid		

Requester's Justification  
*No justification entered by requester.*

[View printable version](#)

▸ Line Information ?

▾ Review/Edit Approvers

### Department and Proj. Approval

▾ **Line 1:Approved**  
Out Of Warranty Standard

Department and Proj. Approver

**Approved**

✓ Hoeting, Mark A  
Req-Dept Mgr-Line Level  
10/28/15 - 11:04 AM

▾ **Line 2:Approved**  
2 Day Shipping and Handling

Department and Proj. Approver

**Approved**

✓ Hoeting, Mark A  
Req-Dept Mgr-Line Level  
10/28/15 - 11:04 AM

### Logistical Services Approval

▾ **Canon Repair Media Spot:Approved**

Purchasing Manager Approval

**Approved**

✓ Jackson, Vagillia  
Buyer Approval  
11/02/15 - 6:47 AM

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

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



### How To: Manage Requisitions

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

### Editing a Requisition

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

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



**ORACLE** All Search >> Advanced Search

### Manage Requisitions

**Search Requisitions**  
To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 71000 Requisition Name: Request State: Pending Budget Status: Not Budget Checked  
 Requisition ID: Date From: 08/01/2015 Date To: 11/07/2015 Origin: Special Request  
 Requester: sriley Entered By: PO ID:

Search Clear Show Advanced Search

**Requisitions**  
To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
0000502651	CBT Nuggets IT Training...	71000	11/06/2015	Pending	Not Chk'd	2,998.00 USD	[Select Action]	Go
0000502646	HDI Renewal FY16	71000	11/06/2015	Pending	Not Chk'd	1,340.00 USD	[Select Action]	Go
0000502595	BOR VMware Renewal	71000	11/03/2015	Pending	Not Chk'd	7,088.35 USD	[Select Action]	Go
0000502584	Microsoft Surface Pro	71000	11/02/2015	Pending	Not Chk'd	23,150.80 USD	[Select Action]	Go

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

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



ORACLE All  [Advanced Search](#)

**Edit Requisition** ?

Welcome Sharon Elaine Riley [Home](#) [My Preferences](#) [Requisition Settings](#) | [1 Line](#) [Checkout](#)

**Request Options** All  [Search](#) [Advanced Search](#)

All Request Options

**Web**

GAFirstMarketplace

Express Item Entry

**Special Requests**

Forms

Favorites

Templates

**ePro Services**

Fixed Cost Service

Variable Cost Service

Time and Materials

Recently Ordered

**Special Requests** ?

Enter information about the non-catalog item you would like to order.

**Item Details**

\*Item Description  X

\*Price  \*Currency

\*Quantity  \*Unit of Measure

\*Category  Due Date

**Supplier**

Supplier ID

Supplier Name  CBT NUGGETS LLC [Suggest New Supplier](#)

Supplier Item ID

**Manufacturer**

Mfg ID

Manufacturer

Mfg Item ID

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher

**Request New Item**

Request New Item A notification will be sent to a buyer regarding this new item request.

[Apply](#)

To edit a requisition line’s distribution and schedule information, click on the expand link for that line. The shipping information can be updated, and the ChartFields can be updated if necessary. After making all of your edits, you can select the Save & Preview Approvals button. If you make changes to a requisition that is already in the approval process, when you submit the edited requisition, the approval process will be reinitiated. Therefore, it may be helpful to add a comment explaining why an approver may be seeing the same requisition again. After previewing approvals, you can then submit the requisition.



### How To: Edit a Requisition

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



## Delete a Requisition Line

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

**ORACLE** All Search Advanced Search

**Edit Requisition - Review and Submit**  
Review the item information and submit the req for approval.

My Preferences Requisition Settings

**Requisition Summary**

Business Unit: 71000 GEORGIA PERIMETER COLLEGE Requisition Name: HDI Renewal FY16  
 Requester: sriley Sharon Elaine Riley Requisition ID: 0000502646  
 \*Currency: USD Priority: Medium

Cart Summary: Total Amount 1,340.00 USD  
 Expand lines to review shipping and accounting details Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input type="checkbox"/> 1	Local Chapter HDI Memberships		HDI	10.0000	Each	75.0000	750.00		Edit	
<input checked="" type="checkbox"/> 2	Professional Level HDI Members		HDI	2.0000	Each	295.0000	590.00		Add	

Select lines to: Add to Favorites Add to Template(s) **Delete Selected** Mass Change

Total Amount 1,340.00 USD

## How To: Delete a Requisition Line

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



## Canceling a Requisition

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

The screenshot shows the Oracle Manage Requisitions page. At the top, there is a search bar with 'All' selected and a search button. Below this is the 'Manage Requisitions' section with a search criteria form. The form includes fields for Business Unit (71000), Requisition Name, Requisition ID, Request State (Pending), Budget Status (Not Budget Checked), Date From (08/01/2015), Date To (11/07/2015), Origin (Special Request), and Requester (sriley). There are Search, Clear, and Show Advanced Search buttons.

Below the search criteria is a table of requisitions. The table has columns for Req ID, Requisition Name, BU, Date, Request State, Budget, and Total. Two requisitions are visible:

Req ID	Requisition Name	BU	Date	Request State	Budget	Total
0000502651	CBT Nuggets IT Training...	71000	11/06/2015	Pending	Not Chk'd	2,998.00 USD
0000502646	HDI Renewal FY16	71000	11/06/2015	Pending	Not Chk'd	1,340.00 USD

For the selected requisition (0000502646), there is a detailed view showing the Requester (Sharon Elaine Riley), Entered By (Sharon Elaine Riley), and Priority (Medium). Below this is a process flow diagram with steps: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. A 'Request Lifespan' section shows a table of line items:

Line	Description	Status	Price	Quantity	UOM	Supplier
1	Local Chapter HDI Membership...	Pending Approval	75.00000	10.0000	EA	HDI
2	Professional Level HDI Membe...	Pending Approval	295.00000	2.0000	EA	HDI

At the bottom of the screenshot, there are more requisitions listed in a table:

0000502595	BOR VMware Renewal	71000	11/03/2015	Pending	Not Chk'd	7,088.35 USD	[Select Action]	Go
0000502584	Microsoft Surface Pro	71000	11/02/2015	Pending	Not Chk'd	23,150.80 USD	[Select Action]	Go

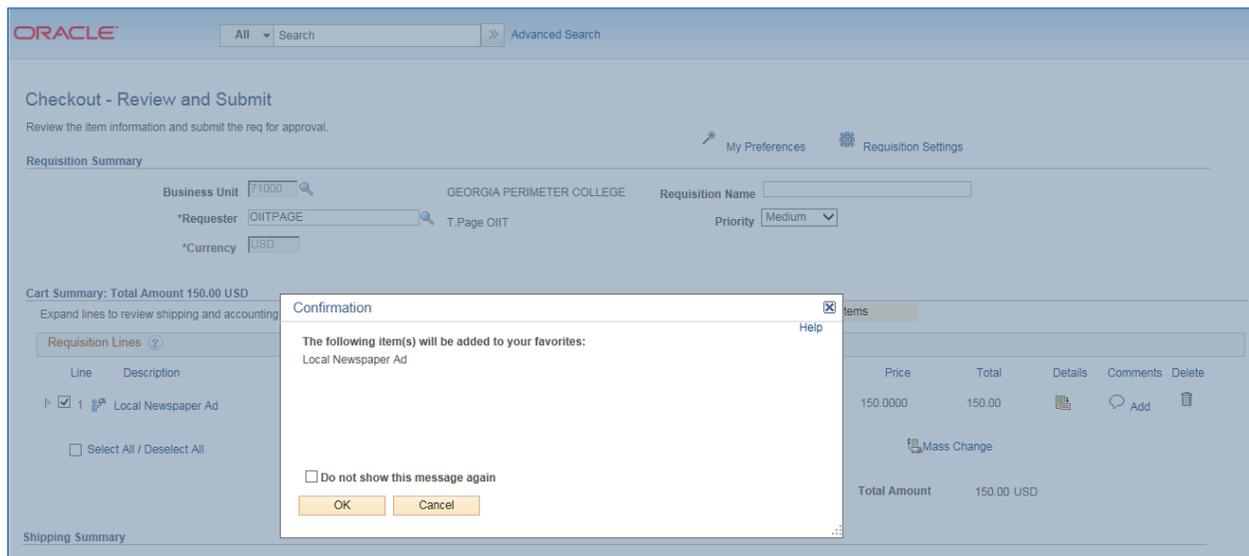
## How To: Cancel a Requisition

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



## Saving Favorite Items for Special Request Requisitions

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



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





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

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Requisitions**.
3. Select the **Special Requests** link.
4. For each line that you want to enter, complete the following steps (Some fields may have been completed through the requisition defaults; these defaults can be overwritten on this page if needed.):
  - a. Enter an Item Description.
  - b. Enter the Price of the item.
  - c. Enter the Quantity requested.
  - d. Enter or select the Unit of Measure.
  - e. In the Category field, enter or select the NIGP Code for the item.
  - f. Enter or select the Due Date for the item.
  - g. Enter or select the Supplier ID for the item if you have a preferred supplier.
  - h. If you have any information that needs to be sent to the supplier, shown on the receipt, and/or shown on the voucher, enter it in the Additional Information field and select the appropriate checkboxes.
  - i. Select the Add Item button.
  - j. Confirm the Requisition Summary updated with your new requisition line.
  - k. To add an addition requisition line, complete steps 4a through 4k again.
5. Select the link the **Checkout - Review and Submit** page.
6. Select the **line items** you want to save as **Favorite items** with a **checkmark**.
7. Click the **Add to Favorites** button.
8. Click **Close** in the Confirmation popup box.
9. Your favorites are now saved. You can either continue creating the Special Request Requisition, or you can exit the requisition by clicking another link in the menu or clicking the Home link.

### How To: Add a Favorite Item to Special Request Requisition

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

- b. Update the item fields as necessary.
- c. Click the **OK** button.
8. Continue creating the requisition.

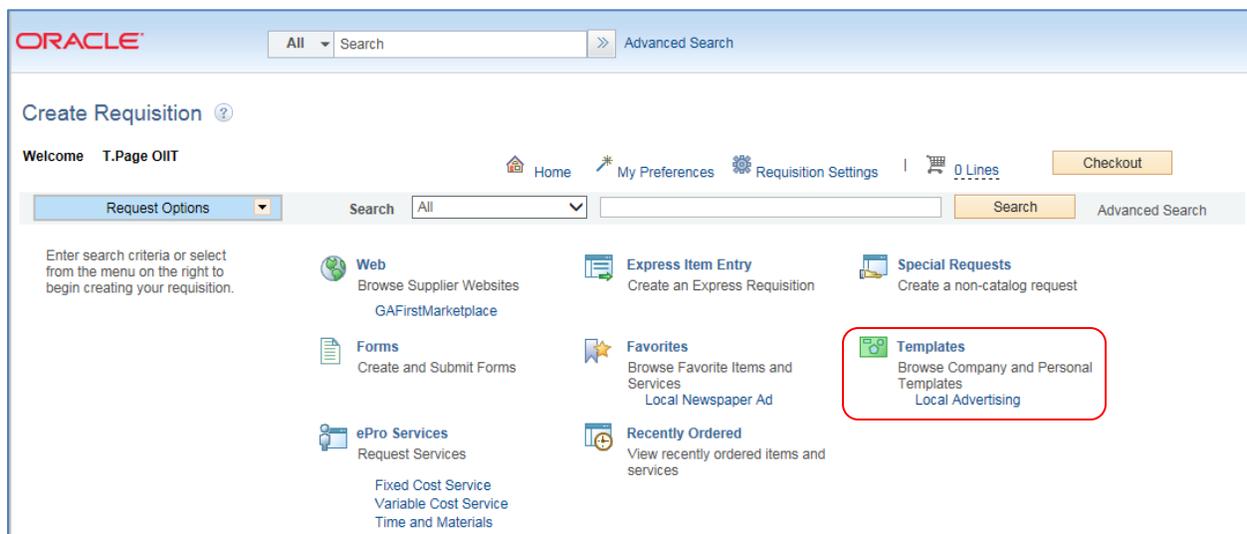
### How To: Delete an Item from Your Favorites List

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

### Special Request Requisition Templates

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

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



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



The screenshot shows the Oracle eProcurement interface for creating a requisition. At the top, there is an Oracle logo and a search bar. Below that, the page title is 'Create Requisition'. There are navigation links for 'Home', 'My Preferences', 'Requisition Settings', and 'Checkout'. A 'Request Options' dropdown menu is visible, and a search bar is present. A 'Quantity' field with an 'Add' button is highlighted with a red box.

### How To: Create a Personal Template for Special Request Requisitions

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisitions**.
3. Select the **Special Requests** link.
4. For each line that you want to enter, complete the following steps (Some fields may have been completed through the requisition defaults; these defaults can be overwritten on this page if needed.):
  - a. Enter an Item Description.
  - b. Enter the Price of the item.
  - c. Enter the Quantity requested.
  - d. Enter or select the Unit of Measure.
  - e. In the Category field, enter or select the NIGP Code for the item.
  - f. Enter or select the Due Date for the item.
  - g. Enter or select the Supplier ID for the item if you have a preferred supplier.
  - h. If you have any information that needs to be sent to the supplier, shown on the receipt, and/or shown on the voucher, enter it in the Additional Information field and select the appropriate checkboxes.
  - i. Select the Add Item button.
  - j. Confirm the Requisition Summary updated with your new requisition line.
  - k. To add an addition requisition line, complete steps 7a through 7k again.
5. Select the **Checkout - Review and Submit** button.
6. Input a **requisition name** that will also serve as the **Template** name.
7. To update a requisition line's distribution information, click its **Expand** button and update the information.
8. To update multiple requisition line's distribution information, select the lines to update with a check mark and then select the Mass Change button. Make the necessary updates, which will update all selected lines.



9. To enter a comment to an individual requisition line, click that line's call out icon. Enter the comments and select where you want the comment to appear.
10. Enter any justification or comments you wish to attach to the requisition in the Justification/Comments field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
11. Select the **Save as Template** checkbox.
12. Click the **Save for Later, then the Preview Approvals** buttons.
13. Your template is now saved. You can continue with the current requisition by submitting it.

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

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisitions**.
3. Select the **Templates** link.
4. Enter the **quantity** of the template you wish to apply.
5. Click the **Add** button.
6. Select the **Checkout - Review and Submit** page link.
7. To update a requisition line's distribution information, click it's Expand button and update the information.
8. To update multiple requisition line's distribution information, select the lines to update with a check mark and then select the Mass Change link. Make the necessary updates, which will update all selected lines.
9. To enter a comment to an individual requisition line, click that line's call out icon. Enter the comments and select where you want the comment to appear.
10. Enter any justification or comments you wish to attach to the requisition in the Justification/Comments field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
11. Click the **Save for later, then the Preview Approvals** button.
12. Insert any ad hoc approvers as necessary.
13. Click the **Submit** button.



## Chapter 8: Desktop Receiving

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

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

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

### **Desktop Receiving**

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

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



ORACLE  Search

**Receive Items**

You have 76 lines open for receiving

and go to the Receive Form.

Desktop Receiving should not be used for Receipt of Assets.  
Request the appropriate staff on your campus to create a PO Receipt instead

Requisition Lines to Receive Personalize | Find | View All |  | First 1-25 of 76 | Last

Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Part# Z4-0471001 P3364V Network Cameras with Audio built in		9	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Part# License and Support ONSSI Software License with 3-Year Support		9	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Part# CMP-00424IBDN-RB-05 Belden Cat 6 Yellow		2	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Part# MM07-AXC6-05 Cat6 Patch Cords Yellow		9	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Part# TS-100010C Cat6 RJ45 Conn		1	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Part# LH-TBC33 1/8x3 Toggle		1	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Freight		1	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Warranty		1	0	EA	RECEIVING			CONVERGINT-001	
<input type="checkbox"/>	71000 Convergent Cks Jagspot Cameras	Labor		1	0	EA	RECEIVING			CONVERGINT-001	

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

ORACLE  Search

**Receive Items**

**New Receipt**

\*Business Unit

Receipt Status

\*Received Date

[Reject Shipment](#)

Receipt Lines  Personalize | Find | View All |  | First 1 of 1 | Last

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty	PO	Cancel Line
1		Part# Z4-0471001 P3364V	<input type="text" value="9.0000"/>	EA	9.0000	<input type="button" value="Details"/>	<input type="button" value="Receipt"/>		N			<input type="button" value="PO"/>	<input type="button" value="Cancel Line"/>

[Add New Receipt](#)   [Manage Return To Supplier](#)   [Inquire Receipts](#)

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



ORACLE

All Search >> Advanced Search

### Receipt Saved Successfully

You have saved receipt # 0000522114 containing the following items:

Receipt Lines				
Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity
1	Part# Z4-0471001 P3364V Network Cameras with Audio built in	9.0000		9.0000

Return to Manage Requisitions      Return to Receiving

**How To: Create a Desktop Receipt**

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

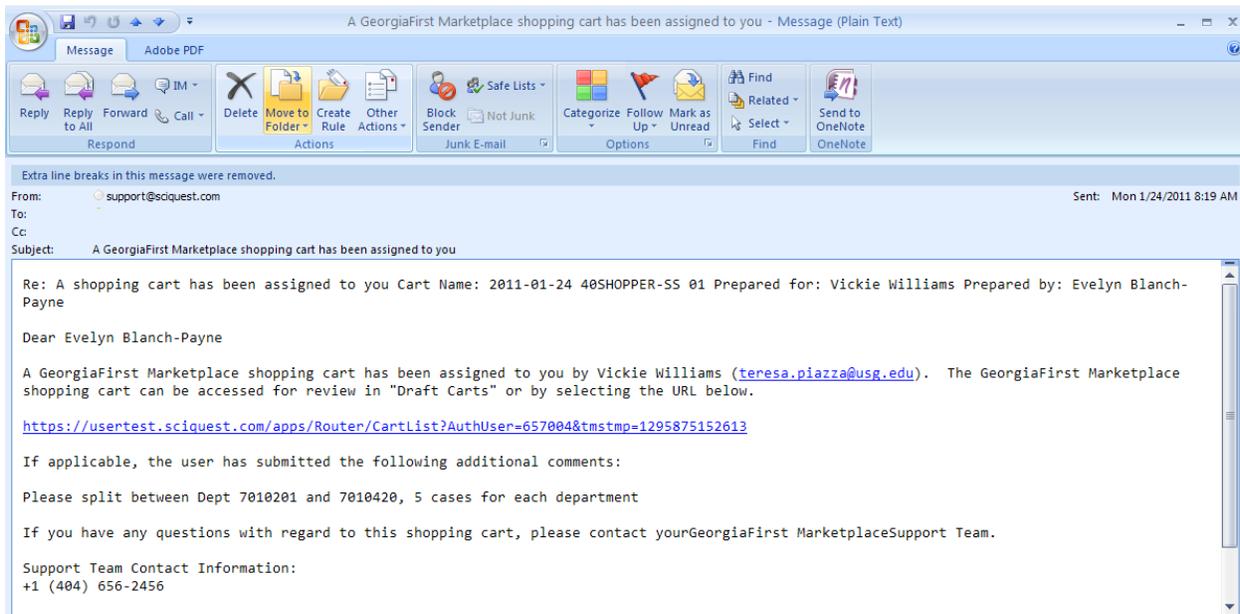


## Chapter 9: Requester Notifications

To help you manage requests for goods, the eProcurement and GeorgiaFIRST Marketplace systems employ the use of automatic emails to provide notifications to you throughout the process.

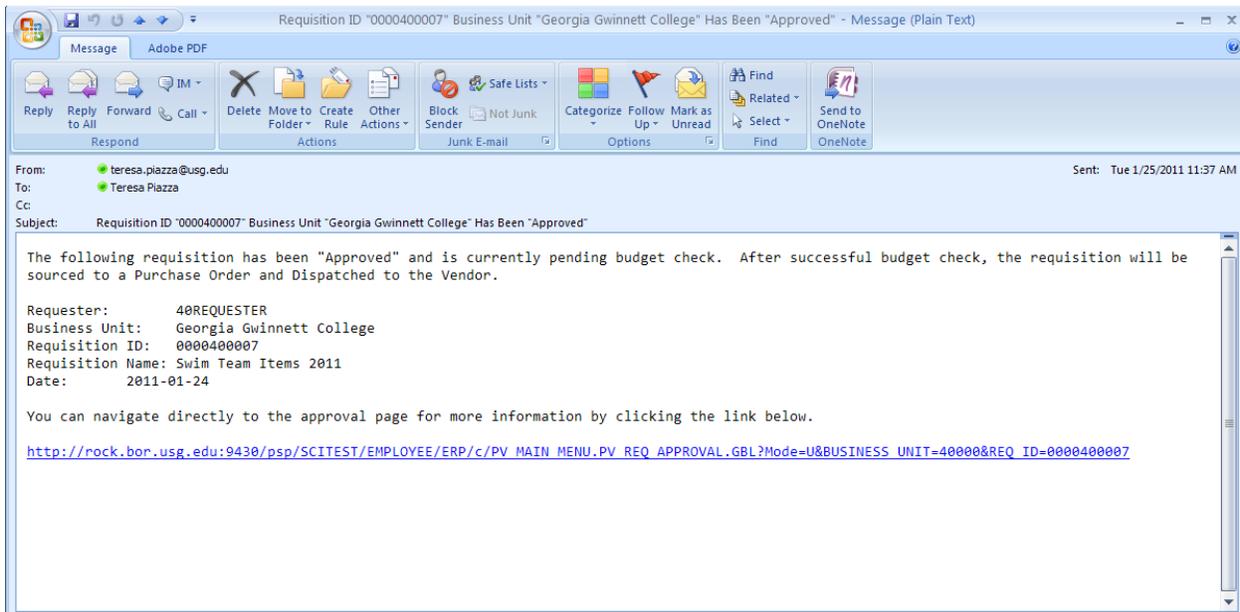
### **Requester Notification #1: You have been assigned a shopping cart**

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



### **Requester Notification #2: Your Requisition Has Been Approved**

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



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. If your Shopper receives notification that a requisition has been denied, they have been instructed to forward the message to you. Denied requisitions can be edited and resubmitted when necessary.

### **Notification #3: Your Requisition Items Need to be Received**

Once your requisition has been turned into a purchase order and dispatched to the 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. If a receipt is required and has not been entered into the system yet, you may receive an email indicating that you need to "receive" your items in the system.

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



## Chapter 10: Searching for Items in the GeorgiaFIRST Marketplace

As a Requester, you may sometimes need to create your own shopping cart in the GeorgiaFIRST Marketplace and pull it into a requisition. In addition, you may need to edit an assigned shopping cart that you are working with. To search for items in the GeorgiaFIRST Marketplace, you need to know how to use its search functions. In this chapter, we will review most of these. After using the marketplace for a while, you will find the search method with which you are most comfortable.

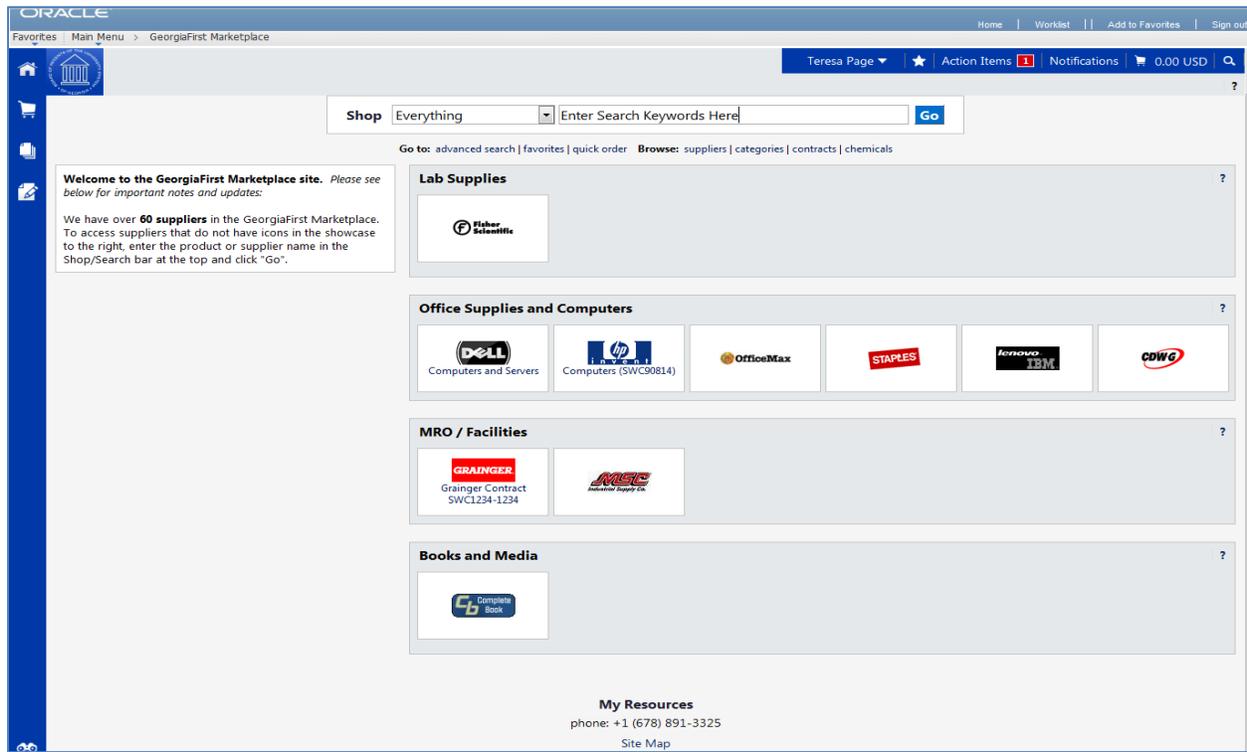
Before we discuss what search options are available, let's take a minute to review what is available to be searched. First, GeorgiaFIRST Marketplace has "hosted catalogs." A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with 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 GeorgiaFIRST 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 GeorgiaFIRST 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 GeorgiaFIRST Marketplace. With the Simple Search feature, you can search through everything or you can search by product category. By default, the search will occur across all product categories (“Everything”). All of the words that you enter in the keyword textbox must be found in the items displaying in the product search results. After entering the keywords, click the “Go” button or press “Enter” on your keyboard.

When performing a simple search, the system looks through many different things in order to find the most relevant search results. This includes looking through Keywords and Item information.

GeorgiaFIRST Marketplace System Administrators enter keywords to help guide users to the correct contract, supplier and favorite items. Item Information includes the following:

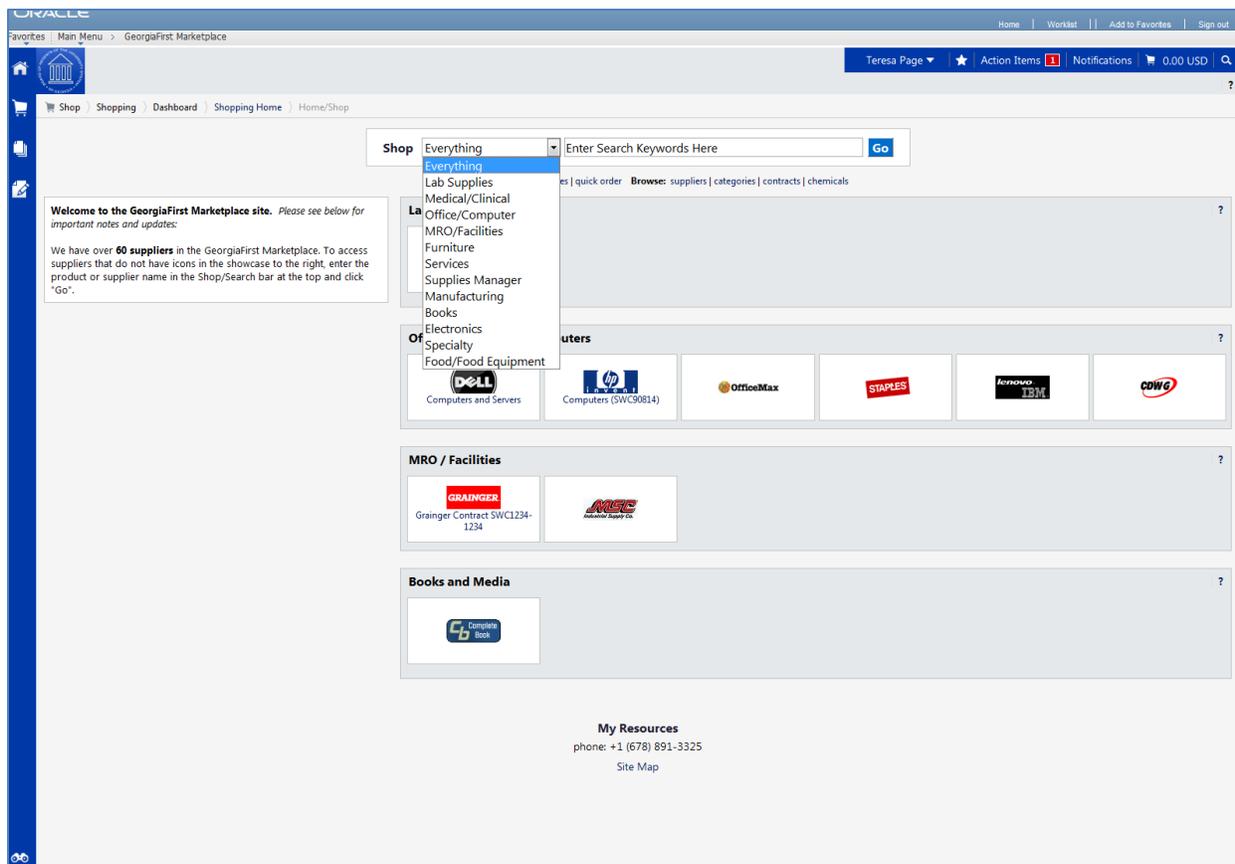
- Product Description
- Product Category/Sub Category
- Supplier (Supplier)
- Manufacturer Name and Manufacturer Part Number



- 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

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

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



We recommend that you first search by product category when searching for an item. If you do not find what you are looking for, then search “Everything.”

Once the marketplace retrieves your search results, you can use the filter options to refine your results. Primarily, you can use the filter options for “Custom Attributes” to see those items on a state contract, agency contract, etc.

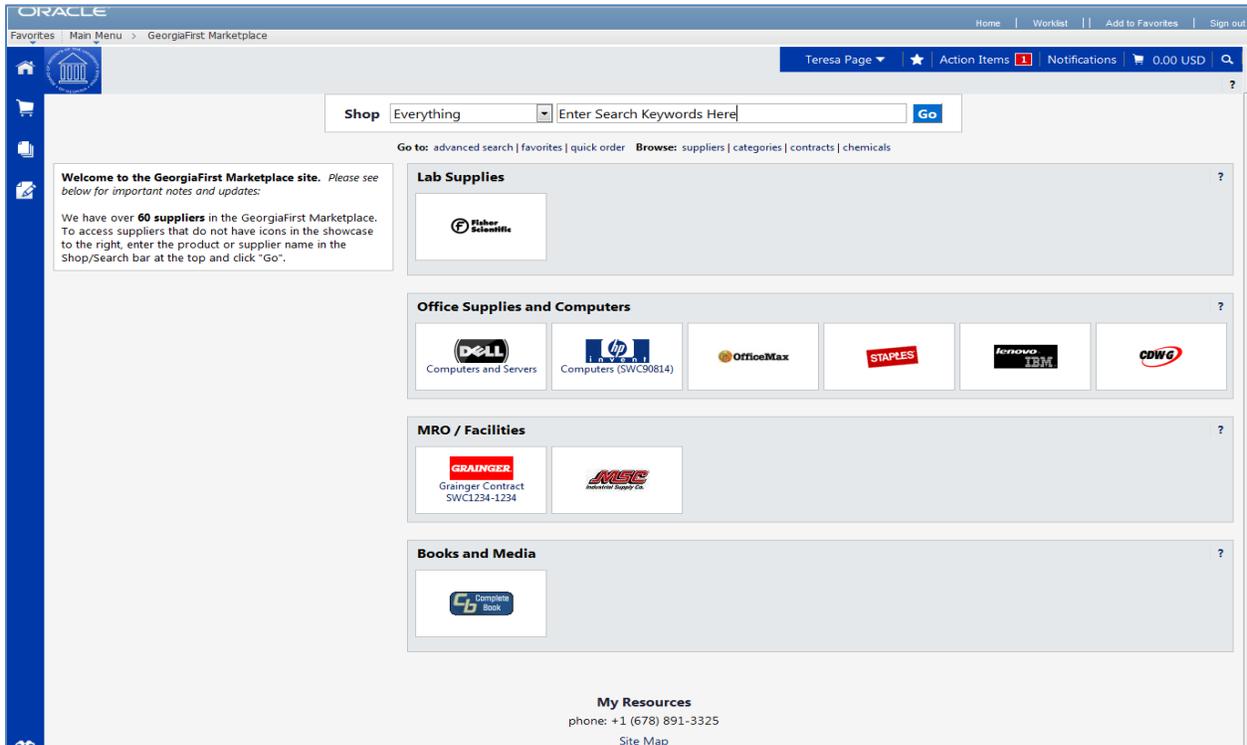
### How To: Perform a Simple Search

1. Start From the GeorgiaFIRST Marketplace **home/shop** page.
2. Select the appropriate **Product Category** (optional).
3. Enter one or more **keywords**.
4. Press the **Go** button.

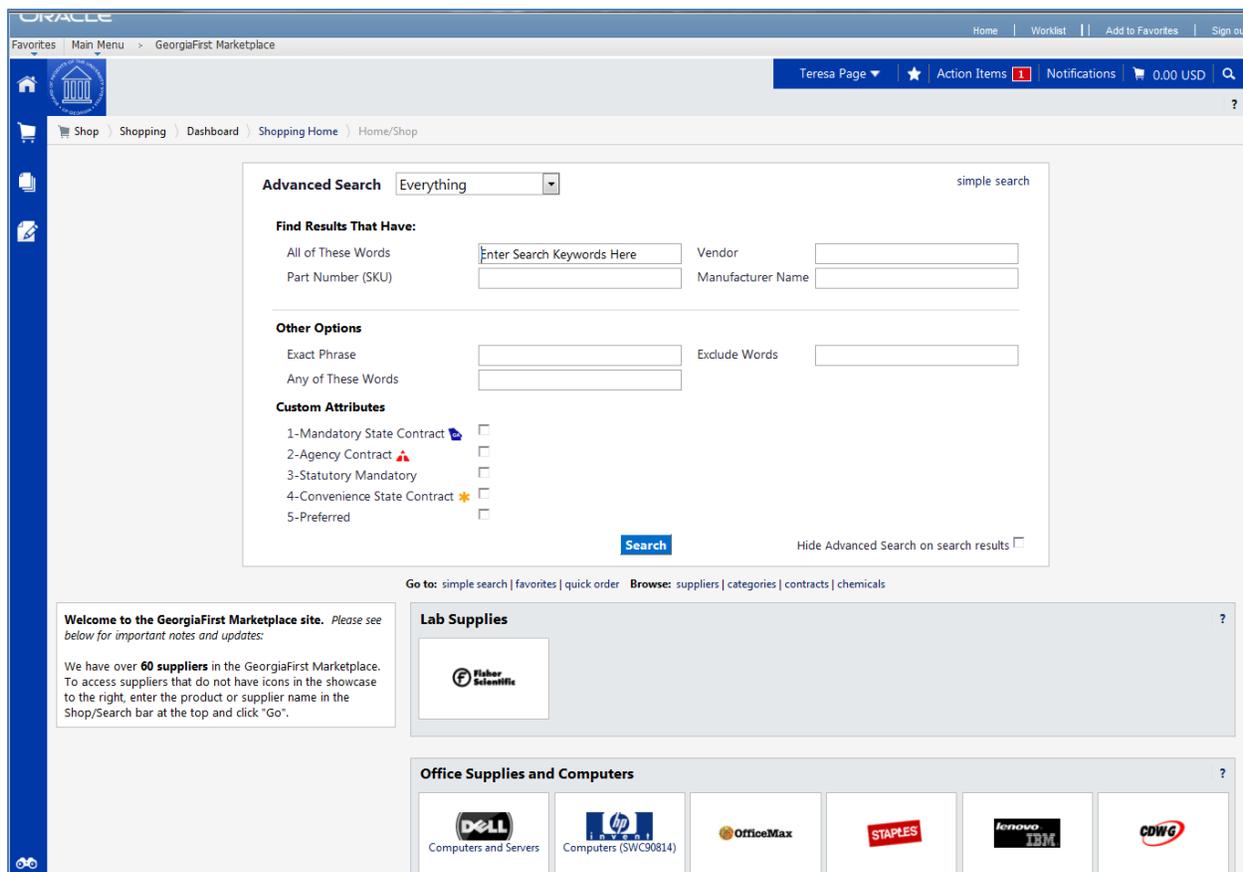


## Using Advanced Search

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



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



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

Search Criteria Field	Description
<b>All of These Words</b>	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.
<b>Part Number (SKU)</b>	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.



Search Criteria Field	Description
	<p>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 Number, Manufacturer Part Number, Alternate Part Number, Client Catalog Number, and Custom Catalog Number.</p>
<b>CAS No.</b>	<p>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.</p>
<b>Product Class</b>	<p>This field is only available for Lab Supplies and provides a more detailed level of categorical search.</p>
<b>Product Size</b>	<p>Enter the units for the product size and select the dimension of the units from the pull-down menu. For example, enter “500” for units and select “mL” from the pull-down for a product size of 500mL. This is available only in the Lab Supplies category.</p>
<b>Supplier Name</b>	<p>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.</p>
<b>Manufacturer Name</b>	<p>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 GeorgiaFIRST Marketplace. Enter multiple manufacturer names to limit results to a set of certain manufacturers. Only the manufacturer field is searched for matches.</p>
<b>Exact Phrase</b>	<p>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.</p>
<b>Exclude Words</b>	<p>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.</p>



Search Criteria Field	Description
<b>Any of These Words</b>	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
- Statutory Preferred

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

When executing your search, select the “Hide Advanced Search on search results” checkbox if you want 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.



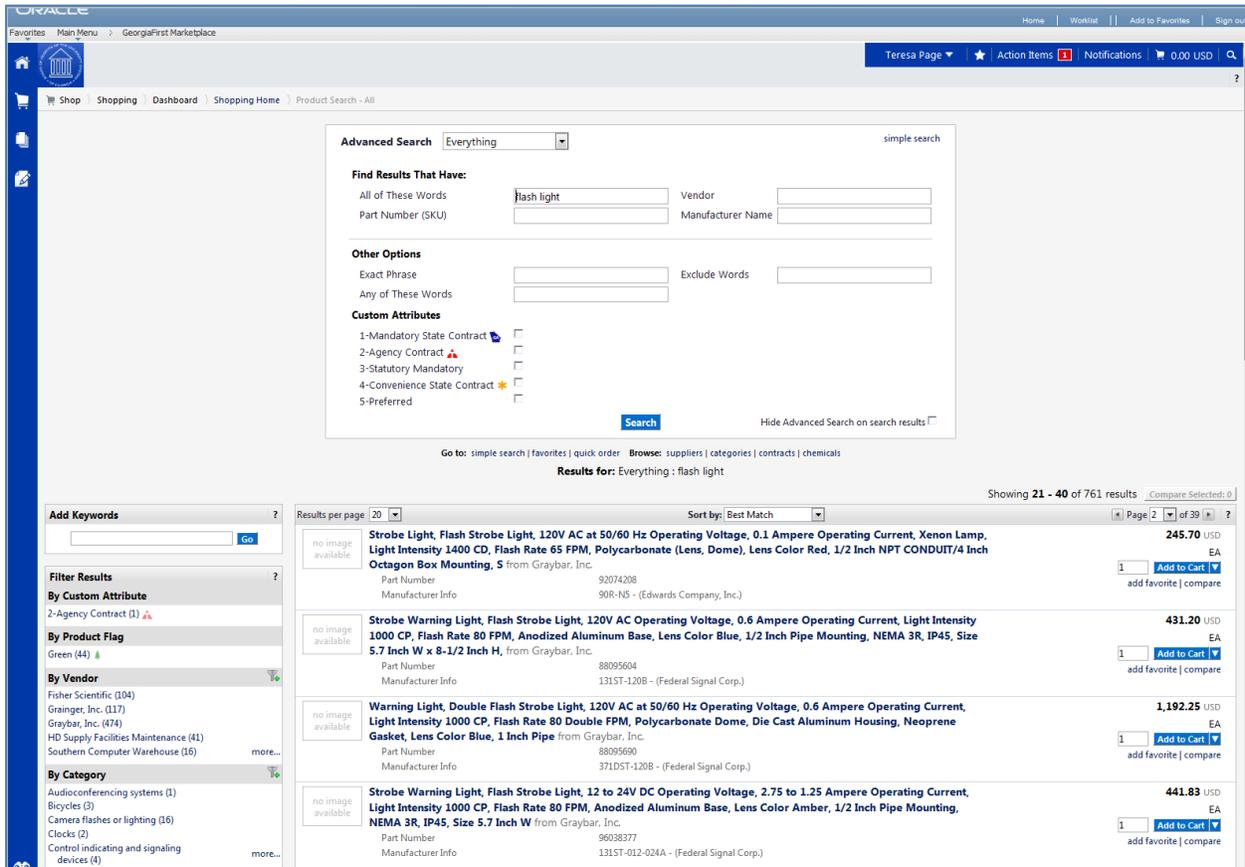
### How To: Perform an Advanced Search

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



### Search Result Details

Search results display below the Simple and Advanced Search.



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

Search Results	Description
<b>Search Listing</b>	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.
<b>Showing</b>	After the search is performed, you can see how many items are displayed from the overall total of results.
<b>Sort By</b>	After the search is performed, you can choose to re-sort the data by part number, product description, price, etc.,
<b>Refining the Search through Keywords</b>	GeorgiaFIRST 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.



Search Results	Description
<b>Refining the Search through Filters</b>	GeorgiaFIRST 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.
<b>Icon Definitions</b>	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.
<b>Comparing Items in Search Results</b>	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.
<b>Access Additional Pages and Changing Items per Page</b>	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.



**Filter Results** ?

**By Custom Attribute**  
2-Agency Contract (164) ▲

**By Product Flag**  
Recycled (2) ♻️

**By Supplier** 📏  
Grainger (21)  
Office Depot (87)  
Staples (77)

**By Category** 📏  
Binder or bulldog clips (34)  
Clasp fasteners (1)  
Clip holders or dispensers (26)  
Desktop trays or organizers (6)  
Folders (1) more...

**By Packaging UOM** 📏  
BG (1)  
BX (30)  
1/BX (8)  
12/BX (5)  
24/BX (1) more...

**By Result Type**  
Products (185)

**By Manufacturer Name** 📏  
3M CORPORATION (1)  
ACCO (24)  
ADVANT (9)  
APPROVED VENDOR (8)  
Baumgarten's (3) more...

**Filtering Results**

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

**Filter Results** ?

**By Custom Attribute**  
2-Agency Contract (164) ▲

**By Product Flag**  
Recycled (2) ♻️

**By Supplier** 📏  
Grainger (21)  
Office Depot (87)  
Staples (77)

**By Category** 📏  
Binder or bulldog clips (34)  
Clasp fasteners (1)  
Clip holders or dispensers (26)  
Desktop trays or organizers (6)  
Folders (1) less...  
Paper clips (107)  
Paper or pad holder or dispensers (1)  
Pen or pencil holders (1)  
Report covers (4)  
Self adhesive fasteners (2)  
Wall or board clips (2)

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

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

**Filter Results** ?

**By Custom Attribute**  
2-Agency Contract (164) ▲

**By Product Flag**  
Recycled (2) ♻️

**By Supplier** 📏  
Grainger (21)  
Office Depot (87)  
Staples (77)

**By Category** 📏  
Binder or bulldog clips (34)  
Clasp fasteners (1)  
Clip holders or dispensers (26)  
Desktop trays or organizers (6)  
Folders (1)  
Paper clips (107)

**Filter By Category** X

Paper or pad holder or dispensers (1)  
 Pen or pencil holders (1)  
 Report covers (4)  
 Self adhesive fasteners (2)  
 Wall or board clips (2)

**Filter** **Cancel**



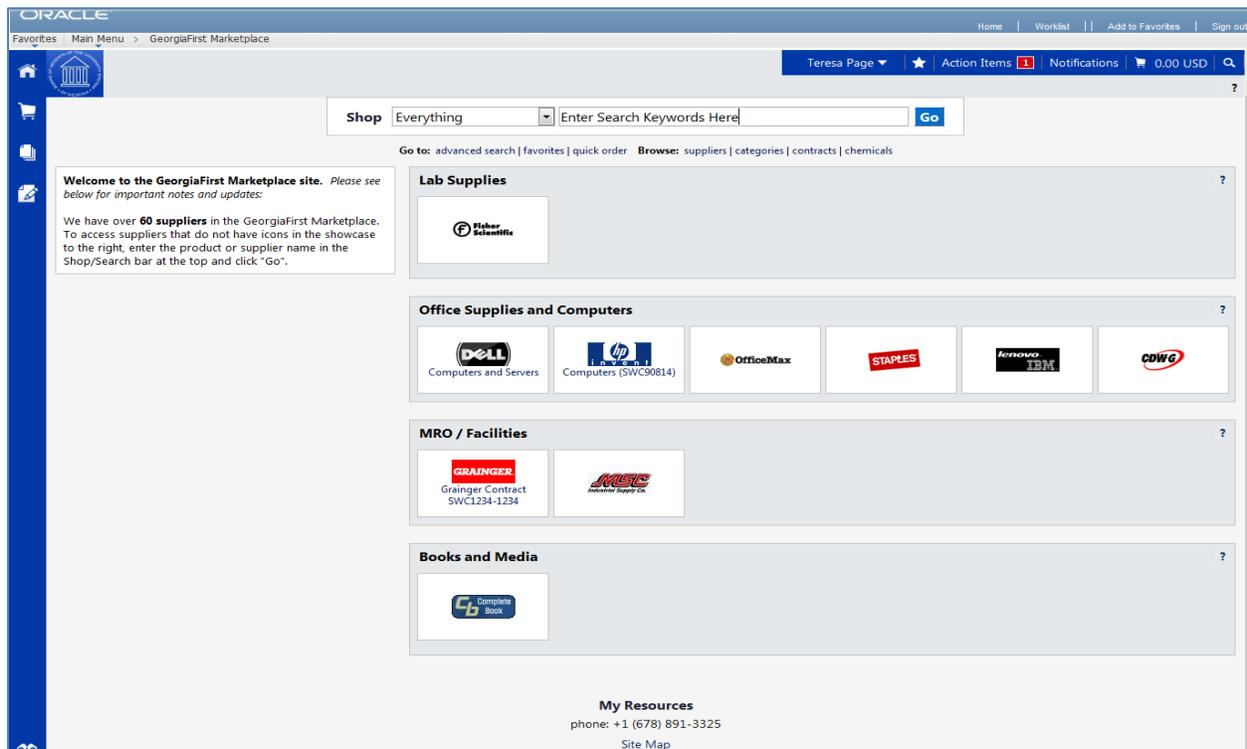
If you want to remove a filter, click the **remove selected filter** icon (funnel with red minus sign).

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



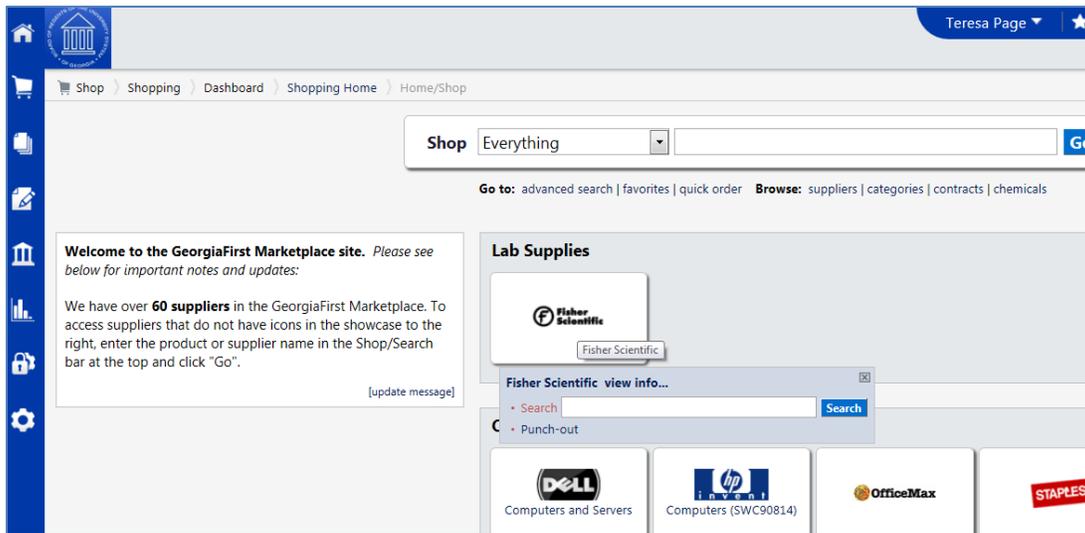
## Searching from the Purchasing Showcase

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

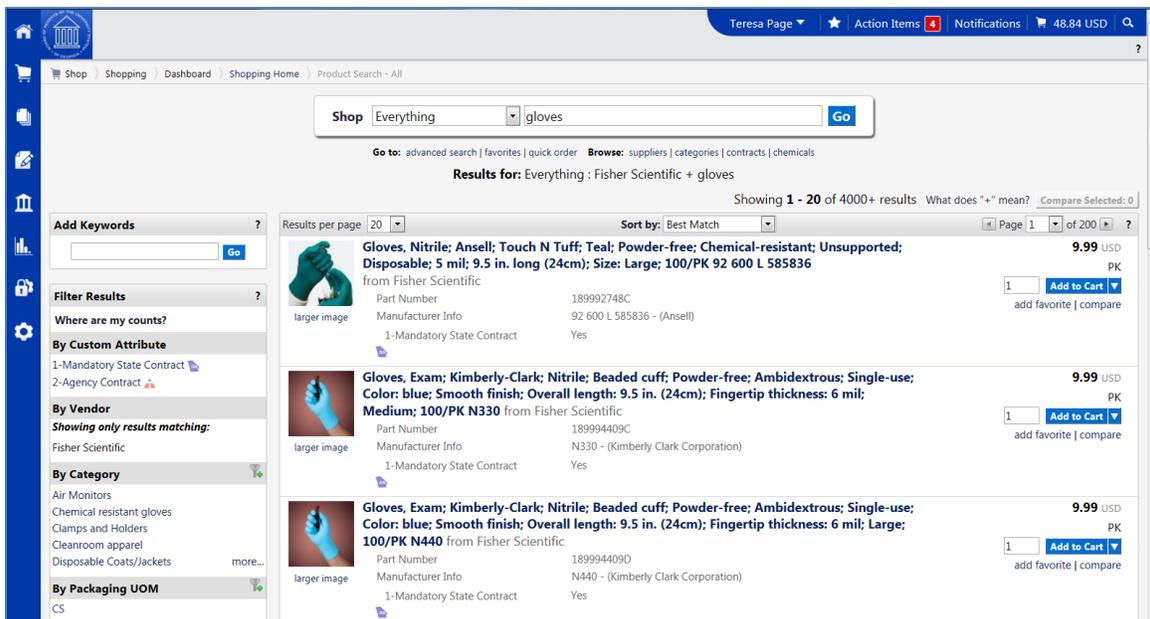


## How To: Search from a Showcased Supplier

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



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



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



**Browse by Supplier**

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

The screenshot shows the Oracle eProcurement interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, a breadcrumb trail reads 'Shop > Shopping > Browse By > Suppliers > Browse by Vendor'. A search box titled 'Search For Vendor' is present, with fields for 'Vendor' and 'Vendor Type' (set to 'All') and a 'Search' button. Below the search box, it says 'Showing 1 - 20 of 239 results'. The results are displayed in a table with columns for 'Vendor Name', 'Type', and 'Preference'. The table is split into two columns for readability. The first column lists vendors like '1st Coast Printing', '3 Order 2 Remit 2 bus and fax', 'A Legendary Event', 'A&D Painting, Inc', 'A. Daigger & Co.', 'ABC Sign Group', 'Ace Glass Inc.', 'Activate the Space', 'Adrenalin Powerports, Inc.', and 'Advanced Backflow Technologies'. The second column lists vendors like 'Advanced Business Supplies', 'Agilent Technologies, Inc.', 'Airgas South', 'Airgas South', 'All Star Screen Printing LLC', 'Allgood Pest Solutions', 'Alligare, LLC', 'Allmond, Sarah E', 'American Facility Services', and 'AMERIPRESS'. Each row has a red square icon in the 'Type' column and a 'Preference' column. At the bottom of the table, there are controls for 'Results per page' (set to 20) and 'Page 1 of 12'.

Vendor Name	Type	Preference	Vendor Name	Type	Preference
1st Coast Printing	<input type="checkbox"/>		Advanced Business Supplies	<input type="checkbox"/>	
3 Order 2 Remit 2 bus and fax	<input type="checkbox"/>		Agilent Technologies, Inc.	<input type="checkbox"/>	
A Legendary Event	<input type="checkbox"/>		Airgas South	<input type="checkbox"/>	
A&D Painting, Inc	<input type="checkbox"/>		Airgas South	<input type="checkbox"/>	
A. Daigger & Co.	<input type="checkbox"/>		All Star Screen Printing LLC	<input type="checkbox"/>	
ABC Sign Group	<input type="checkbox"/>		Allgood Pest Solutions	<input type="checkbox"/>	
Ace Glass Inc.	<input type="checkbox"/>		Alligare, LLC	<input type="checkbox"/>	
Activate the Space	<input type="checkbox"/>		Allmond, Sarah E	<input type="checkbox"/>	
Adrenalin Powerports, Inc.	<input type="checkbox"/>		American Facility Services	<input type="checkbox"/>	
Advanced Backflow Technologies	<input type="checkbox"/>		AMERIPRESS	<input type="checkbox"/>	



### How To: Browse for Items by Supplier

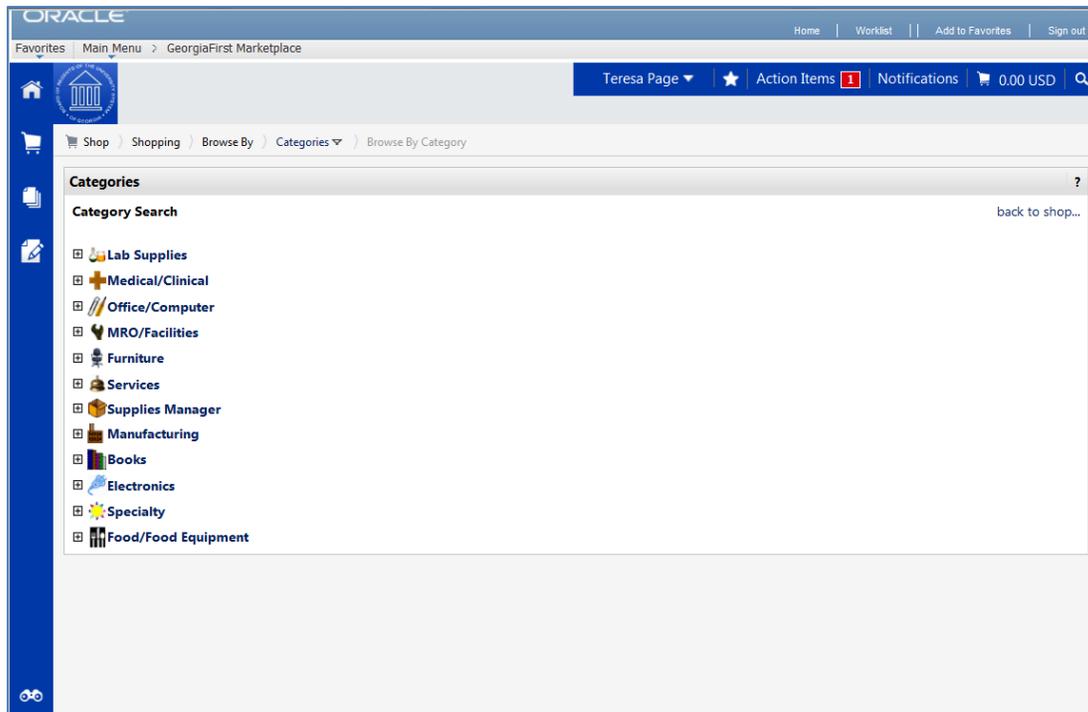
1. From the GeorgiaFIRST Marketplace **home/shop** page, select the **Browse: suppliers** link.
  - a. By default, all suppliers display. Suppliers are listed in alphabetical order with preference suppliers displaying first.
2. To search for a specific supplier, click on the **expand** icon (+) to the left of “Click to expand Search for Supplier Filter.”
3. To view all suppliers click the **Search** button.
4. To search by supplier name or supplier information, enter the appropriate information in the Supplier Name field. The supplier search allows for a “contains” name search.
5. From the **Supplier Type** drop down list, select to view **Hosted Catalog Suppliers**.
6. Click the **Search** button.
7. Select the supplier from the results by selecting the **Supplier Name**. The supplier information and categories display.
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 instead of viewing one supplier’s table of contents, all supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section.

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



### How To: Browse for Items by Category

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



## 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.

Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add to Cart	Qty <input type="text" value="1"/> <a href="#">Add to Cart</a>	Qty <input type="text" value="1"/> <a href="#">Add to Cart</a>	Qty <input type="text" value="1"/> <a href="#">Add to Cart</a>	Qty <input type="text" value="1"/> <a href="#">Add to Cart</a>
Product Details	PAD LEGAL 6/PK WE [UNITED STATIONERS SUPPLY CO NM/500018-230] Pad,Legal,6/Pk,We	PAD J. LEGAL 6/PK WE [UNITED STATIONERS SUPPLY CO NM/500018-225] Pad,Jr, Legal,6/Pk,We	PAD YELLOW LEGAL RULED	PAD LEGAL WIDE RULE 50SHEETS [W B MASON CI/COUNV20630ALK]
Catalog No.	500018-230 (PK)	500018-225 (PK)	TX982820 (EA)	COUNV20630ALK (EA)
Price	29.67 USD	21.24 USD	1.60 USD	0.01 USD
Vendor	VWR International	VWR International	VWR International	VWR International
Category	General Laboratory Safety Equipment	General Laboratory Safety Equipment	TLC Aluminum Plates	TLC Aluminum Plates
UOM	----	----	----	----
Price per UOM	29.67 USD / unit	21.24 USD / unit	1.60 USD / unit	0.01 USD / unit



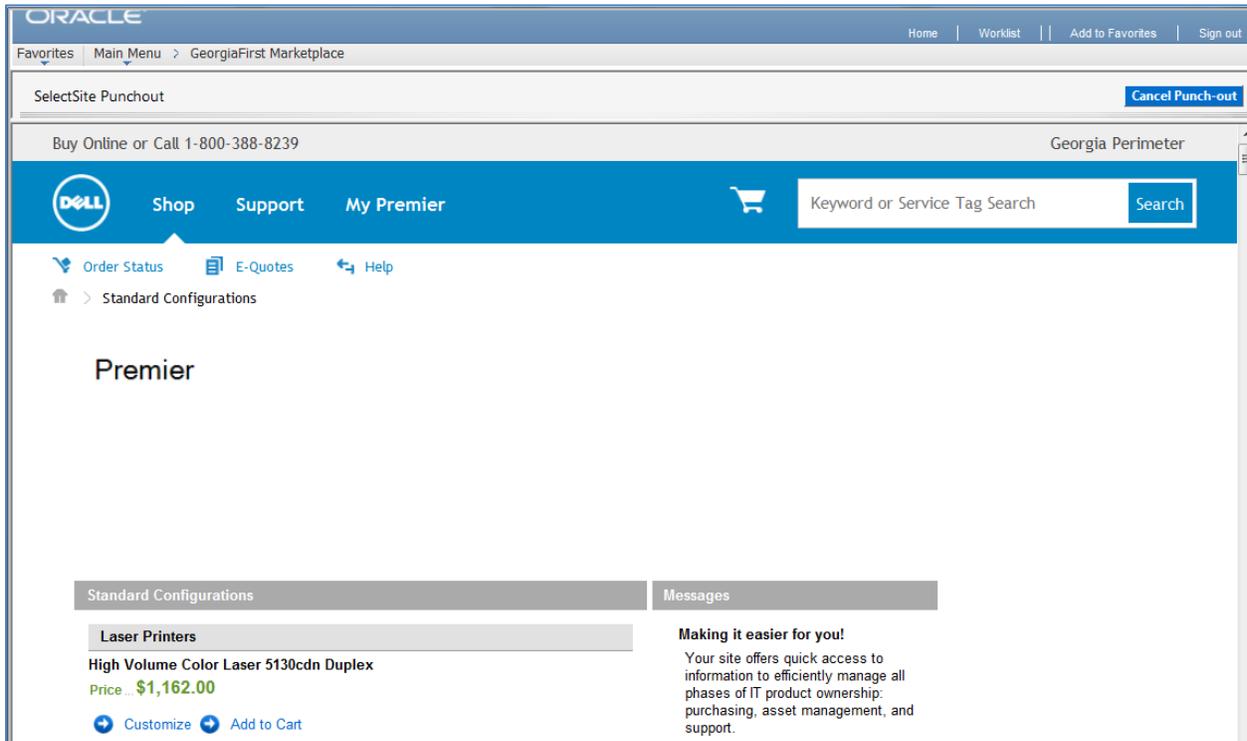
### How To: Compare Products Side-by-Side

1. From the GeorgiaFIRST Marketplace **home/shop** page, search for an item using your preferred search method.
2. From the search results, click the **compare** hyperlink for each item you want to include in the comparison. To remove an item from comparison, while on the **Search Results** page, select the **remove** hyperlink.
3. Note: Items across multiple pages can be selected. Once one or more items are selected, the **Compare Selected** button will activate.
4. Continue to select items for comparison. Once all items are selected, click the **Compare Selected** button at the top of the search results.
5. The **Product Comparison** page lists all of the products selected for comparison. Product attributes are shown on the left side of the page. Scroll down to review the information for each item/attribute.
6. To remove a product from the Product Comparison page:
  - a. Click the **check box** at the top of the product
  - b. Select the **Remove** action from drop down list
  - c. Click the **Go** button
7. Click on the **supplier** hyperlink for an item for more information about that supplier. Here you can see supplier and contract information.
8. Click the **more information URL** to view a detailed product description.
9. Click the **Add to Cart** icon to add the item directly to your shopping cart.
10. Click the **Back to Search Results** button to go back to your original search results and cancel the product comparison. From here, additional products can be selected for comparison.



## Searching from Punch-Out Suppliers

In addition to searching supplier-hosted catalogs that are loaded into the GeorgiaFIRST Marketplace, you can also search for items via punch-out suppliers. When accessing a punch-out supplier via the GeorgiaFIRST 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

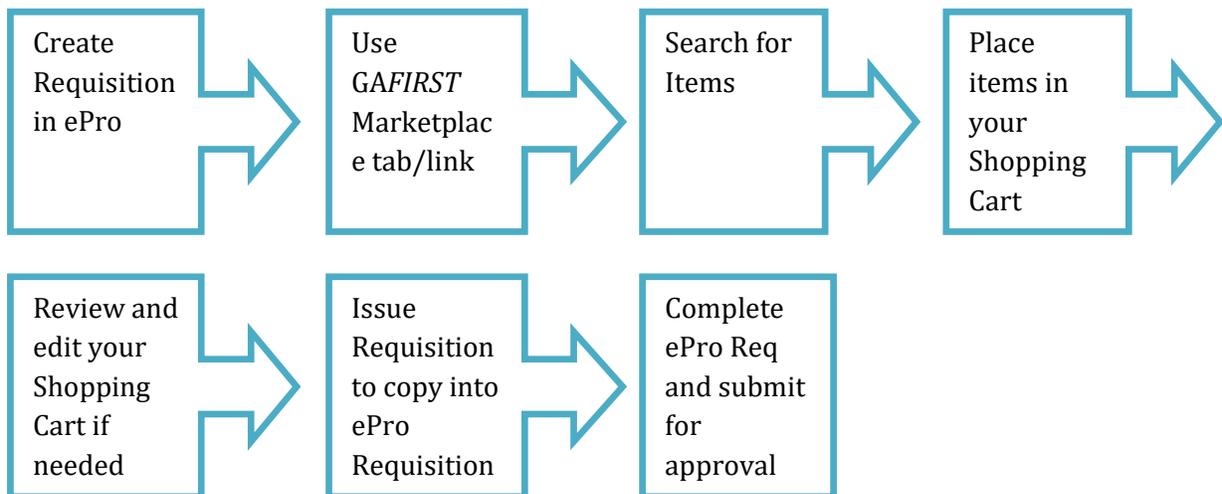
1. From the GeorgiaFIRST Marketplace **home/shop** page, click on the **Punch-Out supplier** from the Punch-Out section.
2. The system will redirect you to that supplier's webpage.
3. If you decide that you did not want to search from the punch-out supplier, select the **Cancel Punch-out** button in the upper right corner of the screen. This will take you back to the GeorgiaFIRST Marketplace.
4. Search for your items through the Punch-out supplier's website. The specific steps for searching and selecting items will be different for each punch-out supplier.
5. Select your items using the punch-out supplier's tools (i.e., "Add to Cart," "Add Item," etc.).
6. After selecting your items, proceed to the punch-out supplier's checkout. Check out of the punch out site. Checking out will be different for each supplier. For example, in the Dell punch-out site, when you are ready to pull your selected items into your GeorgiaFIRST Marketplace shopping cart, you select the "Create Order Requisition" button within the Dell punch-out site, and then choose "Submit Order Requisition". This action places the items you selected into your GeorgiaFIRST Marketplace shopping cart. An order is NOT placed with the supplier when checking out of a punch-out site.
7. After checking out of the punch-out supplier's website, the system returns you 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 11: Creating Your Own Marketplace Requisition

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

The process that you will follow is shown here:



### Active vs. Draft Carts

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

If you have started creating a cart, you can locate it within the **Shopping Cart** icon, then **My Carts and Orders** link, then **Open My Active Shopping Cart** link. You can locate all of your carts under the My Carts and Orders link, and then under the “View Draft Shopping Carts” sub-link. Even your active cart will be listed here. The current active cart will have a colored background with its shopping cart icon.

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



## Adding an Item to a Cart

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

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

The screenshot shows the Oracle GeorgiaFIRST Marketplace interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, a user profile for 'Teresa Page' is visible along with 'Action Items' (1), 'Notifications', and a shopping cart icon showing '0.00 USD'. The main content area features a search bar with 'legal pad' entered and a 'Go' button. Below the search bar, there are links for 'Go to: advanced search | favorites | quick order' and 'Browse: suppliers | categories | contracts | chemicals'. The search results are displayed as follows:

Results for: Everything : legal pad		Showing 1 - 6 of 6 results	
<p>no image available</p> <p><b>PAD YELLOW LEGAL RULED</b> from VWR International</p> <p>Part Number TX982820 (EA)</p> <p>Manufacturer Info AMP20020 - (STAPLES BUSINESS ADVANTAGE NO)</p>	<p>1</p> <p><b>Add to Cart</b></p> <p>add favorite   compare</p>	<p><b>1.60</b> USD</p> <p>EA</p>	<p>Page 1 of 1</p>
<p>no image available</p> <p><b>PAD LEGAL WIDE RULE 50SHEETS [W B MASON CI/COUNV20630ALK]</b> from VWR International</p> <p>Part Number COUNV20630ALK (EA)</p> <p>Manufacturer Info UNV20630 - (W B MASON CI)</p>	<p>1</p> <p><b>Add to Cart</b></p> <p>add favorite   compare</p>	<p><b>0.01</b> USD</p> <p>EA</p>	

On the left side of the search results, there are filter options: 'Add Keywords', 'Filter Results' (By Vendor: Grainger, Inc. (2), VWR International (4); By Category: General Laboratory Safety Equipment (2)).

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



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

[Close](#)

---

**PAD YELLOW LEGAL RULED**

Supplier: VWR International	Preferred location: Fulfillment Address 1 <small>change preference show all locations</small>
Part Number: TX982820 (EA)	Price: 1.60 USD
Manufacturer Name: STAPLES BUSINESS ADVANTAGE NO	Quantity: <input type="text" value="1"/>
Manufacturer Part Number: AMP20020	<b>Add To Active Cart</b> <input type="button" value="Go"/>
System Packaging: EA	

---

**Product Details** ?

Vendor UOM:	EA
Vendor Size:	0
Buyer UOM:	EA
Alternate Part Numbers:	TX982820
Category:	TLC Aluminum Plates
Category UNSPSC:	41-11-57-00
Color:	
Direct Factory Ship:	N
Hazardous Material:	N
Image URL:	<a href="https://www.vwrsp.com/catalog/produ...">https://www.vwrsp.com/catalog/produ...</a>
Lead Time:	3-5 days
More Information URL:	<a href="http://www.vwrsp.com/catalog/produ...">http://www.vwrsp.com/catalog/produ...</a>
Product Weight:	1.00
UNSPSC:	41-11-57-00
PAD YELLOW LEGAL RULED	

---

**Vendor Details** ?

**VWR International**  
1310 Goshen Pkwy.  
West Chester, PA 19380 US

Phone No.:	+1 (610) 429-2728 +1 (800) 932-5000
Fax No.:	+1 (610) 436-1761
Web Site URL:	<a href="http://www.vwrsp.com">www.vwrsp.com</a>

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



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

The screenshot shows the Oracle eProcurement interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, a user profile for 'Teresa Page' is visible along with 'Action Items' (1), 'Notifications', and '1.60 USD'. The main content area is titled 'Product Comparisons' and includes a '<< Back to Search Results' button. A table compares two products:

Select	<input type="checkbox"/>	<input type="checkbox"/>
<b>Add to Cart</b>	Qty <input type="text" value="1"/> <b>Add to Cart</b>	Qty <input type="text" value="1"/> <b>Add to Cart</b>
<b>Product Details</b>	PAD YELLOW LEGAL RULED	PAD LEGAL WIDE RULE 50SHEETS [W B MASON CI/COUNV20630ALK]
<b>Catalog No.</b>	TX982820 (EA)	COUNV20630ALK (EA)
<b>Price</b>	1.60 USD	0.01 USD
<b>Vendor</b>	VWR International	VWR International
<b>Category</b>	TLC Aluminum Plates	TLC Aluminum Plates
<b>UOM</b>	----	----
<b>Price per UOM</b>	1.60 USD / unit	0.01 USD / unit
<b>Product Size</b>	----	----
<b>Price per Product Size Unit</b>		

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

## How To: Add Items from a Punch-Out Supplier

1. From the GeorgiaFIRST Marketplace home page, select the **Punch-Out supplier** by clicking on its name or icon in the Punch Out section.
2. The marketplace redirects you to the supplier's punch-out site.
3. Search for products and add products to the cart in the supplier's punch-out (this process varies from punch-out to punch-out).
4. Use the supplier's mechanism to return products to the GeorgiaFIRST Marketplace (this process again varies from punch-out to punch-out).
5. Upon returning to the GeorgiaFIRST Marketplace, the selected items will have been placed 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 number of items in the cart, and the total cart amount. Click this shortcut to go directly to the cart page where the cart details can be reviewed and updated.

The screenshot displays the Oracle eProcurement Shopping Cart interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this, a breadcrumb trail shows 'Favorites | Main Menu > GeorgiaFirst Marketplace'. The main header area includes 'Teresa Page', 'Action Items 1', 'Notifications', and '1.60 USD'. The cart is titled 'Shopping Cart for Teresa Page' and shows '1 Item(s) for a total of 1.60 USD'. A text input field contains the cart name '2013-12-23 OIIIPAGE 01'. Below the cart name, there are buttons for 'Add to Favorites', 'Remove', and 'More Actions'. The cart item is 'PAD YELLOW LEGAL RULED' with a unit price of 1.60 USD and a quantity of 1. The total is 1.60 USD. The page also shows the fulfillment address for VWR International: '1310 Goshen Pkwy., West Chester, PA 19380 US'. At the bottom right, there is a 'view cart history' link.

## Shopping Cart Name

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

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

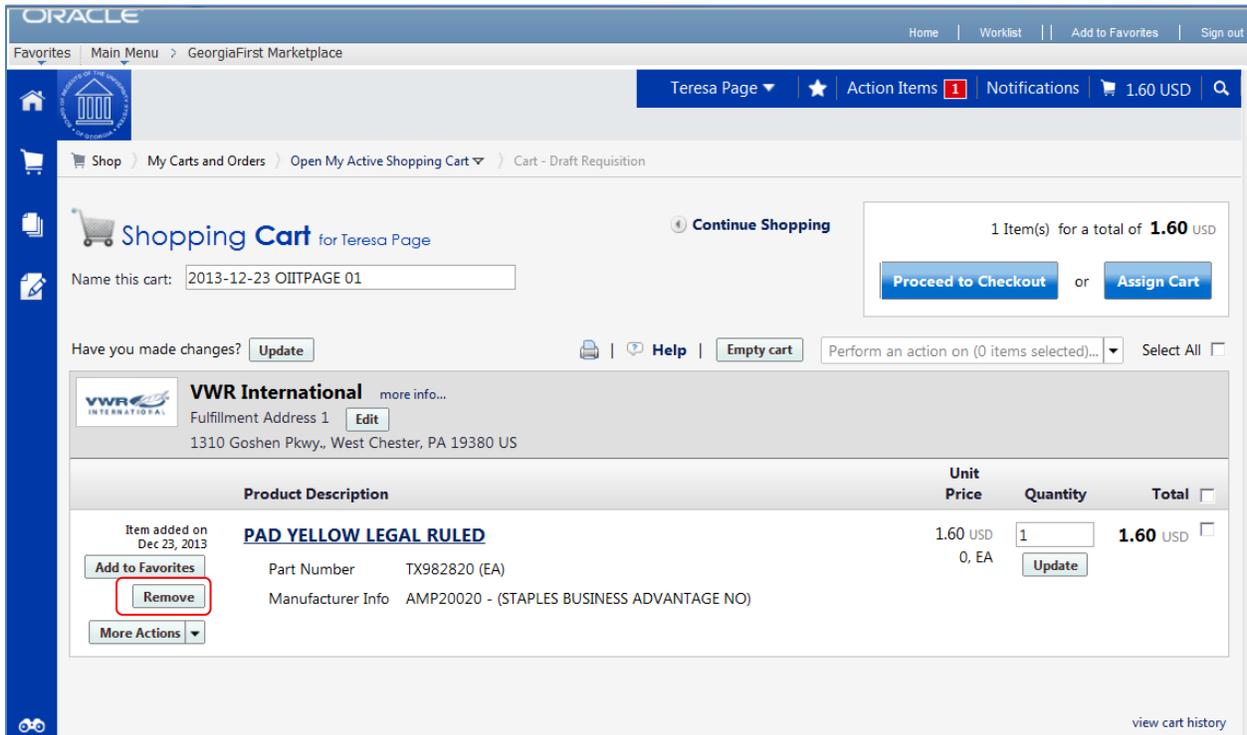


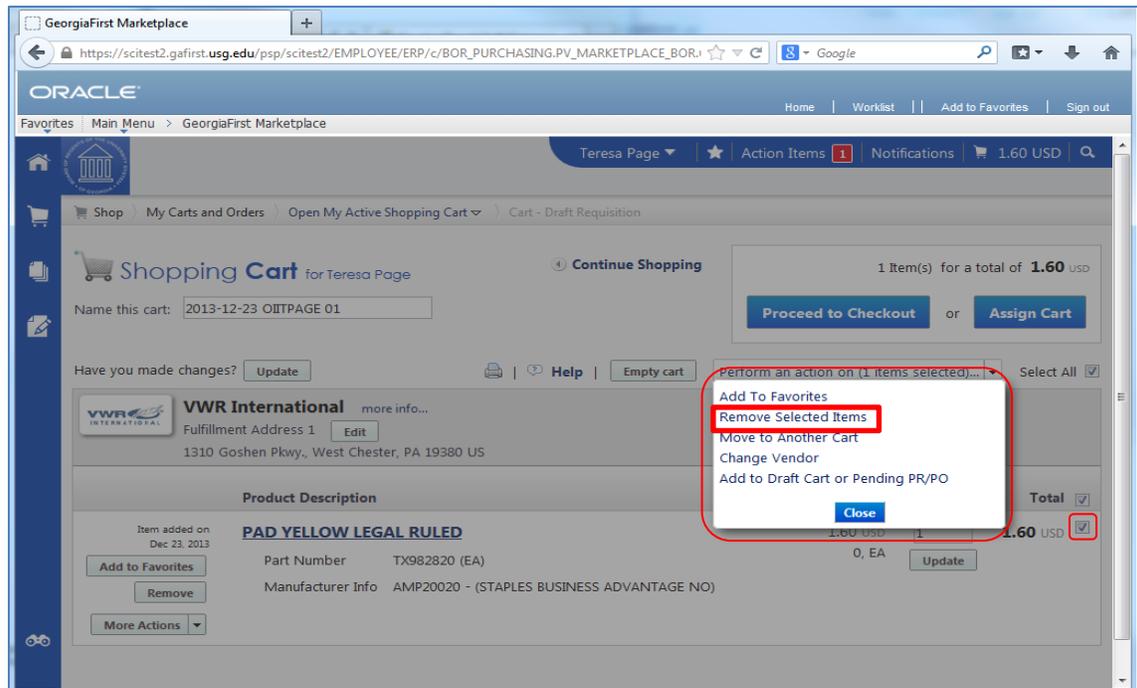
### How To: Rename Your Shopping Cart

1. Retrieve your shopping cart.
2. Input your new shopping cart name in the 'Name this cart' box.
3. Click the **Update** button directly below the cart name.

### Removing Items from the Cart

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





## How To: Remove Selected Items from a Cart

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



## How To: Remove All Items from a Shopping Cart

The screenshot shows the Oracle eProcurement interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, a user profile bar for 'Teresa Page' shows 'Action Items' (1), 'Notifications', and a cart icon with '1.60 USD'. The main content area is titled 'Shopping Cart for Teresa Page' and shows '1 Item(s) for a total of 1.60 USD'. A table lists the item: 'PAD YELLOW LEGAL RULED' with a unit price of 1.60 USD and a quantity of 1. The 'Empty cart' button is highlighted with a red box.

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

## Updating the Quantity of Items in a Cart

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

## How To: Update Quantity of Items in a Cart

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



### Selecting the Applicable Contract for an Item

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

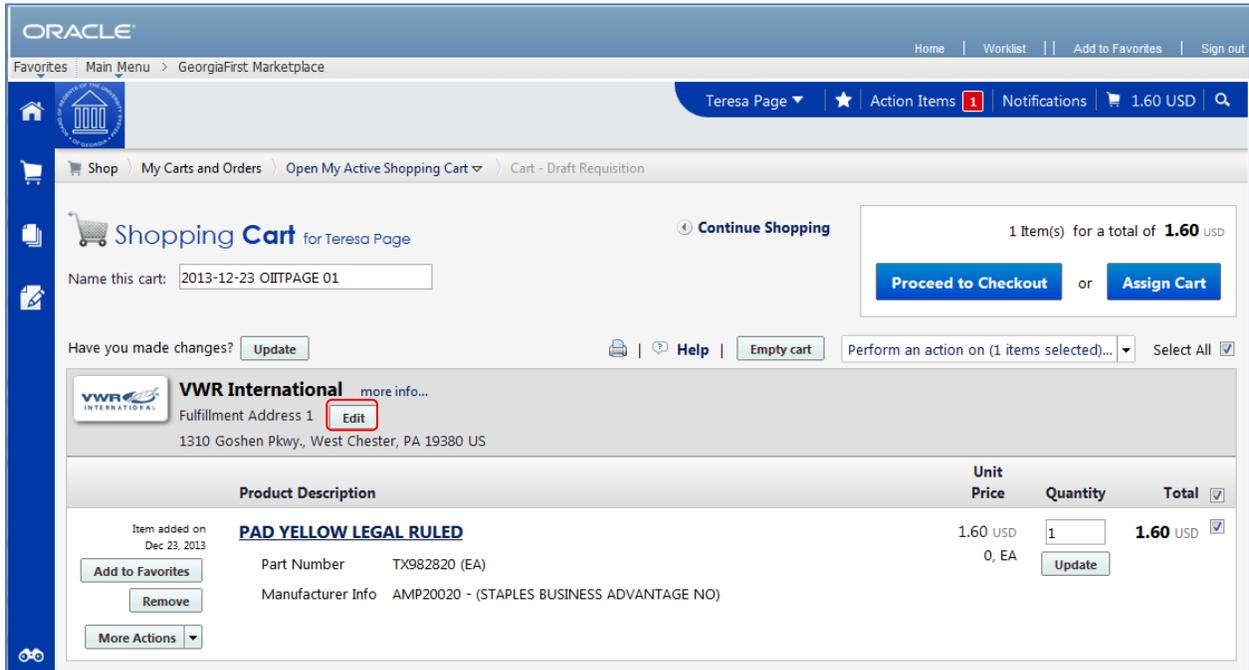
#### *How To: Select a Contract for an Item*

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

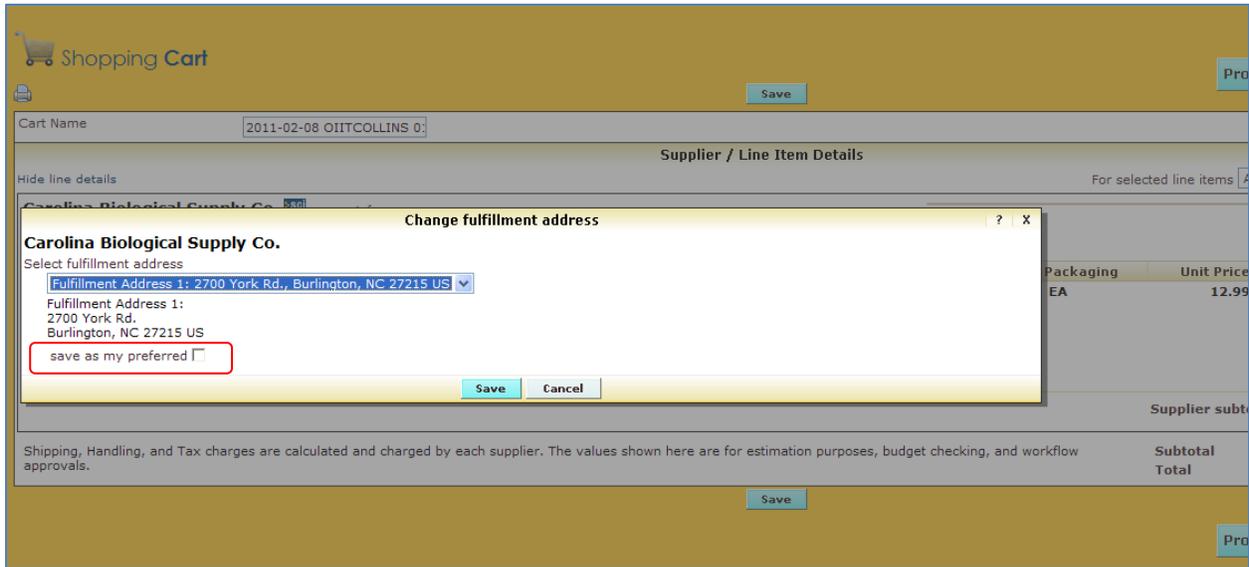


## Selecting Fulfillment Addresses (applies only to fax or email suppliers)

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



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



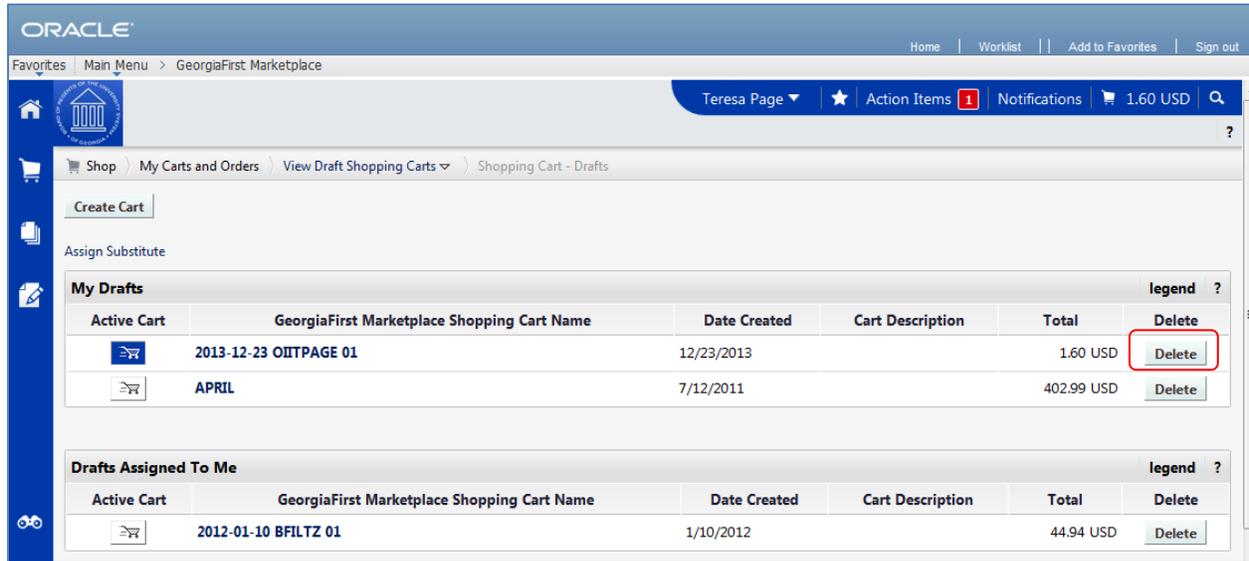
### How To: Select Fulfillment Address

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



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



### Creating ePro Requisition from Your Cart

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

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

1. Log into PeopleSoft Financials Core System.
2. Select **eProcurement** in the menu.
3. Select **Requisitions**.
4. Select the **GeorgiaFIRST Marketplace** link.
5. Build your **shopping cart** (or retrieve one that you built and saved earlier) by searching for and adding items.
6. Select the **Proceed to Checkout** button.
7. Here you perform a final review of your shopping cart. If you need to make any updates, you can select the appropriate edit button and make changes. You can also select the **Return to shopping cart** link in the upper right corner of the page.
8. Select the **Issue Requisition** button.
9. Confirm the **Requisition Summary** within ePro has the same number of line items as the GeorgiaFIRST Marketplace cart.
10. Name the requisition if desired.
11. For each requisition line item, edit **Chartfields** and **Ship To** Location if necessary.
12. Add a comment on each requisition line if needed by clicking the “**call out**” (**comment**) icon at the end of the line.
13. Add a **header comment** to be attached to the requisition if needed within the **Justification/Comment** box.
14. Click the **Save for Later, then Preview Approvals** buttons.
15. Review the approval path. Insert additional ad hoc approvers if necessary.
16. Click the **Submit** button to submit the requisition.

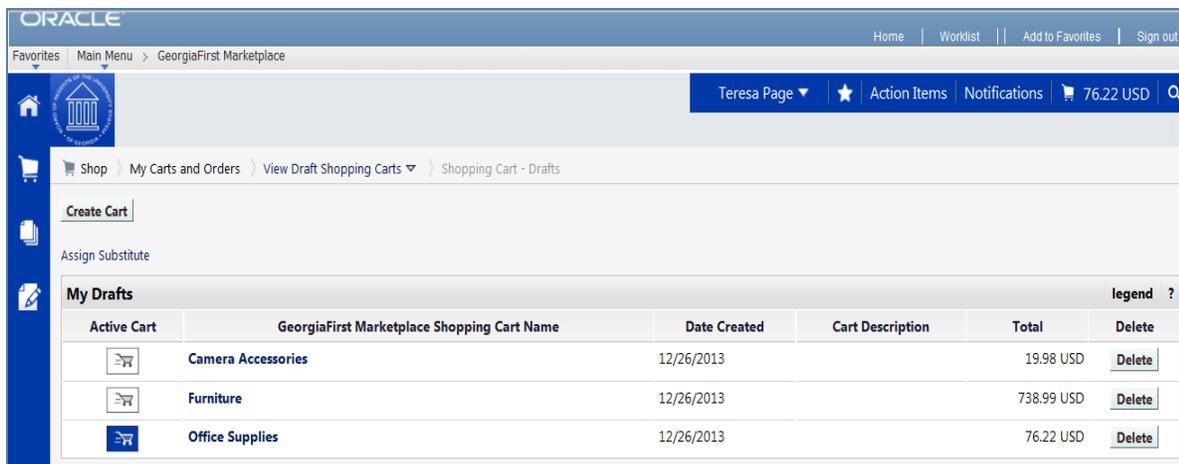


## More about Draft Carts

Earlier, we discussed the difference between an active cart and a draft cart. Remember, an active cart is the shopping cart you are actively working on. You can create additional carts whenever necessary. Additionally, draft carts can be created for future use. Creating draft carts may be useful for setting up orders that are similar or that might be used later. For example, you can have draft carts for different standing orders.

Under the **Shopping Cart** icon, you will see a link for **My Carts and Orders**. Within that link you will see a link for **Open My Active Shopping Cart** and a link for **View Draft Shopping Carts**. Under the **Active cart** link will be the current shopping cart that you are working with. Under the **Draft carts** link are all of the carts you have created. The shopping cart that you are current working with, or your active cart, will have a colored background in its shopping cart icon. Draft carts will have a white background.

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



As you can see in the picture above, our current active cart is Office Supplies because its icon has a colored background. If we were to select the ‘Open My Active Shopping Cart’ link, we would see the Office Supplies cart.



The screenshot shows the Oracle eProcurement interface. At the top, there's a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below that, a user profile for 'Teresa Page' is visible. The main content area shows a 'Shopping Cart' for 'Teresa Page' with a total of 76.22 USD. The cart contains two items:

Product Description	Unit Price	Quantity	Total
<b>Hammermill Copy Plus Premium Copy Paper, LETTER-Size, 92/104+ US/Euro Brightness, 20 lb., 8 1/2 H x 11 W, 5,000 Sheets/Ct</b> Part Number: 122374 Manufacturer Info: HAM105007CT - (Hammermill) Contract: 99999-SPD-G20100809-001 more info... Office Supplies change...	36.04 USD CT	1	36.04 USD
<b>Domtar EarthChoice Office Paper, LETTER-size, 92/104+ US/Euro Brightness, 20 lb., 8 1/2 x 11, 5,000 Sheets/Ct</b> Part Number: 674747 Manufacturer Info: 40475 - (Domtar) Contract: 99999-SPD-G20100809-001 more info... Office Supplies change...	40.18 USD CT	1	40.18 USD

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

### How To: Create a New Cart

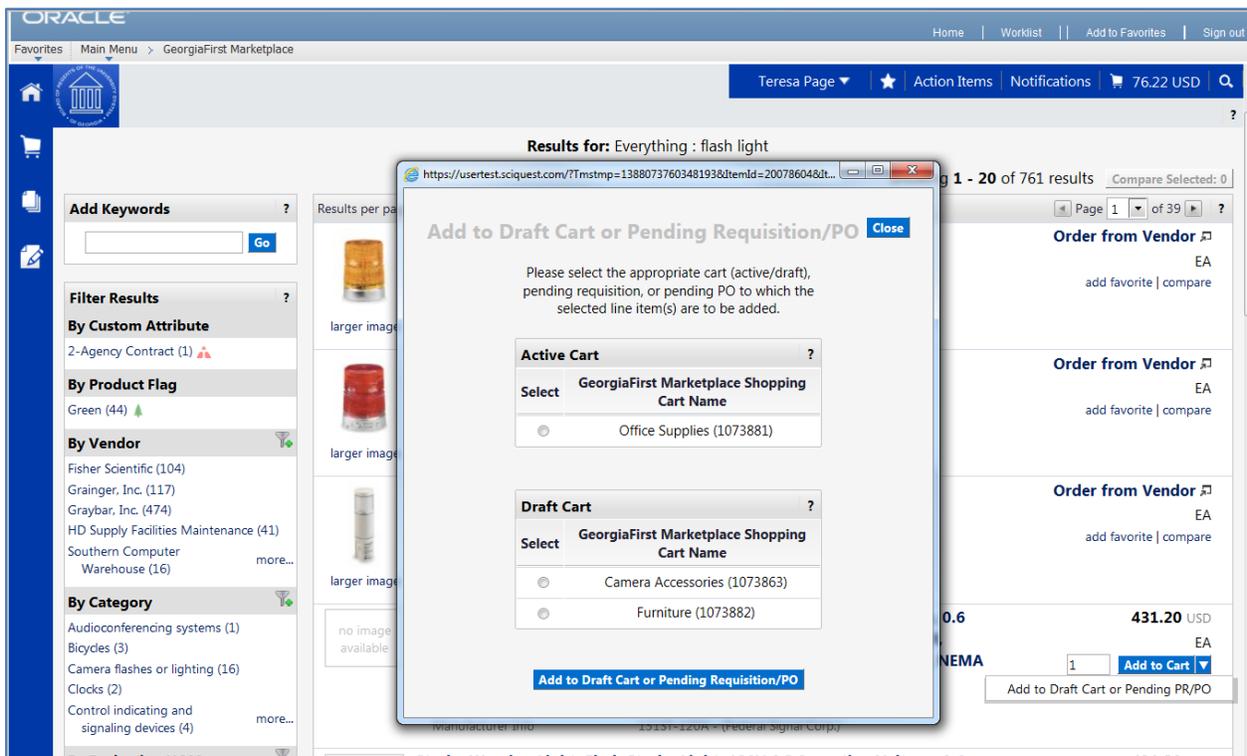
1. Select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Draft Shopping Carts** sub-link.
4. Select the **Create Cart** button.
5. In the **Name this cart** field, you can replace the system default cart name with a different one if desired. Then click 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”. You will then get a pop-up box asking which draft cart you want to add the item to. Select the appropriate cart by clicking its radio button. Then select the Add to Draft Cart button.
- This can also be accomplished by selecting the item description link, then selecting the “Add to Draft Cart” option in the drop down menu.



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



The screenshot displays the Oracle eProcurement interface. The search results for 'flash light' are shown, with a modal window titled 'Add to Cart/Requisition' open. The modal window contains a table with the following data:

Vendor	Catalog No.	Description	Quantity
Graybar, Inc.	88095603	Strobe Warning Light, Flash Strobe Light, 120V AC Operating Voltage, 0.6 Ampere Operating Current, Light Intensity 1000 CP, Flash Rate 80 FPM, Anodized Aluminum Base, Lens Color Amber, 1/2 Inch Pipe	1

The modal window also shows a price of 431.20 USD and an 'Add to Cart' button. The background search results show various filters and product listings.

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, you will see a 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 other recent purchases may prevent unnecessary external purchases. To perform this task, you must have the “View Line Item History” permission assigned.

#### How To: Review Line Item History

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



## Chapter 12: GeorgiaFIRST Marketplace Favorites

As a Requester who creates your own shopping carts, you can set up favorites in the GeorgiaFIRST 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 GeorgiaFIRST Marketplace. There are Personal Favorites and Shared Favorites. Personal favorites are those items that you identify as a favorite. Only you can see your personal favorites. With personal favorites, you create folders and sub-folders to manage these items. You have full control over the items in your personal favorites.

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

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

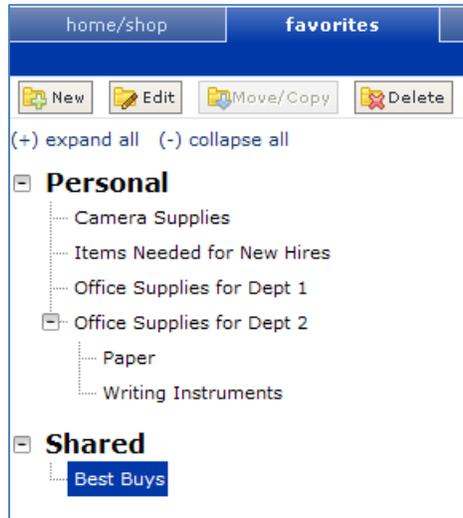
Recommendation: Only save items from hosted catalogs as favorites. Punch-out Items can be saved as a favorite, however, the pricing tied to the favorite will not be updated when the supplier updates that item’s price.

### **Creating Favorites Folders**

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



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



### How To: Create a Personal Folder or Sub-Folder

1. Select the **Shopping Cart** 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. For new users, you should start by creating at least one Personal folder.
5. To add a top-level folder, click the **New** button.
  - a. Select the option **Top level personal folder**.
  - b. Enter a folder name and description.
  - c. Click **Save**.
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**.



## Adding Items as Favorites

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

## How To: Add an Item as a Personal Favorite

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

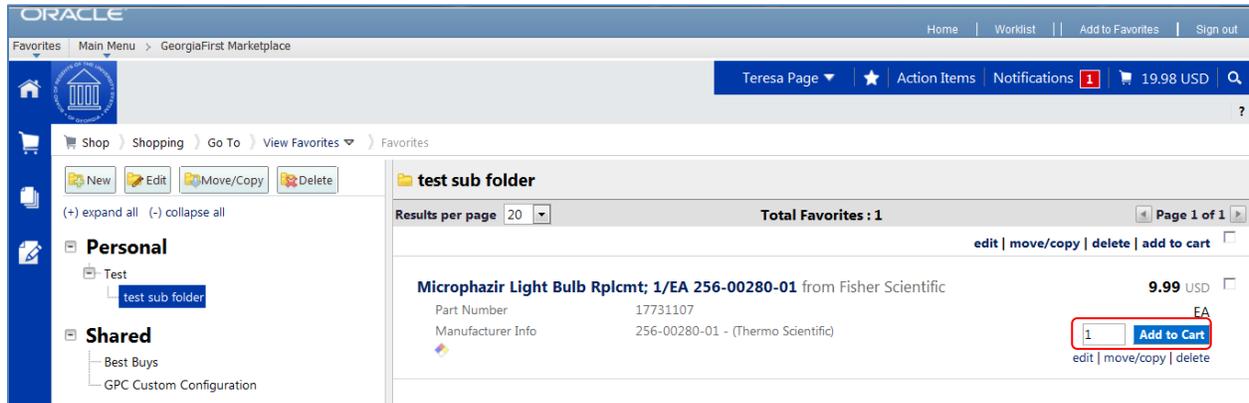


- iv. The new folder displays in the list and is automatically selected for the favorite item.
      - v. Click **Submit** to save the item.
      - vi. Click **Close**.
7. After an item is added as a favorite, it can be accessed via the **favorites** link.
8. To add an item as a Favorite from a cart, select the **Add to Favorites** button on the item line within the cart.
  - a. Give the item a nickname and update the quantity if desired.
  - b. Select a **folder**.
  - c. Click **Submit**.
  - d. Click **Close**.



## 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 link or from the Product Search results page (if favorite items are listed in the search results). Favorite items are designated with a star icon on the search results and can be added like any other item.



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

1. From the GeorgiaFIRST 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 its **Add to Cart** button.
5. To add multiple items to your cart, select the items with a **check mark** 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 GeorgiaFIRST Marketplace, you can move items from one folder to another, as well as copy items from one folder to another. These features may be useful if you create a sub-folder for a specific type of item and need to move favorites added earlier, or when creating “repeat” items for multiple folders.

The screenshot displays the Oracle eProcurement & GeorgiaFIRST Marketplace interface. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The user is logged in as 'Teresa Page' with a balance of '19.98 USD'. The main content area shows a list of items under the folder 'test sub folder'. The items are:

- Microphazir Light Bulb Rplcmnt; 1/EA 256-00280-01** from Fisher Scientific, priced at 9.99 USD. The 'move/copy' link is highlighted with a red box.
- Strobe Light, Flash Strobe Light, 12V DC Operating Voltage, 0.5 Ampere Operating Current, Xenon Lamp, Light intensity 1000000 CD, Flash Rate 65 FPM, Polycarbonate Lens, Plastic Base, Lens Color Amber, Magnetic Mounting, Size 4-9/32 Inch Dia x 4-7/32 Inch** from Graybar, Inc., priced at 117.50 USD.
- Strobe Light, Flash Strobe Light, 24V DC Operating Voltage, 0.3 Ampere Operating Current, Xenon Lamp, Light intensity 300000 CD, Flash Rate 65 FPM, Polycarbonate Lens, Plastic Base, Lens Color Red, 1/2 Inch Conduit Mounting, NEMA 4X, Size 4-9/32 Inch Dia** from Graybar, Inc., priced at 127.20 USD.

The left sidebar shows a folder structure with 'test sub folder' selected under 'Personal'.

## How To: Move and Copy Items Between Folders

1. From the GeorgiaFIRST 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 the **move/copy** link directly under its “Add to Cart” button.
  - a. Select the **folder** (so that it is highlighted) that you want to move or copy the item to.
  - b. Select either the **move** or the **copy** button.
  - c. Click **Close** in the confirmation window.
4. To move or copy multiple items to a different folder, select the items with a **checkmark**.
  - a. Click the **move/copy** link at the top of the list.
  - b. Select the **folder** (so that it is highlighted) that you want to move or copy the items to.
  - c. Select either the **move** or the **copy** button.
  - d. Click **Close** in the confirmation window.



## 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.

The screenshot shows the Oracle eProcurement Favorites page. The left sidebar shows a folder structure under 'Personal' with a folder named 'test sub folder'. The main content area displays a list of three items under the heading 'test sub folder'. Each item has an 'edit' link highlighted with a red box. The items are:

- Microphazir Light Bulb Rplcmt; 1/EA 256-00280-01** from Fisher Scientific, priced at 9.99 USD. Part Number: 17731107. Manufacturer Info: 256-00280-01 - (Thermo Scientific).
- Strobe Light, Flash Strobe Light, 12V DC Operating Voltage, 0.5 Ampere Operating Current, Xenon Lamp, Light Intensity 1000000 CD, Flash Rate 65 FPM, Polycarbonate Lens, Plastic Base, Lens Color Amber, Magnetic Mounting, Size 4-9/32 Inch Dia x 4-7/32 Inch** from Graybar, Inc., priced at 117.50 USD. Part Number: 92074338. Manufacturer Info: 998A-E1 - (Edwards Company, Inc.).
- Strobe Light, Flash Strobe Light, 24V DC Operating Voltage, 0.3 Ampere Operating Current, Xenon Lamp, Light Intensity 300000 CD, Flash Rate 65 FPM, Polycarbonate Lens, Plastic Base, Lens Color Red, 1/2 Inch Conduit Mounting, NEMA 4X, Size 4-9/32 Inch Dia** from Graybar, Inc., priced at 127.20 USD. Part Number: 97211607. Manufacturer Info: 988R-G1 - (Edwards Company, Inc.).

### How To: Editing Favorite Items

1. From the GeorgiaFIRST Marketplace, select the **favorites** 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 **Close** 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.

The screenshot shows the Oracle eProcurement Favorites page. The left sidebar contains a navigation menu with 'Personal' and 'Shared' folders. Under 'Personal', there is a 'Test' folder containing a 'test sub folder'. The main content area displays a list of items under the 'test sub folder'. The list includes three items, each with a title, part number, manufacturer info, and price. The 'delete' link is highlighted in red for the first item.

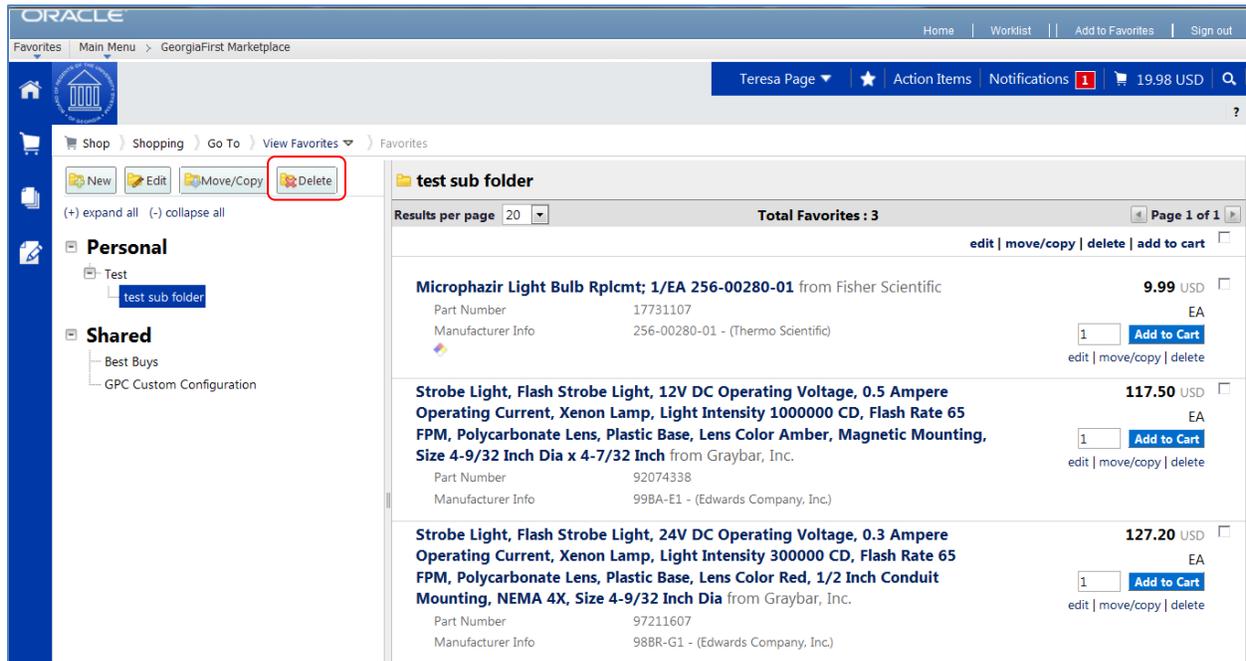
Item Description	Part Number	Manufacturer Info	Price	Actions
Microphazir Light Bulb Rplcmt; 1/EA 256-00280-01 from Fisher Scientific	17731107	256-00280-01 - (Thermo Scientific)	9.99 USD	edit   move/copy   delete   add to cart
Strobe Light, Flash Strobe Light, 12V DC Operating Voltage, 0.5 Ampere Operating Current, Xenon Lamp, Light Intensity 1000000 CD, Flash Rate 65 FPM, Polycarbonate Lens, Plastic Base, Lens Color Amber, Magnetic Mounting, Size 4-9/32 Inch Dia x 4-7/32 Inch from Graybar, Inc.	92074338	99BA-E1 - (Edwards Company, Inc.)	117.50 USD	edit   move/copy   delete
Strobe Light, Flash Strobe Light, 24V DC Operating Voltage, 0.3 Ampere Operating Current, Xenon Lamp, Light Intensity 300000 CD, Flash Rate 65 FPM, Polycarbonate Lens, Plastic Base, Lens Color Red, 1/2 Inch Conduit Mounting, NEMA 4X, Size 4-9/32 Inch Dia from Graybar, Inc.	97211607	98BR-G1 - (Edwards Company, Inc.)	127.20 USD	edit   move/copy   delete

### 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 **OK** button to confirm the deletion.
4. To delete multiple items, select the items with a **checkmark**.
  - a. Click the **delete** link at the top of the list.
  - b. Click the **OK** button to confirm the deletion.



## How To: Delete a Folder from Favorites



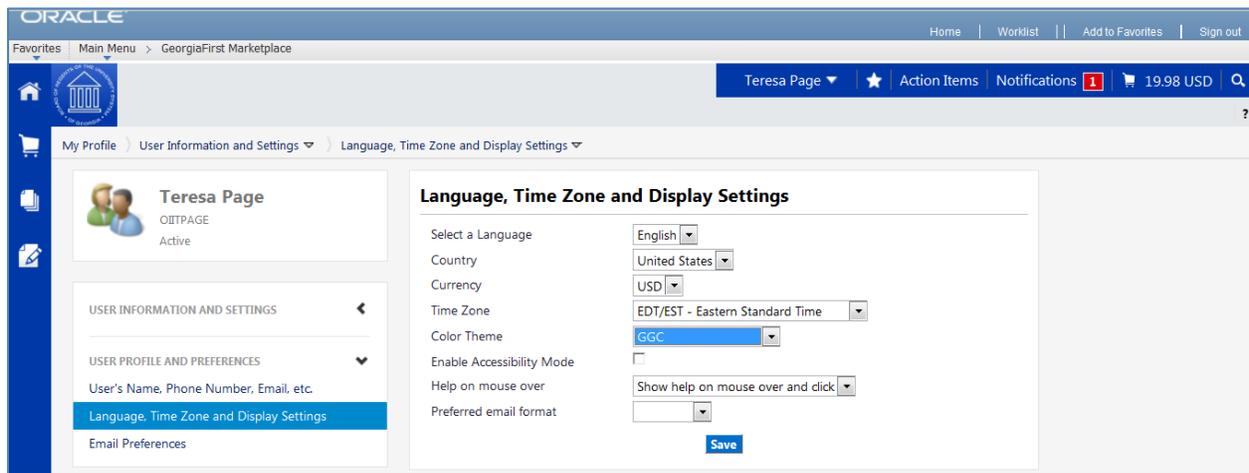
1. From the GeorgiaFIRST Marketplace, select the **favorites** link.
2. Select the appropriate **folder** from the left pane.
3. Click the **Delete** button at the top of the folder list.
4. Click **OK** to confirm the deletion.



## Chapter 13: User Profile in GeorgiaFIRST Marketplace

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

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



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

### How To: Update Color Theme to Match School Logo

1. In the GeorgiaFIRST Marketplace, click on your **Name**, found in the banner at the top of the page.
2. Under the **User Information and Settings** 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 button.