



eProcurement and Georgia*FIRST* Marketplace
User's Guide
for
Shoppers

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Introduction

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

Topics covered in this user's guide:

- Overview of eProcurement and the GeorgiaFIRST Marketplace
- Accessing and Navigating the GeorgiaFIRST Marketplace
- Basic Procurement Policies
- Searching for Items in the GeorgiaFIRST Marketplace
- Shopping for Items in the GeorgiaFIRST Marketplace
- Assigning a Shopping Cart to a Requester
- Shopper Notifications
- Desktop Receiving
- GeorgiaFIRST Marketplace Folders and Favorites
- GeorgiaFIRST Marketplace User Profile

Chapter 1: eProcurement and GeorgiaFIRST Marketplace Overview

What is eProcurement?

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

Previously, your institution may have used paper requisitions, or some other format, to request an item to be purchased. The hard copy requisition had to be routed for approval signatures and then sent to the purchasing department. The purchasing department had to re-key the information into the system to create a purchase order to send to the supplier.

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

What is the GeorgiaFIRST Marketplace?

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

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

Types of Requisitions

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

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

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

Benefits of ePro and the 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
- Request goods from multiple suppliers through one shopping cart
- Items in the GeorgiaFIRST Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as ‘favorites’ in the GeorgiaFIRST Marketplace
- Automatic batch processing of approved requisitions

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:

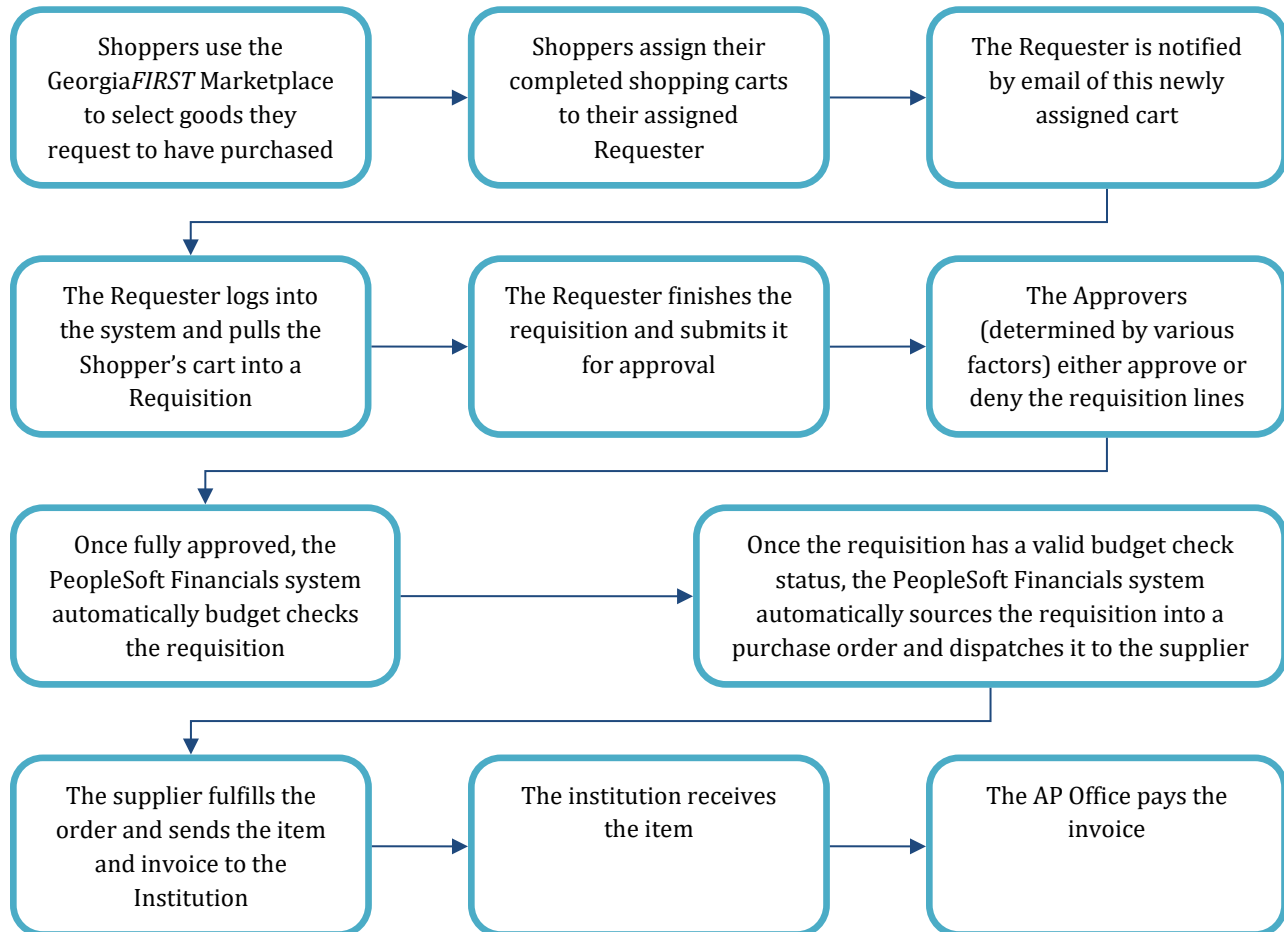
- **Marketplace Browser:** User without any GeorgiaFIRST Marketplace roles assigned will default to a Marketplace Browser. A Browser can view items, contracts, and pricing in the Marketplace but cannot add items to a cart or create requisitions.
- **Shopper:** User can select items to purchase, add them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

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

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

Process Flow

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



How does PeopleSoft pass along user information to the GeorgiaFIRST Marketplace?

In order for you 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 can be used to store a set of default ChartFields that can be charged for your requested goods, unless otherwise specified.

How Do Approvals Work?

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

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

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

Approval Stages

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

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

Here is a summary of each stage:

Stage 1: Department and Project Approval

This is a mandatory approval stage for all requisition lines. Each requisition line must be charged to a Department. In addition, requisition lines can be charged to a Project. The requisition line is routed to the Department Manager (as entered in PeopleSoft) for approval. If the Project ChartField is used on the requisition line, the system also routes it to the Project Manager.

Stage 2: Fund Approval

This approval stage is optional.

Agency Fund Approval:

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

Grant Fund Approval:

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

Tech Fee Fund Approval:

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

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

Stage 3: Amount Approval

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

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

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

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

Stage 4: Item Type-Based Approvals

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

- **Stage 4, Path 1: Asset Approval**

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

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

- **Stage 4, Path 2: Audio Visual Approver**

This is an optional approval path and is for any item on a requisition line that contains an NIGP code related to Audio Visual items or services. An NIGP code is the National Institute of Governmental Purchasing's coding classification used primarily to classify products and services procured by state and local governments.

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

An Audio Visual Approver must have the role "BOR_AUDIO_VIS_APPR". If your institution chooses to use the Audio Visual (AV) Approver path, there can be multiple AV approvers. The institution will determine whether all AV approvers must approve the requisition or if only one from the group of multiple approvers has to approve it. In addition, institutions may identify

additional NIGP codes for audio visual approval, and they may add monetary amount criteria (i.e., item has an NIGP code of 06400 and is greater than \$1,000).

- **Stage 4, Path 3: Chemical Approver**

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

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

- **Stage 4, Path 4: Facilities Planning and Design Approver**

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

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

- **Stage 4, Path 5: IT Approver**

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

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

- **Stage 4, Path 6: University Relations Approver**

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

The University Relations Approver must have the role “BOR_UNIVREL_APPR”. If your institution chooses to use the University Relations Approver path, there can be multiple approvers in this

path. The institution will determine whether all University Relations Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for University Relations approval, and they may add monetary amount criteria.

- **Stage 4, Path 7: Default NIGP Code – 00000**

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

- **Stage 4, Path 8: Furniture Approver**

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

- **Stage 4, Path 9: Human Resource Approver**

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

- **Stage 4, Path 10: Pharmaceutical Drug Approver**

This optional path is for any requisition line with an NIGP code associated with pharmaceutical drugs. The Pharmaceutical Drug Approver must have the role “BOR_PHARM_DRUG_APPR”. If your institution chooses to use the Pharmaceutical Drug Approver path, there can be multiple approvers in this path. The institution will determine whether all Pharmaceutical Drug Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for Pharmaceutical Drug approval, and they may add monetary amount criteria.

- **Stage 4, Path 11: Budget Reference Approver**

This optional path of approval will route to a Budget Reference approver for any requisition line where the Budget Reference does not equal the Fiscal Year. The Budget Reference approver must have the role “BOR_EP_BUD_REF_APPR”. If your institution chooses to use the Budget Reference Approver path, there can be multiple approvers in this path. The institution will determine whether all Budget Reference Approvers must approve the requisition, or if only one from the group of approvers must approve it.

Stage 5: Buyer Approval

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

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

For Special Requisitions (created for non-catalog/non-contract items not in the 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 also be used for Marketplace Requisitions. The Buyer is someone in the Purchasing Department, who is responsible for ensuring the purchase meets all State of Georgia purchasing standards. The Buyer approval step is necessary for Special Requisitions since these items are not from approved contracts in the GeorgiaFIRST Marketplace.

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

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

Once the requisition hits an Approver's Worklist, that approver has 3 days to either approve or deny it, before they get a reminder notification from the system. If the requisition sits in an Approver's Worklist for 4 days without being approved or denied, the system removes the requisition from that Approver's Worklist, the transaction is escalated, and the ePro Administrator reassigns the transaction to another

approver. After the Approver has approved the requisition, the system automatically moves it onto the next required Approver's Worklist. If an Approver denies a requisition, the system returns it to the Requester. Denied requisition lines can be edited and resubmitted for approval, or canceled if necessary.

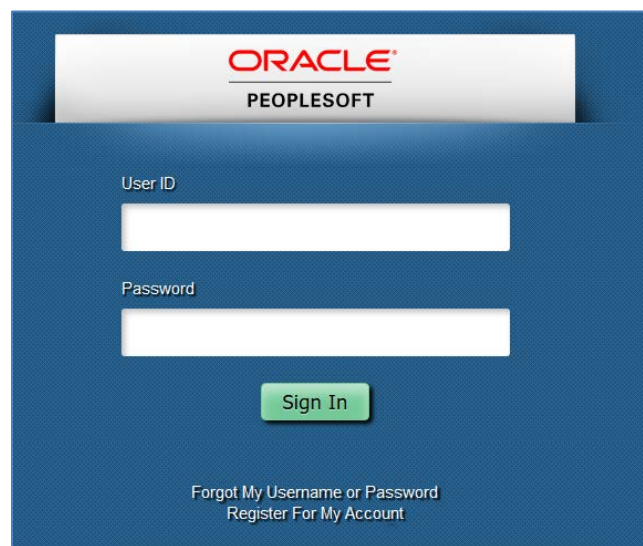
If an approver will be out of the office for an extended period of time and will be unable to work the requisitions in their Worklist, they have the ability to assign an alternate to serve in their place. This way, their Worklist does not build up while they are out of the office, and requisition approval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

Chapter 2: Accessing and Navigating the GeorgiaFIRST Marketplace

As mentioned earlier, Shoppers access the GeorgiaFIRST Marketplace through the PeopleSoft Financials system. Once you have your PeopleSoft User ID and password, as well as the Self Service URL, you are ready to log into the PeopleSoft Self Service site.

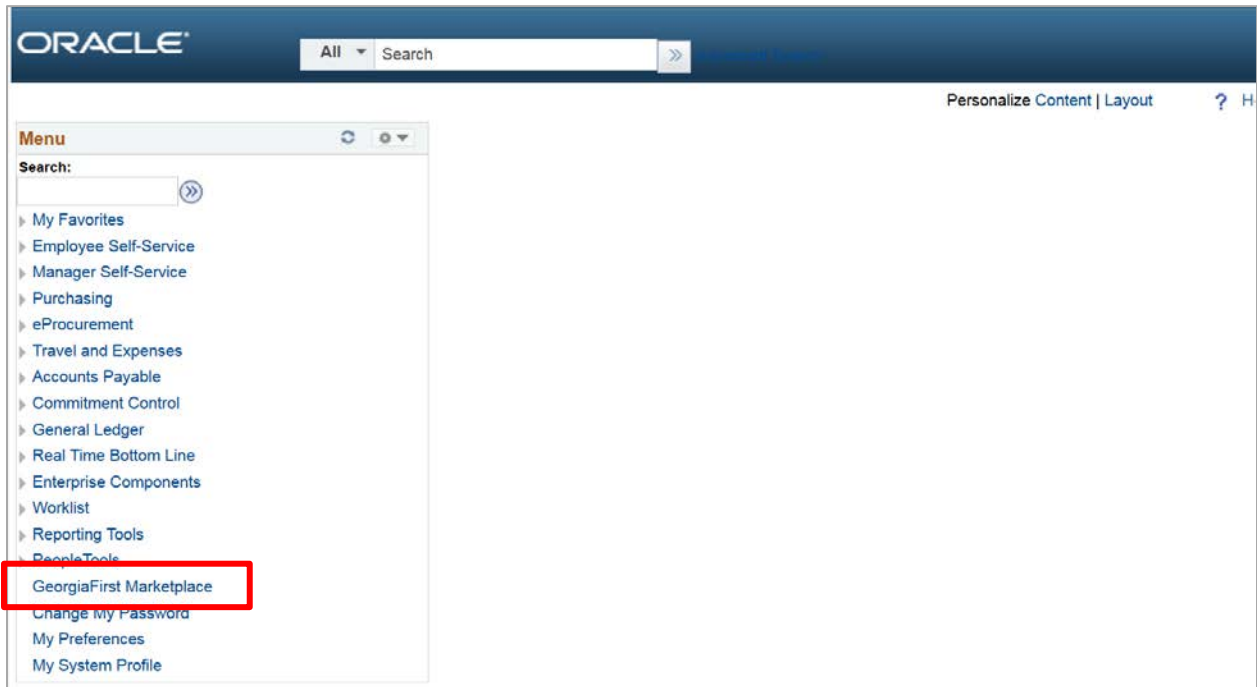
Logging into PeopleSoft Financials Self Service

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

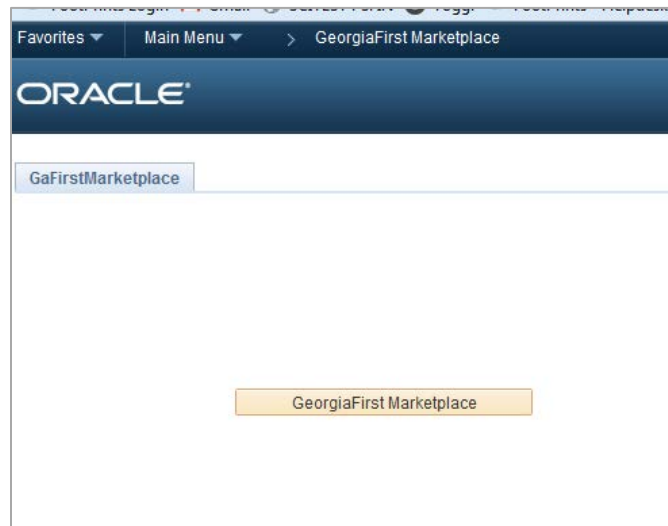


How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Self Service

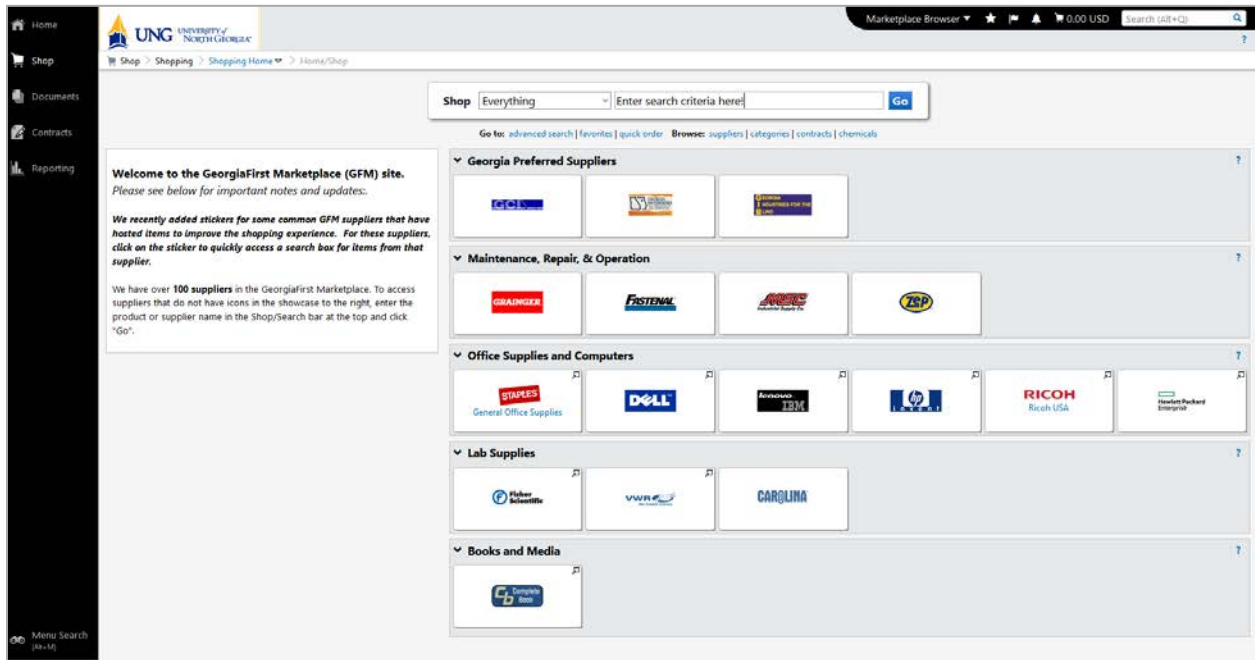
1. Navigate to the PeopleSoft Financials login page.
2. Enter your **User ID** and **Password**. Remember, both of these items are case sensitive. If you try to log in more than five times with an incorrect User ID and/or password, the system will lock you out.
3. Click the **Sign In** button.



- Depending on your institution, your screen may vary slightly from the one pictured above. You may see your institution's logo and welcome message. However, the menu should look familiar. To access the GeorgiaFIRST Marketplace, select the **GeorgiaFIRST Marketplace** link in the menu.



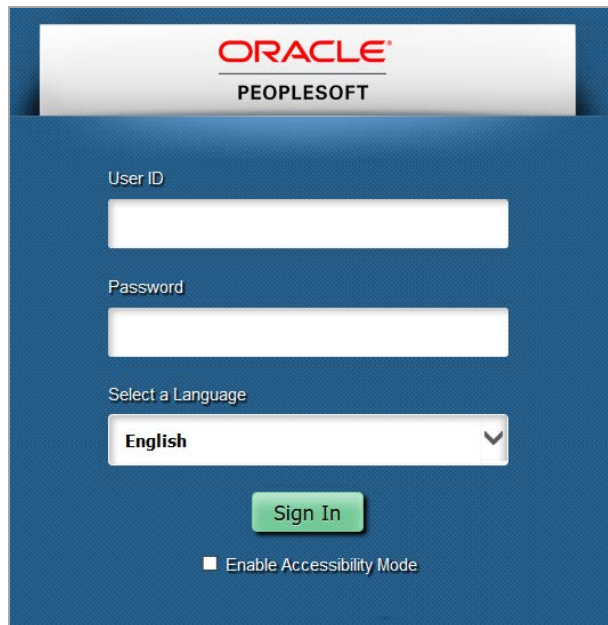
- Select the GeorgiaFIRST Marketplace button.



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

Logging in through PeopleSoft Financials Core System

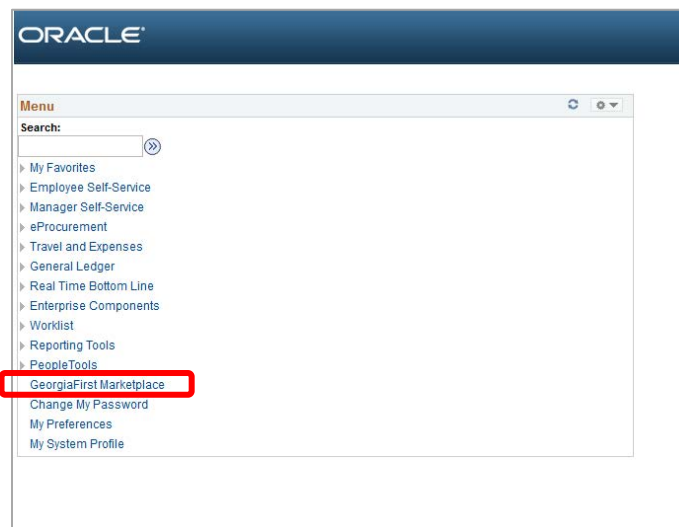
For Shoppers who have access to the core system, access to the GeorgiaFIRST Marketplace is slightly different.



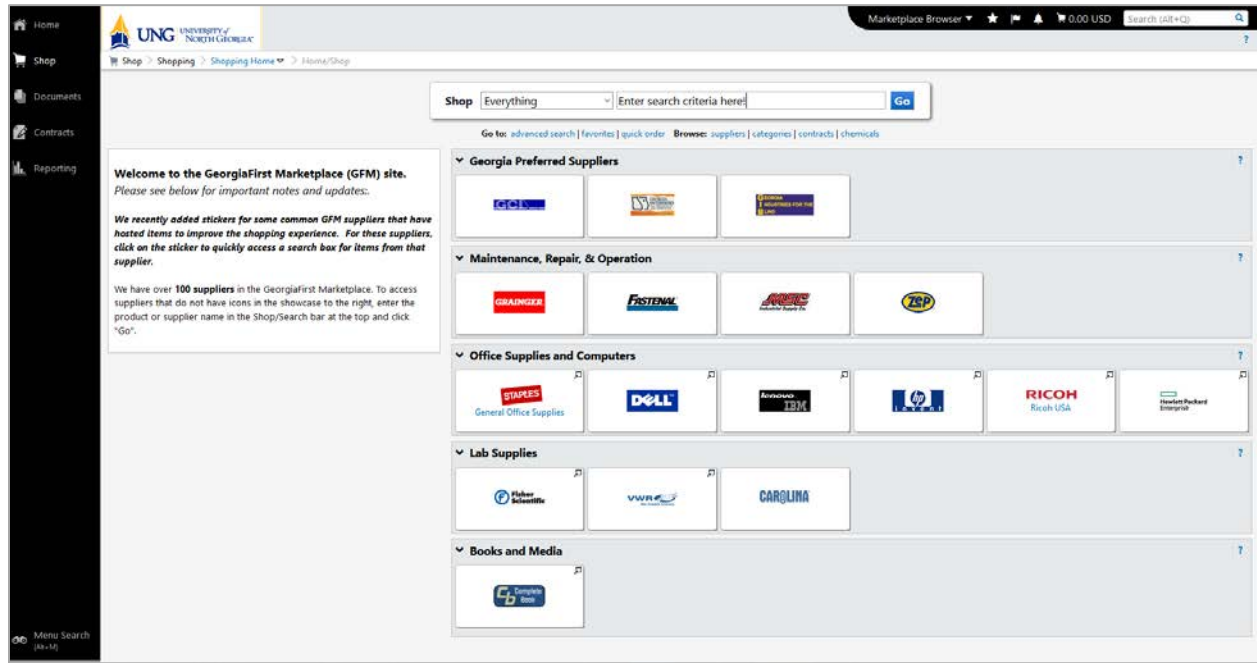
The image shows the Oracle PeopleSoft login page. At the top, the Oracle logo is displayed in red, with the word "PEOPLESOFT" in black below it. The page has a dark blue background. There are three white input fields: "User ID", "Password", and "Select a Language". The "Select a Language" dropdown menu is currently set to "English". Below the input fields is a green "Sign In" button. At the bottom, there is a checkbox labeled "Enable Accessibility Mode".

How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Core System

1. Above is the PeopleSoft Financials log in page.
2. 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.
3. Click the **Sign In** button.



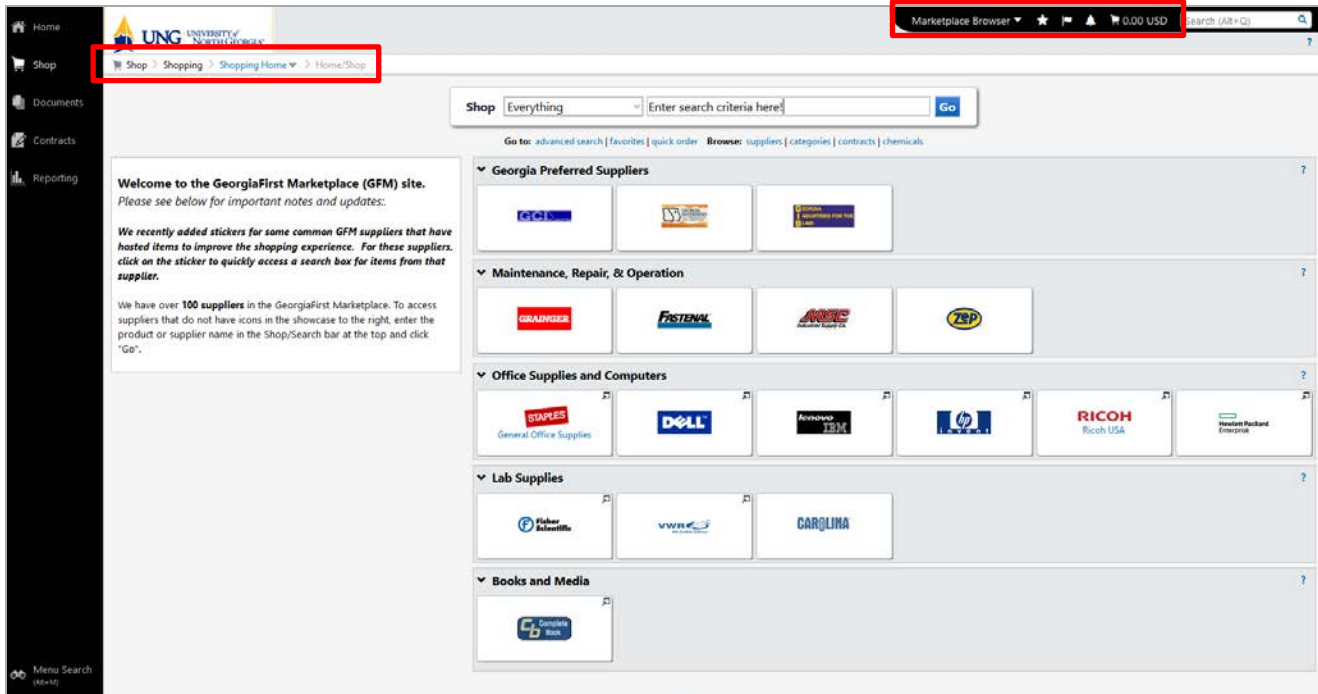
- Depending on your set up, you may have different menu options. However, you will have a link towards the bottom of the menu for the GeorgiaFIRST Marketplace. Select the **GeorgiaFIRST Marketplace** link to enter the Marketplace.



- Notice that the GeorgiaFIRST Marketplace is now displayed in your main window. You are now able to start navigating through the marketplace. You should see your institution logo in the top left corner of the GeorgiaFIRST 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 on the Home icon. You can also click on your institution's logo in the upper left corner to return to the home page.



User Information: In the top right of the GeorgiaFIRST Marketplace, you will see your name. The drop-down arrow by your name provides a link to your user profile, where you may verify your user preferences and settings, including changing your color theme and setting up your cart assignees.

1. **Navigation Breadcrumbs and Screen Title:** The screen title indicates the title of the current page that you are on. Breadcrumbs in software applications like the GeorgiaFIRST Marketplace offer users a way to trace their path back to their original landing point.
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:** The 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.
 - Shop: This icon is used for shopping and provides quick access to other parts of the application. You can also View and modify the current shopping cart, create new carts, delete existing carts, and prepare the active cart for processing.
 - Documents: This icon allows you to search for documents that you have created.
 - Contracts: This icon allows you to look up statewide contracts.
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 searches 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 will trigger Notification messages informing the user that action is needed. Notifications are clickable and take you to the appropriate area of the application, so that action can be taken. The number of notifications will be displayed in red to the right of the Notifications menu.
 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 3: 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 4: Searching for Items in the GeorgiaFIRST Marketplace

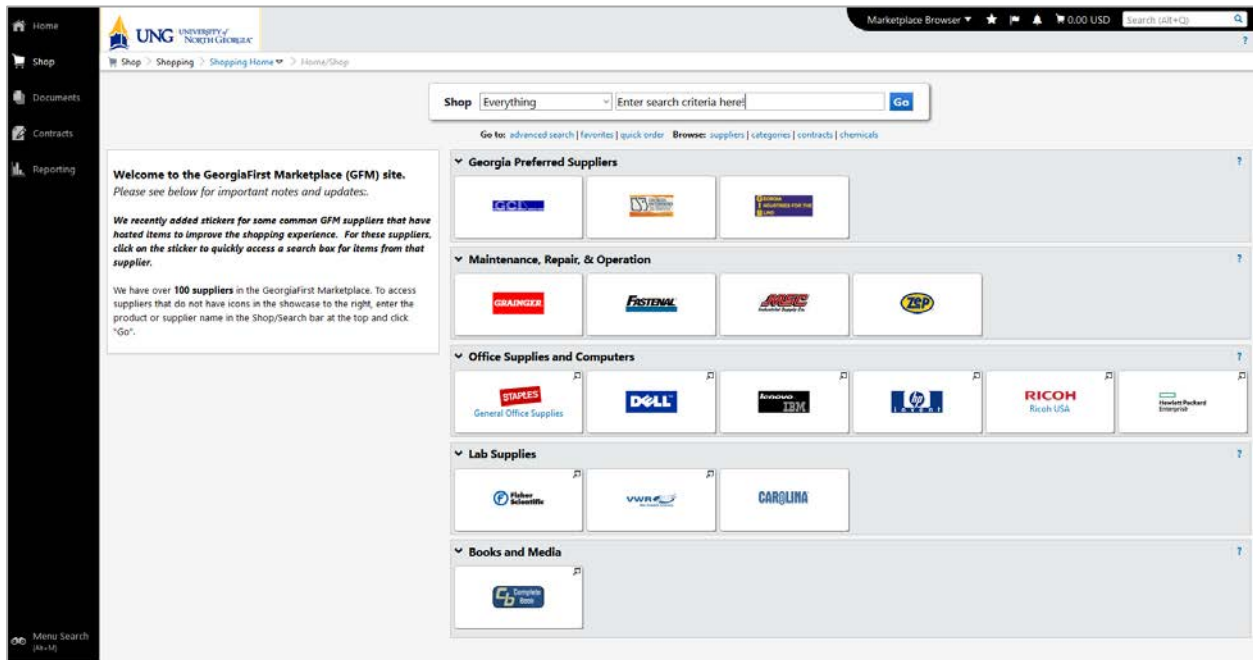
Within the GeorgiaFIRST Marketplace, there are many ways that you can search or browse for items. In this chapter, we will review most of the search methods. However, after using the marketplace for a while, you will find the way with which you are most comfortable.

Before we discuss what search options are available, let's take a minute to review what is available to be searched. First, 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.

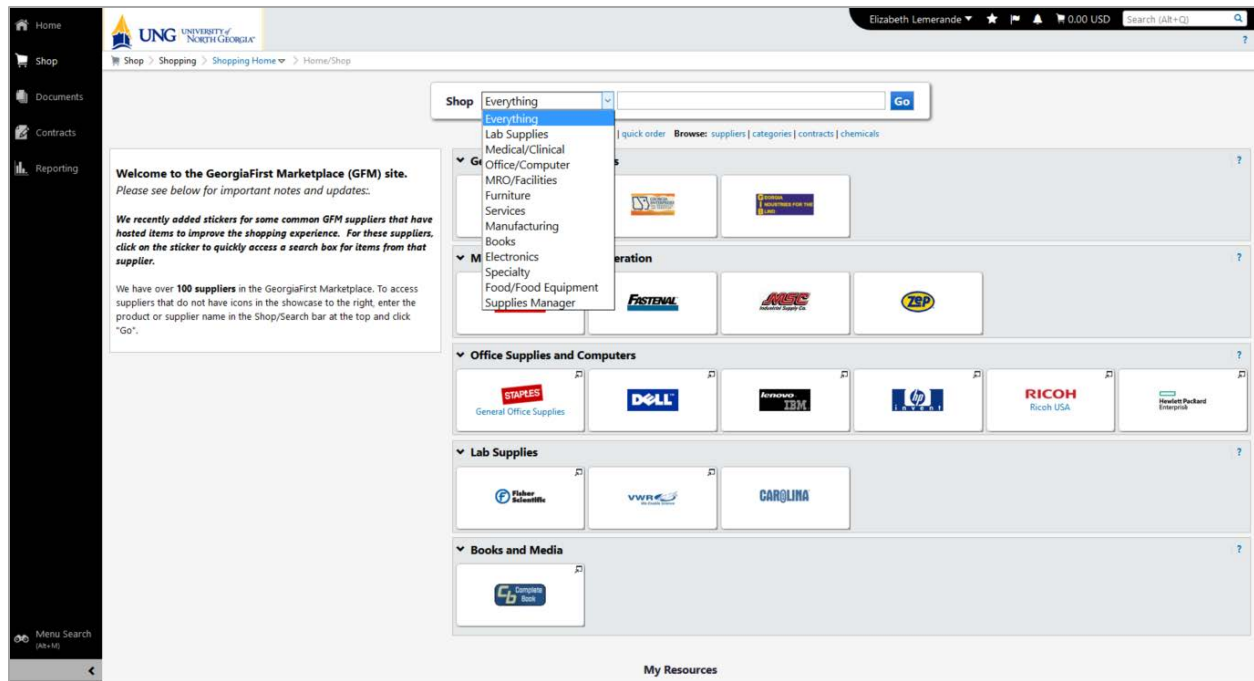
When performing a simple search, the system looks through many different things in order to find the most relevant search results. This includes looking through Keywords and Item information. GeorgiaFIRST Marketplace System Administrators enter keywords to help guide users to the correct contract, supplier 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 down 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 out those not in the selected category. When shopping by category, the data being searched is limited. Available categories may vary by institution, depending on the suppliers and items enabled. The Product Categories that you may see include:

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



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

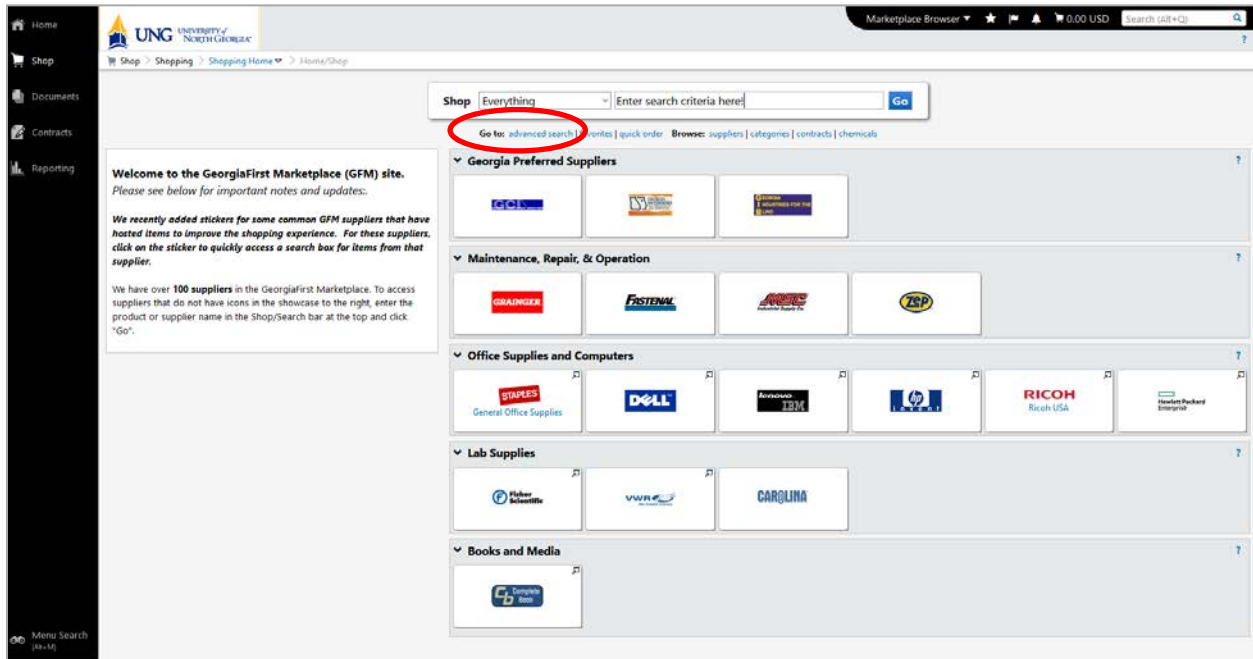
Once ePro retrieves your search results, you can use the filter options to refine them. Primarily, you can use the filter options for “Custom Attributes” to see those items on a state contract, agency contract, etc.

How To: Perform a Simple Search

1. Start from the 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 found below the 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
All of These Words	This field functions in the same way that Simple Search does. Only products containing ALL the word entered in this field are returned in search results. The words do not need to be in the same order as listed, but all words must be found in the item data or keyword data.
Part Number (SKU)	<p>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.</p> <p>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.</p> <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.</p> <p>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</p>

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

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

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

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

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

[How To: Perform an Advanced Search](#)

1. On the 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, perform the search with **Mandatory State Contract** selected.
6. Click the **Search** button

Search Result Details

Search results display below the Simple and Advanced Search.

The screenshot displays the search results interface. At the top, the 'Advanced Search' form is visible with the search criteria 'Everything : flash light + 1-Mandatory State Contract'. Below this, the search results are listed. The first result is 'Canon Macro Twin Lite MT-24EX' with a price of 869.01 USD. The second result is 'PENTAX AF 360FGZ Flash for 1st D Series digital SLR cameras' with a price of 11.90 USD. The results table includes columns for item name, part number, manufacturer info, and price. A red box highlights the search results area.

Item Name	Part Number	Manufacturer Info	Price
Canon Macro Twin Lite MT-24EX	CAN-2357A002	2357A002 - (CANON)	869.01 USD
PENTAX AF 360FGZ Flash for 1st D Series digital SLR cameras	DVM-30333	30333 - (DVM)	11.90 USD

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

Search Results	Description
Search Listing	By default, items and recommended services, suppliers, etc., are presented in the Best Match “Order.” Hosted products are displayed with an image (if available), along with product description and product detail information.
Showing	After the search is performed, you can see how many items are displayed from the overall total of results.
Sort By	After the search is performed, you can choose to re-sort the data by part number, product description, price, etc.,
Refining the Search through Keywords	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.
Refining the Search through Filters	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.
Icon Definitions	Custom Attributes (used for contract type, supplier classes, and product attributes are identified with icons below the product description. An item-specific legend is provided for product flags and supplier classes in the appendix.
Comparing Items in Search Results	From the search results, product details can be compared to determine which one should be ordered. This function is explained more in depth in the next chapter.
Access Additional Pages and Changing Items per Page	To change the number of items displaying per page, select the appropriate option from the “Items per page” drop-down at the top or bottom of the search results. To view items on a different page, use the arrow buttons or select a specific page number. This information is displayed above and below the search results.

Filter Results ?

Where are my counts?

By Custom Attribute 🔍+

- Furniture - Delivered and Installed
- Furniture - Dock Delivery
- Furniture - Inside Delivery
- 1-Mandatory State Contract

By Supplier 🔍+

- Affordable Interior Systems, Inc.
- Agati, Inc.
- ALAMO GROUP (TX) INC
- Arcadia Chair Company
- ARIENS COMPANY more...

By Category 🔍+

- Agricultural tractors
- Backhoes
- Benches
- Blowers
- Bookcases more...

By Packaging UOM 🔍+

- EA
- 1/EA
- PK

By Result Type

- Products

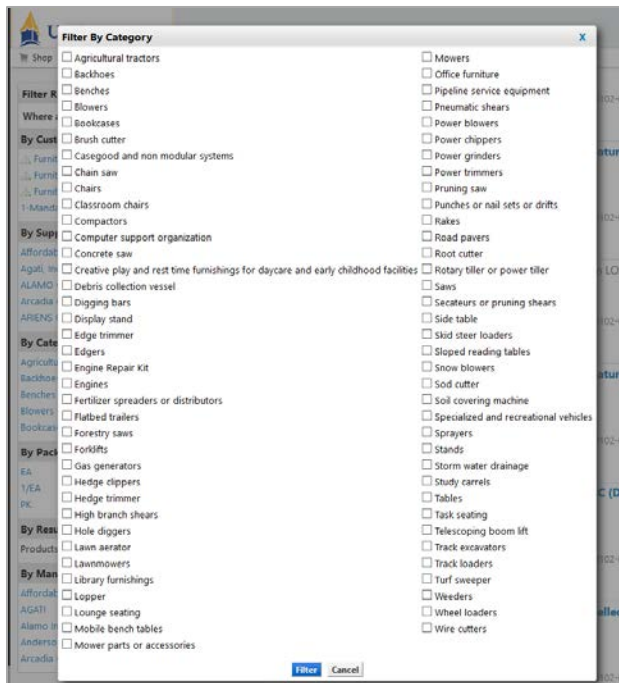
By Manufacturer 🔍+

- Affordable Interior Systems Inc.
- AGATI
- Alamo Industrial
- Anderson Mfg.
- Arcadia Chair Company more...

Filtering Results

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

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



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

Filter Results ?

By Custom Attribute

- Furniture - Delivered and Installed (512)
- Furniture - Dock Delivery (489)
- Furniture - Inside Delivery (512)
- 1-Mandatory State Contract (1537)

By Supplier

- Adden Furniture, Inc. (30)
- Affordable Interior Systems, Inc. (24)
- Agati, Inc. (325)
- American Seating Company (18)
- Blockhouse Company, Inc. (84) [more...](#)

By Category

Showing only results matching:

- Tables (1135)
- Task seating (402) [show all...](#)

By Packaging UOM

- EA (1537)

By Result Type

- Products (1537)

By Manufacturer

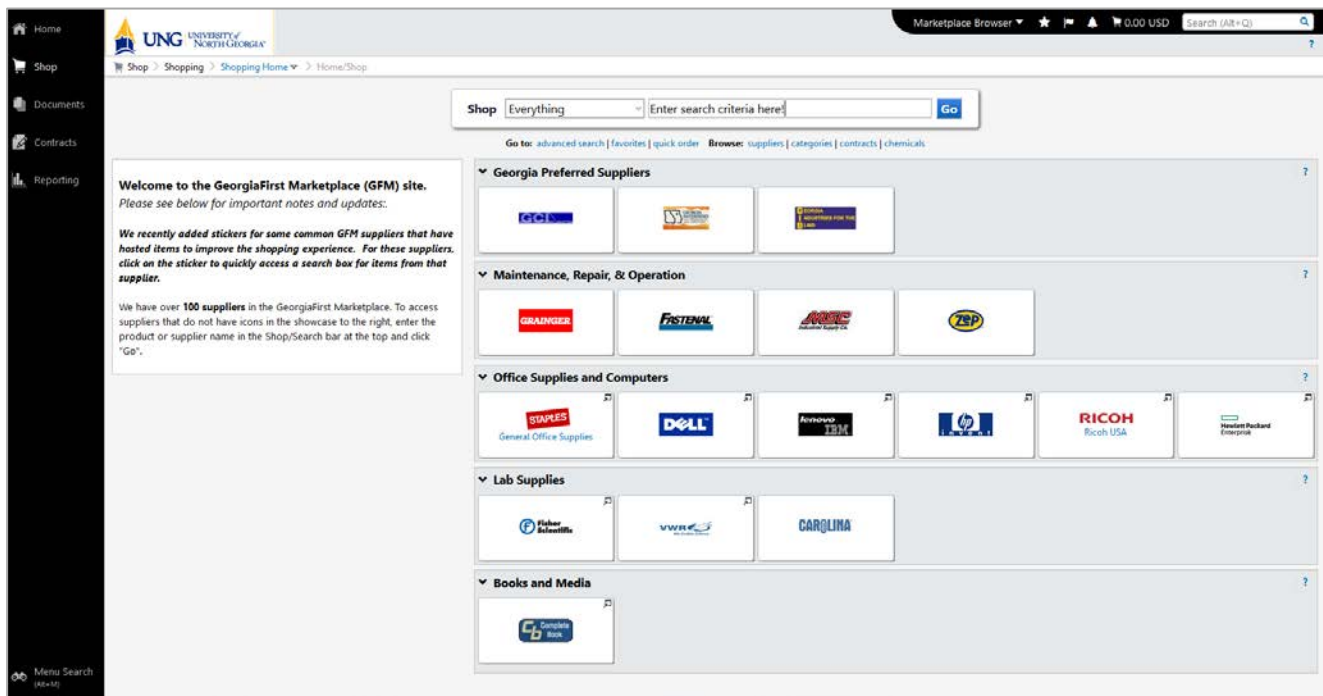
- Adden Furniture Inc. (30)
- Affordable Interior Systems Inc. (24)
- AGATI (325)
- American Seating Company (18)
- BERCO ANYWAY (9) [more...](#)

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.

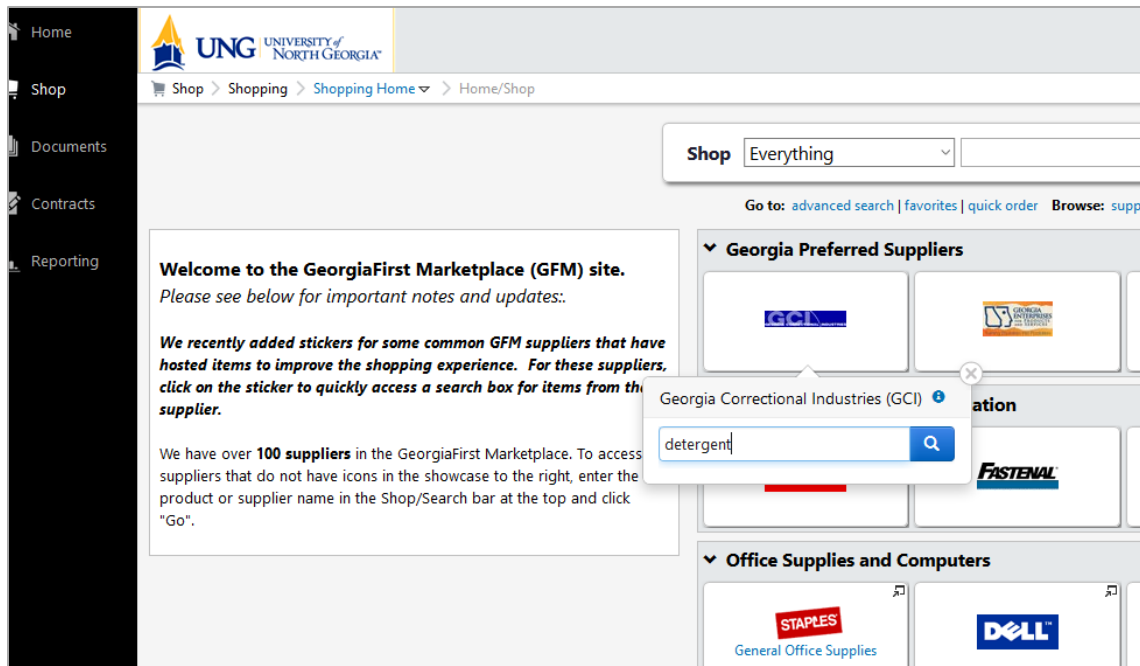
Searching from the Purchasing Showcase

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. In addition, suppliers can have a caption indicating what the supplier offers, what special discounts they have, or the contract number.

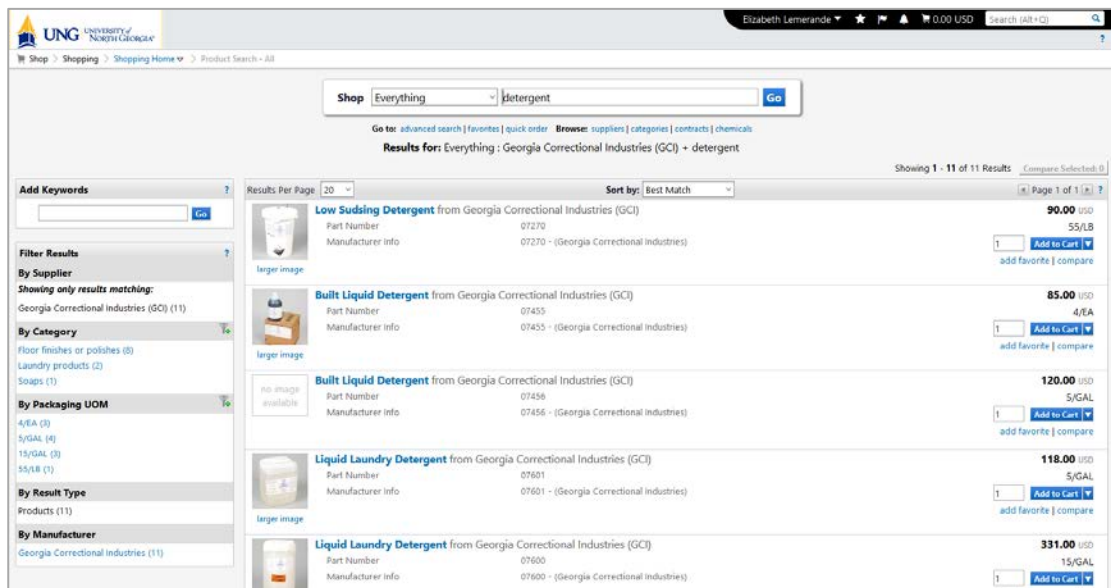


How To: Search from a Showcased Supplier

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** into the Search field and click the **Search** button.
3. Search Results will appear in the same format as the Simple Search and Advanced Search displays.



4. 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 you find the chapter you want (product category), a single click takes you to all of the products provided by that supplier in that selected category. This functionality is different from selecting a specific supplier from the Showcase or through Punch-outs.

Shop > Shopping > Browse By > Suppliers > Browse by Supplier

Search for Supplier

Supplier

Supplier Type Hosted Catalog

[Search](#)

Showing 20 of 96 Results

Results Per Page 20 Sort by: Best Match

Supplier Name	Type	Preference
Acuity Specialty Products		ASS
Adrenalin Powersports, Inc.		ATL
Advanced Business Supplies		Boh
Agilent Technologies		Bric
Alligare LLC		Car
Allseating Corp.		Cly
AllSteel		CP
American Bio Medical		CR
ANTHRO INTERNATIONAL		CW
ARTOPEX INC		DA

Results Per Page 20

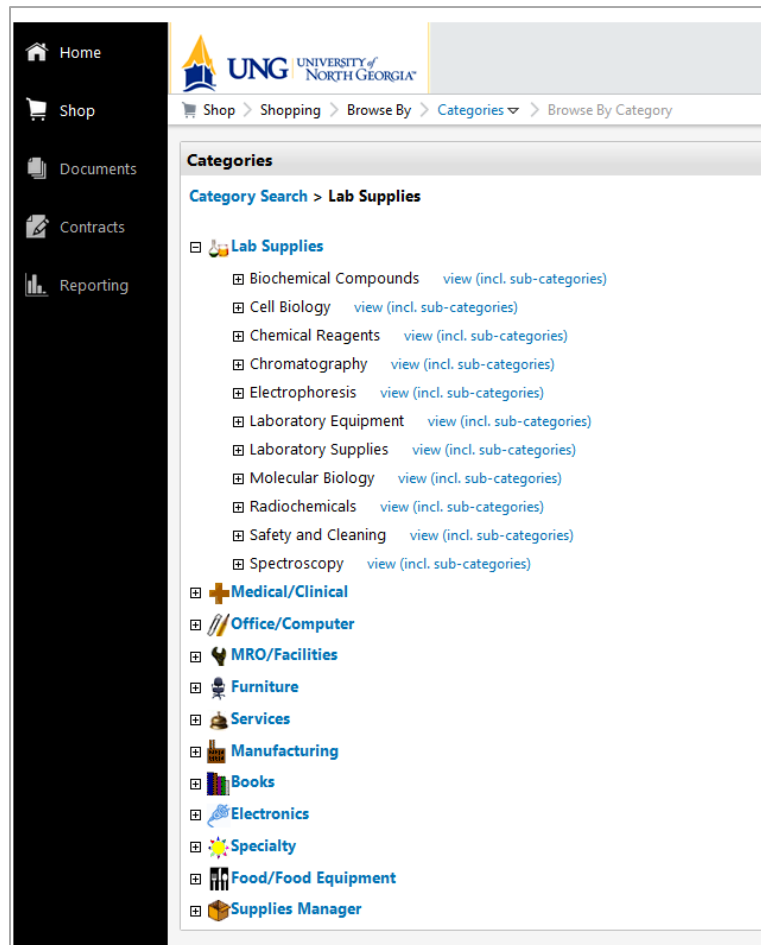
How To: Browse for Items by Supplier

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 that, instead of viewing one supplier’s table of contents, you view all supplier tables of contents. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section.

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



How To: Browse for Items by Category

1. From the 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.

- 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.
- 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.

The screenshot shows a product comparison interface with a table of four items. Each item has a 'Select' checkbox, a quantity input field (set to 1), and an 'Add to Cart' button. The table columns represent different product specifications.

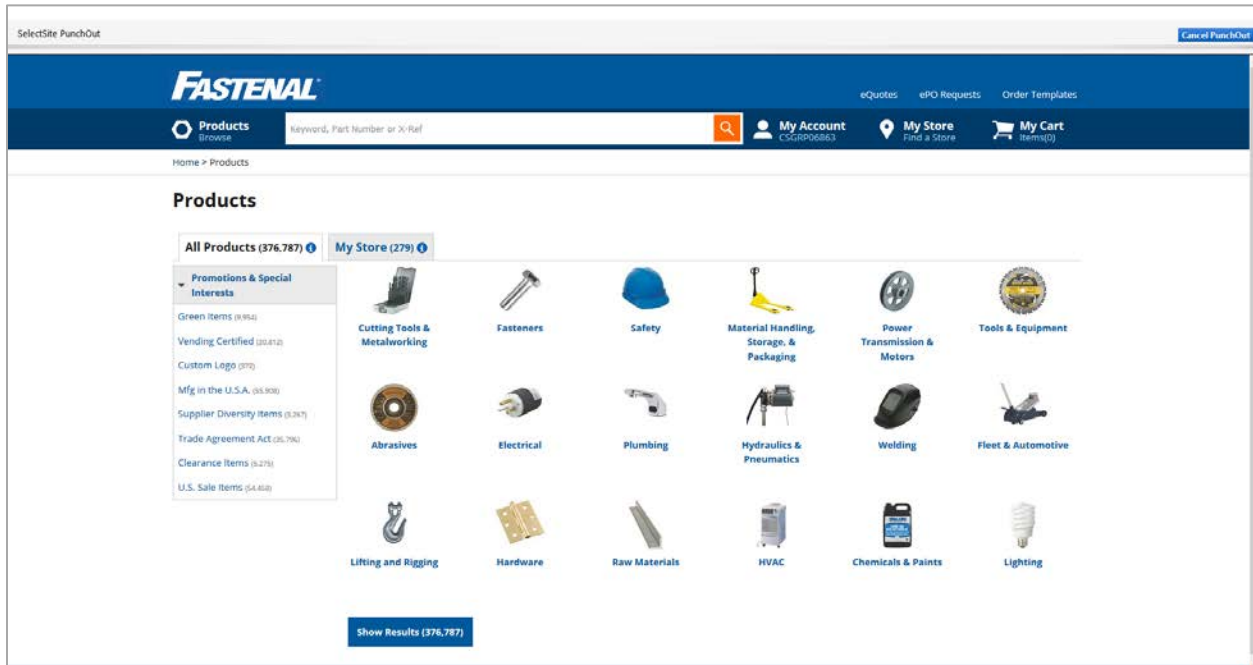
Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add to Cart	Qty 1 Add to Cart	Qty 1 Add to Cart	Qty 1 Add to Cart	Qty 1 Add to Cart
Product Details	Whatman No. 1 Chromatography Paper, 11-cm2 Sheets, Pack of 100	Chromatography Paper, Pack of 100	Whatman No. 1 Chromatography Paper, 1-1/2" x 300-ft Roll	Whatman No. 1 Chromatography Paper, 1" x 600-ft Roll
Catalog No.	689110	974432	689105	689107
Price	25.16 USD	14.95 USD	42.75 USD	44.96 USD
Supplier	Carolina Biological Supply Co.	Carolina Biological Supply Co.	Carolina Biological Supply Co.	Carolina Biological Supply Co.
Category	Chromatography Paper	Chromatography Paper	Chromatography Paper	Chromatography Paper
UOM	----	----	----	----
Price per UOM	25.16 USD / unit	14.95 USD / unit	42.75 USD / unit	44.96 USD / unit
Product Size	----	----	----	----
Price per Product Size Unit	----	----	----	----
* 4 Convenience State Contract	Yes	Yes	Yes	Yes
Category UNSPSC	41-11-57-00	41-11-57-00	41-11-57-00	41-11-57-00
Color				
Image URL	http://www.carolina.com/images/p...	http://www.carolina.com/images/p...	http://www.carolina.com/images/p...	http://www.carolina.com/images/p...
Lead Time	5	5	5	5
Manufacturer Name	Carolina Biological Supply Company	Carolina Biological Supply Company	Whatman	Carolina Biological Supply Company
Manufacturer Part Number	689110	974432	689105	689107

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

Chapter 5: Shopping for Items in the GeorgiaFIRST Marketplace

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

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



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

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

Adding an Item to a Cart

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

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

Product Search - All

Shop Everything tube Go

Go to: advanced search | favorites | quick order Browse: suppliers | categories | contracts | chemicals

Results for: Everything : tube

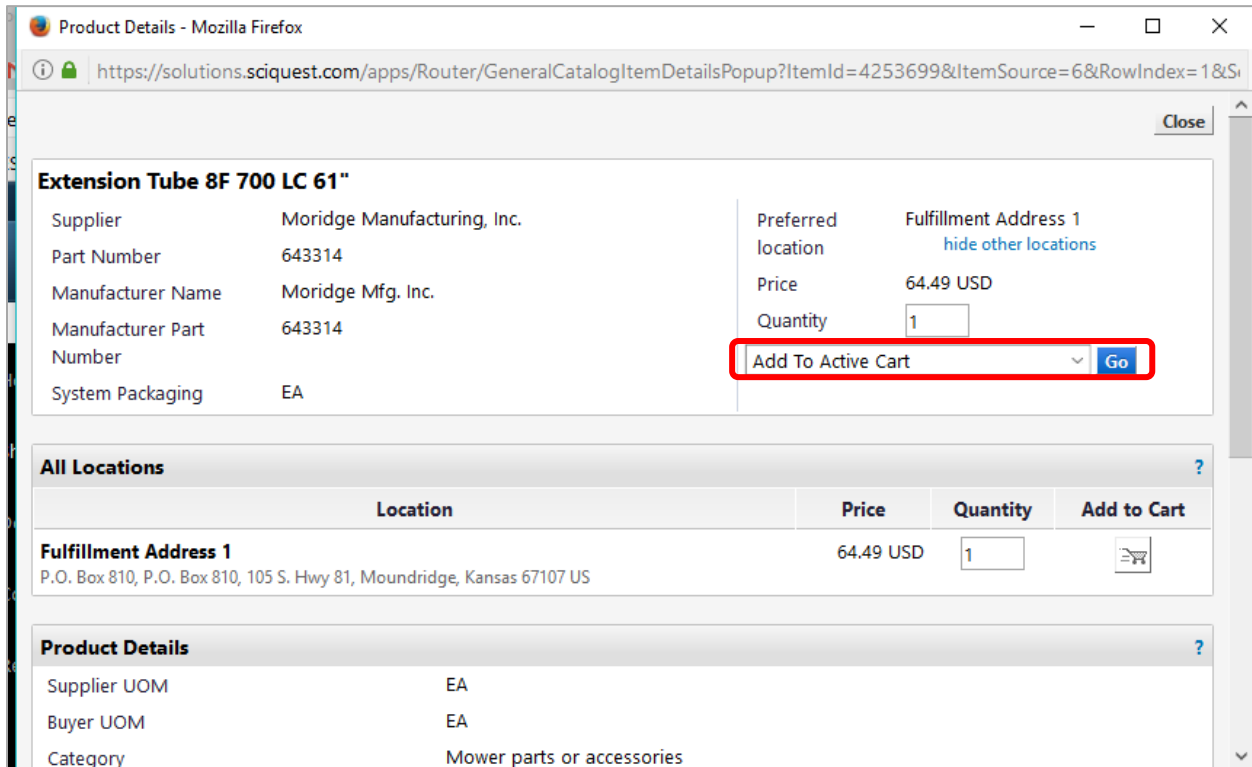
Showing 1 - 20 of 4000+ Results What does "+" mean? Compare Selected: 0

Results Per Page: 20 Sort by: Best Match Page 1 of 200

no image available	Extension Tube 8F 700 LC 61" from Morigde Manufacturing, Inc.	64.49 USD
	Part Number: 643314	<input type="text" value="1"/> Add to Cart
	Manufacturer Info: 643314 - (Morigde Mfg. Inc.)	add favorite compare
	Contract Number: 99999-001-SPD0000102-0020 more info... Tractors & Mowers	
no image available	30cc, backpack blower, tube mount throttle, 360cfm, 145mph, 14.8lbs from WESTOVER LAWN AND GARDEN	207.96 USD
	Part Number: 130BT	<input type="text" value="1"/> Add to Cart
	Manufacturer Info: 965102204 - (Husqvarna)	add favorite compare
	Contract Number: 99999-001-SPD0000102-0001 more info... Tractors & Mowers	
no image available	50.2cc, backpack blower, tube mount throttle, 494cfm, 251mph, 22.5lbs from WESTOVER LAWN AND GARDEN	239.96 USD
	Part Number: 150BT	<input type="text" value="1"/> Add to Cart
	Manufacturer Info: 965877601 - (Husqvarna)	add favorite compare
	Contract Number: 99999-001-SPD0000102-0001 more info... Tractors & Mowers	

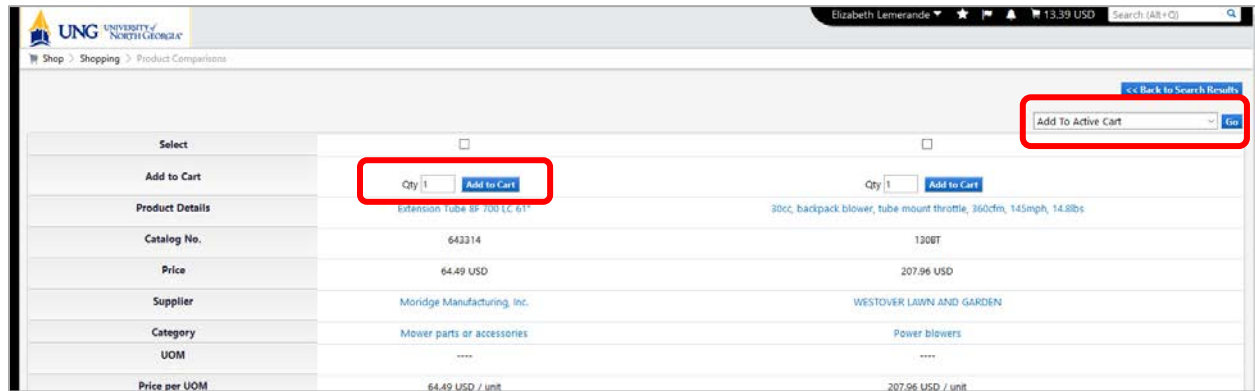
1. From the GeorgiaFIRST Marketplace **home/shop** page, **search** for the item using your preferred search method.
2. From the search results, locate the item you wish to add.
3. For that item, enter the **quantity** you wish to request.
4. Select that item's **Add to Cart** button.

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



1. From the GeorgiaFIRST Marketplace **home/shop** 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



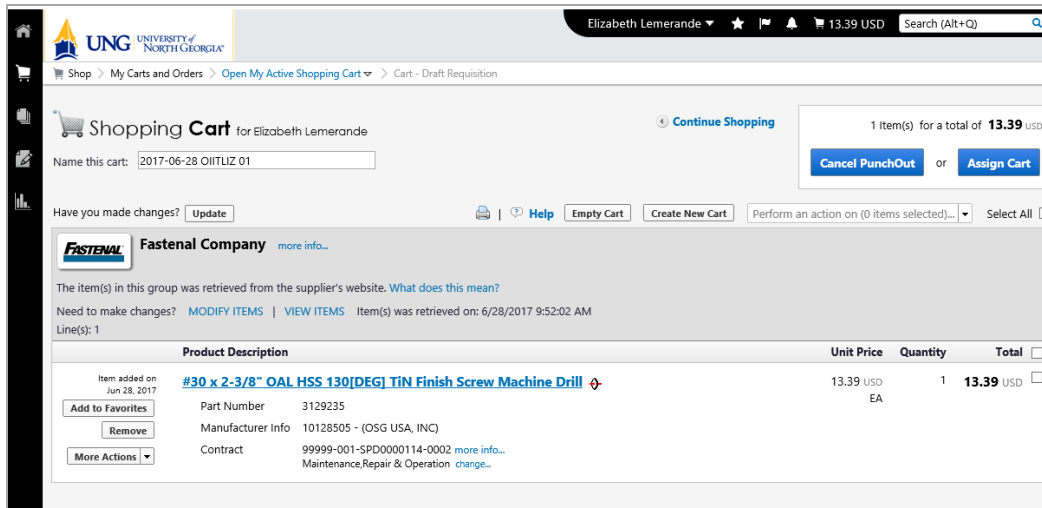
1. After searching for items and selecting items for comparison, open the Product Comparison page by selecting the **Compare Items** button.
2. From here, you can add items to your shopping cart in one of two ways:
 - a. Enter the **Quantity** and click the **shopping cart** icon, or
 - b. Place a **check**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

How To: Add Items from a Punch-Out Supplier

1. From the GeorgiaFIRST Marketplace home/shop 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 be in the active shopping cart and you will be on the Shopping Cart page.

Shopping Cart Page

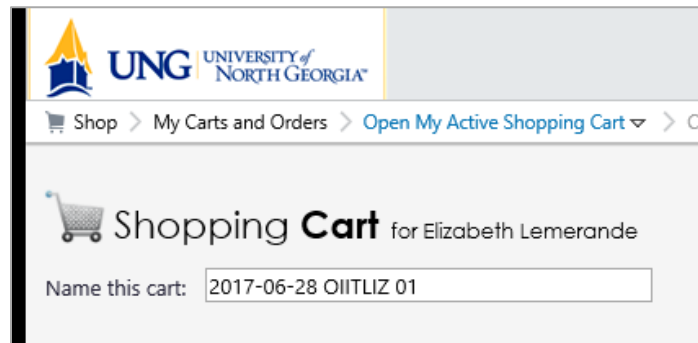
From anywhere in the Marketplace, when you are ready to review your shopping cart, you can select the cart summary link in the upper right corner of the screen. You should see your active cart name (by default, this is your user name, the date, and sequential order number for the day), the number of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



Shopping Cart Name

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

You can easily rename your cart. 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

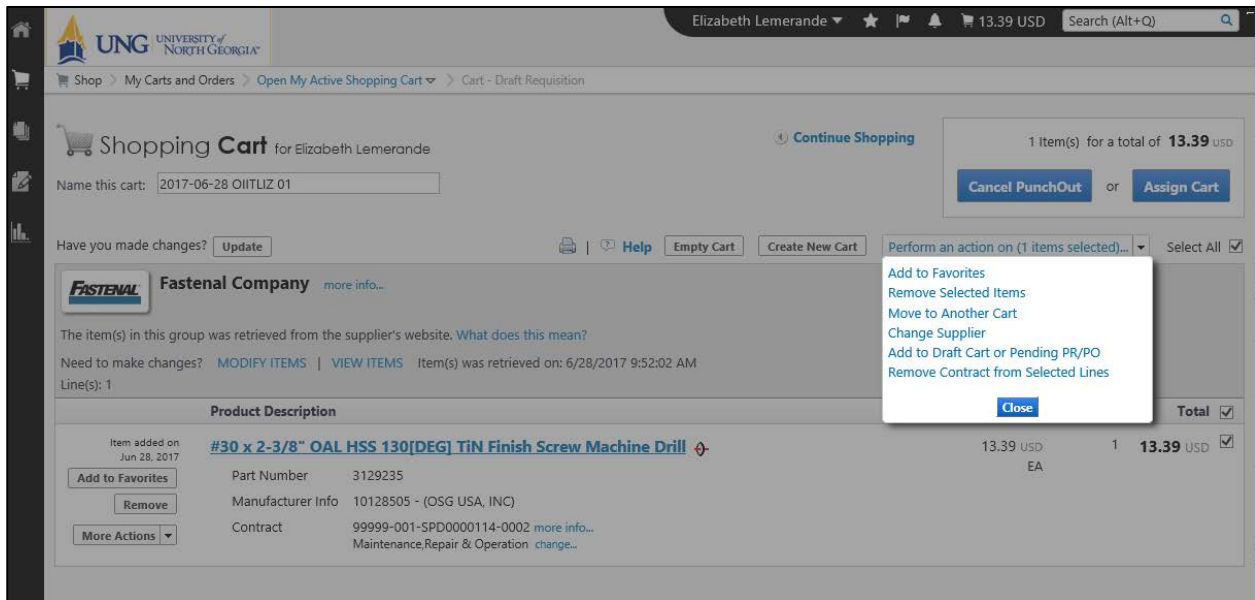
You can remove items from a shopping cart either individually or all at once. GeorgiaFIRST Marketplace allows the removal of items from the cart, regardless of whether the item is from a punch-out supplier or hosted catalog item.

How To: Remove Selected Items from a Cart

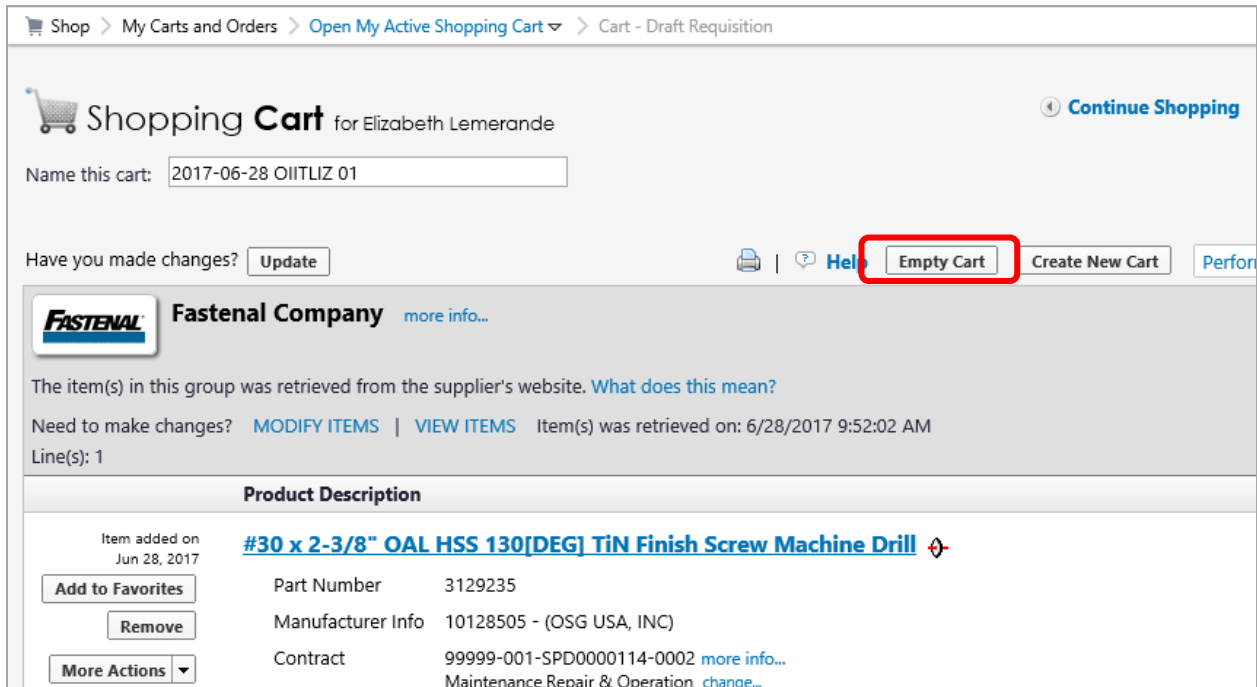
The screenshot shows the 'Shopping Cart' page for Elizabeth Lemerande. The cart contains one item from Fastenal Company: '#30 x 2-3/8" OAL HSS 130[DEG] TIN Finish Screw Machine Drill'. The item's unit price is 13.39 USD, quantity is 1, and total is 13.39 USD. A red box highlights the 'Remove' button in the 'More Actions' dropdown menu for this item. The page also shows a 'Continue Shopping' button, 'Cancel PunchOut' and 'Assign Cart' buttons, and a 'Select All' checkbox.

Product Description	Unit Price	Quantity	Total
#30 x 2-3/8" OAL HSS 130[DEG] TIN Finish Screw Machine Drill	13.39 USD	1	13.39 USD

1. Go to the **Shopping Cart**.
2. Option 1:
 - a. Select the **Remove** button on the product line.
3. Option 2:
 - 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**.
4. The selected items are then removed from your shopping cart.



How To: Remove All Items from a Shopping Cart



1. Go to the **Shopping Cart**.
2. Select the **Empty Cart** button.

3. Click the **OK** button.
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. 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. Go to the **Quantity** field in the row of the item you want to update.
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 may be listed on multiple contracts. The Marketplace will always default to the lowest price. If you wish to change to a different contract (for example, the Dell Software Contract to the Dell Networking Contract), you can select the appropriate contract while in the Shopping Cart. **If you are unsure which contract to use, contact your institution's Procurement Lead.**

Price Select - Internet Explorer
 https://solutions.sciquest.com/apps/Router/SimpleCartPriceSelectPopup?DocumentId=89991168&LineId=335309929&UnitPrice=733.82&UnitPrice_

Step 1: Select a Price

Price set currency USD
 733.82 USD
 (Current price)

Step 2: Select a Contract

No Contract

99999-SPD-SPD0000060-0006 (Software)
 This is a Statewide Contract for Software and Ancillary Services for the State of Georgia. This contract with Dell is for Software and Services in the following Categories: End User (Category 1), Enterprise (Category 2), Microsoft Reseller Services (Category 3). Services available include Maintenance, Support, Training, and limited consulting and installation services. See Exhibit A to each contract for the description of Software and Services available through the contract.

99999-SPD-SPD0000060-006A (Software)
 This is a Statewide Contract for Software and Ancillary Services for the State of Georgia. This contract with Dell is for Software and Services in the following Categories: Oracle (including Peoplesoft) Software and Databases (Category 4). Services available include Maintenance, Support, Training, and limited consulting and installation services. See Exhibit A to each contract for the description of Software and Services available through the contract.

99999-SPD-T20120501-0007 (Networking Equipment)
 This is a statewide contract Networking Equipment and other IT Infrastructure Products for the State of Georgia. Dell contract awards cover the following categories: Category 1 – Wired Networking & Infrastructure Products Category 2 – Network Optimization & Management Products Category 3 – Wireless Networking & Infrastructure Products Category 4 – Security Products. Currently, there are eighteen (18) new, active suppliers on this Statewide Contract. It is anticipated that there will be 18 active suppliers on the Statewide Contract by the end of August 2012. Network Equipment - 20664, Network Software - 20928, Network Support and Services - 92037, Network Consulting Svcs - 91830, Network Equipment Leasing - 98419.

99999-SPD-T20120702-0002 (PC Hardware, Related Equipment and Services)
 This is the Statewide Contract (SWC) for Dell Hardware. Dell has four contracts, one for software one for PC hardware, one for Servers and on for Peripherals. The Dell hardware contract covers PCs, laptops, networking, and mobile related products. For more details, see the contract details/attachments. There are [8] Vendor(s) on this statewide contract: Dell, HP, Lenovo, Howard, M&A, Transource, Panasonic, Ace. NIGP Codes: 20410, 20413, 20416, 20442, 20448, 20453, 20454, 20455, 20460, 20464, 20468, 20476, 20477, 20484, 20684, 92007, 92031, 92047, 92056, 93921, 20372, 20772, 20476, 20673

SWC90813-01 (Servers/Storage)
 This is a copy of the State Contract. See SWC90813-01 for the supplier "Dell-SWC90813 (Server)" for additional contract info.

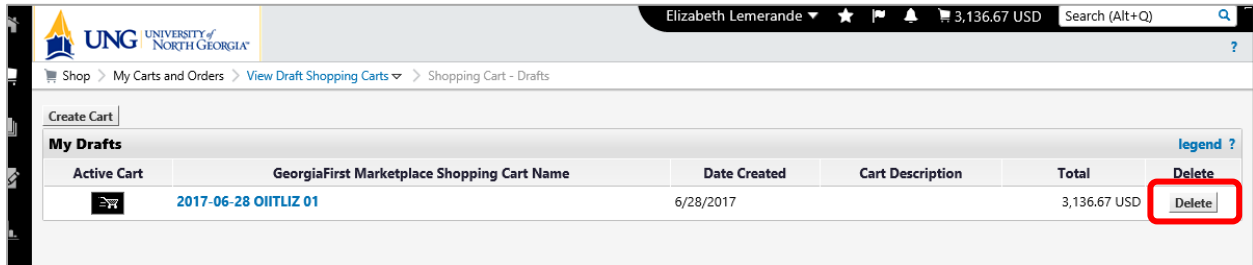
OK Cancel

How To: Select a Contract for an Item

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

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.

More about Draft Carts

Earlier, we discussed the difference between an active cart and a draft cart. Remember, an active cart is the shopping cart you are actively working on. However, you can create additional carts whenever necessary. Draft carts can be created for a variety of reasons: they can be saved for future use, used for setting up orders that are similar to your active cart, or used for standing orders you make on a regular basis.




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

Active Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2017-06-28 OIITLIZ 01	6/28/2017		3,136.67 USD	Delete
	2017-06-28 OIITLIZ 02	6/28/2017		182.60 USD	Delete
	Office Supplies	6/28/2017		12,201.26 USD	Delete

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 a web browser window with the University of North Georgia logo and navigation links. The main content area is titled "Shopping Cart for Elizabeth Lemerande". It includes a "Continue Shopping" button, a summary box showing "3 Item(s) for a total of 12,201.26 USD" with "Cancel PunchOut" and "Assign Cart" buttons, and a form to "Name this cart: Office Supplies" with an "Update" button. Below this is a table of items from "Georgia Enterprises for Products & Services (GEPS)".

Product Description	Unit Price	Quantity	Total
Item added on Jun 28, 2017  Pillow, 20" x 24", Reusable (Prison Setting) - 24 per carton ▲ Part Number: 7359800005 Manufacturer Part Number: PIDET Contract: GEPS-CERT more info... Georgia Enterprises change...	137.55 USD 24PC, CS change price...	1 Update	137.55 USD
Item added on Jun 28, 2017  Pillow, 20" x 24", Clear Cover, Reusable (Prison Setting) - 24 per carton ▲ Part Number: 7359800006 Manufacturer Part Number: PIDET-CV Contract: GEPS-CERT more info... Georgia Enterprises change...	165.94 USD 24PC, CS change price...	1 Update	165.94 USD
Item added on Jun 28, 2017  Pillow, 20" x 26", Resuable - 24 per carton ▲ Part Number: 7359800008 Manufacturer Part Number: PIGP-S Contract: GEPS-CERT more info... Georgia Enterprises change...	105.29 USD 24PC, CS change price...	113 Update	11,897.77 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 colored background. Your active cart will always be listed in the Cart Summary in the upper right corner of the screen.

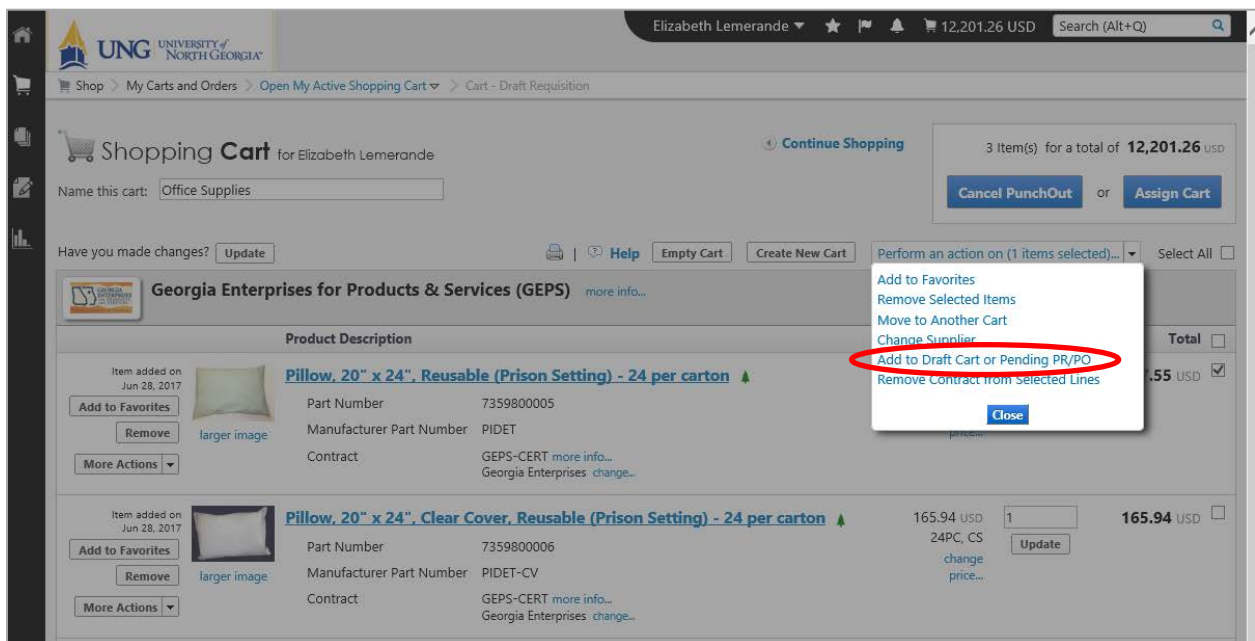
How To: Create a New Cart

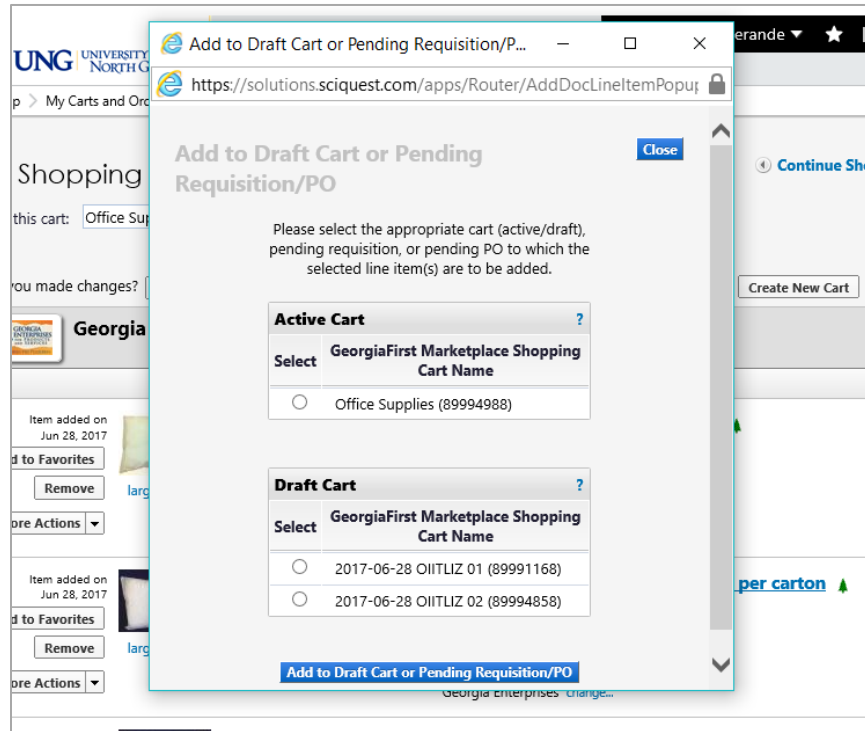
1. Select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Draft Shopping Carts** sub-link.
4. Select the **Create Cart** button.
5. In the **Name this cart** field, you can replace the system default cart name with a different one if desired. Then click the **Update** button.

Adding Items to a Draft Cart

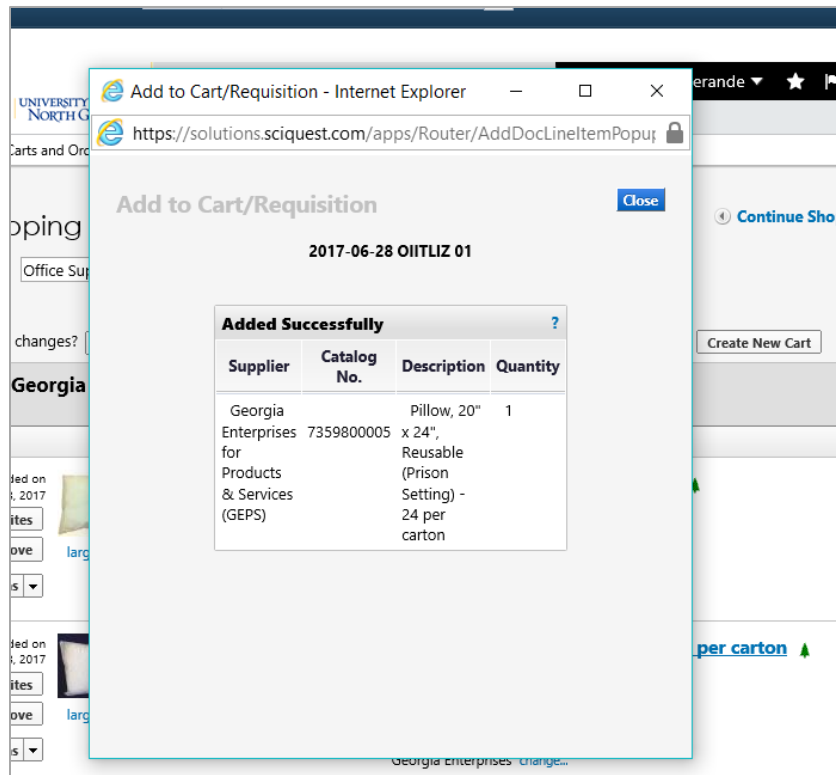
Generally, when you add an item to a cart, that item is added to your active cart. If you want to add an item to a draft cart without making that cart active, you can do so.

- 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 to which draft cart you want to add the item. Select the appropriate cart by clicking its radio button. Then select the Add to Draft Cart button.
- Note: If your browser is set to block pop-ups, you will have to allow pop-ups temporarily to add to a draft cart.





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



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

Reviewing Line Item History

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

How To: Review Line Item History

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

Chapter 6: Assigning a Cart to a Requester

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

Specifying a Default Requester

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

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

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

The screenshot shows the 'Cart Assignees' page for user Elizabeth Lemerande. The page includes a navigation menu on the left with options like 'User Profile and Preferences', 'Default User Settings', 'Custom Field and Accounting Code Defaults', 'Default Addresses', and 'Cart Assignees'. The main content area is titled 'Cart Assignees' and features an 'Add Assignee...' button. Below this is a table titled 'My Cart Assignees' with two columns: 'Name' and 'Action'.

Name	Action
Shanda Agricola	Set as Preferred Remove
Melody Armstrong (Preferred Assignee)	Remove Preferred Remove

How To: Specifying a Default Requester

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

Shopper ChartField Defaults

As a shopper, you have a set of default ChartFields that will be charged when you request goods through the GeorgiaFIRST Marketplace. In other words, you have a defined default account code that is charged for the items that you request. This way, if you are a shopper for the Biology Department, the Biology Department is charged.

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

The ChartFields tied into your Requester ID are:

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

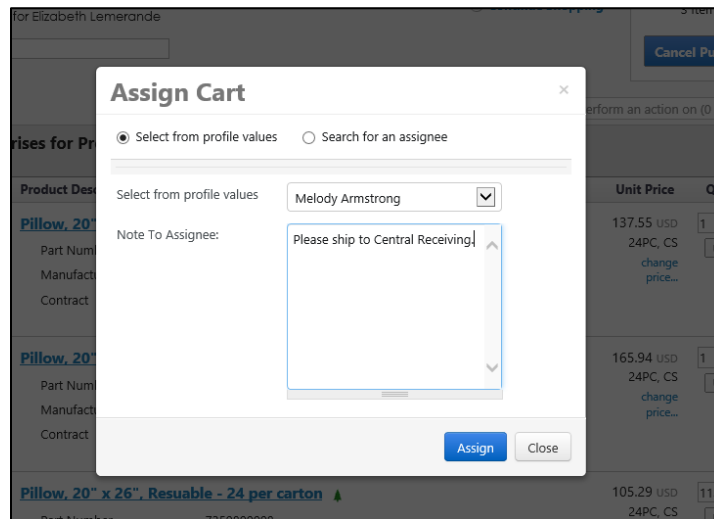
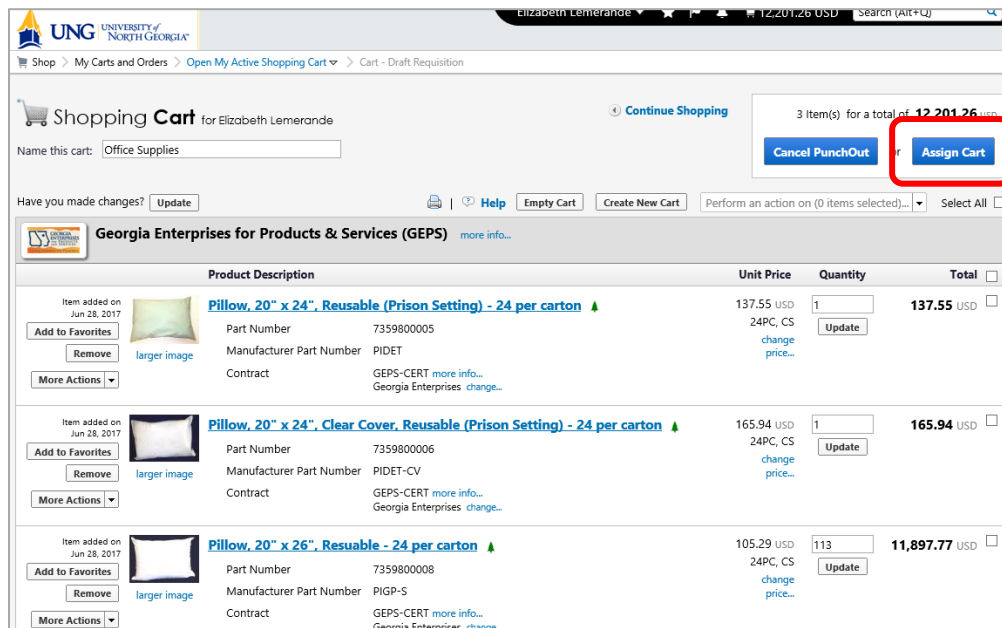
The Account Code that will be charged will default based on the item. Each item in the GeorgiaFIRST Marketplace belongs to an NIGP code (or product category). For example, pencils belong to one category, while office furniture belongs to another. Therefore, when you request office supplies through the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

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

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

Assigning a Cart

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



How To: Assign a Cart

1. Pull up your **shopping cart**.
2. Review your shopping cart to ensure that everything is correct. Make any necessary updates to the items in your cart. 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.
3. When you are ready to assign your cart, click the **Assign Cart** button.
4. If you have a Default Requester in your profile, that Requester's name should appear next to **"Select from profile values."**
 - a. If you want to assign your cart to another Requester set up in your User Profile, select the **"Select from profile values"** radio button.
 - i. Using the drop down list, select the appropriate Requester.
 - b. If you do not have a Default Requester in your profile and need to search for your requester, select the **"Search for an assignee"** radio button.
 - i. Select the **Search for an assignee** link.
 - ii. In the User Search box, confirm that your **Business Unit** appears in the Business Unit drop down list.
 - iii. Click the **Search** button.
 - iv. Select the **Requester** you want to assign your shopping cart to and click the **[select]** link.
5. In the **Note to Assignee** section, enter any instructions about charging ChartFields that are not your default. This note is included in the email notification to the Requester.
6. Click the **Assign** button. A shopping cart notification displays. Your shopping cart has now been assigned to your Requester.

Unassigning a Cart

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

The screenshot shows the 'My Drafts Assigned to Others' section of the GeorgiaFIRST Marketplace interface. It contains a table with the following data:

View Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	Office Supplies	6/28/2017	Elizabeth Walker	12,201.26 USD	Unassign

How To: Unassign a Cart

1. From the GeorgiaFIRST Marketplace home page, select the **Shop** icon.
2. Select the **My Carts and Orders** link.
3. Select the **View Draft Shopping Carts** link.
4. Locate the cart you want to unassign under the section “My Drafts Assigned to Others” and click the **Unassign** button.
5. Edit your cart as needed and then reassign it back to your Requester.

Reviewing Cart History

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

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

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

How To: Review the History for a Cart

1. Retrieve a **Shopping Cart** that already has items.
2. In the bottom right corner of the page, select the **view cart history** link.
3. Review the cart history. You can select the "**Click to filter history**" link to filter your results by date or by action.
4. To export the cart history to a csv file, click the **Export CSV** button.

Creating a New Cart from a Previous Cart

This function allows you to create a new, active cart by copying a previously used cart. This is a convenient way to repeat an order. Items can be removed or additional products can be added to the copied cart if needed.

The screenshot shows the 'Summary' tab of a cart. The 'Available Actions' dropdown menu is highlighted with a red box, showing 'Copy to New Cart' as the selected option and a 'Go' button to its right. Below this, the 'General' section shows the Cart Name as '2017-01-12 OIITLIZ 01' and the Business Unit as 'University of North Georgia (53000)'. The 'Supplier / Line Item Details' section shows the supplier 'WW Grainger, Inc.' and a table of line items. The table has columns for Product Description, Catalog No, Size / Packaging, Unit Price, Quantity, and Ext. Price. The first line item is 'TK5210161T Coated Gloves Coating Material Latex Coating Coverage Palm Coating Finish Crinkled Lining PolyesterCotton Size L Color High Vis YellowBlack Cuff Knit Thumb Style Wing Gauge 10 ANSISEA Abrasion Level 2 Application Automotive Assembly General M' with a unit price of 3.26 and a quantity of 1 EA, resulting in an extended price of 3.26 USD. A 'Supplier subtotal' of 3.26USD is shown at the bottom right.

How To: Create a New Cart from a Previous Cart

1. Select the **Shop** icon.
2. Select **My Carts and Orders**.
3. Select either View My Orders (Last 90 Days) or View My Orders (Last 5 Orders).
 - a. Tip: Use the Refine Search Results section to select different criteria.
4. Locate the cart you want to copy and select it by clicking on the cart number. Use the **Quick View** icon to see a summary.
5. Select the **Cart Number** link.
6. In the **Available Actions** drop down list, select **Copy to New Cart** and select the **Go** button.
7. A new active cart has now been created. You can now treat this new cart as you would any other active cart.

Chapter 7: Shopper Notifications

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

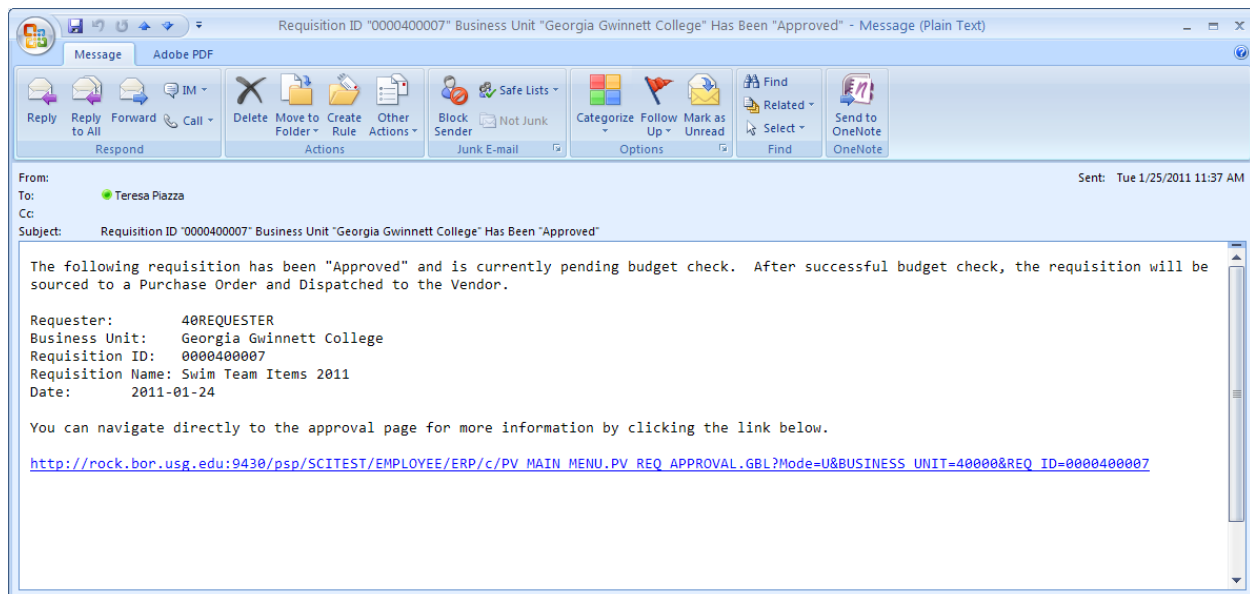
Notification #1: Shopping Cart Has Been Pulled into a Requisition

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

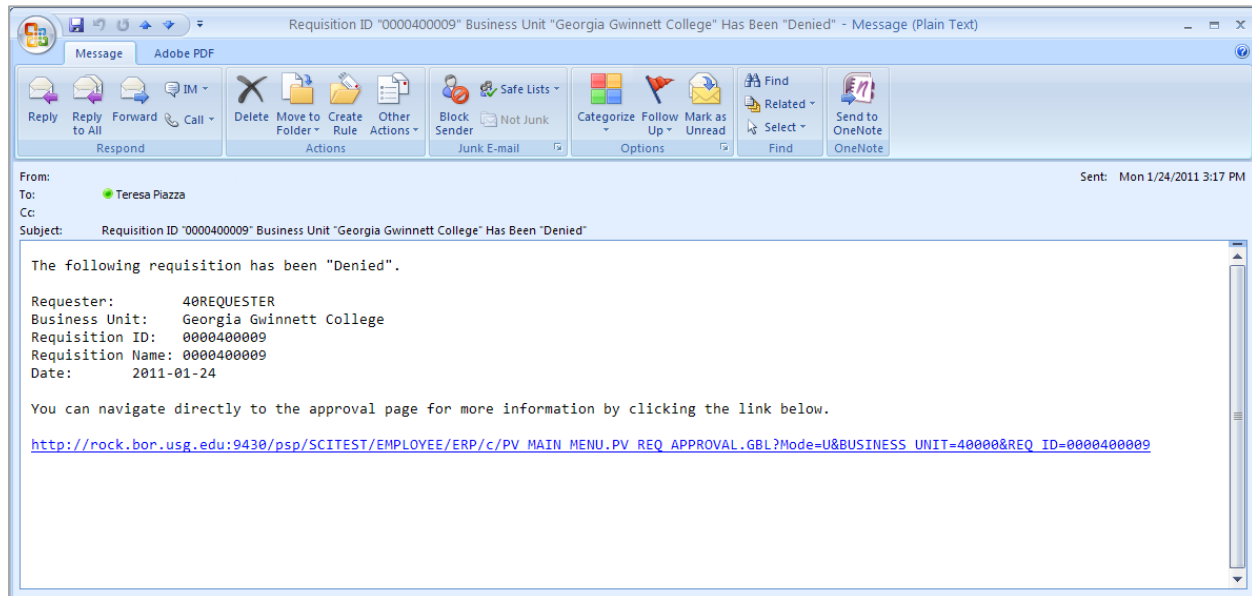
Notification #2: Your Requisition Has Been Approved

Once the Requester has pulled your shopping cart into a requisition, he/she submits the requisition for approval. Depending on your institutional setup for approvals, your requisition may be approved by one or more individuals. Once the last approver has approved your requisition, the system will notify you via email that your requisition has been fully approved.

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

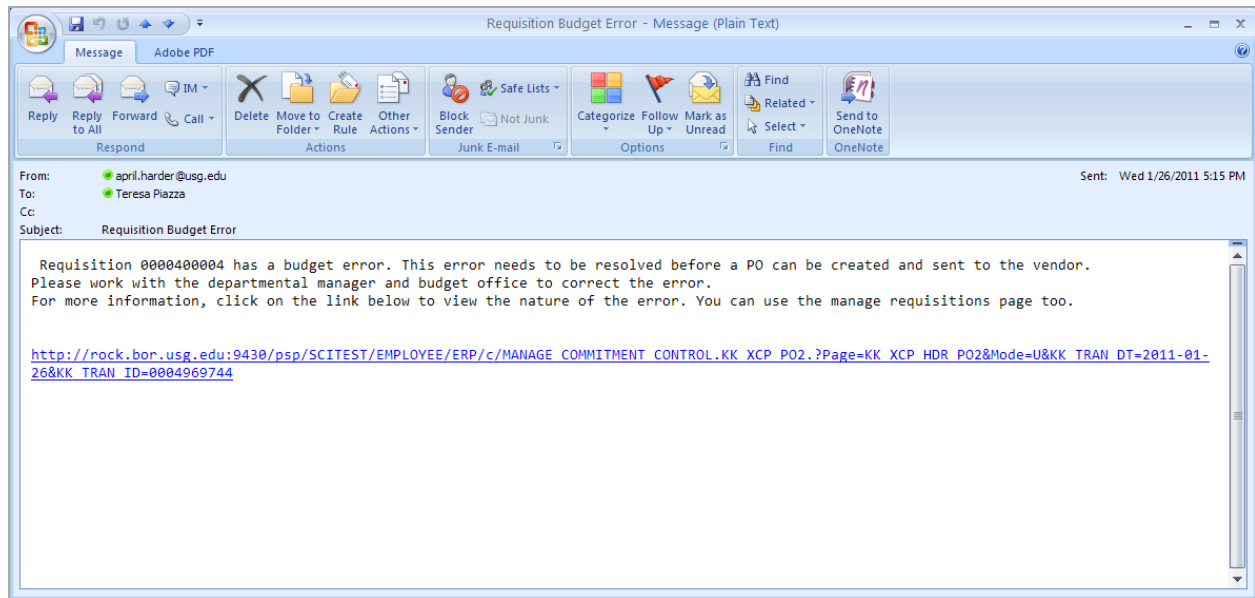


Likewise, if your requisition (or a requisition line) is denied, you will also receive an email indicating this. When you do, you should notify your Requester to determine the best course of action. We recommended that if you receive a “Denied Requisition” email, you forward it to your Requester. Only your Requester can go into the system and correct your requisition for resubmission.



Notification #3: Your Requisition has Failed Budget Checking

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



Notification #4: Your Requisition Items Need to be Received

Once your requisition has been turned into a purchase order and dispatched to the supplier, the supplier can then fill your order. In addition to sending you the purchased items, the supplier will send an invoice to your Accounts Payable department for these items. Before Accounts Payable can pay an invoice, it will check to see if the items you purchased require a receipt before payment can be made. If a receipt is required and has not been entered into the system, 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 8: GeorgiaFIRST Marketplace Favorites

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

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

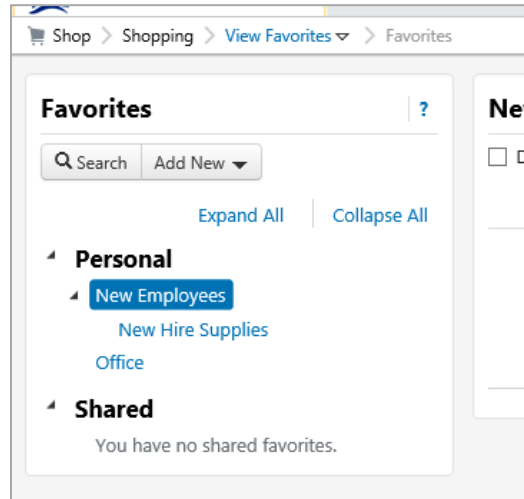
Each institution has a “Custom Configuration” shared favorites folder that can be used to highlight or specify particular items and configurations that are standard or recommended by the institution procurement department.

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

Creating Favorites Folders

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

You can create a structure with only one folder named “favorites” or you can create several folders in which you separate favorite item types. In order to save a favorite item, you need to create at least one personal folder. Below is an example of a folder structure:

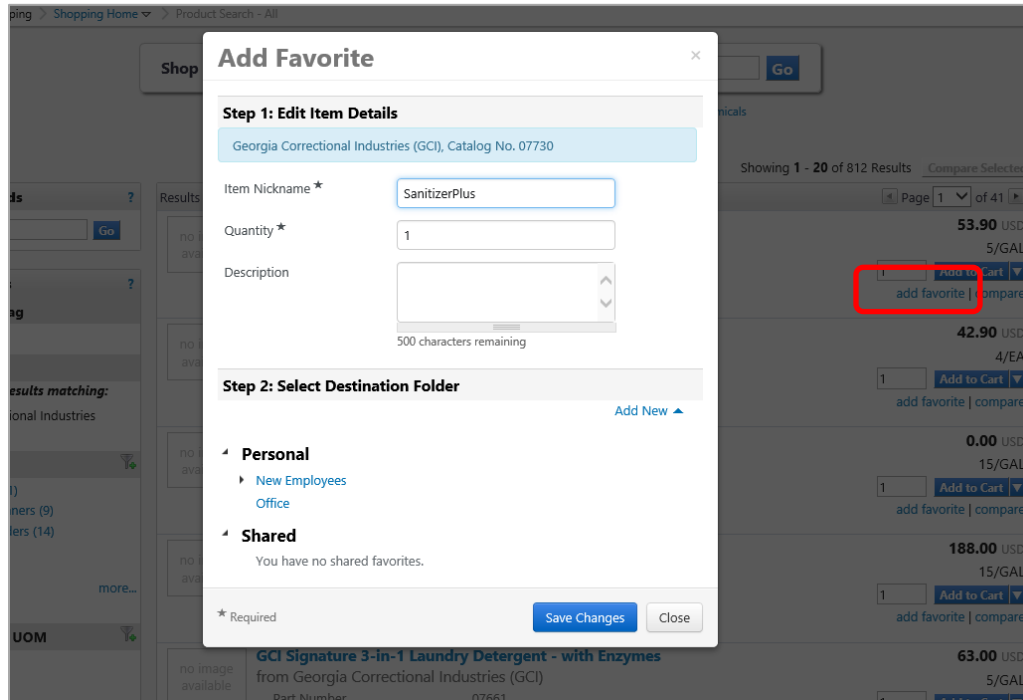


How To: Create a Personal Folder or Sub-Folder

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

Adding Items as Favorites

You can add personal favorites from the Product Search Results page or from a cart. Adding favorites is a fairly simple process. Once an item is saved as a favorite, it is identified in search results by a 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 Favorite** popup displays.
4. In the **Item Nickname** field, you can enter a name to reference the item. If you do not enter a nickname, the supplier's description will remain.
5. In the **Quantity** field, you can enter the standard quantity that will be ordered for this item. Once you add a favorite item to your cart, the quantity can be updated there as well.
6. Select the **Destination Folder**.
 - a. If you already have folders created, you will see your Personal Folders listed.
 - i. Select the **folder** you want to add your favorite item to so that it is highlighted.
 - ii. Click the **Save Changes** button.
 - b. If you do not have any Personal folders created, you will need to create at least one personal folder in order to save an item as a Favorite.

- i. Click the **New** button.
 - ii. Select the option **Top level personal folder**.
 - iii. Enter a folder name and description. Click **Save**.
 - iv. The new folder displays in the list and is automatically selected for the favorite item.
 - v. Click **Submit Changes** to save the item.
7. After an item is added as a favorite, it can be accessed via the **favorites** link.
8. To add an item as a Favorite from a cart, select the **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 **Save Changes**.

Adding Favorite Items to Your Cart

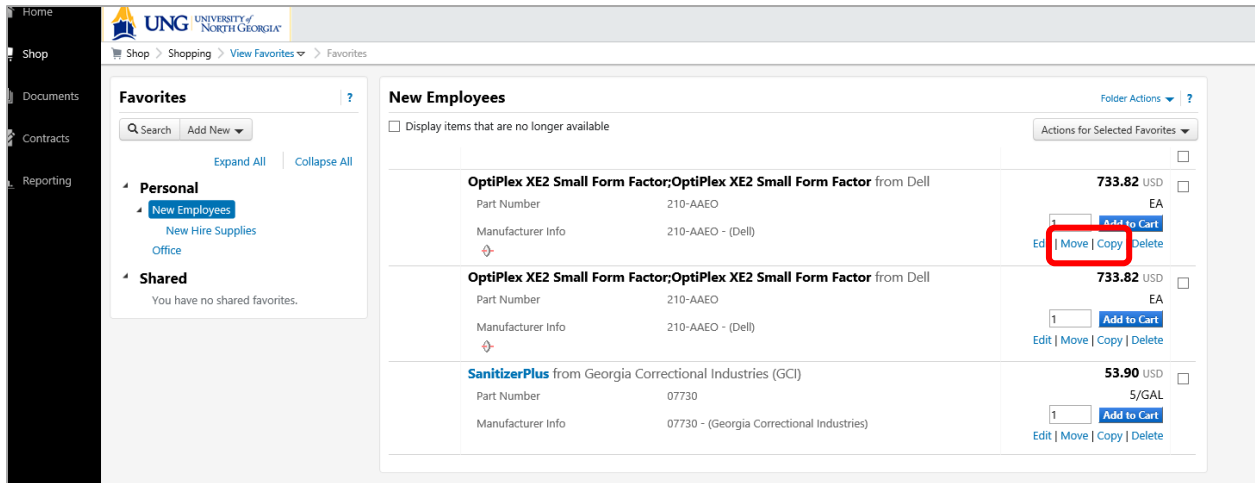
The Favorites functionality allows shoppers to store items that are referenced or ordered on a regular basis. Once items are added to Favorites, they can be added to a shopping cart from either of two places: from the Favorites page or from the Product Search results page (if favorite items are listed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

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

1. From the 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 the **Add to Cart** button.
5. To add multiple items to your cart, select the items with a **checkmark**, and then click **add to cart** at the top of the list.
6. Your selected favorite items are now in your cart.

Moving and Copying Items Between Folders

Within 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 to create “repeat” items for multiple folders.



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

Editing Favorite Items

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

The screenshot shows the 'Favorites' section of the GeorgiaFIRST Marketplace. On the left, a sidebar lists navigation options: Home, Shop, Documents, Contracts, and Reporting. Under 'Personal', the 'New Employees' folder is selected. The main area displays a table of favorite items. The table has columns for item name, part number, manufacturer info, price, and actions. The 'Edit' link for the second 'OptiPlex XE2 Small Form Factor' item is highlighted with a red box.

New Employees		Folder Actions	?
<input type="checkbox"/> Display items that are no longer available			
OptiPlex XE2 Small Form Factor;OptiPlex XE2 Small Form Factor from Dell		733.82 USD	<input type="checkbox"/>
Part Number	210-AAEO	EA	<input type="checkbox"/>
Manufacturer Info	210-AAEO - (Dell)	1 <input type="text"/> Add to Cart	Edit Move Copy Delete
OptiPlex XE2 Small Form Factor;OptiPlex XE2 Small Form Factor from Dell		733.82 USD	<input type="checkbox"/>
Part Number	210-AAEO	EA	<input type="checkbox"/>
Manufacturer Info	210-AAEO - (Dell)	1 <input type="text"/> Add to Cart	Edit Move Copy Delete
SanitizerPlus from Georgia Correctional Industries (GCI)		53.90 USD	<input type="checkbox"/>
Part Number	07730	5/GAL	<input type="checkbox"/>
Manufacturer Info	07730 - (Georgia Correctional Industries)	1 <input type="text"/> Add to Cart	Edit Move Copy Delete

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 **Save Changes** button.

Deleting Favorite Items and Folders

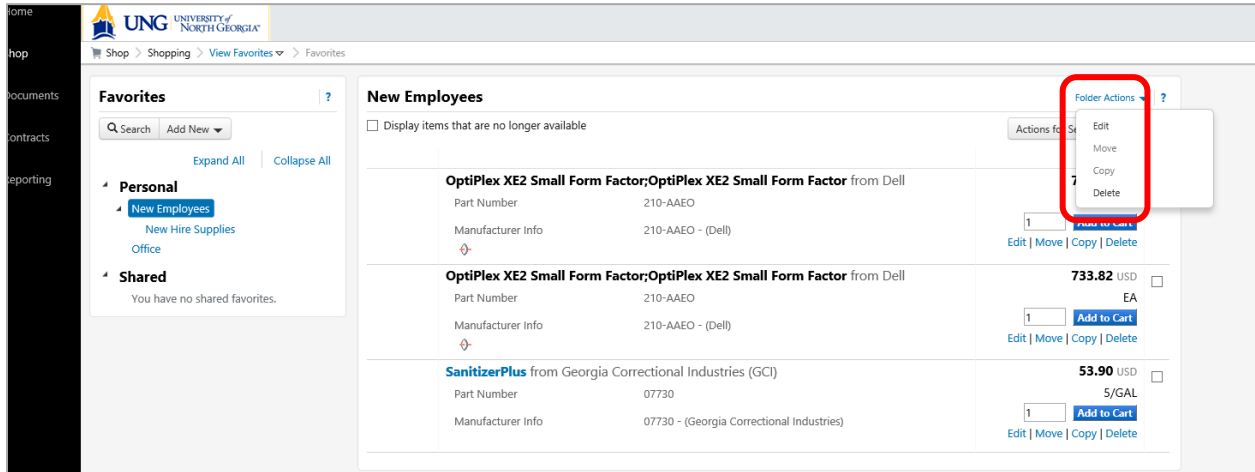
In Favorites, items and folders can be deleted as necessary. When you delete a folder, you delete those items saved in that folder as favorites also.

The screenshot shows the 'Favorites' section of the GeorgiaFIRST Marketplace. On the left, a sidebar lists 'Personal' and 'New Employees' folders. The 'New Employees' folder is selected, showing a list of items. The first two items are 'OptiPlex XE2 Small Form Factor' from Dell, each priced at 733.82 USD. The third item is 'SanitizerPlus' from Georgia Correctional Industries (GCI), priced at 53.90 USD. A red box highlights the 'Delete' link under the 'Add to Cart' button for the first two items.

How To: Delete an Item from Favorites

1. From the GeorgiaFIRST Marketplace, select the **Favorites** link.
2. Select the appropriate **folder** from the left pane and locate the item(s) in the right pane.
3. To delete one item, click the **Delete** hyperlink directly under its “Add to Cart” button.
 - a. Click the **Yes** button to confirm the deletion.
4. To delete multiple items, select the items with a **checkmark**.
 - a. Click the **Delete** link at the top of the list.
 - b. Click the **Yes** button to confirm the deletion.

How To: Delete a Folder from Favorites



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

Chapter 9: User Profile in 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. You want to be careful before making any changes to items that are editable in your user profile. Changing your settings may have a direct impact on receiving notifications, access to certain catalogs, and access to view contracts.

It is through your User Profile that you select your Requesters (see page 53). Therefore, you will need to access your profile on occasion. Below are some brief descriptions of what makes up your User Profile.

User Information and Settings

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

When you enter the 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 to **Profile > User Profile and Preferences > Language, Time Zone and Display Settings**. To change the color, select your institution in the Color Theme drop down list.

How To: Update Color Theme to Match School Logo

1. In the GeorgiaFIRST Marketplace, click on your **Name**, found in the banner at the top of the page.

2. Under the **User Profile and Preferences** section, select the **Language, Time Zone and Display Settings** link.
3. Select your institution in the **Color Theme** drop down list.
4. Click the **Save Changes** button.

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

The screenshot displays the 'User Profile and Preferences' interface. On the left, a navigation menu lists various settings, with 'Cart Assignees' highlighted in blue and a red box around it. The main content area is titled 'Cart Assignees' and features a red-bordered 'Add Assignee...' button. Below this is a section for 'My Cart Assignees' which includes a table with headers 'Name' and 'Action'.

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

1. In the GeorgiaFIRST Marketplace, click on the drop down arrow by your **Name**, found in the banner at the top of the page.
2. Under the **Default User Settings** section, select **Cart Assignees**.
3. Click the **Add Assignees** button to open the User Search box.
4. Add the last name of the requester you wish to choose or click the Search button to see a list of all requesters.
5. Click select in the Action column by the requester that you wish to choose.

Chapter 10: Desktop Receiving

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

Some shoppers will have the ability to perform their own Desktop Receiving, which is creating a receipt in the system. This receipt is tied into the Requisition, Purchase Order, and Invoice so that payment can be issued. Without the receipt, the payment cannot be issued.

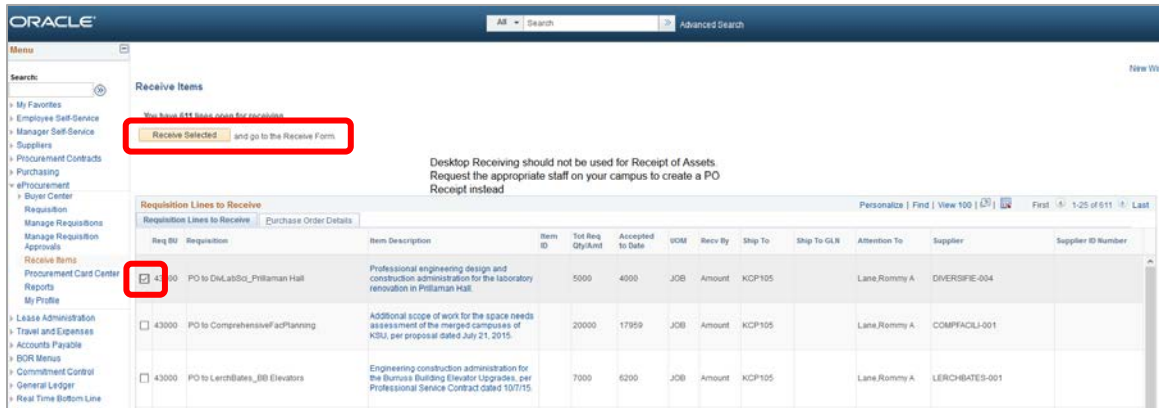
Not all shoppers will have this responsibility. Check with your institution for your applicable business processes. If you do have the Desktop Receiving responsibility, continue with this chapter to learn how to create receipts in the PeopleSoft system.

Desktop Receiving

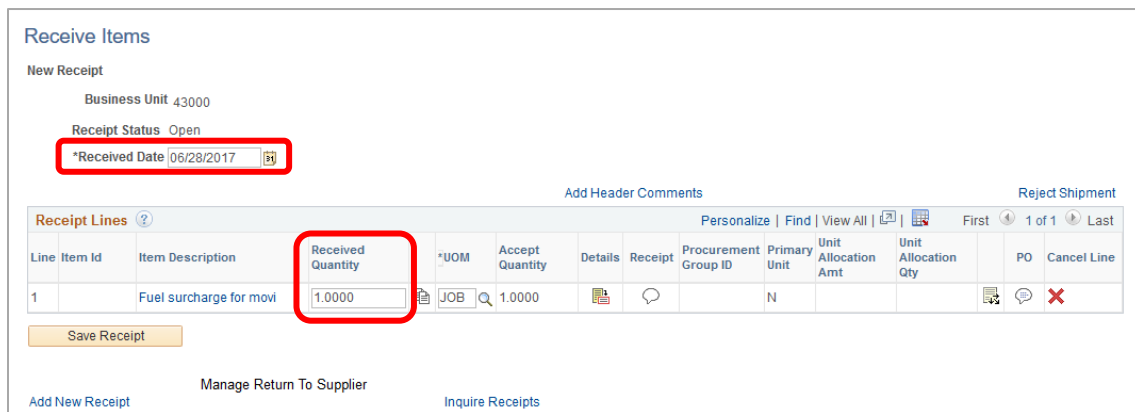
Desktop Receiving is a function within the eProcurement module. It is a simplified version of what your Central Receiving department does on campus. Your Central Receiving Department will still be responsible for creating receipts in the PeopleSoft system for assets and other items that need to be inventoried.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

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

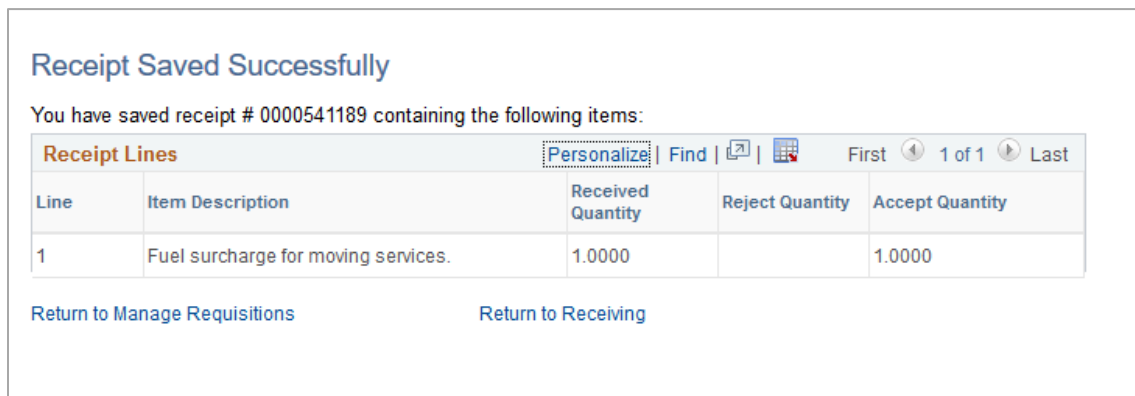
On the Receive Items page, all of your requisitions that have not been fully received will be listed. Through the Receive Items page, you will be able to indicate whether you have received the full quantity requested or just a partial quantity.



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



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



How To: Create a Desktop Receipt

1. Log into the **PeopleSoft Core** system.
2. Select **eProcurement** in the menu.
3. Select **Receive Items** in the menu.
4. Locate the **Requisition Line Item** you need to receive.
5. Select the requisition by placing a **checkmark** in its **select** box (or to receive all line items, choose the Check All button).
6. Select the **Receive Selected** button.
7. If needed, change the **Received Date**. By default, the current date will be listed.
8. In the **Received Qty** field, enter the **quantity** received.
9. To review details about the actual purchase order, select the **details...** icon.
10. To attach comments to the Receipt, select the **comments** icon.
 - a. Here you can indicate the condition and input a comment if needed.
 - b. Do not include any slashes (/) in your comments.
11. Click the **Save Receipt** button.
12. Your Receipt Number will be listed on the “Receipt Saved Successfully” page.

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