Procurement Services Training Manual

An Introduction to

ePROCUREMENT and GeorgiaFIRST Marketplace

CLAYTON STATE UNIVERSITY

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Chapter 1: eProcurement and Georgia*FIRST* Marketplace Overview

What are eProcurement and the Georgia*FIRST* Marketplace?

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

Currently, we use paper requisitions to request an item to be purchased. The hardcopy requisition is routed for approval signatures, and then sent to the Purchasing Office. The Purchasing Office keys the information into the system to create a Purchase Order to send to the supplier.
With ePro, much of this is completely automated. A requisition is created within ePro and then electronically routed for approval. The approval chain is dependent on the Chartstring charged and item type, among other things. Finally, after the last electronic approval is made, the requisition can be copied into, or sourced into an official Purchase Order that is dispatched to a supplier.

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

Benefits of ePro and the Georgia*FIRST* Marketplace

With this new system of online shopping and electronic requisitioning, you will see some immediate benefits, including:

- Reduction in paper forms routing through different offices
- Online browsing and shopping for items
- Comparison shopping
- You only need one login to shop from multiple suppliers
- You can request goods from multiple suppliers through one shopping cart
- All items in the Georgia*FIRST* Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as 'favorites' in the Georgia*FIRST* Marketplace

Types of Roles Involved

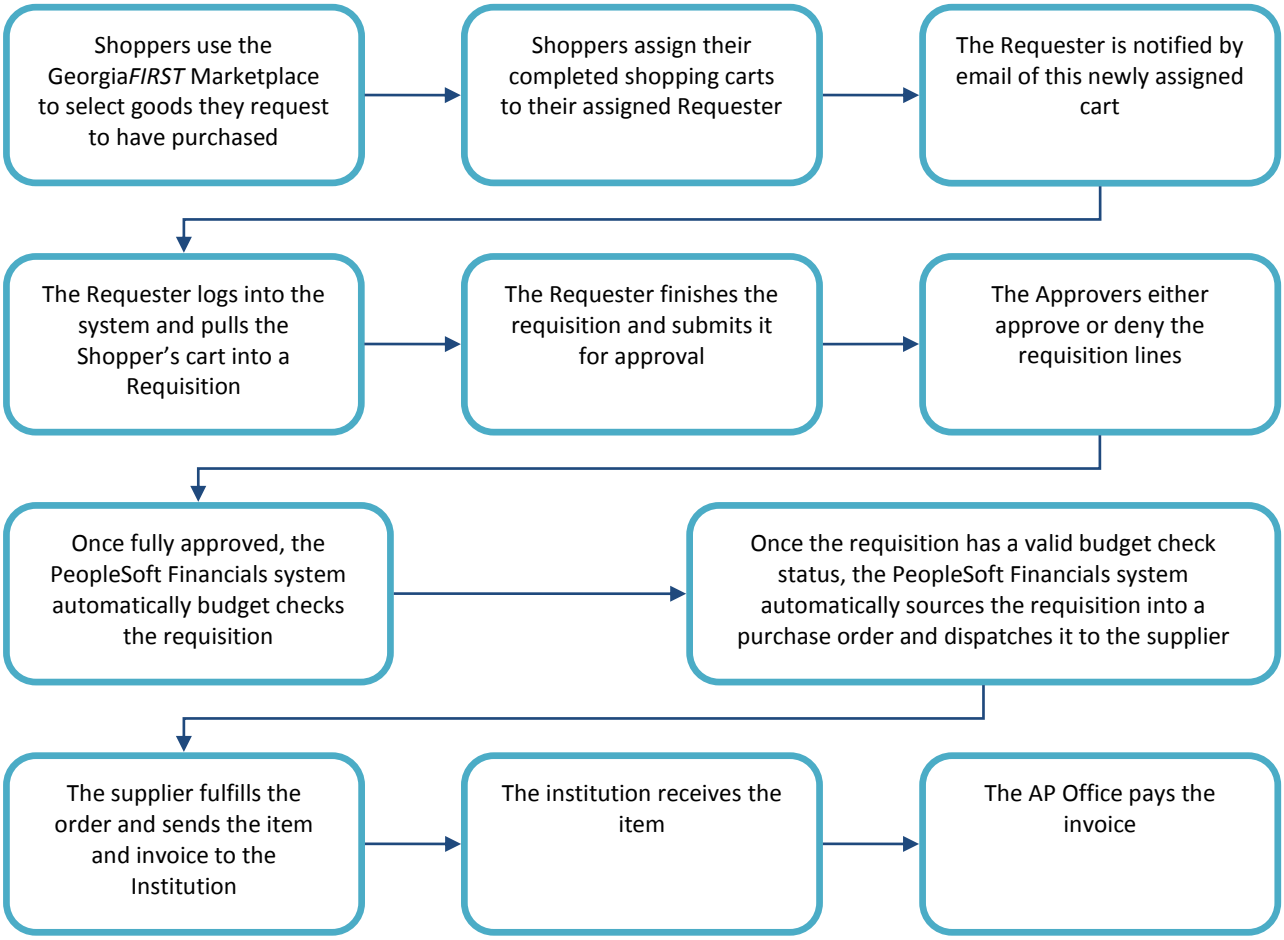
In order for the ePro and Georgia*FIRST* Marketplace functionality to work properly, users are set up with specific roles and responsibilities. They include:

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

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

Process Flow

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



How does PSFIN pass along user information to Georgia*FIRST* Marketplace?

In order for you to begin using the Georgia*FIRST* Marketplace, your local security administrator first sets you up in the PeopleSoft Financials system, with the correct roles and authorizations. By using your PeopleSoft User ID and Password, you can access the PeopleSoft system. Once in PeopleSoft, you simply proceed to the Georgia*FIRST* Marketplace through a hyperlink.

By logging in through PeopleSoft, the system sends specific user information to the Georgia*FIRST* Marketplace, allowing you to log in only once and shop from multiple

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

How Do Approvals Work?

As mentioned earlier, once the Requester builds the requisition in ePro from a GeorgiaFIRST Marketplace shopping cart, the Requester submits it for approval. In ePro, approvals are completed through Workflow. The ePro module looks at certain values in the requisition and automatically routes it to all necessary approvers.

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 5 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 7 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: eProcurement Requisition Basics

When building an eProcurement Requisition, there are three steps in the process: Defining the requisition, Adding items or services, and then reviewing and submitting. In this chapter, we will review each step.
Remember, there are two types of requisitions:

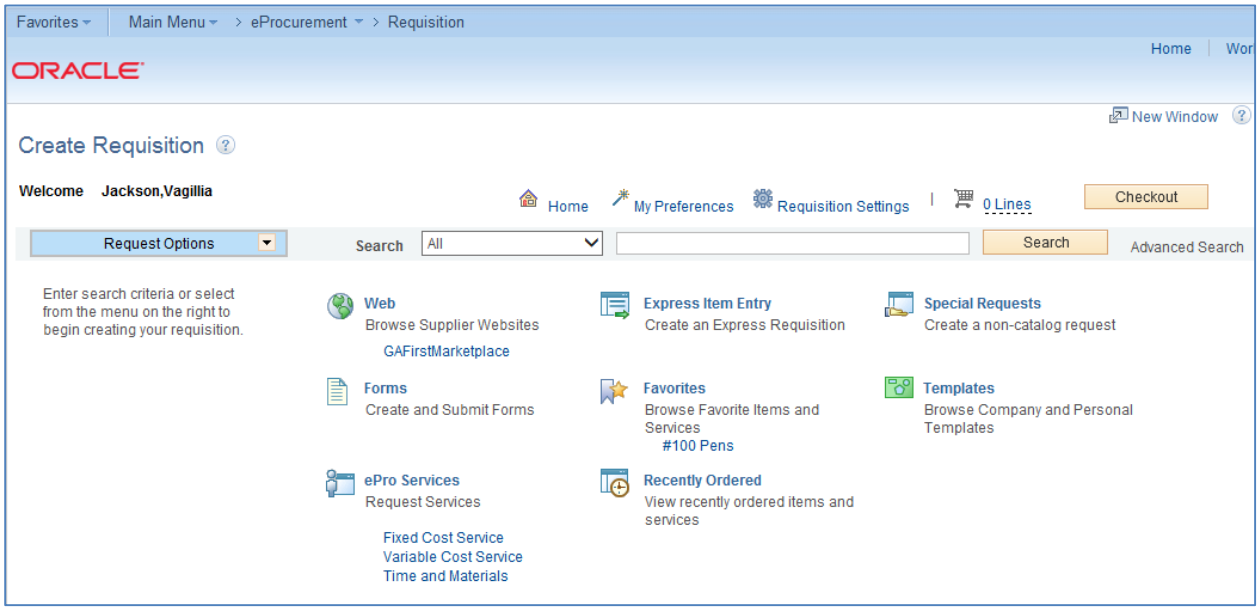
- Marketplace Requisition that is built from selected contract/catalog items in the Georgia*FIRST* Marketplace
- Special Request Requisition that is built from non-contract/catalog items without accessing the Georgia*FIRST* Marketplace

Creating a Requisition

To begin creating an eProcurement Requisition, you will need to access eProcurement through the PeopleSoft Financials core system. Once in eProcurement, select Requisition, then select either the Georgia*FIRST* Marketplace or Special Requests link.

Add Items

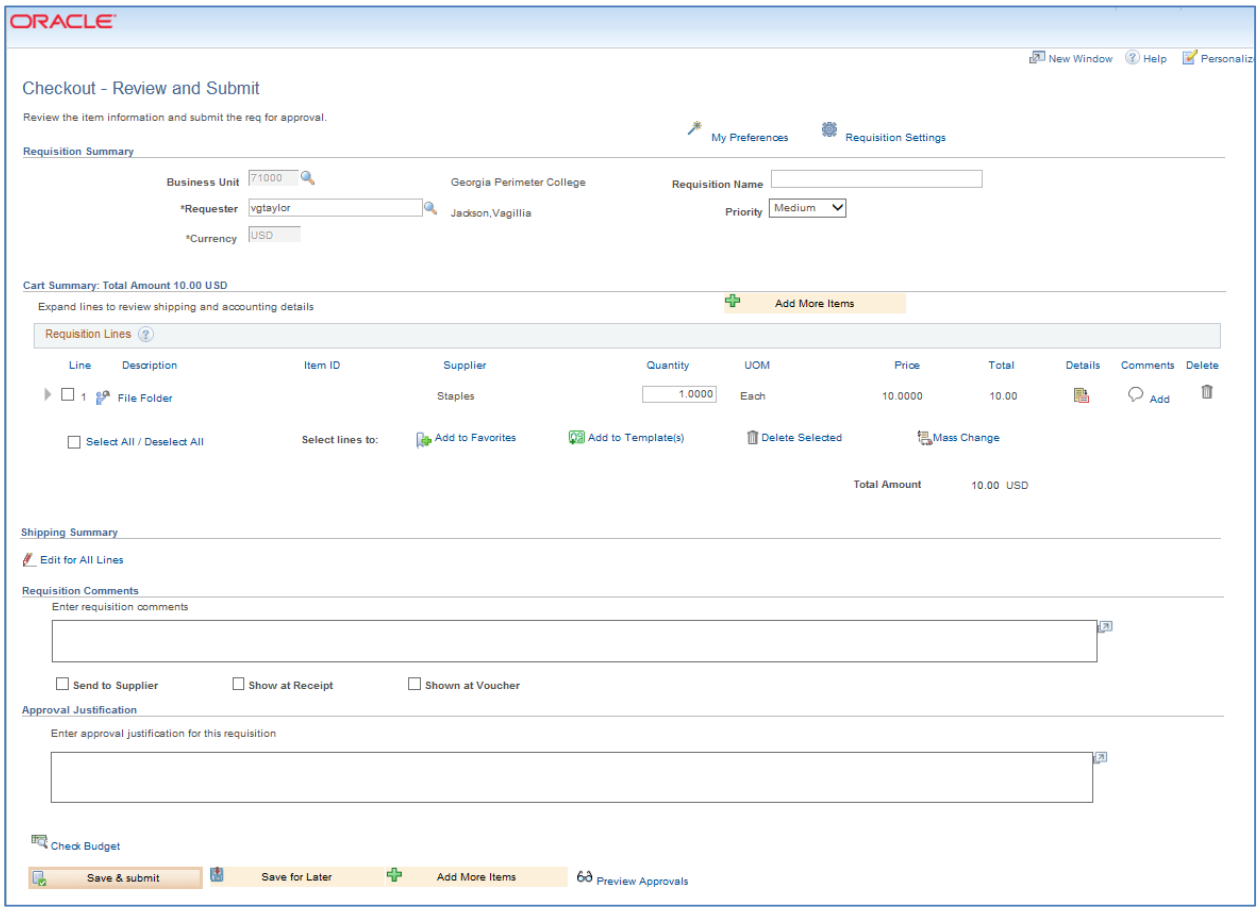
There are two ways to add requisition line items: Add them through a Georgia*FIRST* Marketplace or add them manually for a Special Request. When creating a requisition, you cannot combine Marketplace Requisition items with Special Request Requisition items. When creating a Marketplace Requisition, you will select the GA*FIRST* Marketplace link INSTEAD of selecting the Special Requests link. When creating a Special Request Requisition, you will select the Special Requests link. We will go into the details of each type of requisition later in this user guide. Here, we will just provide an overview.



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

Checkout – Review and Submit

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



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

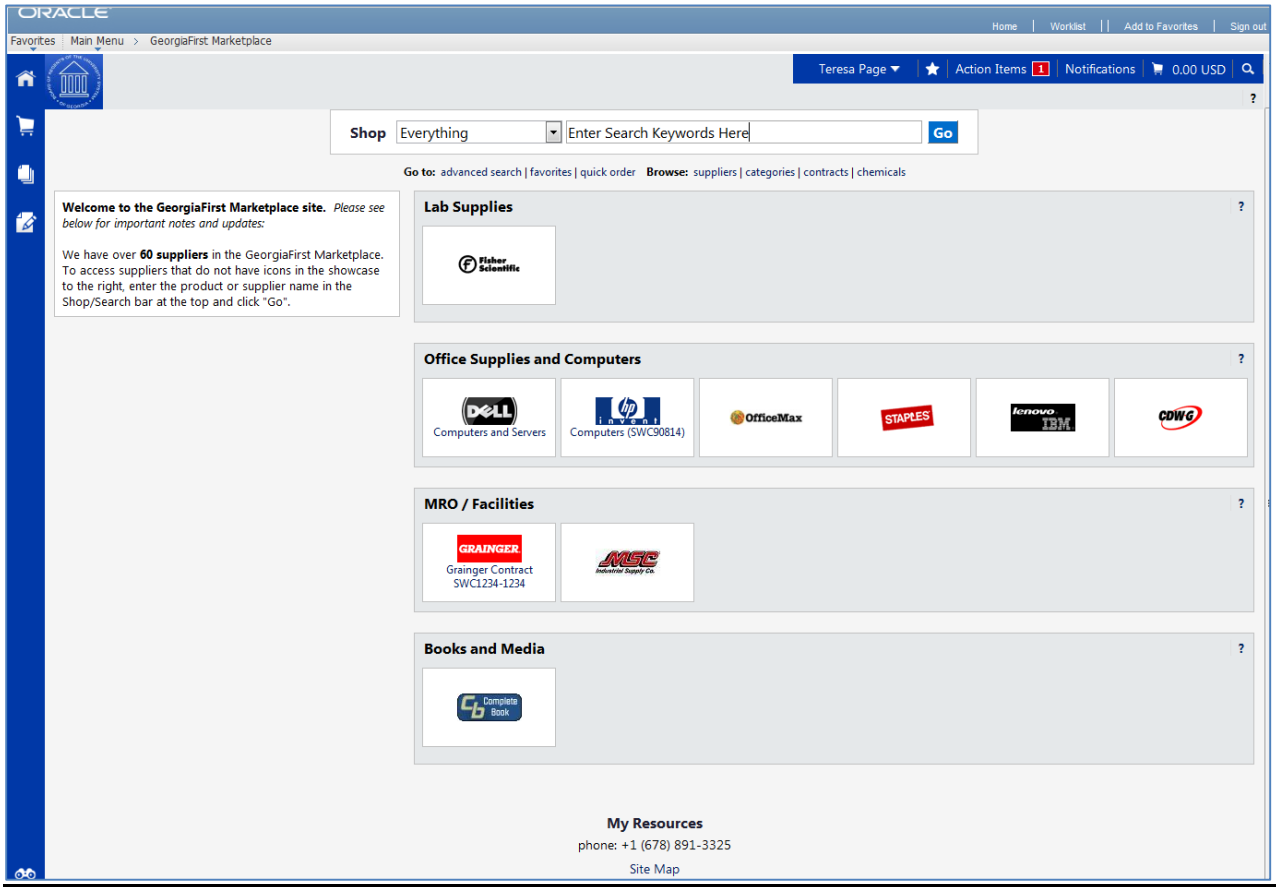
Chapter 3: Accessing and Navigating the Georgia*FIRST* Marketplace

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

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

How To: Accessing GeorgiaFIRST Marketplace through PeopleSoft Financials Core System

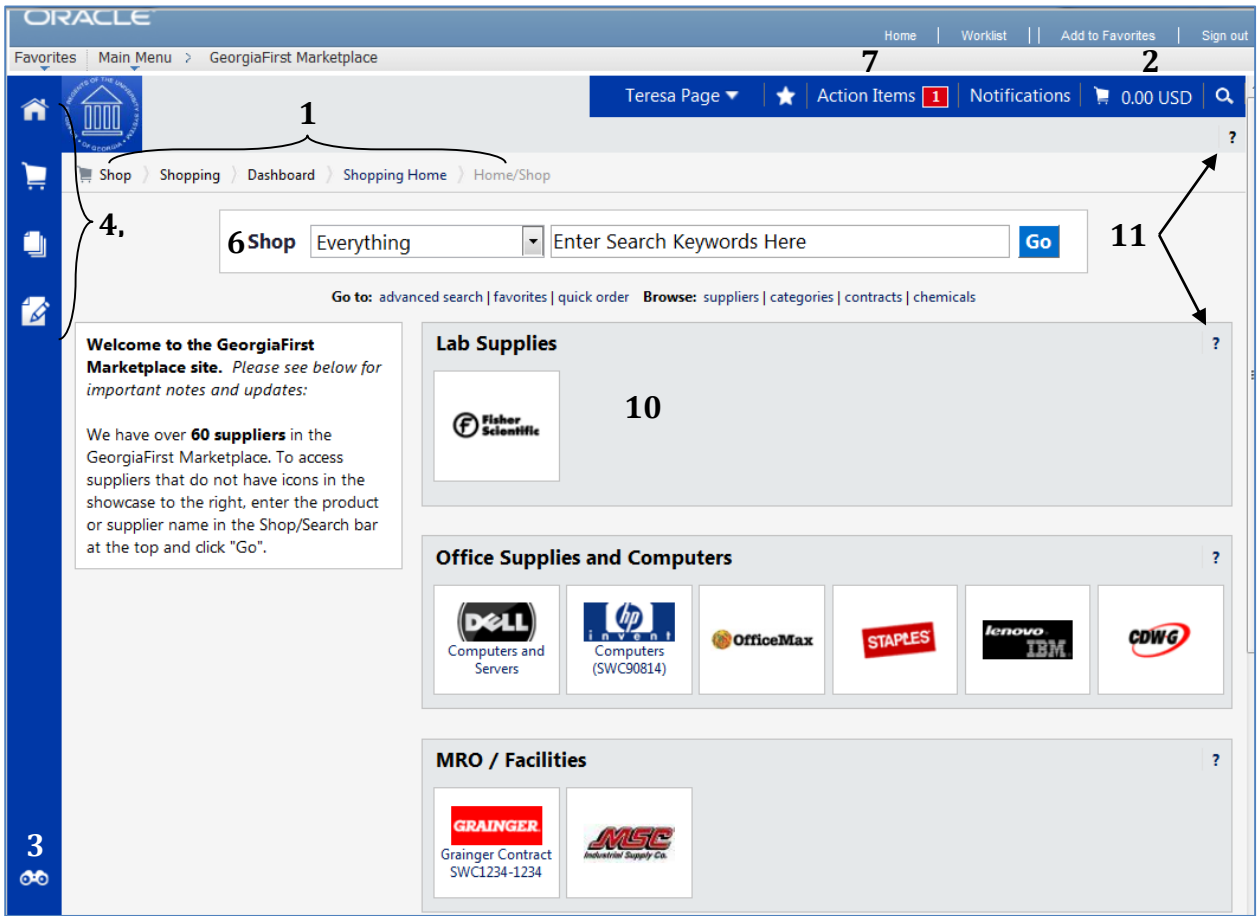
1. On the PeopleSoft Financials login page, enter your **User ID** and **Password**. Remember, both of these items are case sensitive. If you try to log in more than five times with an incorrect User ID and/or password, the system will lock you out.
2. Click the **Sign In** button.
3. Select **eProcurement**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



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

Georgia*FIRST* Marketplace Home Page

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



1. **Navigation Breadcrumbs and Screen Title:** The screen title indicates the title of the current page that you are on.
2. **Cart Summary:** The upper right corner displays a summary of your shopping cart. Included is the cart name, the number of items in the cart, and the total cart amount. You can click on this shortcut to go directly to the cart page to review, update, and process your shopping cart.
3. **Quick Search:** This quick search feature allows for a variety of searches to be executed anywhere in the marketplace.
4. **Navigation Icons:** Down the left side of the Georgia*FIRST* Marketplace are the primary navigation icons. By clicking on an icon, the screen refreshes to display sub links for the topics or functions covered in that particular part of the Marketplace. The links that you see are dependent on your permissions.
    - Home: This icon will return you to the Home page from any other parts of the application.
    - Shopping Cart: This icon is used for shopping and provides quick access to other parts of the application. You can also View and modify the current shopping cart, create new carts, delete existing carts, and prepare the active cart for processing.

- Orders & Documents: This icon will allow you to search for documents that you have created.
- Catalogs and Contracts: Contains a repository of various documents within the application.

5. **Navigation Sub-Links:** Once you select a link, additional sub-links may be available. If sub links are available, they will be located just beneath the primary navigation links.
6. **Shop at the Top/Shop Quick Search:** You can access simple and advanced search from this feature. This is the primary area to perform item searches. We will cover search features later in this chapter.
7. **Action Items:** Action Items are items that require some sort of action by the user logged in. The number of action items will be displayed in red to the right of the Action Item menu.
8. **Notifications:** Certain action items 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 Georgia*FIRST* Marketplace community. This message box is available to all users and is a common way to communicate important upcoming dates, information about new suppliers, links to training, and more.
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.

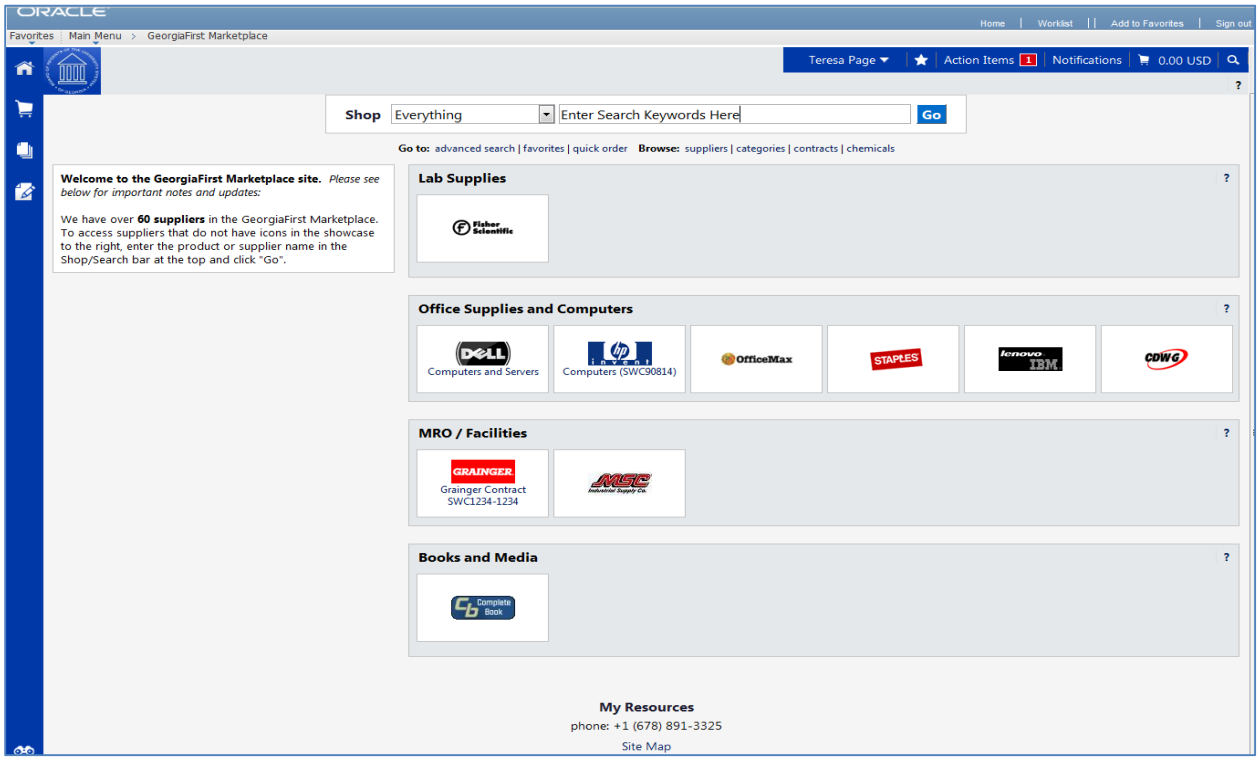
Chapter 4: Searching for Items in the Georgia*FIRST* Marketplace

As a Requester, there may be times when you need to create your own shopping cart in the Georgia*FIRST* Marketplace to pull into a requisition. In addition, you may need to occasionally edit an assigned shopping cart that you are working with. In order to effectively look for items in the Georgia*FIRST* Marketplace, you need to know how to use its search functions. Within the Georgia*FIRST* Marketplace, there are many ways that you can search or browse for items. In this chapter, we will review most of the search methods. However, after using the marketplace for a while, you will find the way that you are most comfortable.

Before we discuss what search options are available, let's take a minute to review what is available to be searched. First, Georgia*FIRST* Marketplace has "hosted catalogs". A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product data and details, along with pricing information for each item. When you perform a product search, the products in all of the hosted catalogs are searched.

Second, there are "punch-out catalogs". Punch-out catalogs are integrated external links to a supplier's web-based catalog. The Shopper enters the punch-out supplier's website through the Georgia*FIRST* Marketplace to search and select products from that supplier's web catalog (i.e., Dell's Government Catalog). The shopper then returns the items to the Georgia*FIRST* Marketplace shopping cart. Punch-out catalogs still maintain items and pricing specific to the University System of Georgia. In some cases, items and pricing in a punch-out are also specific to each institution.
Third, there are "self-managed" catalogs. These catalogs function very similarly to hosted catalogs, but the items and pricing are managed by the institutions, the University System Office, and the System Admin.

Using Simple (Basic) Search



A simple search is similar to a "Google" search, where you enter a word, phrase, or keyword into a single text box for searching. By using a simple search, you can get results from hosted catalogs, self-managed catalogs, and contracts. Simple Search displays when you enter the Georgia*FIRST* Marketplace. With the Simple Search feature, you can search through everything or you can search by product category. By default, the search will occur across all product categories ("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.

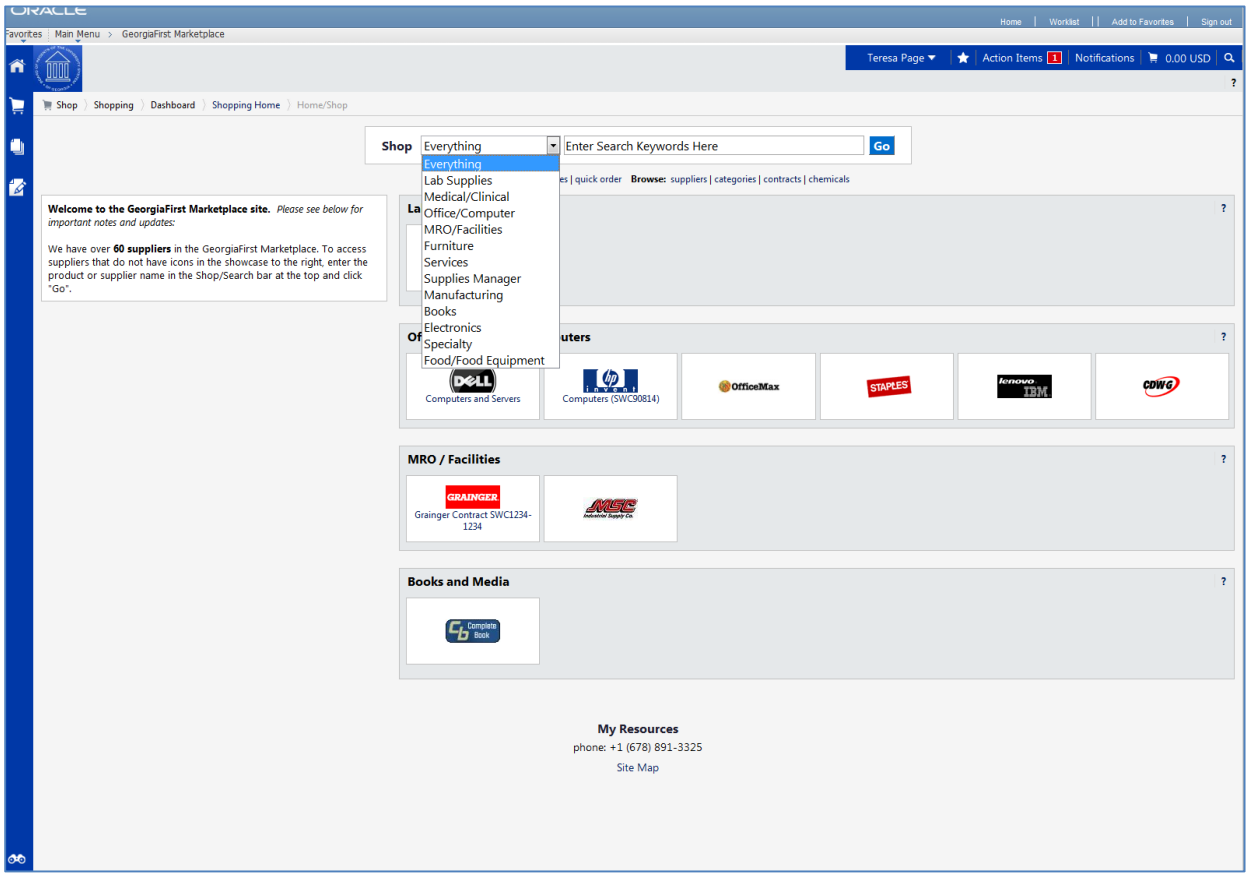
When performing a simple search, the system looks through many different things in order to find the most relevant search results. This includes looking through Keywords and Item information. Georgia*FIRST* Marketplace System Administrators enter keywords to help guide users to the correct contract, 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 only search 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 search is limited. Available categories may vary by institution depending on the suppliers and items enabled. The Product Categories that you may see include:

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



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 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.

Let's log into PeopleSoft FPlay to conduct a simple search

https://fplay.gafirst.usg.edu/psp/fplay/?&cmd=login&errorCode=105&languageCd=ENG

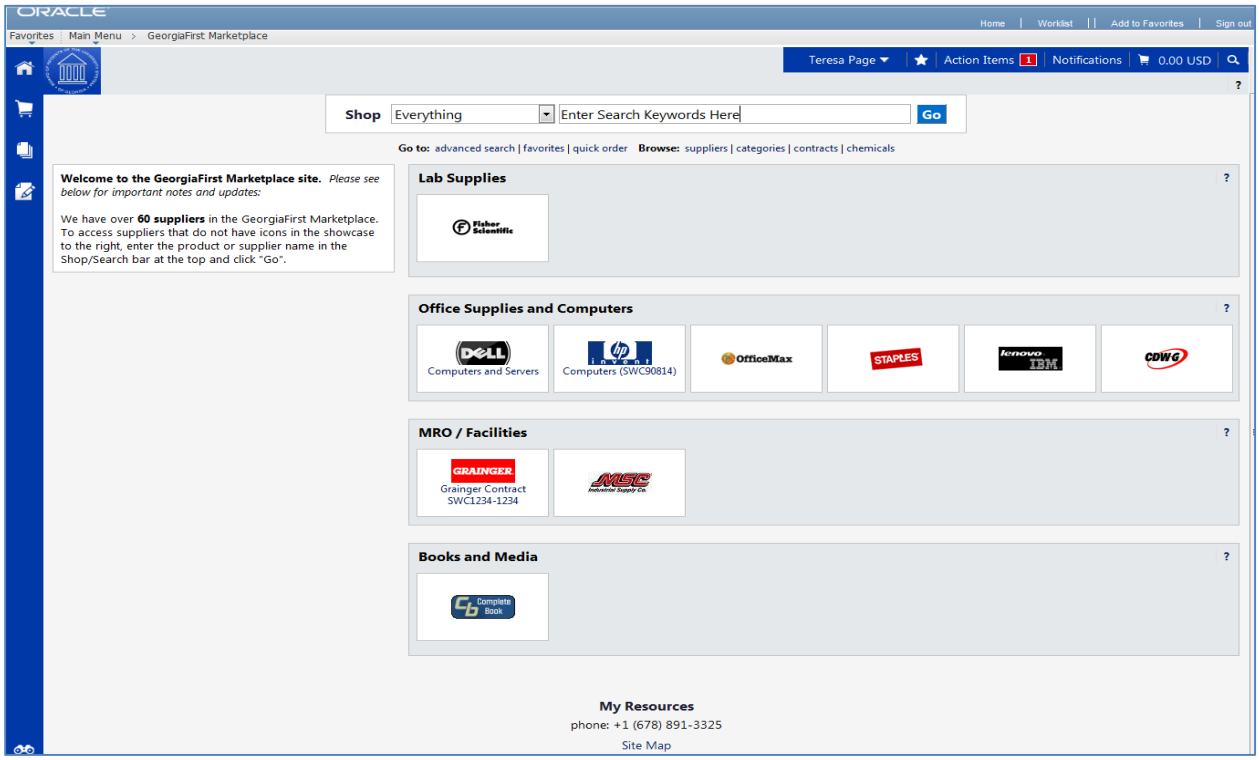
How To: Perform a Simple Search

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

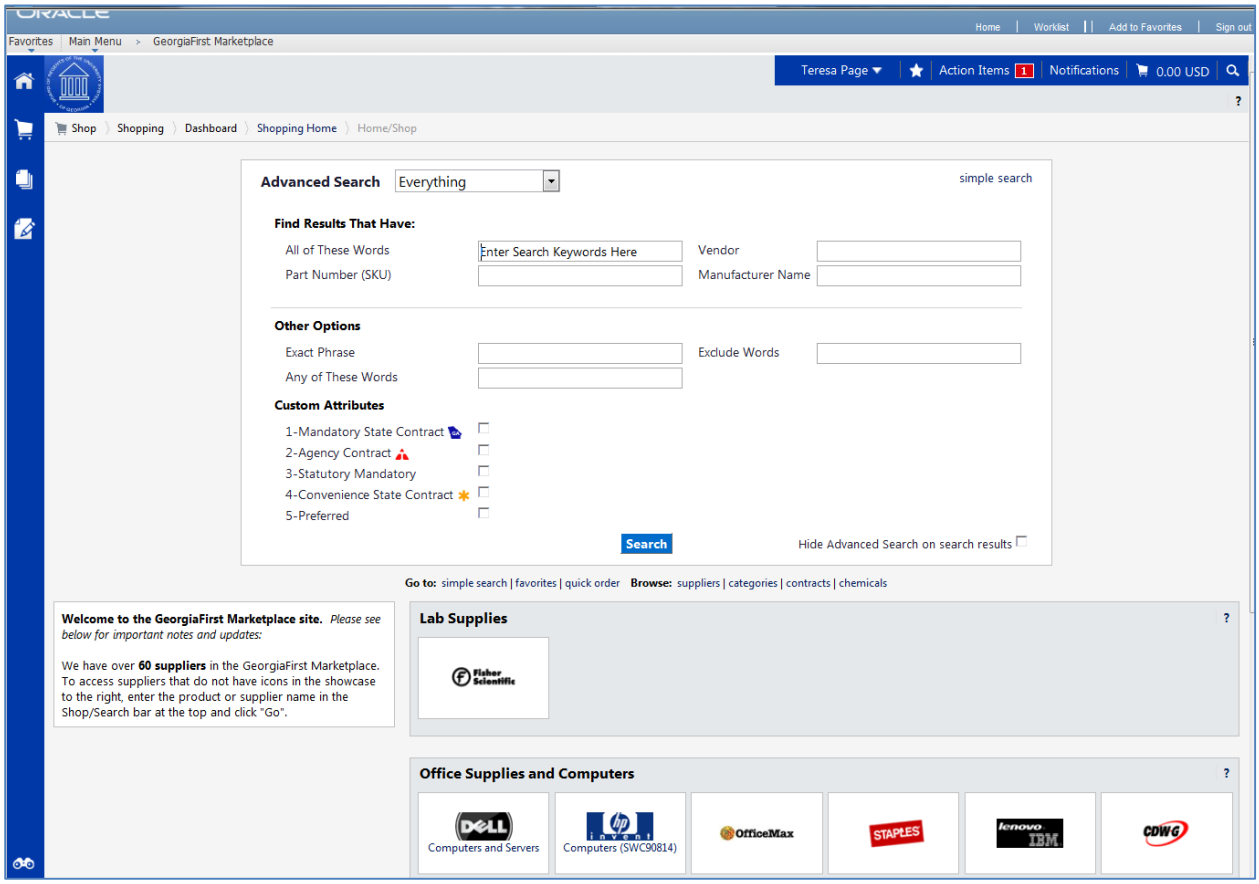
7. Select the appropriate **Product Category** (optional).
8. Enter one or more **keywords**.
9. Press the **Go** button.

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 Georgia*FIRST* Marketplace, it will remain open for subsequent searches, for the remainder of the shopping session.



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



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

Search Criteria Field	Description
All of These Words	This field functions in the same way that Simple Search does. Only products containing ALL the word entered in this field are returned in search results. The words do not need to be in the same order as listed, but all words must be found in the item data or keyword data.
Part Number (SKU)	Enter the catalog number or SKU (Stock Keeping Unit) for the required product(s). This may be the distributor's SKU or the manufacturer SKU. For best results, the entire SKU should be entered. A partial match on part number returns the closest matching or similar results. This is a "begins with" match and at least four characters must be entered. If multiple strings of text are entered (i.e., "123 456 798"), then all components of that string must be present in the part number for the item to be returned. For example, if "123 456 789" is entered into Product Search, the part numbers

Search Criteria Field	Description
	"123-456-789" and "123-456-789-000" would be returned, and "123-456" would not. When the Part Number field is used as part of the search criteria, only those fields related to the Part Number for items are searched. This includes Supplier Part Number, Manufacturer Part Number, Alternate Part Number, Client Catalog Number, and Custom Catalog Number.
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 Georgia*FIRST* Marketplace. Enter multiple manufacturer names to limit results to a set of certain manufacturers. Only the manufacturer field is searched for matches.
Exact Phrase	Products containing the exact words in the ordered entered are returned. This is a very powerful search strategy if you know the precise way in which a supplier presents its information. If you are unsure – and looking for results from multiple suppliers – it is recommended that you use "All of These Words" option instead.
Exclude Words	Products including any of the words entered in this field are excluded from Search Results. Another search field must be used when using the exclude function. For example, you may be looking for all glove options that are not small or medium. You could enter "latex gloves" in the "must include the words" field and "small medium" in the "exclude the words" field.
Any of These Words	Search results will include products containing any of the words entered in this field. Products containing more than one word appear higher in search results than products with only one. Keep in mind, the search results will not be as targeted as using the "must include the words" field.

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

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

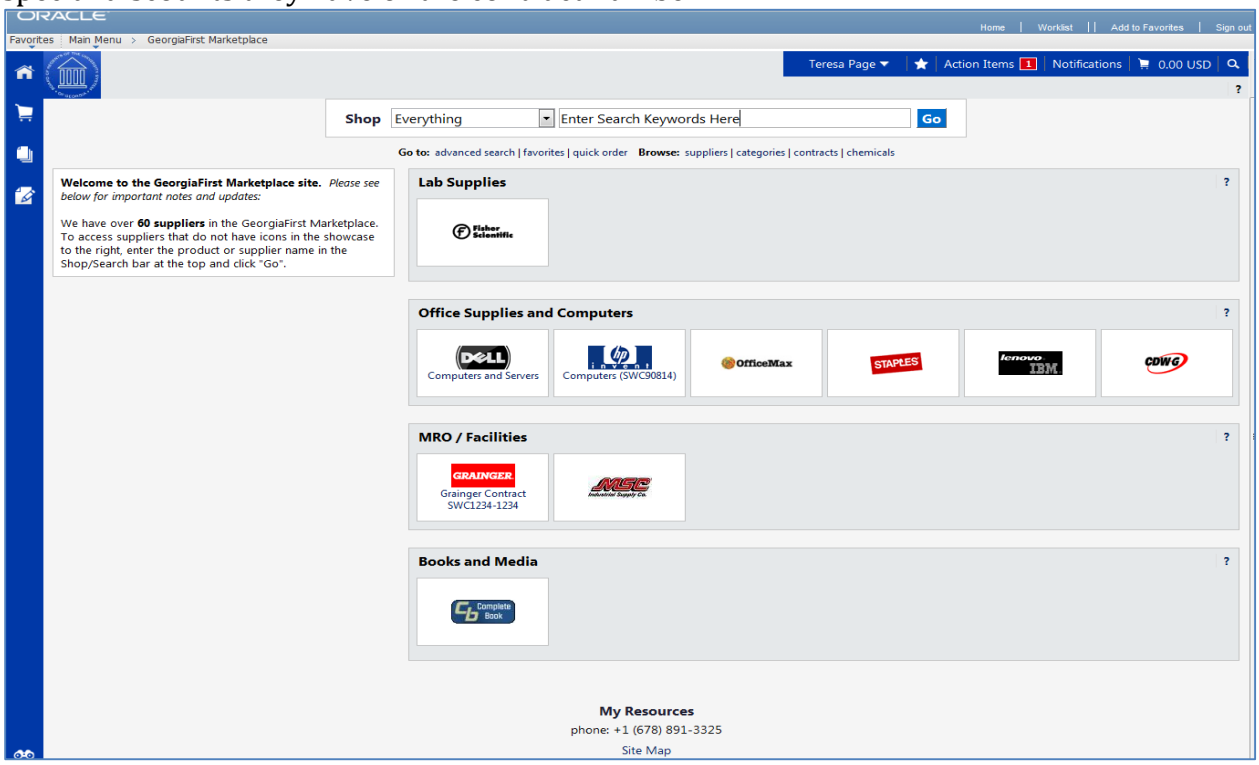
Once your search results are retrieved, you can use the filter options to further refine your results. Primarily, you can use the filter options for "Custom Attributes" to see those items on a state contract, agency contract, etc.
When executing your search, select the "Hide Advanced Search on search 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 Georgia*FIRST* Marketplace **home/shop** page, select the **advanced search** link.
2. Select a **Product Category** in the Advanced Search drop down list.
3. In the **Find Results That Have:** section, use one or more of the following options:
    a. All of These Words
    b. Supplier
    c. Part Number (SKU)
    d. Manufacturer Name
    e. CAS No. (Laboratory Supplies Category only)
    f. Product Class (Laboratory Supplies Category only)
    g. Product Size (Laboratory Supplies Category only)
4. In the **Other Options:** section, use these additional fields as necessary:
    a. Exact Phrase
    b. Exclude Words
    c. Any of the Words
5. To search for items for a particular contract type, select the checkbox next to the appropriate **custom attribute/contract type**.
    a. For example, initially perform the search with **Mandatory State Contract** selected. If the search does not return the required item, repeat the search with **Agency Contract** selected.
6. Click the **Search** button

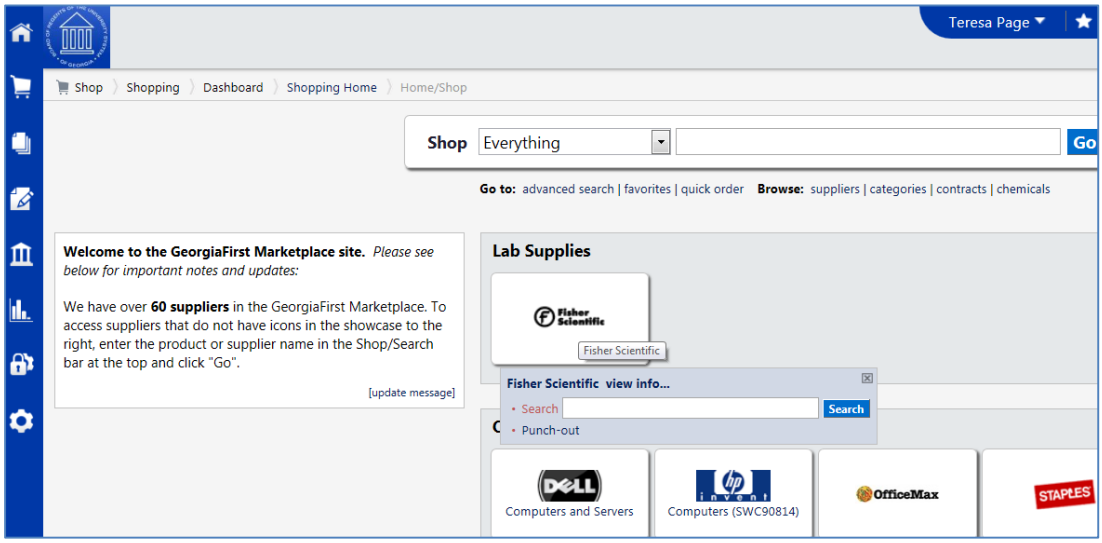
Searching from the Purchasing Showcase

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

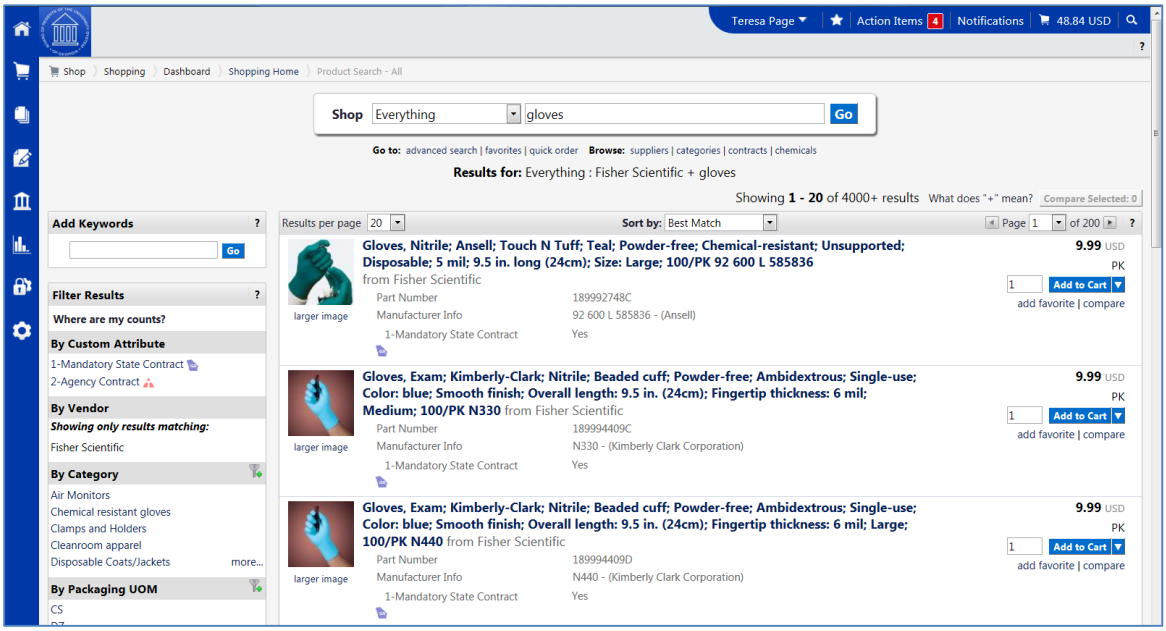


How To: Search from a Showcased Supplier

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



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

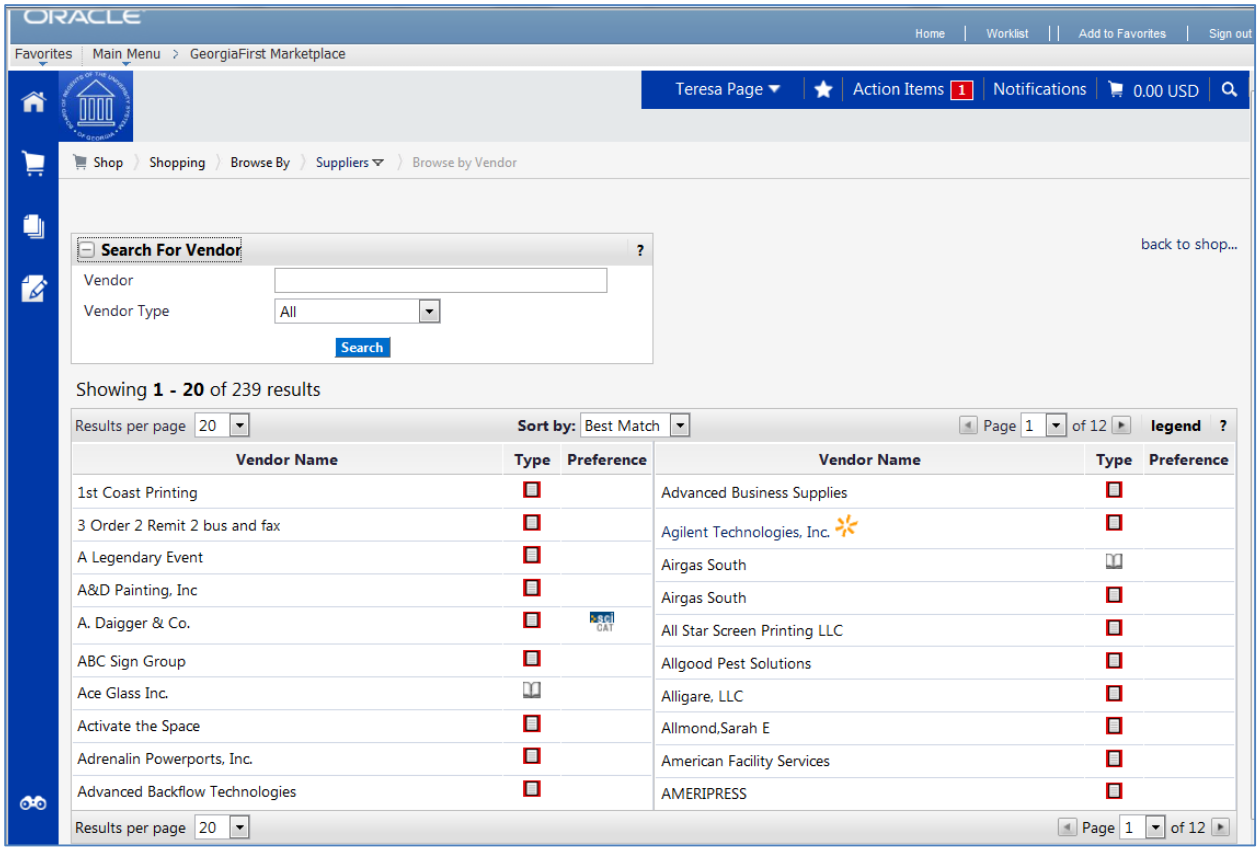


4. From these search results, you can narrow down your results by using **filter** options, re-sorting the results, or adding additional keywords.

Browse by Supplier

The "Browse by Supplier" functionality is much like using a table of contents from a paper catalog. Once the desired chapter is found (product category), a single click takes you to all

of the products provided by that supplier in that selected category. This functionality is different than selecting a specific supplier from the Showcase or through Punch-outs.



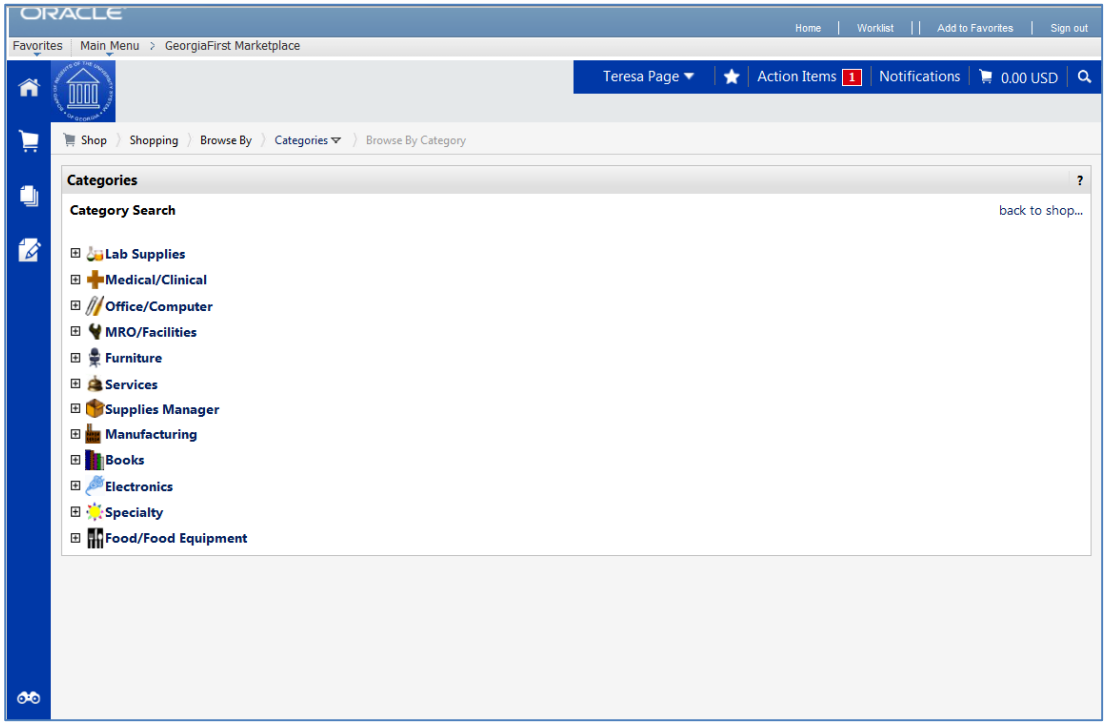
How To: Browse for Items by Supplier

1. From the Georgia*FIRST* Marketplace **home/shop** page, select the **Browse: supplier's** link.
    a. By default, all suppliers display. Suppliers are listed in alphabetical order with preference suppliers displaying first.
2. To search for a specific supplier, click on the **expand** icon (**+**) to the left of "Click to expand Search for Supplier Filter."
3. To view all suppliers click the **Search** button.
4. To search by supplier name or supplier information, enter the appropriate information in the Supplier Name field. The supplier search allows for a "contains" name search.
5. From the **Supplier Type** drop down list, select to view **Hosted Catalog Suppliers**.
6. Click the **Search** button.
7. Select the supplier from the results by selecting the **Supplier Name**. The supplier information and categories display.
8. From the supplier category page, select the desired product category by clicking on its name or the **expand** icon (**+**) next to its name.

9. Continue drilling down into the categories until you locate the sub-category that you would like to view.
10. Final sub-categories (with items) are indicated with the word "view" next to it. Click the **view** button to view the items for the supplier in that particular category. You will be taken to the **Search Results** page, which is formatted like all other Search Results pages.

Browse by Category

The "Browse by Category" functionality is similar to the "Browse by Supplier" functionality. The main difference is instead of viewing one supplier's table of contents, all supplier tables of contents are shown. Using this functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section.
Browse by Category provides a quick way to locate all items, across all suppliers, in a certain category.



How To: Browse for Items by Category

1. From the Georgia*FIRST* Marketplace **home/shop** page, select the **Browse: categories** link.

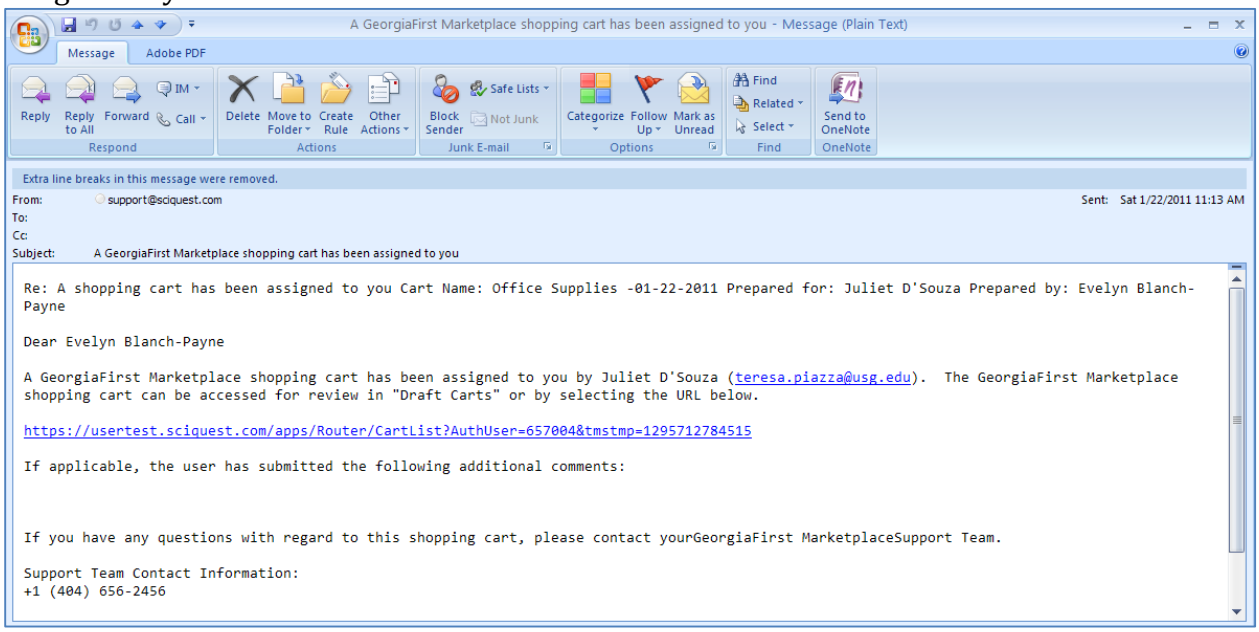
2. A full list of available categories, across all hosted catalogs is presented. This represents your full table of contents.
3. Use the **expand** (**+**) and **collapse** (**-**) buttons to drill down to the category of your choice.
4. Final sub-categories (with items) are indicated with the word "view"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

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

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

Notification

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

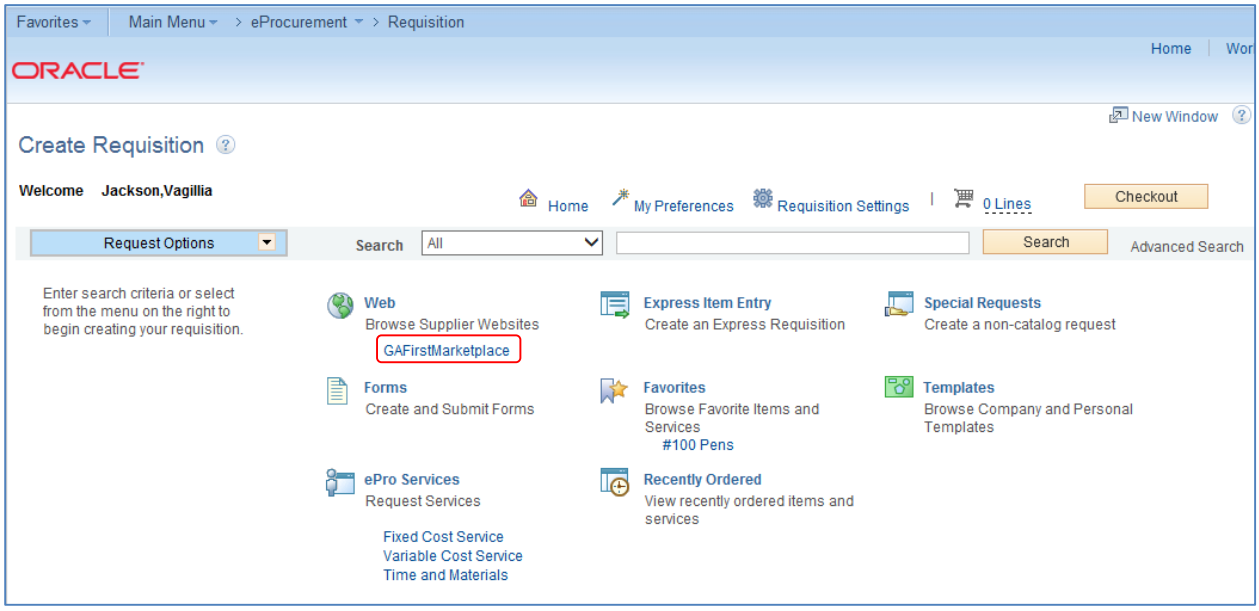


Once you are notified of your assigned shopping cart, you can begin the process of building the Marketplace Requisition

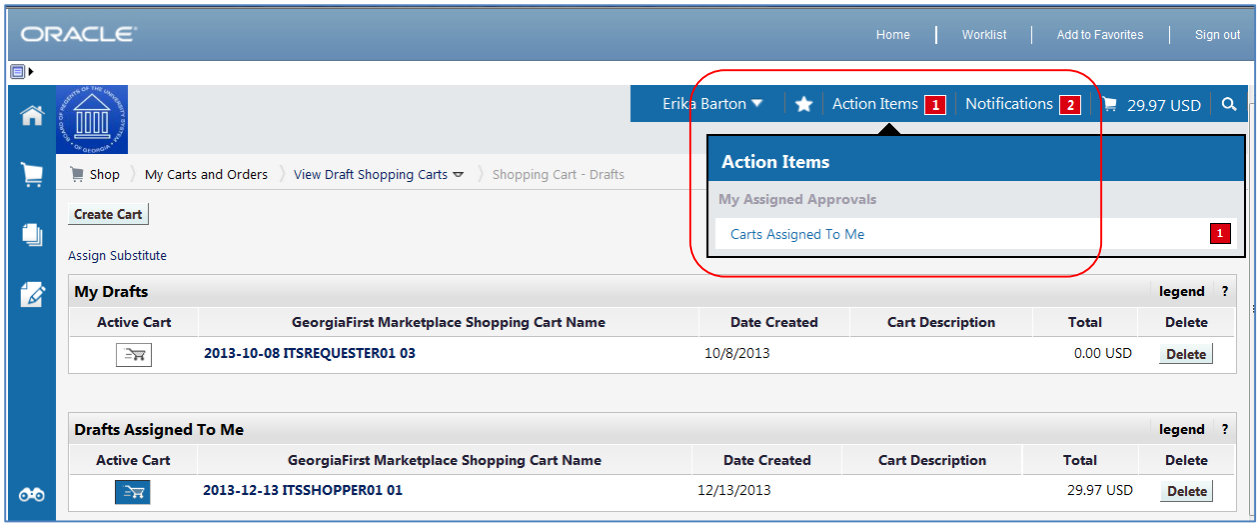
Create a Basic Marketplace Requisition

To begin a Marketplace Requisition, you are going to start in the eProcurement module and create a new requisition.
After logging into PeopleSoft Financials, go to eProcurement in the menu, and then select Requisition.

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

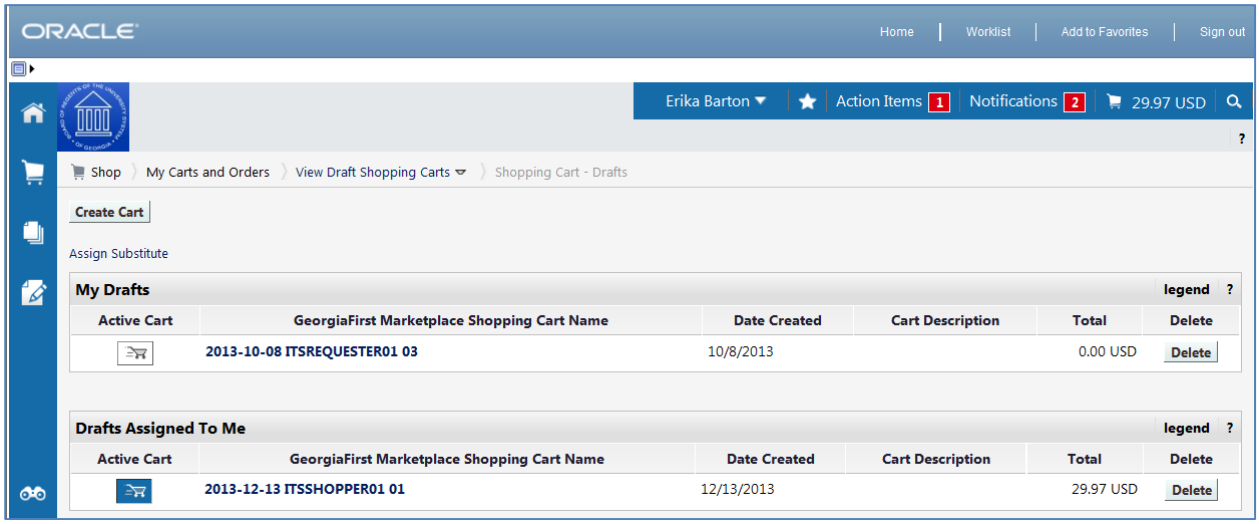


Once you get into the Georgia*FIRST* Marketplace, there are two additional ways to see if any carts have been assigned to you. First, on the **home/shop** page, you can see in the Action Items section if you have any pending Action Items. Also, note that the Notifications section may also show pending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



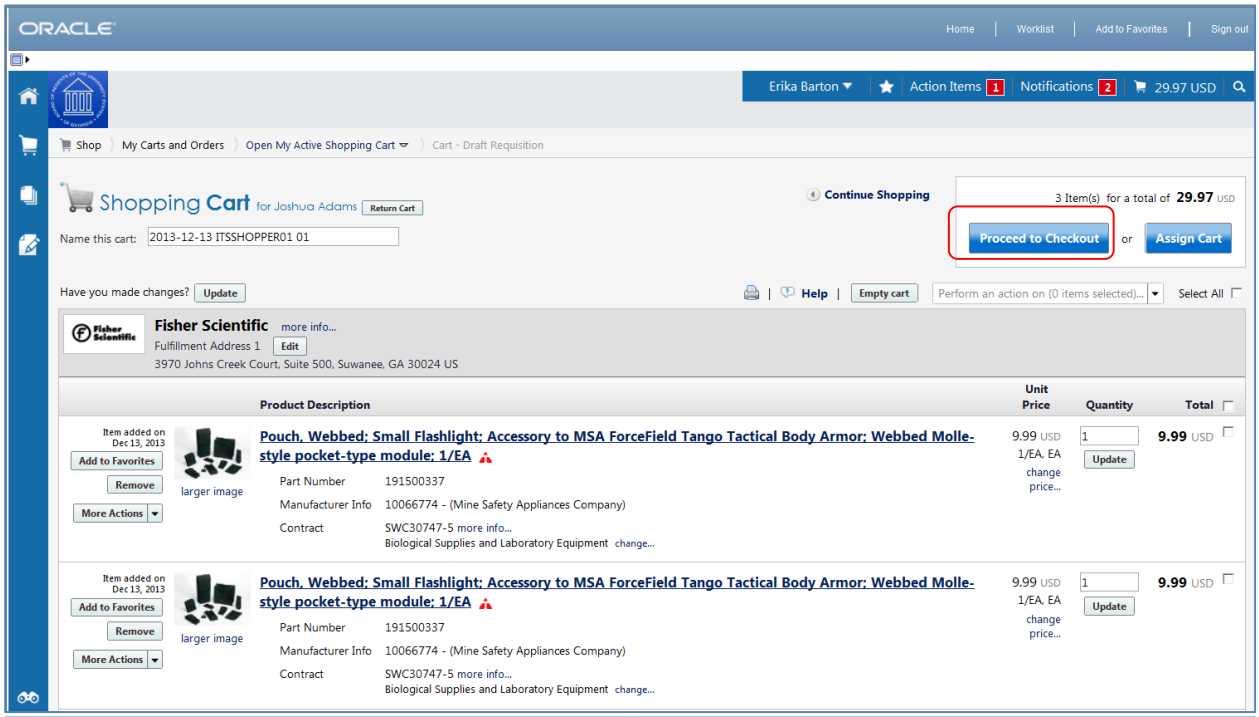
Second, if you go to the **Shopping Cart** icon and select the **My Carts and Orders** link, then **View Draft Shopping Carts link**, you will see an area titled "**Drafts Assigned to Me**" if you

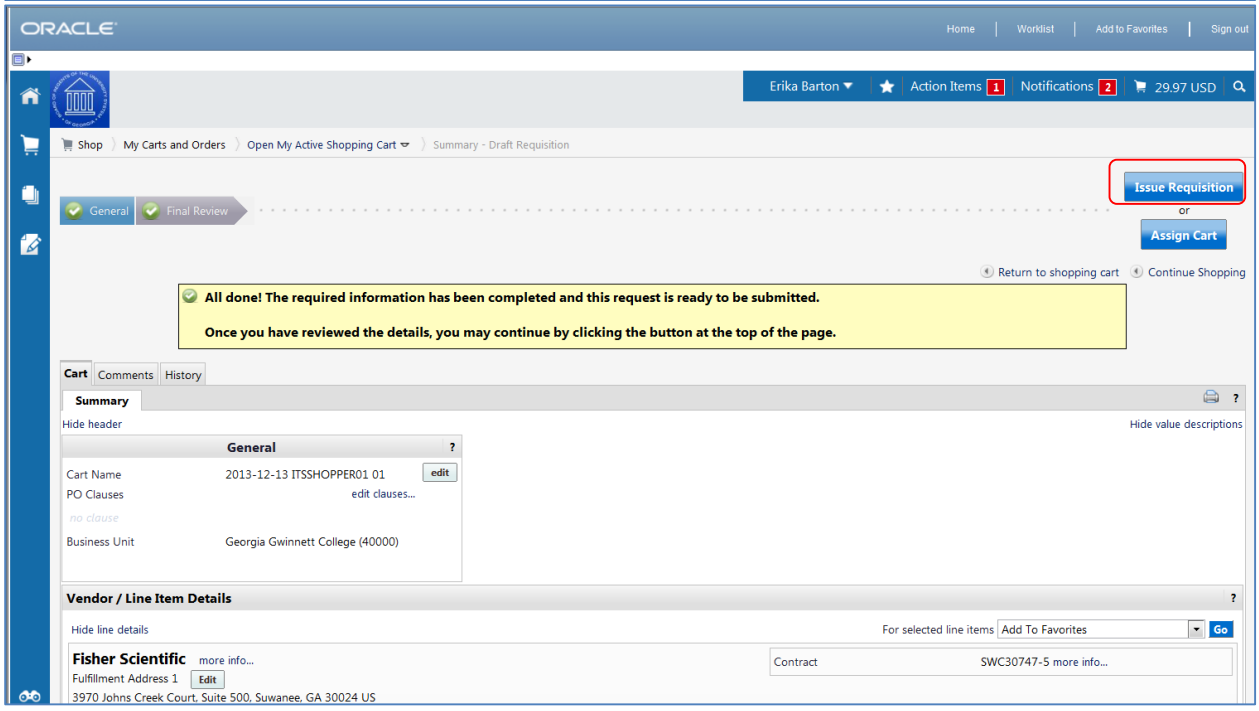
have any carts assigned to you. If you select the link in the **Action Items** box, the system will bring you to this draft carts page.



To begin reviewing the order, click on the shopping cart name. You are able to edit the shopping cart by changing quantities, removing and adding line items, and updating contract information if necessary.

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

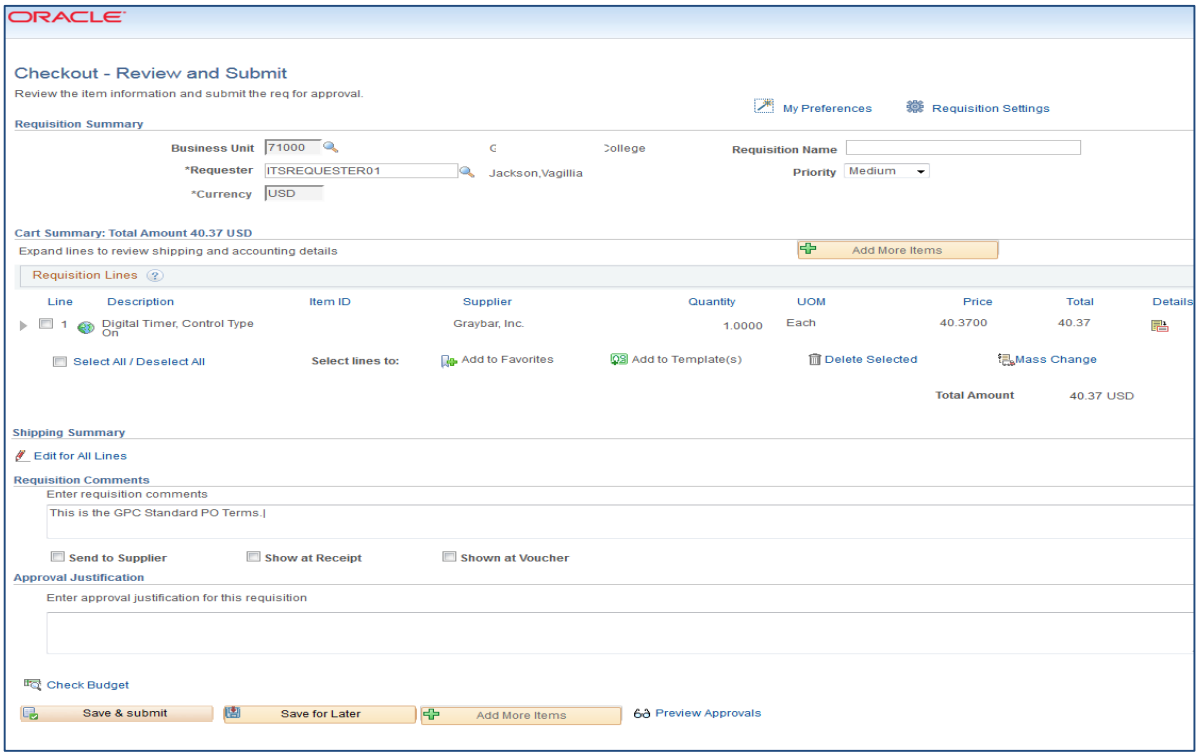




Once your shopping cart has been pulled into eProcurement, the original Shopper is notified via email that their shopping cart is now being worked in ePro. From here, you should see your Requisition Summary box on the left-side of the screen populate with your

Marketplace line items. You will not be able to select the Special Request tab to add additional items.

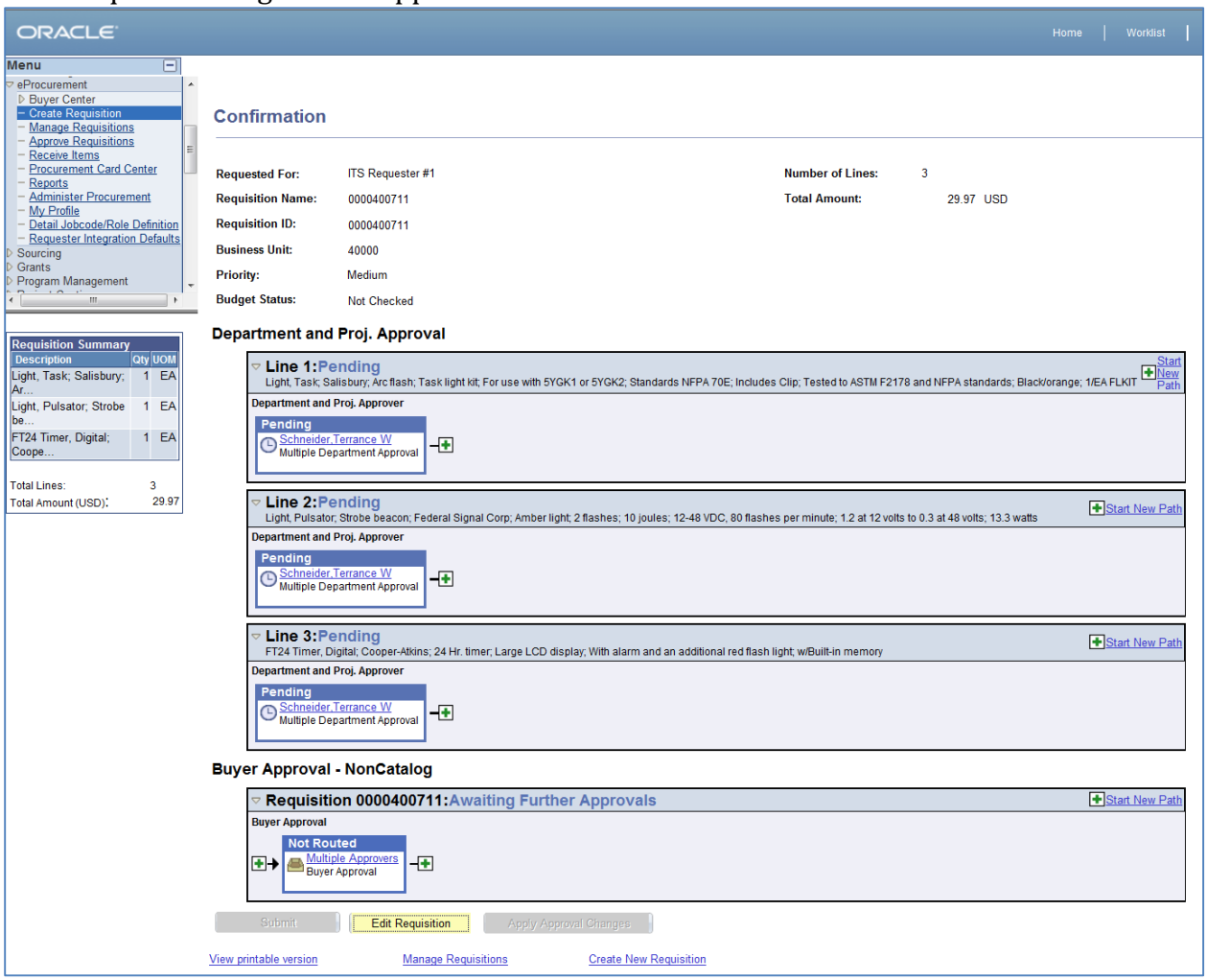
The system automatically returns you to the Checkout – Review and Submit page. On this page, if you are creating a Shopper's requisition, you will insert the shopper's User ID in the Requester field. By completing this step, this enables the system to tie the requisition to the shopper so that they will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



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

After making any necessary edits, you will need to select the "**Save for Later"** button, then the **Preview Approvals" link.** Here you will see the approval path this requisition will

follow. The exact approval path depends upon the department and project charged, as well as other criteria specified by your institution. If you need to insert an additional ad hoc approver, you will do so on this page. When you are ready to submit your requisition for approval, you click the **Submit** button. At this point the system routes the requisition lines to all required Georgia*FIRST* approver's Worklist.



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

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

1. Log into PeopleSoft Financials Core System.
2. In the menu, select **eProcurement**.
3. Select **Requisition**.
4. Select the **GAFIRST Marketplace link**.

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

Approvals revisited

Approval routings are based on the individual lines in a requisition. Below is a quick summary of how approvals flow for requisitions originating from the Georgia*FIRST* Marketplace:

- First, all requisitions are routed to a Department Manager for approval. The correct Department Manager is determined by the Department Chartfield used on the requisition line.
- If a Project or Grant is indicated on the requisition line also, then the line is routed to the assigned Project Manager for approval as well.
- The following approval steps are customizable by institution. Therefore, not all of these steps will apply to your requisition line.
    - Agency Fund Approval: If an agency fund is entered on a requisition line, the line will be routed to the approver responsible for approving agency fund transactions.
    - Amount Approval: If a requisition line is over a certain amount (i.e., $10,000 or greater), it will be routed to a special approver responsible for approving these high-amount lines. This is specified by each institution.

- Item Type Approvals: These approvals are determined by the type of item being requested through the requisition line account number, NIGP code, or both. The special item types include:
  - Assets
  - Audio Visual Equipment
  - IT Hardware and Software

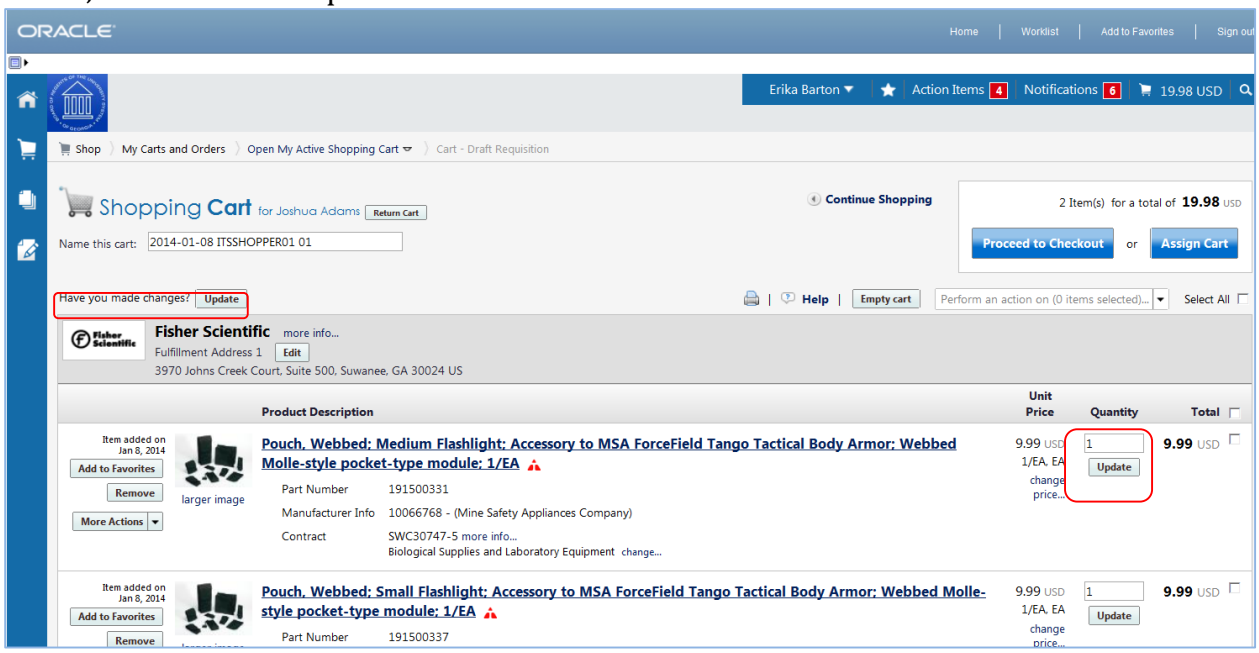
For Special Requisitions (created for non-catalog/non-contract items not in the Georgia*FIRST* Marketplace), the approval chain can be slightly different. All requisitions are still routed to a Department Manager and Project Manager (if a project is indicated on the requisition line).

Editing an Assigned Marketplace Shopping Cart

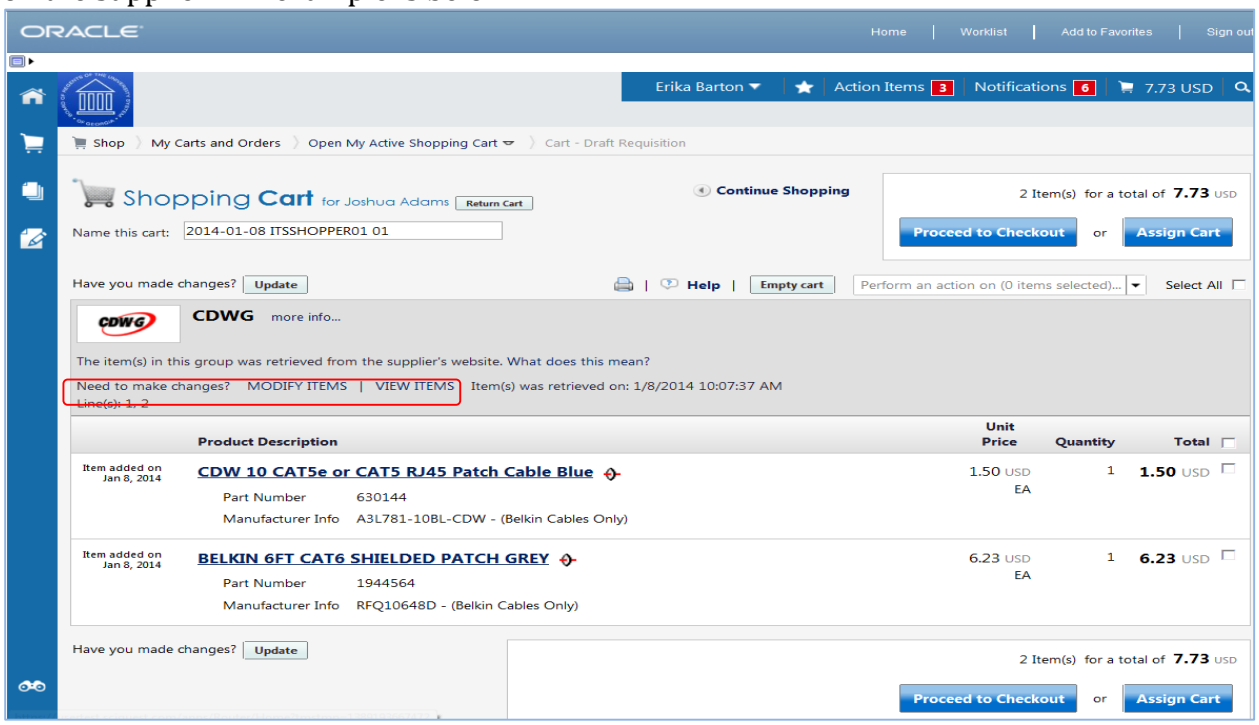
There may be times when you need to edit a shopping cart that has been assigned to you. You can easily do this in the Georgia*FIRST* Marketplace. Some of the reasons why you may need to edit an assigned shopping cart include updating a quantity, specifying the correct contract, and adding or removing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

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

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



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



Leaving the Georgia*FIRST* Marketplace

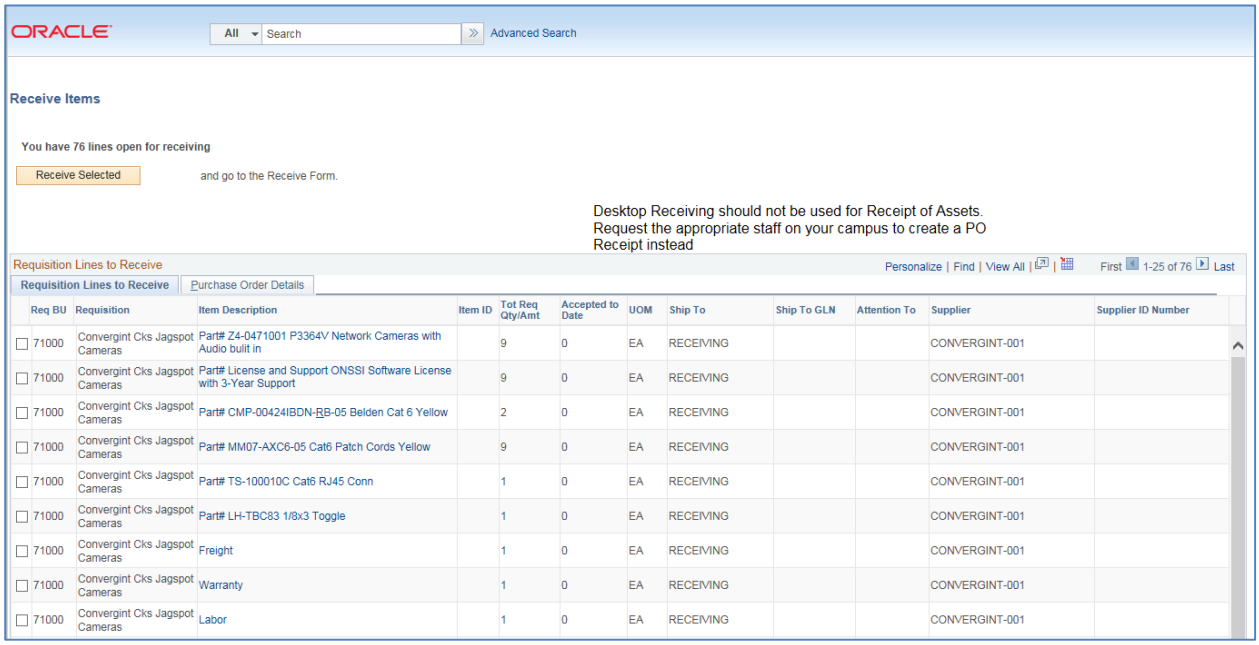
When you are ready to leave the Georgia*FIRST* Marketplace and go to another menu selection in PeopleSoft, you can simply select that menu selection. When you are ready to close PeopleSoft, select the Sign Out link in the top right corner. You do not have to log out of the Georgia*FIRST* Marketplace since you accessed it through PeopleSoft, which remains open while you are in the marketplace.
Remember, PeopleSoft will automatically log you out for security purposes after 60 minutes of inactivity

Chapter 6: Desktop Receiving

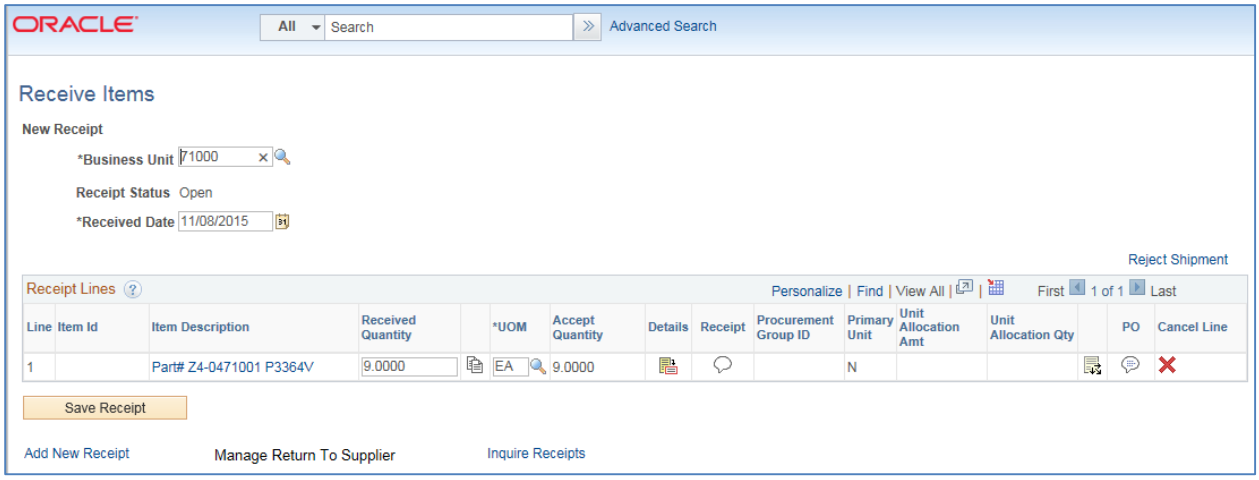
For many items that are purchased, a receipt will be required before payment is issued by your Accounts Payable department. The receiving requirement is set on purchase orders. By creating a receipt in the system, your Accounts Payable Department can be sure that they are issuing payment for goods that have been received.
Some requesters will have the responsibility of performing Desktop Receiving, which is creating a receipt in the system. This receipt is tied into the Requisition, Purchase Order, and Invoice so that payment can be issued. Without the receipt, the payment cannot be issued.
Not all requesters will have this responsibility. Some shoppers may be responsible for their own desktop receiving. If you do have the Desktop Receiving responsibility, continue with this chapter to learn how to create receipts in the PeopleSoft system.

Desktop Receiving

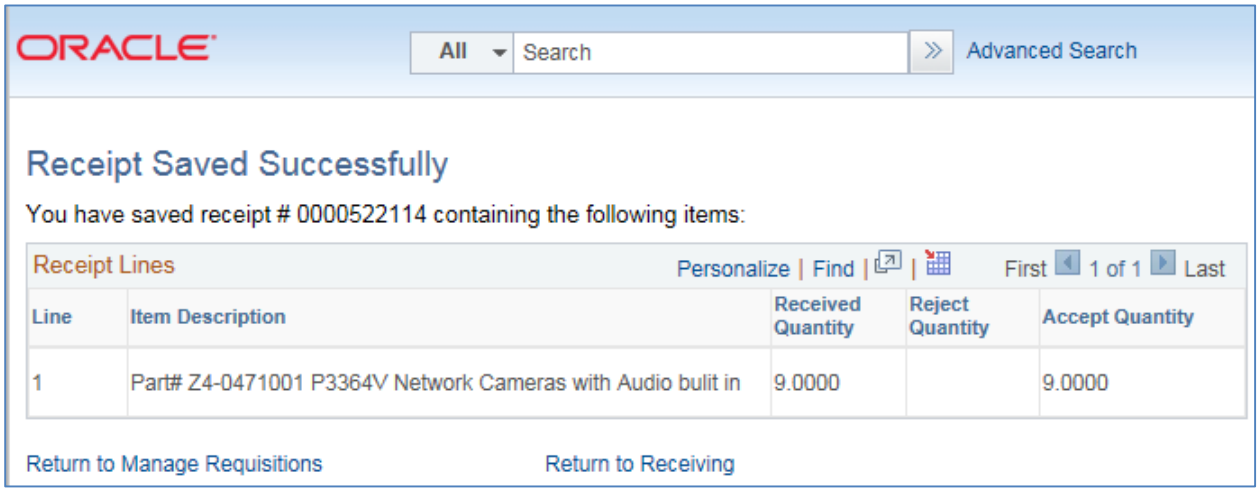
Desktop Receiving is a function within the eProcurement module. It is a simplified version of what your Central Receiving department does on campus. Your Central Receiving Department will still be responsible for creating receipts in the PeopleSoft system for assets and other items that need to be inventoried. However, this eProcurement Desktop Receiving function will enable you to receive many of the goods ordered through ePro Requisitions. You will need the proper security setup to perform desktop receiving.
Desktop receiving is done through the PeopleSoft Core system, in the eProcurement module. On the Receive Items page, all of your requisitions that have not been fully received will be listed. Through the Receive Items page, you will be able to indicate whether you have received the full quantity requested, or just a partial quantity.



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



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



How To: Create a Desktop Receipt

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

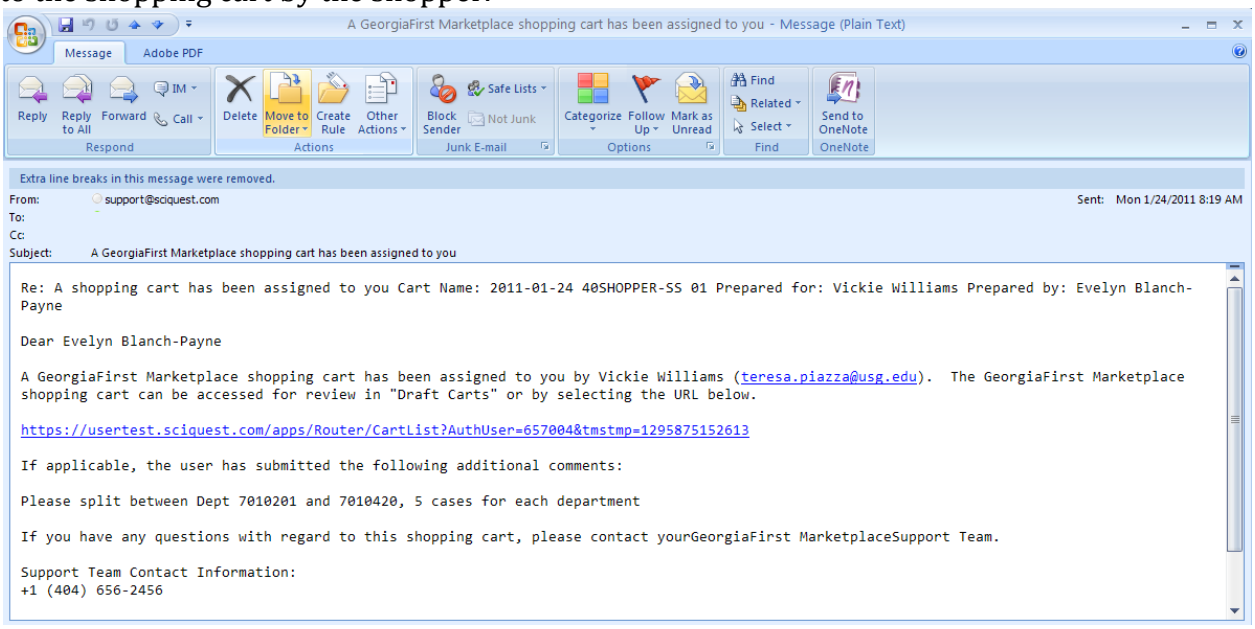
If you have a Requisition line item that you previously received a partial quantity for, you will still be able to go back to this same page and receive additional quantities.

Chapter 7: Requester Notifications

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

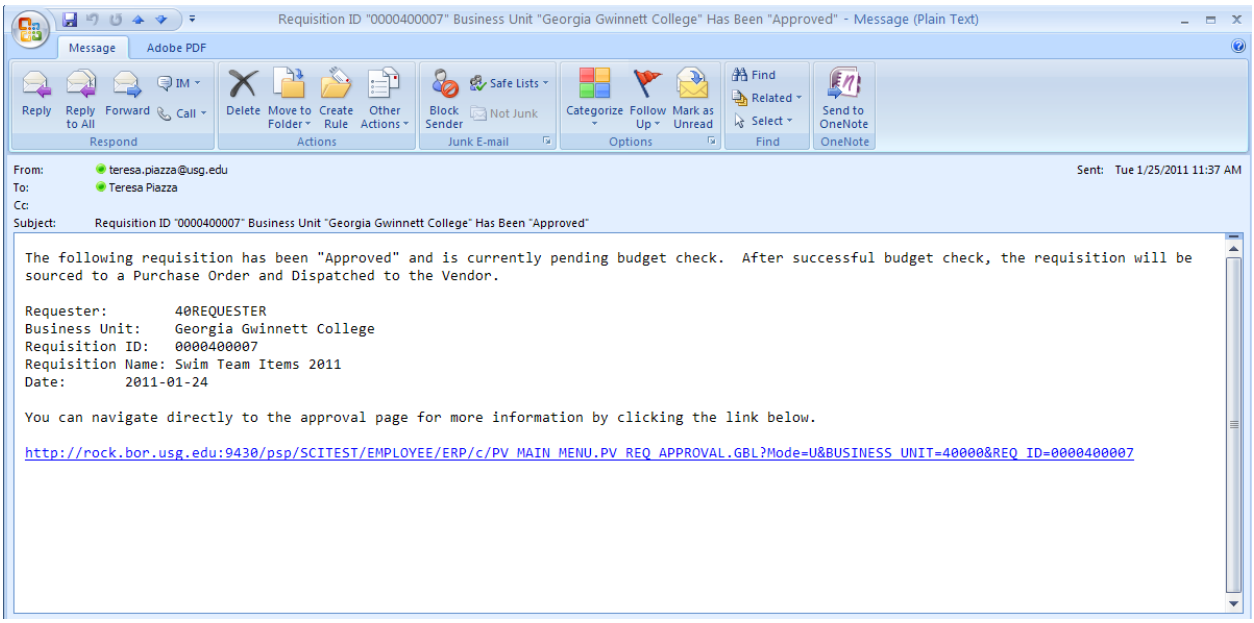
Requester Notification #1: You have been assigned a shopping cart

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



Requester Notification #2: Your Requisition Has Been Approved

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



Once your requisition has been approved, it will then be available for further automatic processing such as budget checking and sourcing into a purchase order. It is then dispatched to the supplier for order fulfillment.
Likewise, if your requisition (or a requisition line) is denied, you will also receive an email indicating this. If your Shopper receives notification that a requisition has been denied, they have been instructed to forward the message to you. Denied requisitions can be edited and resubmitted when necessary.

Notification #3: Your Requisition Items Need to be Received

Once your requisition has been turned into a purchase order and dispatched to the supplier, the supplier can then fill your order. In addition to sending you the purchased items, the supplier will send an invoice to your Accounts Payable department for these items. Before Accounts Payable can pay an invoice, it will check to see if the items you purchased require a receipt before payment can be made. If a receipt is required and has not been entered into the system yet, you may receive an email indicating that you need to "receive" your items in the system.
Please note: You should not "receive" an item in the system unless you have actually received it. Do not enter a receipt just because you get this email. This system is in place to ensure that the institution only pays for goods that it receives.

Chapter 8: Creating a Special Request Requisition

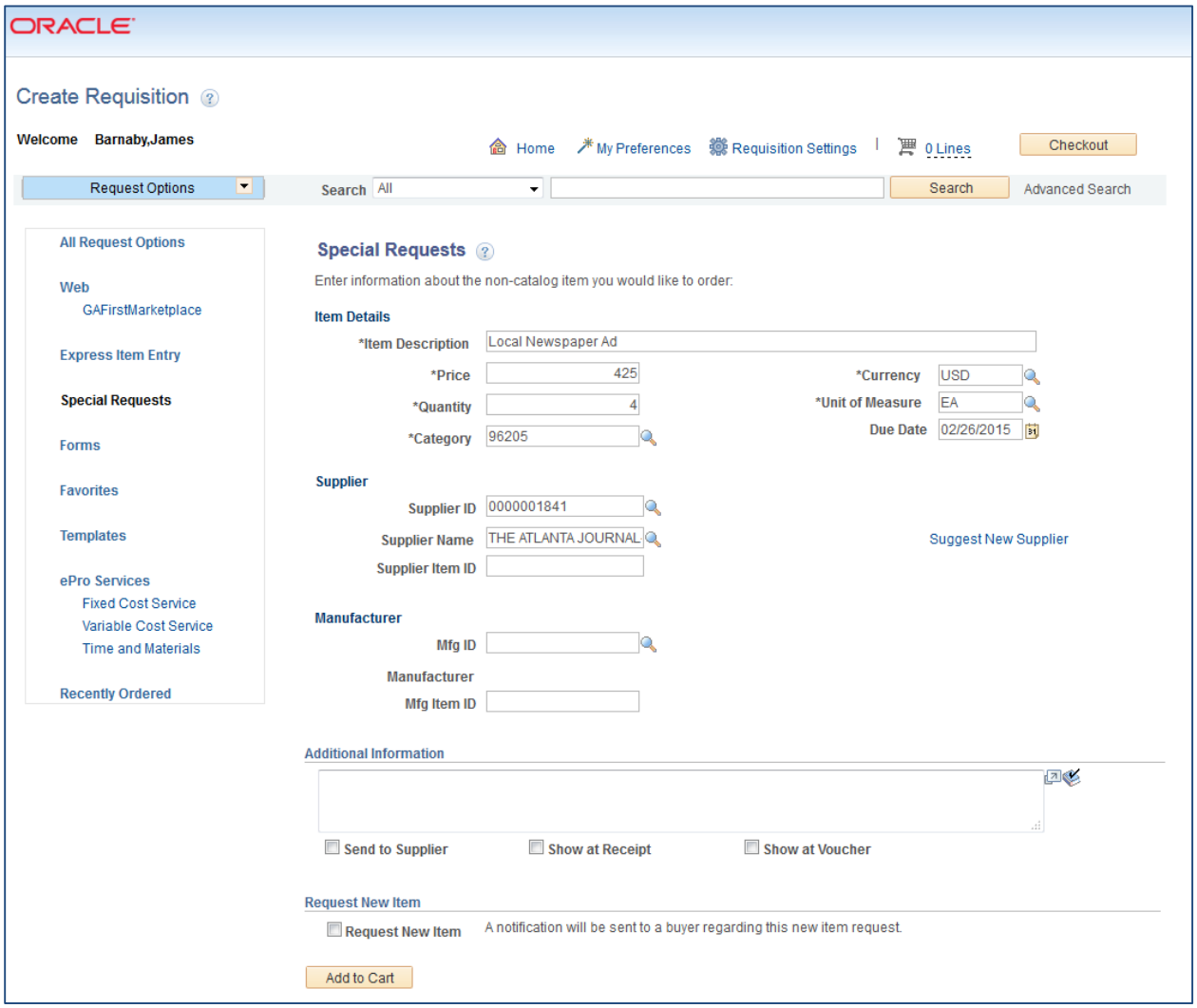
In addition to creating requisitions built from Georgia*FIRST* Marketplace shopping carts, you can also create Special Request Requisitions. Special Request Requisitions are built by entering information directly into the requisition using the Special Request tab – Special Item link. Therefore, you create the individual requisition line items as opposed to originating from the Marketplace Shopping cart.
Outside of how you add the requisition lines to the requisition, much of the steps between a Marketplace Requisition and a Special Request Requisition are the same. In this chapter, we are going to detail how to create a Special Request Requisition.

Creating a Special Request Requisition

To create a Special Request Requisition, you are going to start in the same way as you did with the Marketplace Requisition. You need to select the menu item Create Requisition from the eProcurement module.
Depending on the number of lines you need to add to your requisition, you may or may not find it useful to setup the defaults for your requisition. As we mentioned earlier by selecting the Step 1 – Define Requisition link, you can specify defaults that apply to the entire requisition so that you do not have to add them line by line. This is an optional step though.
After setting up your requisition defaults, if any, you can proceed to Step #2 – Adding Items and Services. Since this requisition will not be built from contract catalog items in the Georgia*FIRST* Marketplace, you will use the Special Request tab on this page. From the Special Request tab, you should select the Special Item hyperlink. This is how you enter line items directly into a requisition.
For each line item, you need to complete this page. If you entered any defaults in Step 1, that information will carry over to the appropriate fields here. The information that you will need to input is:

- Item Description – this is where you enter the description of the item you are requesting
- Price
- Quantity
- Unit of Measure
- Category – this is the NIGP Code
- Due Date
- Supplier Name – You must include the Supplier information. If this is a new Supplier, you must request a W9 from the Supplier and send it to Accounts Payable to create and approve supplier. The email address to send all W9s is accountspayableW9@clayton.edu.

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



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

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

or multiple lines through the Mass Change option. If you need to include asset information for a line item, you can also do this here. Finally, you can add comments and attachments to each line, as well as to the overall requisition. When all of your information has been added, you can preview your approvals by selecting the **Save for Later button & Preview Approvals** link.
The Confirmation page lists the Requisition ID and the number of lines on the requisition. It also lets you see the approval path for the requisition based on the distribution line and your institution specific Workflow setup. You will see an approval for each Requisition Line. If you need to insert additional approvers, you can do so using the Ad Hoc approver functionality. If you notice an error and need to edit your requisition, select the Edit Requisition button. When you are ready to submit your requisition for approval, click the Submit button. The requisition header is set to a Pending Status until all lines are fully approved.

How To: Create a Special Request Requisition

1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisitions**.
3. Select Special Requests
4. To enter Requisition Defaults, click the **Requisition Settings** link. Otherwise, go to step 4.
    a. If desired, enter a name for your requisition (if left blank, the Requisition ID will be listed here after saving).
    b. Expand the **Line Defaults** section by clicking on the expand button.
    c. To enter a default supplier for all requisition lines, enter the **Supplier ID** or select it using the Look Up icon.
    d. All of your line items will have the same NIGP code (00000), enter it in the **Category** field.
    e. If all of your line items will have the same **Unit of Measure**, enter it or select it using the Look Up icon.
    f. To enter a default **Due Date** for each line item, enter it or select it using the Calendar icon. The Due Date for a Requisition is typically within 30 days of the current date.
    g. To enter a default "**Attention To**" for each line, enter in the Attention field.
    h. In the **Accounting Defaults – Chartfields 1** tab, the Location, GL Unit, and Department originally default from your User ID. If needed, you can change the Fund Code, Department, Program, Class, and Project that are to be charged for each line item.
    i. In the **Accounting Defaults – Asset Information** tab, you can enter the default AM Business Unit field and Profile ID that will appear on each requisition line item. This should only be set if all requisition line items are to be tracked in the Asset Management module, and each line item requires the same Profile ID.
    j. Click the **OK** button.

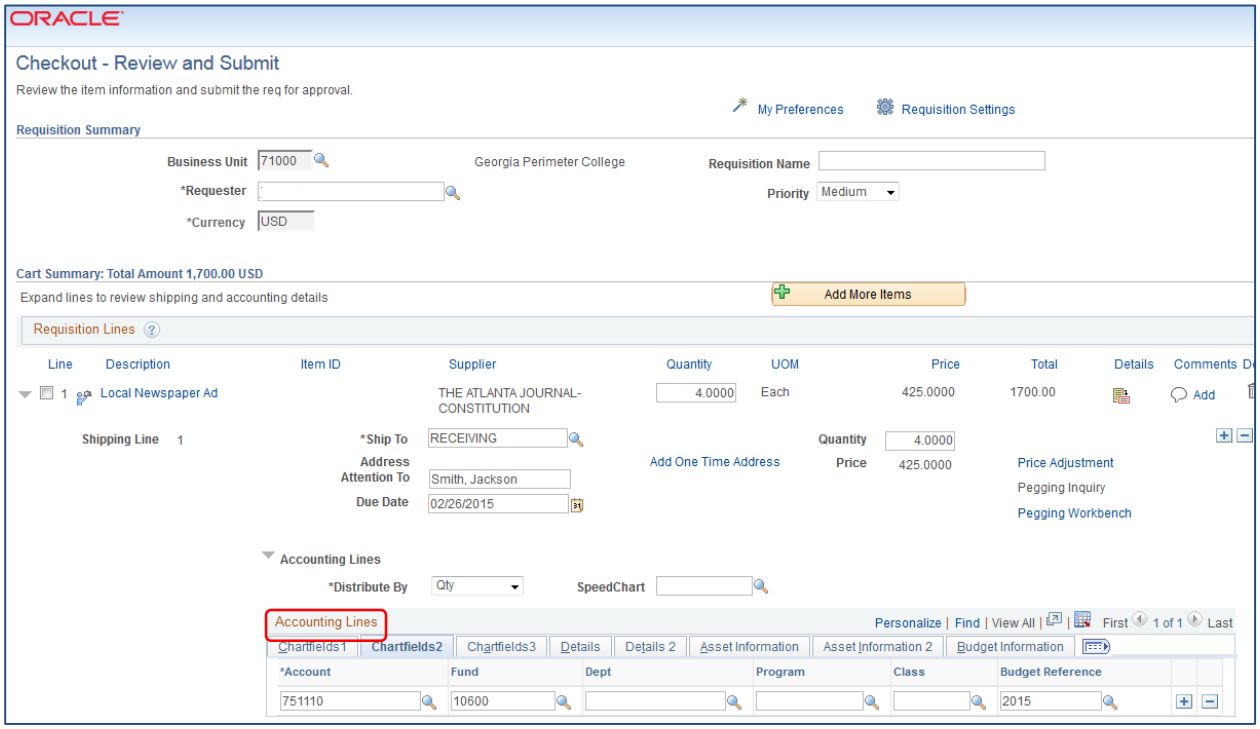
5. For each line that you want to enter, complete the following steps (some fields may have been completed through the requisition defaults – these defaults can be overwritten on this page if needed):
    a. Enter an **Item Description**
    b. Enter the **Price** of the item
    c. Enter the **Quantity** requested
    d. Enter or select the **Unit of Measure**
    e. In the **Category** field, enter [**00000**] for the item
    f. Enter or select the **Due Date** for the item
    g. Enter or select the **Supplier ID** for the item if you have a preferred supplier
    h. If you have any information that needs to be sent to the supplier, shown on the receipt, and/or shown on the voucher, enter it in the **Additional Information** field and select the appropriate checkboxes. **You must select Send to Supplier.**
    i. Select the **Add to Cart** button.
    j. Confirm the **Requisition Summary** updated with your new requisition line.
    k. To add an addition requisition line, complete steps 7a through 7k again.
6. Select the **Checkout** button.
7. To update a requisition line's distribution information, click its **Expand** button and make necessary updates.
8. To update multiple requisition line's information simultaneously, select the lines to update with a check mark and then select the **Mass Change** link. Make all necessary updates, and apply to all selected lines.
9. To enter a **comment** on an individual requisition line, click that line's **call out** (comment) icon. Enter the comments and select where you want the comment to appear.
10. Enter the Business Purpose (**mandatory)** on the requisition header in the **Justification/Comments** field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
11. Click the **Save for Later** button**,** then the **Preview Approvals** link.
12. Insert any additional approvers if necessary.
13. Click the **Submit** button.

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

Charging a Requisition Line Item to a Different Chartstring

When building a Special Request requisition, the Chartfields for each line item's distribution is determined by your User ID as the Requester. These default Chartfields, such as Department, are specified in your Requester setup. If you need to adjust the Chartfields for the line items, you can do this on the Checkout - Review

and Submit page. On this page, you can individually edit each line, or you can edit multiple lines at one time.



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

1. After you have added all Special Items to your requisition, go to the **Checkout - Review and Submit** page by clicking its link.
2. Expand the line by clicking on its **Expand Section** button.
3. Locate the **Accounting Lines** section.
4. Go to the **Chartfields 2** tab. Additional Chartfield values can be updated if needed:
    a. Account
    b. Fund Code
    c. Department
    d. Program
    e. Class
5. Go to the **Chartfields 3** tab to specify or modify the Project ID field
6. Make any other necessary changes and then continue with the Special Request Requisition by selecting the **Save for Later** button and **Preview Approvals** link.

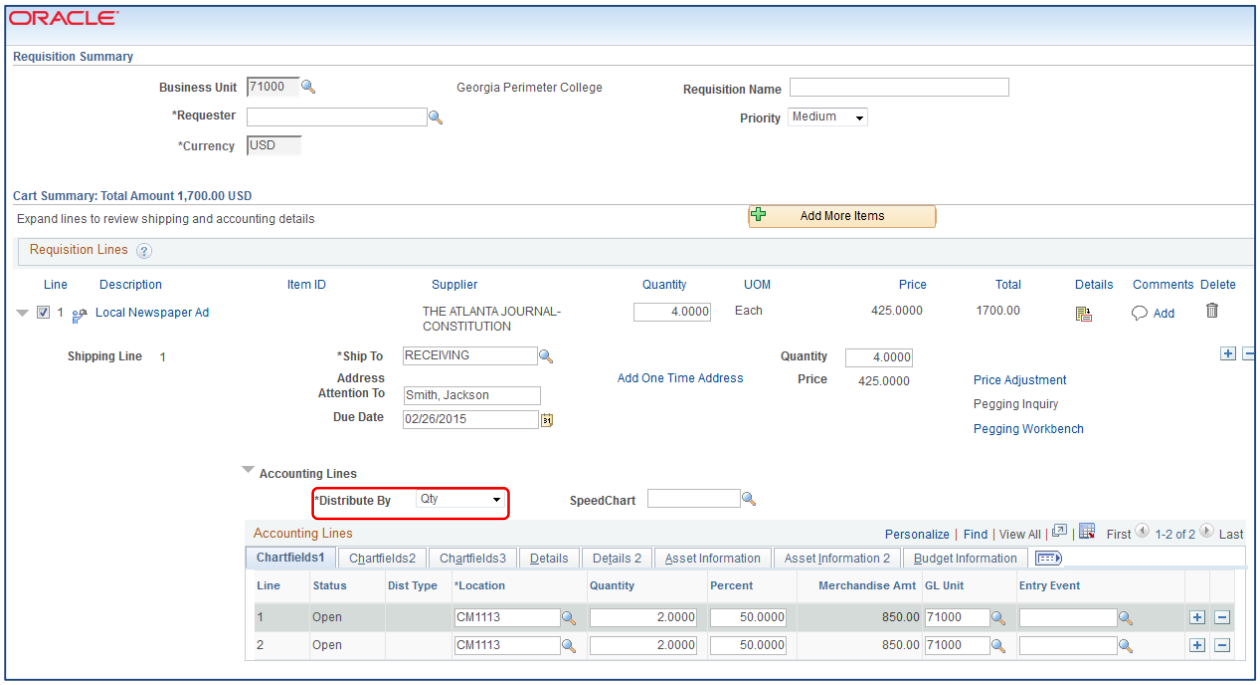
How To: Charge Multiple Requisition Line Items to a Different Chartstring

1. After you have added all Special Items to your requisition, go to the **Checkout - Review and Submit** page by clicking its link.

2. Select the lines you wish to change distribution information for by placing a **checkmark** in their **select** boxes.
3. Select the **Mass Change link**.
4. In the Accounting Information section, enter the new **Chartfields** and then click **Apply**.
5. On the Distribution Change Options, to apply changes to all selected lines, select the option "**All Distribution Lines**" and click **OK**.
6. Make any other necessary changes and then continue with the Special Request Requisition by selecting the **Save for later button and Preview Approvals** link.

Using Multiple Distributions for a Requisition Line

At times, it may be necessary for you to have multiple distributions for a requisition line. After adding Special Request items, you can split the distribution for the line needed.
To set up multiple distributions for a requisition line, you first specify whether you want to distribute by quantity or by amount. Then, you can add a new distribution line. After adding the new distribution line, you will need to update the percentage in the original distribution line first. Then, you can set the distribution quantity or amount for the new distribution line. On the Chartfields tabs, you can specify the new distribution Chartstring.



How To: Split Distribution for a Requisition Line

1. After you have added all Special Items to your requisition, go to the **Checkout - Review and Submit** page by clicking its link.
2. Expand the line by clicking on its **Expand Section** button.

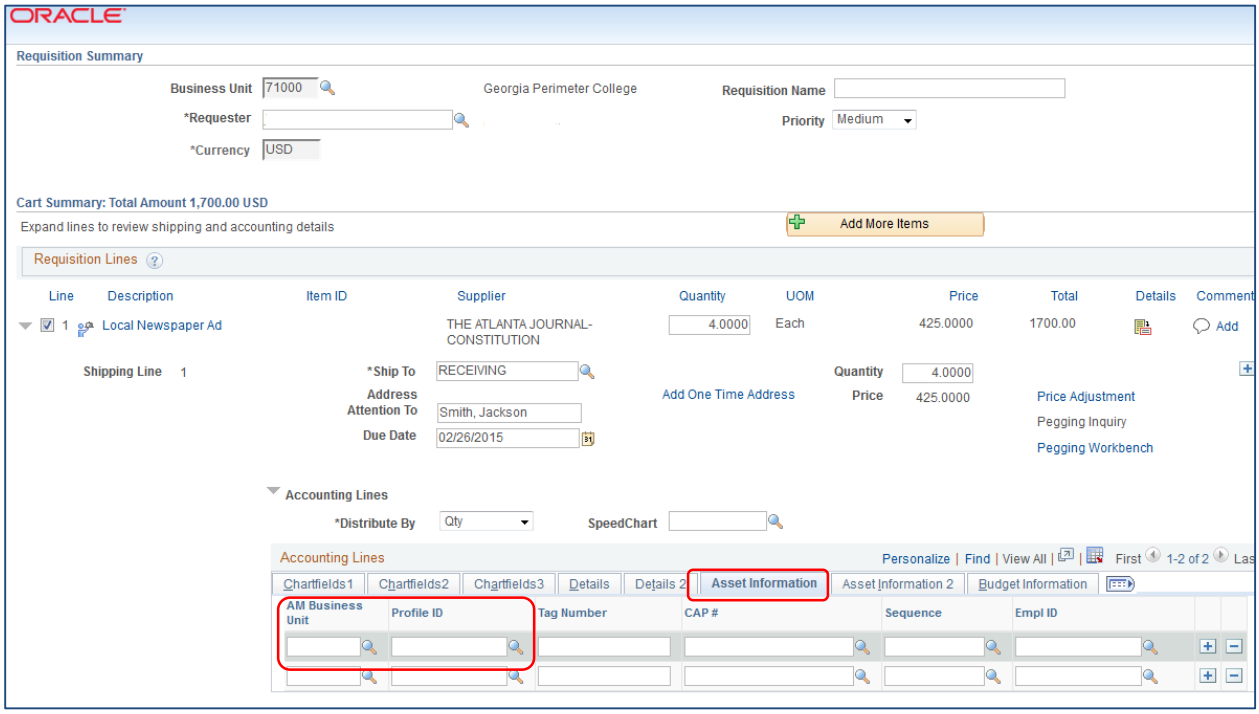
3. Choose whether to **Distribute** by **Amount** or **Quantity** through the drop down list.
4. Locate the **Accounting Lines** section.
5. At the end of the line under the **Chartfields1** tab, click the **Add a New Row** button (+).
6. If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.
    a. In the original distribution line, edit the **quantity** for the revised distribution.
    b. **Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
    c. In the new distribution line, enter the **quantity** for the second Chartstring.
    d. **Tab** out of the Quantity field. The **Percent** field will adjust accordingly.
    e. Make the necessary changes to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.
7. If distributing by **Amount**, continue. Otherwise, go to step 8.
    a. In the original distribution line, edit the amount for the revised distribution.
    b. **Tab** out of the Amount field. The **Percent** field should adjust accordingly.
    c. In the new distribution line, enter the **amount** for the second Chartstring.
    d. **Tab** out of the Amount field. The **Percent** field will adjust accordingly.
    e. Make the necessary changes to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.
8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save for Later button and Preview Approvals link**.

Entering Asset Information for an Item

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

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

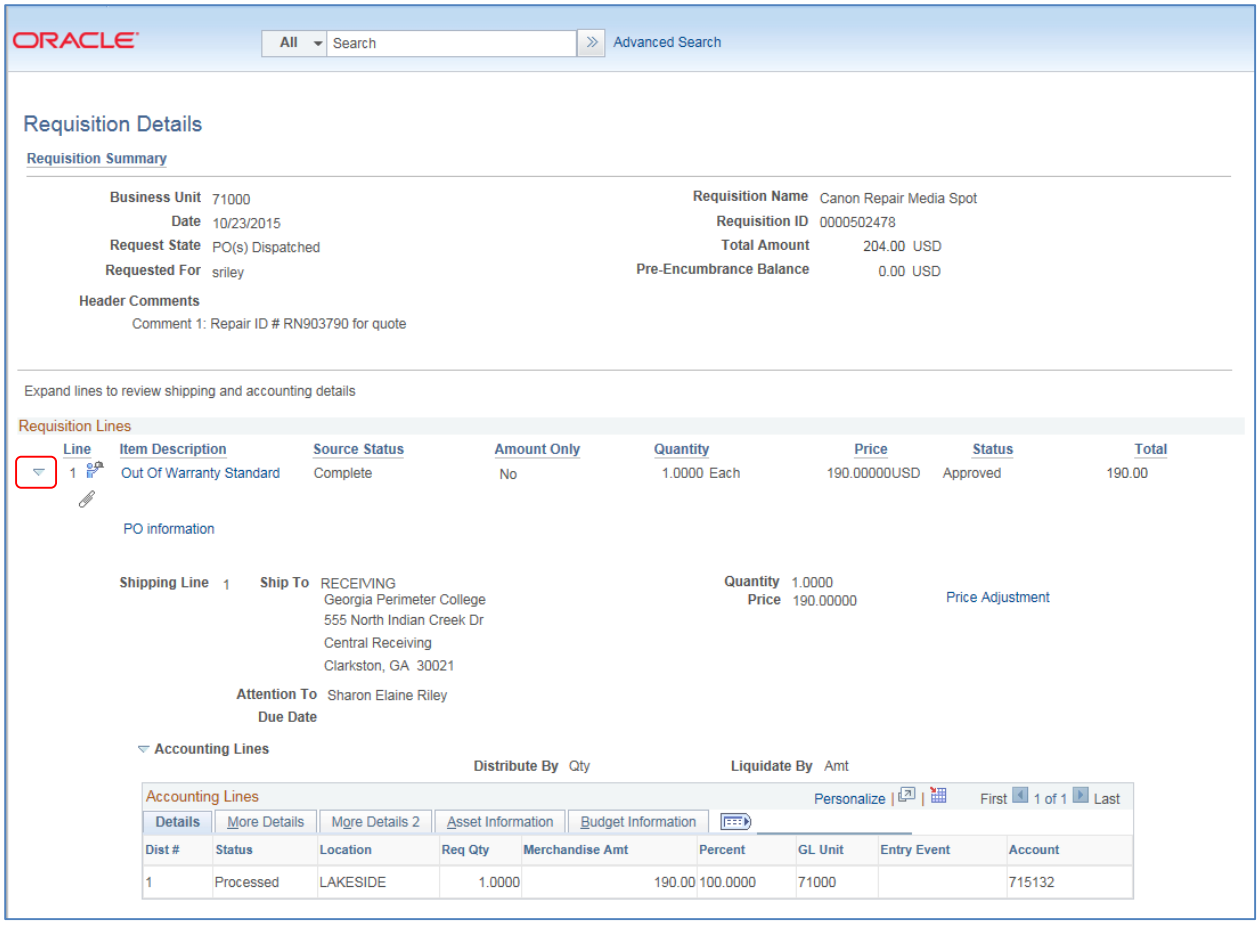
In order to enter the asset information for an item in the Marketplace Requisition, you need to be on the **Checkout - Review and Submit** page. You will need to enter the AM Business Unit and Profile ID.



How To: Enter Asset Information for a Requisition Line Item

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

If you want to see a requisitions shipping and distribution information, you can select the 'Expand Section' icon to view the Shipping and Accounting Line information.



The Line section contains all of the line items on a requisition. The Shipping section displays shipping information for the item, such as where the item is being shipped, when it is due, the quantity, the price, and the total amount of the line.
The Accounting Lines section details the Chartfields and additional information. The Dist # displays the number the system assigned to the distribution. The system uses this numbering to distinguish between multiple distributions for a single requisition line. The distribution statuses include the following:

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

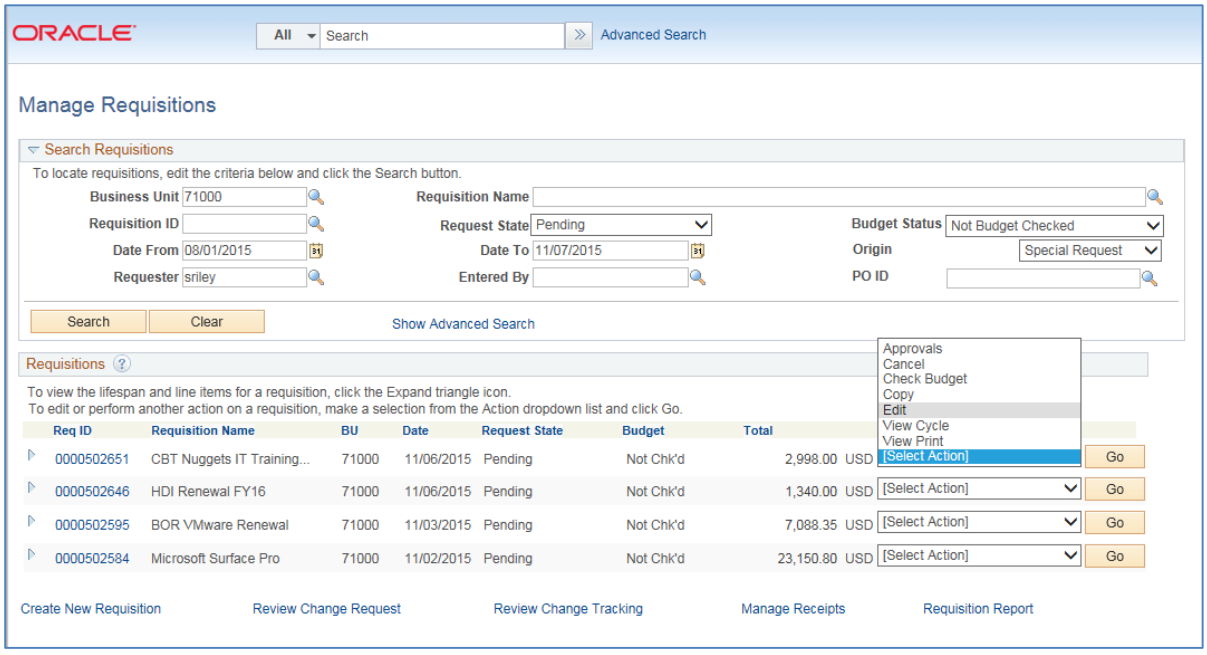
How To: Manage Requisitions

1. In PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. Enter **search criteria** for your requisitions.
4. Click the **Search** button.
5. To see a requisition's lifespan, click it's **expand** button.
6. To see details about an active or completed stage in the lifespan, click on the lifespan icon.

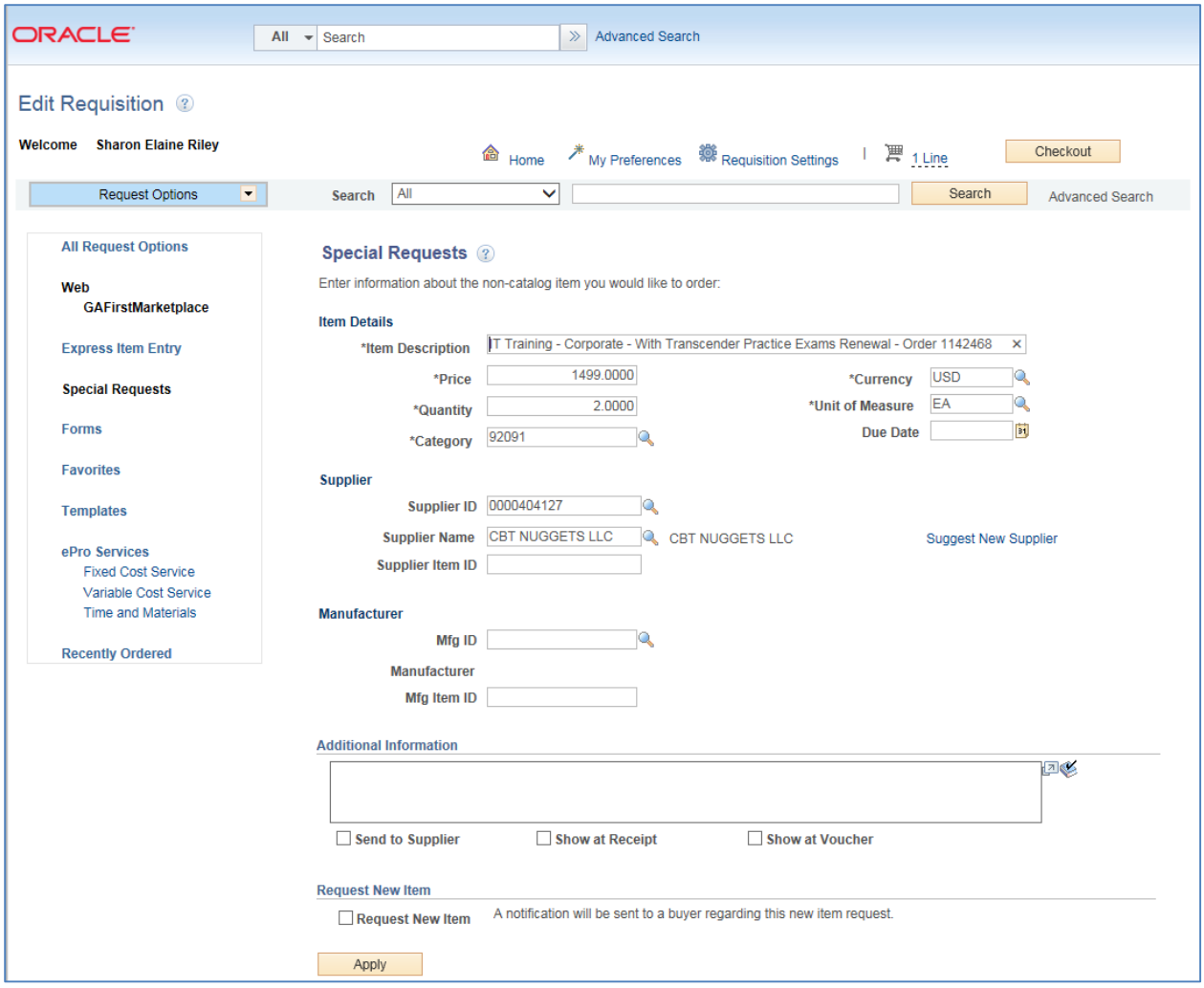
7. To see the approval path for a requisition, click on the **Approvals** lifespan icon.
8. To see requisition line information, click on the **line description**.
9. To see requisition schedule and distribution information, click on the **Requisition lifespan** icon and then select the **Requisition and Schedule Information** link.

Editing a Requisition

There will be times when you need to edit a requisition. This includes those requisitions that you have created and saved, but not yet submitted, as well as requisitions that have been denied and may need to be corrected. And, there may be a few occasions when you need to edit a requisition that has already been submitted for approval.
In order to edit a requisition, you can go through the Manage Requisitions page and search for the requisition in need of editing. When it is displayed in your search results, there will be the option of "Edit Requisition" in its action drop down list. If the requisition is no longer available for editing, that option will not appear in the drop down list. For example, once a PO is created from a requisition, that requisition can no longer be edited.



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



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

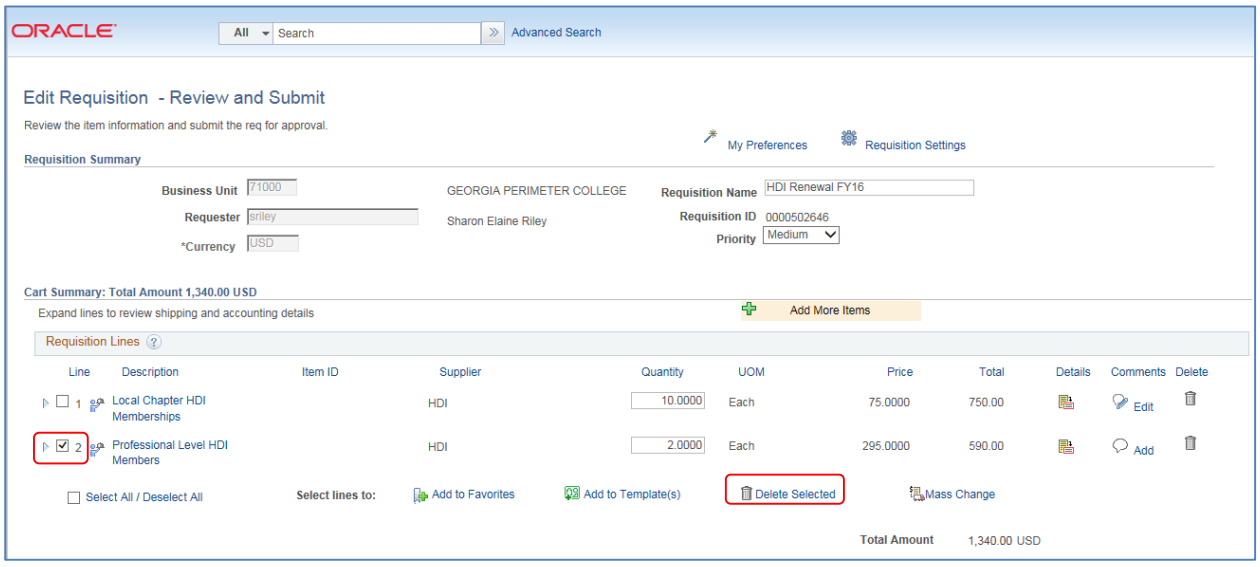
How To: Edit a Requisition

1. In PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.
3. In the search field, enter the **Requisition ID** that needs to be edited (you may need to clear some of the search fields).
4. Click the **Search** button.

5. In the Requisition ID's action drop-down list, select **Edit Requisition**.
6. Click the **Go** button.
7. To update the requisition line information, select the link under **Description**. Make the necessary changes and the return to 3. Review and Submit.
8. To update an individual requisition line Chartfield information, click its **expand** button. Make the necessary changes.
9. To update multiple requisition lines at one time, select the lines to be edited and the select the **Mass Change link.** Make the necessary edits.
10. Select the **Save for Later, then the Preview Approvals** buttons.
11. If reinitiating the approval process, consider adding a **comment** to inform your approvers of this.
12. Insert any **ad hoc approvers** if necessary.
13. Click the **Submit** button.

Delete a Requisition Line

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



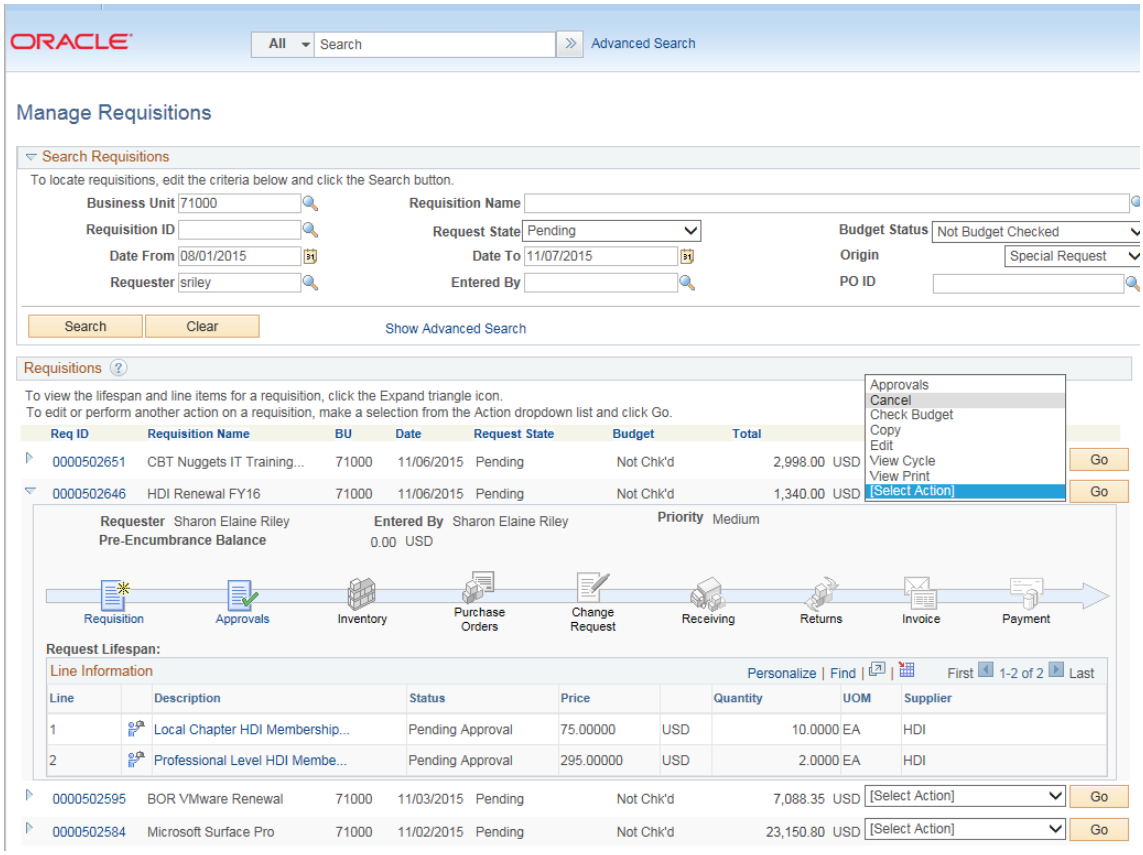
How To: Delete a Requisition Line

1. From the PeopleSoft Financials Core system, select **eProcurement** in the menu.
2. Select **Manage Requisitions**.

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

Canceling a Requisition

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



How To: Cancel a Requisition

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

How To: Attach Documentation to the Requisition

1. Once you have entered the items and supplier information, go to Checkout
2. Click on the **Add** link under **Comments** column
3. Click on **Add Attachments** and upload documents for the Purchase Requisition.
4. **DO NOT** send this to the Supplier.

Scenarios for Special Request

Quote#1234

MedSupply Partners, LLC

Date 3/1/2016
Expiration Date 4/1/2015

MedSupply Partners, LLC
3715 Atlanta Ind. Pkwy, Ste.B
Atlanta, GA 30331
Phone 770.678.4041
Fax 770.678.4042
medsupply@org.com

TO Requester
Clayton State University
1234 Clayton State Blvd
Morrow, GA 30260
Phone 678.466.4000
Customer ID 12172014

Salesperson	Job	Shipping Method	Shipping Terms	Delivery Date	Payment Terms	Due Date
Maggie					Due on receipt	

Qty	Item #	Description	Unit Price	Discount	Line total
75	TT512	Toasti-toes value pack-6 pair per pack	$12.99		$974.25
30	MS105	Gloves	8.99		$269.70

				Total Discount	
				Subtotal	$1243.95
				Shipping & Handling	35.00
				Total	$1278.95

Quotation prepared by: _____

This is a quotation on the goods named, subject to the conditions noted below: (Describe any conditions pertaining to these prices and any additional terms of the agreement. You may want to include contingencies that will affect the quotation.)

To accept this quotation, sign here and return: _____

Thank you for your business!

Quote#: ESS678

Energy Systems Southeast, LLC

Date 3/8/2016
Expiration Date 4/8/2015

Energy Systems Southeast, LLC
3235 Veterans Circle
Birmingham, AL 35235
Phone 205.666.1222
Fax 205.666.1212
ESSLLC@live.net

TO Requester
Clayton State University
1234 Clayton State Blvd
Morrow, GA 30260
Phone 678.466.4000
Customer ID 12172014

Salesperson	Job	Shipping Method	Shipping Terms	Delivery Date	Payment Terms	Due Date
Jim					Net 30	

Qty	Item #	Description	Unit Price	Discount	Line total
1	ES999	Energy efficient generator	$5500	$550	$4950
1		Installation	1200		$1200

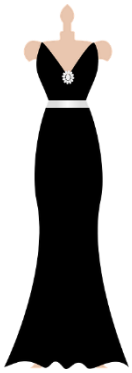
			Total Discount		
				Subtotal	$6150
				Shipping & Handling	$175
				Total	$6325

Quotation prepared by: _____

This is a quotation on the goods named, subject to the conditions noted below: (Describe any conditions pertaining to these prices and any additional terms of the agreement. You may want to include contingencies that will affect the quotation.)

To accept this quotation, sign here and return: _____

Thank you for your business!



F. A. Davis Company

QUOTE#: CLAYSTATE2016

DATE: 2/26/2016
EXPIRES: 4/1/2016

F.A. Davis Company
1915 Arch St.
Philadelphia, PA 19103
Phone 615.213.4545
Fax 615.213.4444
DressesRus@aol.com

TO

Requester
Clayton State University
2000 Clayton State Blvd
Morrow, GA 30260
Phone 678.466.4000
Customer ID 12172014

Salesperson	Job	Shipping Method	Shipping Terms	Delivery Date	Payment Terms	Due Date
Sara					Net 30	

Qty	Item #	Description	Unit Price	Discount	Line total
1		Seamstress service	$3500		$3500
10		Fabric- silk	$40		$400
25		Silk ribbons	$2		$50

				Total Discount	
				Subtotal	$3950
				Shipping & Handling	
				Total	$3950

Quotation prepared by: _____

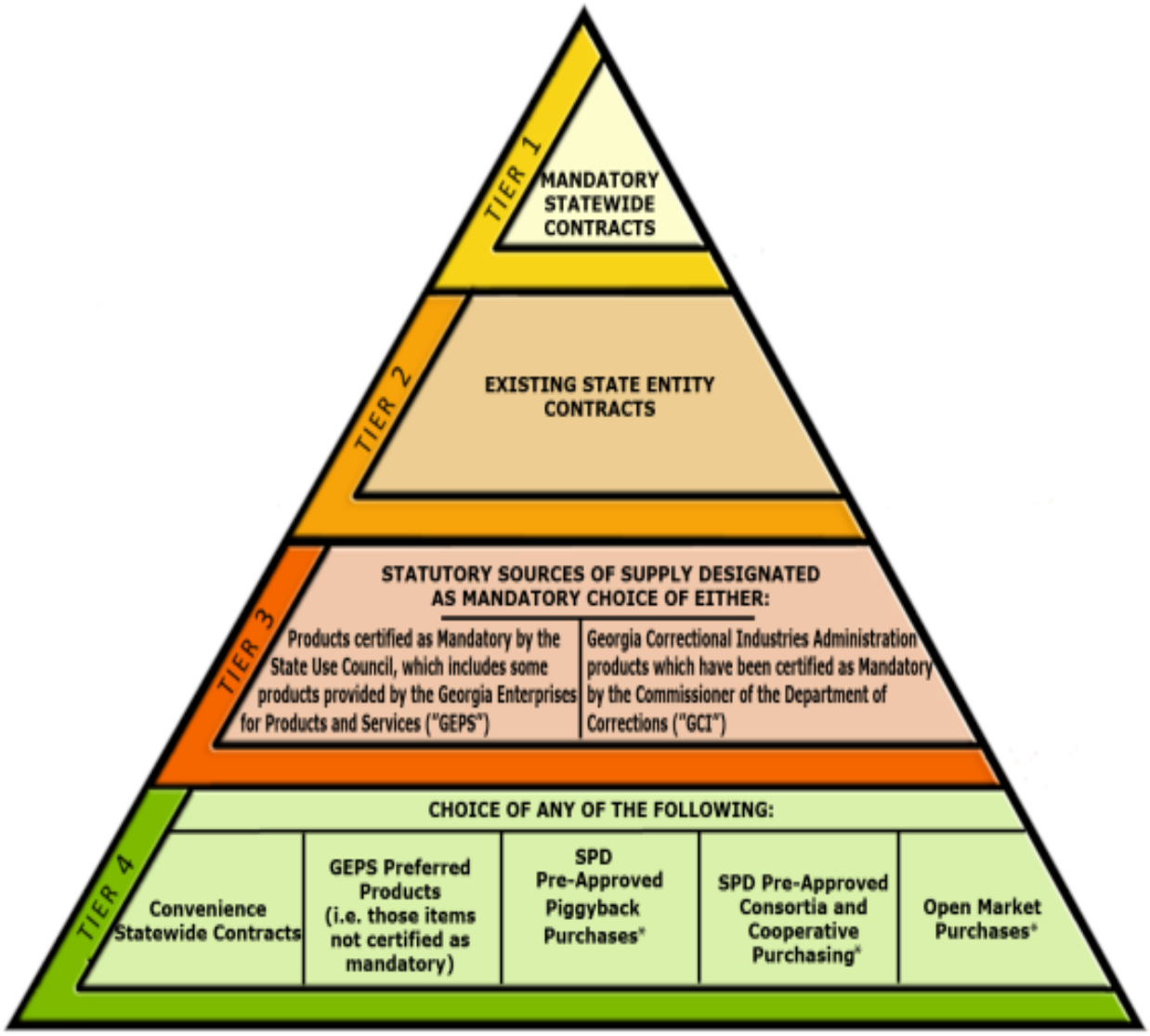
This is a quotation on the goods named, subject to the conditions noted below: (Describe any conditions pertaining to these prices and any additional terms of the agreement. You may want to include contingencies that will affect the quotation.)

To accept this quotation, sign here and return: _____

Thank you for your business!

Appendix

Order of Precedence



PURCHASING LIMITS FOR PROCUREMENT SERVICES

1. **All Purchases-Any Dollar Amount**
   A. All End-Users must verify whether the product and/or service needed is available on Mandatory State Contract prior to purchasing, no matter the dollar amount. If it is on a Mandatory State Contract then the End-User must purchase from the State Contract supplier. **Mandatory Statewide Contracts are contracts established by the State Purchasing Division (SPD) for use by all State entities. State entities must use the mandatory contract unless SPD grants a written waiver.**

   B. If End-users have a valid justification for purchasing from a non-statewide approved supplier and the product and/or service is available on a Mandatory State Contract, a waiver request must be submitted by the Procurement Officer to State Purchasing Division of DOAS for approval. The request for a waiver requires written justification and can take 5 to 7 business days.

   C. All purchases must have a business purpose listed on either the purchase requisition, the check request or on the reconcilement of the P-card in Works.

2. **Purchases less than $2,500** **Business Purpose Required**
   May be purchased and paid with a P-card.
   May be purchased and paid with a Purchase Order.
   May be paid with a Check request.

3. **Purchases between $2,501-$4,999**** **Business Purpose Required**
   May be purchased and paid with a P-card.
   May be purchased and paid with a Purchase Order.

4. **Purchases between $5,000-$24,999 Business Purpose, Three (3) Quotes and Checklist (NEW) Required**
   May be purchased and paid with a Purchase Order Only.

A single item purchase ≥$3000 must be purchased with a Purchase Order Only

All Purchase Orders between $5,000 and $24,999 must have at least three written quotes attached along with an explanation of the business purpose. If the needed product and/or service is on State Convenience Contract, one of the quotes must be from that supplier. **Convenience Statewide Contracts are contracts established by the SPD for use by all State entities. State**

entities may, but are not required to use this type of contract. However, SPD strongly encourages the use of convenience statewide contracts.

5. **Purchases Greater than $24,999**
   If you reasonably foresee purchases ≥$25000 with the same supplier for the fiscal year, then we must place a competitive bid on the Georgia Procurement Registry for the needed products and/or services.

Sole Source and Sole Brand

Sole Source Definition

- A sole source occurs when the product you need is available ONLY through one supplier due to the manufacturer's agreement with the supplier.

Sole Brand Definition

- A sole brand occurs when only one particular manufacturer's brand will suffice. Product may be available from several suppliers but we must have the particular brand.

Both require justification AND may require posting on the Georgia Procurement Registry.

Documents Needed

1. Quote
2. Contract- reviewed and fully executed
3. Contract Affidavit- labor and/or services in the amount of $2500 or greater
4. W9 form if the Supplier is new or inactive

CLAYTON STATE UNIVERSITY

CLAYTON STATE UNIVERSITY

CONTRACTOR AFFIDAVIT UNDER O.C.G.A. § 13-10-91(B)(1)
OR
EXEMPTION FORM

By executing this affidavit, the undersigned contractor verifies its compliance with or is exempt from O.C.G.A. § 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services on behalf of Board of Regents of the University System of Georgia for the use and benefit of CLAYTON STATE UNIVERSITY (public employer) has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91. Furthermore, the undersigned contractor will continue to use the federal work authorization program throughout the contract period and the undersigned contractor will contract for the physical performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the contractor with the information required by O.C.G.A. § 13-10-91(b). Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

_____
FEDERAL WORK AUTHORIZATION NUMBER

_____
DATE OF AUTHORIZATION

Exemptions (check if applicable):

Contractor (or subcontractor) employs less than 11 employees: _____

Licensed in Georgia: _____
State Bar License

_____
Title 26 or 43 License/List of Professions
http://www.clayton.edu/contract-administration/exemptions
(Note: Review GA Code for updated information)
http://www.lexisnexis.com/hottopics/gacode/default.asp

Other: _____

_____
NAME OF CONTRACTOR

_____
PROJECT NAME

Board of Regents of the University System of Georgia for the use and benefit of CLAYTON STATE UNIVERSITY.

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on _____, _____, 20__ in _____ (city), _____(state).

_____
Signature of Authorized Officer or Agent

_____
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME
ON THIS THE _____ DAY OF _____20_____.

NOTARY PUBLIC: _____

My Commission Expires: _____

Form **W-9**
(Rev. October 2007)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: ☐ Individual/Sole proprietor ☐ Corporation ☐ Partnership
☐ Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ .....
☐ Other (see instructions) ▶

☐ Exempt payee

Address (number, street, and apt. or suite no.)

Requester's name and address (optional)

City, state, and ZIP code

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number

or

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here **Signature of U.S. person ▶** **Date ▶**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

Cat. No. 10231X Form **W-9** (Rev. 10-2007)

CLAYTON STATE UNIVERSITY **Purchasing Requisition Form**

Submitted by: Date:

Ordering Department Information-Using PeopleSoft Accounting Info

Fund Code		Department Number	
Program Number		Class Number	
Project/Grant Number		Account Number	

Vendor Information

Statewide Contract Number (if applicable): _____

Vendor Name	
Vendor Address	
City / State / ZIP	
Vendor Contact	
Vendor Fax	
◉ SSN ○ FEI	

Item(s) Requested

Line	Qty	Item Description	Unit Cost	Total Price
1				$ -
2				$ -
3				$ -
4				$ -
5				$ -
Attach additional pages if more lines are required				
			Total Requisition Cost	$ -

All Supporting Documents and Competitive Bids Must Be Attached

Business Purpose and Special Instructions Must Be Included Below

Requestor Approval(s)	
Department Approval	
Additional Approval	
OITS Approval	
Media Approval	

Purchasing Department Use Only **PO#**