

eProcurement: GAFirst Marketplace Guide

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Appendix A: Accessing Statewide Contracts

Appendix B: Requisition/PO/Budget Status Terms and Definitions

Getting Started

- 1. Your Employee Self Service account must be created before you can access PeopleSoft Financials.
- 2. To establish your login information, you must have already completed eProcurement Training. After training Computer Service in Financial Services will automatically send you an email with you login information.
- 3. To access PeopleSoft Financials open your web browser and navigate to the following link: <u>https://core.fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERP/?cmd=logout</u>
 - a. Chrome and Firefox work best, but Explorer will also work if you have the most updated version of the browser. Experiment to see which one works best for you.
- 4. Alternatively, PeopleSoft Financials can also be accessed through your 'My VSU' page, right menu, 7th link down from the top of the list.
- 5. See Appendix A on how to view and review authorized active Statewide Contracts.

Navigating to eProcurement



- 1. Upon initial login to PeopleSoft Financials you will see the Fluid Dashboard. In the top right you will see (in order left to right) the home icon, magnifying glass icon, menu icon, and compass icon.
 - 1. The Home Icon will always bring you back to the Fluid Dashboard.
 - 2. The Magnifying Glass Icon will allow you to search the entire Financials module.
 - 3. The Menu Icon will allow you to personalize your layout and add favorites to your NavBar
 - 4. The Compass Icon will expand out the NavBar menu.

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					Accounts Receivable	>
					Accounts Payable	>
					BOR Menus	>
					Asset Management	>

- 2. To access eProcurement for both Marketplace orders and Special Item Requests, you will click the Compass Icon to expand the NavBar Menu. From here you can see the Recent Places Icon (will show you the most recent links you've visited in PeopleSoft Financials), the My Favorites Icon (shows the links you've added to your favorites list), and the Navigator Icon (shows you the full navigation menu).
 - 1. Click on the Navigator Icon. The eProcurement link should be towards the top of the Navigation Menu.



 Click the eProcurement link in order to expand out the eProcurement menu. You will see that the top Menu header now says "eProcurement". From there, click on the Requisition link in order to create either a Marketplace Order or a Special Item Request.

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Enter search criteria or select from the menu on the right to begin creating your requisition.	Web Browse Supplier Websites GAFirstMarketplace Browse Supplier Websites	
	Forms Create and Submit Forms Create and Submit Forms Favorite Items and Services Consulting Services-Prasad	
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4. From the "Requisition" link the system routes to the Create Requisition page. This will is the starting point for creating both types of requisitions.

STEP 1: ADD ITEMS

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- 1. Access eProcurement by navigating either through
 - a. Main Menu>eProcurement>Requisition OR
 - b. Once logged in, use the eProcurement link in the left hand menu on the front page of Peoplesoft.
- 2. Always use a separate requisition for each supplier. Do NOT submit a request with multiple suppliers.
- 3. Select the "GaFirstMarketplace" link under the "Web" header.
- 4. Note: The State is always working on and updating this page. If you see quirks or run into any problems with the GA First Marketplace along the way, be sure to let Procurement know.

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- 5. The system routes to is the GAFirst Marketplace dashboard. Information found here:
 - a. <u>Home Icon</u>(Yellow Box to the left of the V-State logo) to get back to the Home page.
 - b. Order Summary(Blue Box) will let display a summary of the order.

- c. <u>Shopping Cart Icon</u> (Pink Box) will give access to the specific actions available to take with the cart such as see past carts, draft and active carts.
- d. <u>Quick Search</u> (Red Box) allows searching everything on state wide contract.
 - i. Note: Those items that are special case items or services, like a tractor or temporary labor services, are items that you can't just walk into a store and pick up off the shelf, so you won't see those types of contracted items listed when you use the Quick Search. You will need to go through the contracts link and contact the companies directly for a quote, then enter as a special item request
- e. <u>Punch-Out Catalogs</u> (Orange box) are catalogs that the Marketplace hosts. That means these companies have their own shopping sites that can be visited through Marketplace.
- f. <u>Contracts Link</u> (Green Box) allows acess the details of all contracts the State has negotiated and are currently active for our use.

Adding Items to a cart from the Quick Search function:

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By Supplier To McKesson Medical Surgical (4) Onepath Systems (1)	larger image	Manufacturer Info	27562 - (BALT)		add favorite compare
WW Grainger, Inc. (2) By Category	-	Podium Workstation	21 in W 16-1/2 in D from WW Grai 8TTJ3	inger, Inc.	Order from Supplier 되 FA
Free standing lecterns (1) Hazardous materials cabinets (1) Network system equipment rack (1)	larger image	Manufacturer Info	8001316 - (FORTE PRODUCT SOLUT	TIONS)	EA add favorite compare

- 1. Start a cart with the Quick Search function. Type in what is needed in the quick search field (red box) and click the blue GO button to the right of the search field.
- 2. When the search results come up, the Add Keywords feature (yellow box) is now available and will allow narrowing of the search.
 - a. Ex. If the word "Wood" is entered in the Add Keywords field and click GO, the search results will be narrowed to just wooden podiums.
 - b. The left hand menu on the search results holds very valuable tools.
 - i. Determine if there are any Statewide Mandatory or Convenience Contracts.
 - ii. The search can also be narrowed by supplier, category, etc.
- 3. In the body of the search (orange box) a picture of the items that met the search criteria, a description, pricing, supplier the item is from, part numbers etc. will be visible.

		Catherine Storey 🔻	🔶 🛨 🖌 Action Items	Notifications 📜 215.28 USD 🔍
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Shop Ever	rything 🔹 p	odium	Go	
Go to: ad	vanced search favorites quick	order Browse: suppliers categories c	ontracts chemicals	
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Results Per Page	20 🔻	Sort by: Best Match	T	🔳 Page 1 of 1 🕨 📍
no image	ECR-ST OPTIONAL POL	DIUM SHELF(SHELF ONLY) from	n Onepath Systems	71.76 USD
available	Part Number	ECR-12\16STPS		FA
	Manufacturer Info	ECR-12\16STPS - (Raxxess)		3 Add to Cart 🔻
	1-Mandatory State	Yes		add favorite compare
	Contract			1 item(s) added, view cart

- 4. To change the quantity or amount of the item being requested, type 3 next to the blue "Add to Cart" button, click Add to Cart (green box).
- 5. Clicking "Add to Cart" adds the item to the shopping cart in the top right corner of the page (yellow Box).

no image available	ECR-ST OPTIONAL PODIUM SH	
avaliable	Quantity: 3 Price: 215.28 USD	View My Cart Checkout
wse thin g , pourum		215.28 U
	Showing 1 - 7 of	7 Results Compare Selected
Sort by: Best Mate	:h 🔻	🔳 Page 1 of 1 💌
ELF(SHELF ONL	Y) from Onepath Systems	71.76 USD

6. When ready to check out; click on the dollar amount next to the cart icon in the top right of the page. This expands down information that gives the option to "view my cart", "checkout", or delete an item in my cart (yellow boxes)

ñ	WEREN	VALDOSTA STATE UNIVERSITY	Catherine Storey 🔻 🔺 Action Items Notifications 🍹 215.28 USD 🔍	
	📜 Shop	My Carts and Orders \rangle Open My Active	pping Cart 🗢 👌 Summary - Draft Requisition	
	🕑 Gene	eral 📀 Final Review	Issue Requisition	
2	THIS DO	DES NOT MEAN THAT THI	Assign Cart REQUEST HAS BEEN SAVED NOR HAS IT BEEN SUBMITTED FOR APPROVALS!	,
		>III :	nformation has been completed and this request is ready to be submitted. I the details, you may continue by clicking the button at the top of the page.	כ
	Cart Co	mments History		
	Summa	ary	?	
	Hide head	er	Hide value descriptions	
		General	?	
	Cart Nan	ne 2015-04-02 cfstorey 01	edit	

- 7. Once the blue Checkout button is clicked, the system goes to a summary page of the items in the cart.
 - a. The green check mark in the yellow box that says "All done!" does **<u>NOT</u>** mean the request has been saved nor does it mean the request has been submitted for approvals.
- 8. Below the green checkmark in the yellow box there is a full review of the items in the cart. The system will display the supplier name and quantity. The order can be edited at this point if needed.
- 9. Review the order. Once it is ready to be submitted for approvals, click on the blue Issue Requisition button in the top right (green box).

Adding Items to a cart from a Punch-Out Catalog:

- 1. Adding an item from one of the punch-out catalogs. These punch-out sites will allow purchasing from <u>only</u> items that are on Statewide Contract.
- 2. To Purchase from Staples:



3. Click on the button in the middle of the page with the Staples logo(also known as a Sticker). This will rout to the hosted shopping site for Staples through eProcurement in Peoplesoft Financials.

Customer Service Messages (1)		
Shop By Category • My Orders • My Ink & Toner My Ink & Toner Ouck Order • Ouck Order • Binders Filing Organizers • Ouck Order • 1 Calendrars Planners • Calendrars Planners • • Cleaning Maintenance • • •	STAPLES Advantage	OG-SPD0000103-0001
Shop By Category My Orders My Ink & Toner My Ink & Toner Cuick Order Order Binders Filing Organizers Cuick Order 1 Boards Easels Dry-Erase Calenders Planes 1 Calenders Planes I Messages: • Cleaning Maintenance • •		Customer D: 1062004ATL
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Creating (Intellice and Comparison of Compa		1 Messages:
Coffee Water Snacks	Cleaning Maintenance	An Important Message from Your Organization »
	Coffee Water Snacks	
	Custom: Imprint Stamps	
First Aid Medical Supplies		

- 4. The Staples Office Supply Contract number (Green box), our State Customer ID (Yellow box) as well as a button to Cancel PunchOut (Red box) will be displayed.
- 5. From here, shop the site as would be done with other shopping sites, such as Amazon.

STAPLES Advantage	Cust	ustomer Service Messages (1)	
	Customer ID: 1062004A7L	194 er - 10	
SHOP Pen		GO	O ITEMS -
Shop By Category 🔫	My Orders 👻 My Ink & Toner		
Click To See All Categories		our Shopping Lists Please select a list	•
earch Results Category	"Pen" (1.895 items found)		Protable Version
Gelenk Pena (418) Retractable Dalpoint Pena (371) Roterbal Pena (345)	Company Sort By Best Match T 25 T		terns 1 to 25 of 1,895 1 (2)3
Balpoint Pena (200) Pen Ini Reffini (1910) Porsus Point Pena (89) Security Pena (40) Specialty Pena (40) Polant Highliphere (22) Deals & Teni Highliphere (15) Correction Pena (14)	51apter95 Soato G4 Retroctade Perus, 50 Perus Risch kini Historika Barreta, 1229k Catalone fane 8 (5124-COR Soato fan 16 (5124- Will fane 8 1504/CC		\$1,61 oz/rz ov 1 Add to Cert - Add to Unt Chess Delvery Date
Executive Pena (14) Markera (14)	Staples® Sonix Gel Retractable Pens, I 0.7 mm, Bae Ink / Bae Barret, 32/Pk	Medium Point,	\$1.60 pz+2

6. Enter a keyword for the item needed in the search field and click GO. This will bring up search results. If more than one is needed change the quantity to 4 and click the orange Add to Cart button.

					Cancel Punch-out
	Item Ac	ided to Cart			Close (1)
	Staples® Sontx Ge Black Ink / Black E Customer item # 6 Staples item # 651 MFR item # 13561	51254-CORE 254	nt, 0.7 mm, Qty. 4 DZ/12 Price \$1.61	Cart Summary	
o Staples® Co				Checkout Continue Shopping	
< \$28.25 cm	5000	\$1.60 02/12	\$4.62 ozna	\$1.61 02/12	×

- 7. A pop-up window gives the option to either Checkout or Continue Shopping.
 - a. To continue shopping click the Continue Shopping button.
 - b. To checkout- click the Checkout button:

STAPLES Advantage S	OG-SPD0000103-000	1	Customer Service Messages
	c	ustomer ID: 1062004ATL	
SHOP Search			CO 💥 11TEM -
Shop By Category 👻	My Orders 👻 My Ink & To	ner	
Click To See All Categories	Quick Order Oty. Quick Order tem# 1 Add	o Cart Order Multiple items	Your Shopping Lists Please select a list 🔹
			Printable Version
Your Shopping Cart :	Review Item Information		Continue shopping Update cart Submit
	Sort By		Customers also viewed
	Please select •		^
	View all delivery dates	Item Total	Sanford Sharpie® Permanent Markers, Fine Tip, Black Ink, 12/Pk
Staples® Sonix Gel P Pens, Medium Point, Black Ink / Black Bar	0.7 mm,	\$12.88	\$8.55 pz/12

- 8. An overview of items in the shopping cart will display. The options to 'Continue Shopping', 'Update your cart', or 'Submit' are available on the right hand side of the page (Green box).
 - a. **<u>IMPORTANT</u>**: Click the orange Submit button in order for the items in the cart to be exported to GaFirst Marketplace in eProcurement.
 - b. Note: By clicking Submit in the punch-out site you are <u>only</u> sending the items to your GaFirst Marketplace cart, you are <u>not</u> submitting them to the budget approver.



- 9. Once the Submit button is clicked, the system routes back to the Marketplace shopping cart.
- 10. Once the summary has been approved and is correct, click the blue Proceed to Checkout button (green box).

ñ	Action Items Notified Catherine Storey ▼ ★ Action Items Notified	cations 📜 215.28 USD 🔍
1	📜 🐂 Shop 👌 My Carts and Orders 👌 Open My Active Shopping Cart 🗢 👌 Summary - Draft Requisition	
	🖉 🔗 General 🔗 Final Review	Issue Requisition
1	THIS DOES NOT MEAN THAT THIS REQUEST HAS BEEN SAVED NOR HAS IT BEEN SUBMITTED FOR APPR	Assign Cart ROVALS!
	 All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page. 	
	Cart Comments History	
	Summary	?
	Hide header	Hide value descriptions
	General ?	
	Cart Name 2015-04-02 cfstorey 01 edit	

11. The green check mark in the yellow box that says "All done!" does **<u>NOT</u>** mean the request has been saved nor does it mean the request has been submitted for approvals.

- 12. Below the green checkmark in the yellow box there is a full review of the items in the cart. The system will display the supplier name and quantity. The order can be edited here if any quantities need to be reduced.
 - a. To increase a quantity, go back through the Staples punch-out and shop more of that item.
 - b. This is the case if different items need to be added to the cart as well.
- 13. Review the order. Once it is ready to be submitted it for approvals, click on the blue Issue Requisition button in the top right (green box).
 - a. Note: By clicking the blue Issue Requisition button the items are no longer in a cart nor are they saved as a requisition. Once you click Issue Requisition, you must complete the process to the point of clicking "Save for Later" or "Save & Submit" in the last step. <u>Otherwise all of the items you just shopped will be</u> <u>lost. They no longer be in a cart status nor will they be in a requisition status</u>.

STEP 2: REVIEW AND SUBMIT

ORACL	C								
URACL									
									ra New Window
Obselver	Parison and Cult								
	t - Review and Sub								
Review the ite	em in <mark>f</mark> ormation and submit the	req for approval.			950				
Requisition S	S			Л,	My Preferences	Requisition Settin		t is being	requested
Requisition		-			ame of request so b	augerappion		t is being	requested
	Business Unit	51000	Valdosta State Un	iversity Requi	sition Name				
	*Requester	cfstorey	Storey, Catherine F	-	Priority Medium •]			
	*Currency	USD Who	is submitting the requ	est					
6.46	7.14. 74.70.000								
	ry: Total Amount 71.76 USD to review shipping and account	alle e detelle			Add More Ite				
Expand lines	to review shipping and account	nung details			Add More ite	115			
Requisitio	n Lines 👔								
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments Delete
	ECR-ST OPTIONAL PODIUM SHELF(S		Onepath Systems	1.0000	Each	71.7600	71.76		💭 Add 🗎
	ect All / Deselect All	Select lines to:	😝 Add to Favorites	😡 Add to Template(s)	Delete Selected	ten M	ass Change	2	Add attachments and line specific
Expand do					Make changes to a	l lines of the			comments
budget int	counting and					Total Amount	71.76 USE	0	
budget m	Iormation								
Shipping Sun	nmary								
🖉 Edit for All		EMOVE THIS LINK TO	VSU'S TERMS AND CO	NDITIONS					
Requisition C	Comments								
Enter red	quisition comments								
Pleases	see the following for our Terms	s and Conditions: http://www	v.valdosta.edu/administration/f	finance-admin/business-service	s/purchasing/purchase-orde	-termsconditions	s.php[[7]
Seno	d to Supplier 🔲	Show at Receipt	Shown at Voucher						
Approval Jus	tification								

- 1. Once the blue 'Issue Requisition' button has been selected, the system routes to the 'Checkout Review and Submit' page where the following have been made accessible:
 - a. Requisition Name (red box) needs to be completed. This needs to be a naming convention that denotes the date the request is submitted and what type of order the request is for.
 - i. Ex: 04/05/2015 Office Supplies
 - ii. The 'Requisition Name' field will only allow for 30 characters including spaces.
 - b. Requester (purple box) will be the username of the requester creating and submitting the request.
 - c. Comments bubble (orange box) this is where any line specific comment need to be made.
 - d. Mass Change (blue box) will allow changes to be made to all or some lines of a multi-line requests. Changes such as:
 - i. Accounting(aka Budget) information: Fund, Department, Program, Class, Budget Reference
 - ii. Attention-To
 - iii. Note: this is not to be used when there is only <u>one</u> line on the request.
 - e. Expansion Triangle (green circle) will expand down to view more information about the request. Information such as:
 - i. Ship-To Address
 - ii. Attention-To
 - iii. Accounting (aka Budget) Lines
 - f. Requisition Comments (yellow box) does NOT need editing. Leave this box as it appears by default.

Card Summary: Total Amount 71.76 U 5D Requisitor Lines @ Line Description & Line ID Supplier Onepath Systems Quantity UOM Price Total Details Comments Details Shipping Line 1 Image: Comments Details									
Requisition Lines @ Line Description Item ID Suppler Quantity U/OM Price Total Details Comments Delete I I I I I I I I I I I I I I I I I I I	Cart Summary: Total Amount 71.76 USE)							
Line Description I en ID Suppler Onepath Systems 1.000 Each 71.760 T1.76 Image: Comments Delete Ship for Central Watehouse Receiving 2003 N Ashley St 2003 N Ashley St 2	Expand lines to review shipping and accord	unting details			🕈 Add Mo	re Items			
Image: Sect Alf Desect Alf Image: Sect Alf Desect Alf Desect Alf Desect Alf Desect Alf Description Image: Image: Sect Alf Desect Alf Description Image: Ima	Requisition Lines 👔								
Y DOLUM SHELF(S Note::::::::::::::::::::::::::::::::::::	Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details Comments	Delete
Address Valdosta State University Central Warehouse Receiving 2903 N Ashley St 2903 N Ashley St 2905 Pater St 2015 Pater St 201	■ 1		Onepath Systems	1.0000	Each	71.7600	71.76	Add	Î
Accounting Lines Personalize Find View All [2] First I of 1 > Last Chartfields1 Chartfields2 Chartfields3 Details 2 Asset Information Asset Information 2 Budget Information Email *Account Fund Dept Program Class Budget Reference Image: Class Image: Class <td>Ŷ Shipping Line 1</td> <td>Addres Attention Tr Due Date</td> <td>Valdosta State University Central Warehouse Receiving 2903 N Ashley St Valdosta, GA 31602-0206 Storey, Catherine F</td> <td></td> <td>dress Price</td> <td>71.7600</td> <td>Pegging Inquiry</td> <td>h</td> <td></td>	Ŷ Shipping Line 1	Addres Attention Tr Due Date	Valdosta State University Central Warehouse Receiving 2903 N Ashley St Valdosta, GA 31602-0206 Storey, Catherine F		dress Price	71.7600	Pegging Inquiry	h	
714100 10500 1550000 2015 Image: Comparison of the selected selec						Personalize Find \ ormation 2 Budget	Information 💷	t 💶 1 of 1 🕨 Last	
					Program		-	+ -	
Total Amount 71.76 USD	Select All / Deselect All	Select lines to:	🏚 Add to Favorites 🛛 🔯	Add to Template(s)	<u> Delete</u> Selec	ted 🏭 M	lass Change	-	
						Total Amount	71.76 USD		

- 2. The Expansion Triangles are very important (green boxes).
- 3. The Line Expansion Triangle is the small white triangle located to the left of the line description, it expands down the ship-to and attention-to information.
 - a. Note: use the Expansion Triangle at the line level when there is only one line. If there are multiple lines, use the Mass Change feature explained further down this walk-through document.
 - Ship-To: Do <u>MOT</u> change the ship-to for Marketplace orders unless otherwise directed by a Buyer or Asset Management.
 - c. Attention-To: Be sure to enter the person's name who will be the most knowledgeable about what is being ordered into the Attention-To field.
 - Ex 1: Professor X needs a microscope. The professor would ask a department Requester to submit the order for approvals through ePro since the professor is not a Requester themself. The Requester would enter Professor X's name into the Attention-To field since the Professor knows more about the microscope being ordered than the Requester does.
 - ii. Ex 2: Ms. Lee needs office supplies and is a departmental requester. Since she is submitting the request for the office supplies herself, she would enter her name in the Attention-To field.
- 4. The Accounting Expansion Triangle is the small white triangle located below the Attention-To field to edit accounting/budget information, it expands down to view budget information for one just that line.
 - a. The additional information that drops down will automatically open up to the accounting tab labeled Chartfields1.
 - b. Click on the Chartfields2 tab. There is nothing that needs to edited on the Chartfields1 tab.
 - c. For Marketplace the Account Number has been pre-determined depending on what item has been put on the request. Do <u>NOT</u> change the account number unless a Buyer or Asset Management has given directions otherwise.
 - d. On the Chartfields2 tab fill in the Fund, Dept, Program, Class and Budget Reference fields.
 - i. Budget Reference will be the current Fiscal Year and should be automatically filled do not change the Budget Reference unless directed by a Buyer, Budget Services, or Financial Services.
 - e. If there is a grant click the Chartfields3 tab and enter the grant or PPV number in the Project field.

Requisition Summary									
Business Unit 51	000 🔍	Valdosta State U	Jniversity Requis	ition Name					
*Requester cfs	storey	Storey, Catherine	F	Priority Medi	um 🔻				
*Currency US	SD								
Cart Summary: Total Amount 81.76 USD					Marketplace to shop	more iten	ns for the o	rder	
Expand lines to review shipping and accountin	g details			🕈 Add	More Items				
Requisition Lines 👔									
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	3 Delet
Post-it Super Sticky Full Adhe		Staples	1.0000	Package	8.0700	8.07		📿 Add	Î
Image: Second		Staples	1.0000	Carton	73.6900	73.69		📿 Add	Î
Select All / Deselect All	Select lines to:	🕞 Add to Favorites	Add to Template(s)	<u> Delete</u> Se	elected 🔚 Ma	o Change	llows editir elected line	-	
Select all or some lines by chec marking the box next to the lin				ete all selecte be all or some	Tetel American	81.76 U	ISD		
Shipping Summary									

- 5. To add more items to the order, click the yellow Add More Items button (yellow box) to be taken back to the Create Requisitions page. Remember, only one supplier per request.
- 6. To delete all or some lines, select the check box to the left of the lines needed or select the blue Select All/Deselect All box (blue box), then click the blue Delete Selected link (orange box).
- To edit the Accounting (budget) information and Attention-To for multiple lines, select the check box to the left of the lines needed or select the blue Select All/Deselect All box (blue box), then click the Mass Change (green box) button.

al.	Edit Lines/Shipping/Accounting for Selected Lines	×
	Line Information (2)	Help
	Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines.	
	Supplier ID 🔍 Supplier Location	
	Buyer Category	
	Shipping Information	
	Ship To Location Add One Time Address	
D	Due Date Attention Professor X	
	SpeedChart	
	Accounting Lines	_
	Please enter GL Business Unit before selecting other chartfield values	
"	Accounting Information Personalize Find 🖾 🛗 First 🖪 1 of 1 🔟 Last	
	Chartfields1 Chartfields2 Chartfields3 Details Asset Information	
	Percent Location GL Unit Account	
	Load Values From Defaults	
	OK Cancel Refresh	
15		
3		

- 8. On the "Edit Lines/Shipping/Accounting for Selected Lines" pop-up:
 - a. Remember DO NOT CHANGE the Ship-To location unless directed by a Buyer or Asset Management.
 - b. If the Attention-To person is not the requester, type the Attention-To person's name in the Attention field (green box). Leaving the Attention field blank, the Attention-To will default to the requester's name.
 - c. On the Chartfields1 tab, enter 51000 into the GL Unit field. 51000 is VSU's GL (general ledger) and Business Unit number (blue boxes).

Accounting In	formation	_	Per	rsonalize Find	🖉 🛗 🛛 Fir	st 💶 1 of 1	Last
Chartfields1	Chartfields2	Ch <u>a</u> rtfields3	Details Asset Inf	formation 💷)		
Fund	Dept	Pro	ogram	Class	Bud Ref		
1 10500	. 1550000	. 16	300	11000	2015		+ -

- d. On the Chartfields2 tab, enter the Fund, Department, Program, Class and Bud Ref (budget reference aka fiscal year).
 - i. The Bud Ref will be the current fiscal year, such as 2018 or 2019. Do not use a past year Bud Ref unless directed by a Buyer or Financial Services.

Accounting Lines					
Please enter GL E	usiness Unit befo	ore selecting oth	er chartfiel	d values	
Accounting Information	Per	sonalize Find	2	First 🔳 1 of	1 🕨 Last
Chartfields1	Chartfields2	Chartfields3	<u>D</u> etails		
Project					
1				Q	+ -
OK Ca	Incel Refrest	h			

- e. For grants or PPV's, go to the Chartfields3 tab (blue box) and enter the grant or PPV number in the Project field (green box)
- f. Click the yellow OK button at the bottom of the pop-up window.

Distribution Change Options	×
	Help
For the selected requisition lines, apply distribution changes to	
All Distribution Lines Apply changes to all existing distribution lines.	
Matching Distribution Lines Apply changes to each existing distribution line by matching the distribution line numbers.	le
Replace Distribution Lines Remove the existing distribution lines and replace with the distribution lines changes.	
OK Cancel Refresh	

- g. The system will ask to apply changes to all existing distribution lines; this will apply the changes to only the lines that were selected before the Mass Change link was clicked.
 - i. Always leave the "All Distribution Lines" options selected.
- h. Click the yellow OK button at the bottom of the pop-up window.
- i. Changes will be applied to all selected lines.

Rea	uisition Comments			
iteq	Enter requisition comments			
	Please see the following for o	ur Terms and Conditions: http://v	vww.valdosta.edu/administration/fir	ance-admin/business-servio
	Send to Supplier	Show at Receipt	Shown at Voucher	
Арр	roval Justification			
	Enter approval justification for	this requisition		
I C	Check Budget			
R.	Save & submit	🕒 Save for Later	Add More Items	6ð Preview Approvals

- 9. Scroll to the bottom of the Checkout-Review and Submit page.
- 10. **DO NOT** click the blue Check Budget link (red box). It literally does nothing. This issue is being worked on at the State level currently.
- 11. To preview the approvals, click the blue Preview Approvals link (orange box).
 - a. Note: clicking the blue Preview Approvals link will save the request in an Open Status and will assign a Requisition ID. This does <u>NOT</u> submit the request for approvals.
- 12. To save work to finish later, click the Save for Later button. This will save the request in an Open Status which means it has <u>NOT</u> been submitted for approvals.
 - a. Note: Clicking Save for Later, only saves the request. Clicking Preview Approvals saves the request AND lets you preview the approvals. The only difference between the two is the pop-up window that displays with the approvers names when you click Preview Approvals.
- 13. To submit the request to the budget approver, click the Save & Submit button.

Confirmation		
Your requisition has been submitted.		
Requested For Storey,Catherine F	Number of Lines	2
Requisition Name 4/2/15 Office Supplies	Total Amount	81.76 USD
Requisition ID 0000500036		
Business Unit 51000		
Status Pending		
Priority Medium		
Budget Status Not Checked		
Siew printable version		
Department and Proj. Approval		
Line 1:Pending Post-it Super Sticky Full Adhesive Notes, 3" x 3", Rio d Janeiro Collection, 12 Pads/Pack	∔ Sta	rt New Path
Department and Proj. Approver		
Pending Pilgrim, Antolina E Dept-Manager and Dept-Appr		
Line 2:Pending BANKERS BOX R-KIVE Heavy-Duty Storage Boxes, L tter/Legal, Stacking Strength 850 lb., White/	Blue, 10"H x 12"W x 15"D, 1:	2/Ct €Start Path
Department and Proj. Approver		
Pending Pilgrim, Antolina E Dept-Manager and Dept-Appr		
Apply Approval Changes		
Create New Requisition		

- 14. Once the Save & Submit button has been clicked, the system routes to a Confirmation page which lists:
 - a. Requisition ID number (green box)

- b. Requisition Status (orange box)
- c. Who the request was sent to for approvals (blue box)
- d. View printable version link (purple box)
- e. **<u>DO NOT CLICK</u>** the Check budget link (red box)
- 15. Occasionally there will be additional approvers. These are system generated and are not optional.
 - a. Some additional approvals include:
 - i. <u>Amount Approval</u>: routes assets being purchased to Asset Management for review. This approval will be added based on the price.
 - ii. <u>IT Approval</u>: routes to IT for technology items and is added based on the Category number.
- 16. It is a best business practice to keep a copy of the request for departmental records.
 - a. Click the View Printable Version link in the middle of the page on the left hand side (purple box).
 - b. A pop-up page/new browser window will appear.

ge.	PV_RE	Q_FORM&A	ction=U&BL	□ × ☆ 🖷 🗮
S	<u>365</u>	🗎 WEX	»	Pop-ups were blocked on this page.
	Home	Worklist	Add to Favor	na Pign aut

c. Note: If you have pop-up blocker on; be sure to allow pop-ups for Peoplesoft Financials.

	0000500036 lame: 4/2/15 Off	ice Supplies	Re	quester: cfs quested By: ered Date: 4	Storey, Catherine F		Currency: L	ding Approval JSD Total: 81.76
Header Comn Please see the conditions.php	e following for ou	r Terms and Condit	ions: http://w	ww.valdosta	a.edu/administration/	finance-admir	/business-services/pu	rchasing/purchase-order-terms
Line: 1	Item Description	: Post-it Super Stick iro Collection, 12 Pa	/ Full Adhesiv	e Notes, 3"	Quantity: 1.0000	UOM	PKG Price: 8.07	Line Total: 8.07
	x 5 , No de Jane	ito conection, 121 a	us/i duk					Line Status: Pending
Ship Line: 1 Attention: Prof Ship Via: BEST		Due D	io:CENTWHS late: nt Terms:FOB		Central 2903 N	a State Univer Warehouse R Ashley St a GA 31602-0	eceiving	Shipping Quantity: 1 0000 Shipping Total: 8.07
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account	
1	Open	PO_MAIN	1.0000	100.00	8.07	51000	714100	
Dept	Fund	Program	Class	Budget Ref				
1550000	10500	16300	11000	2015				
Open QTY	Open Amt							
1.0000	0.000							
GL Base Am	iount Currend	y Sequence	Capitaliz	•				
8.07	USD	0	Ν					
Line: 2	Storage Boxes, L	: BANKERS BOX R- etter/Legal, Stacking x 12"W x 15"D, 12/C	Strength 850		Quantity: 1.0000	UOM	: CRT Price: 73.69	Line Total: 73.69
				-				
Ship Line: 1 Attention: Prof Ship Via: BEST		Due D	io: CENTWHS late: ht Terms:FOB		Central 2903 N	a State Univer Warehouse R Ashley St a GA 31602-0	eceiving	Shipping Quantity: 1.0000 Shipping Total: 73.69
Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account	
1	Open	PO_MAIN	1.0000	100.00	73.69	51000	714100	
	Fund	Program		Budget Ref				
Dept	10500	16300	11000	2015				
1550000								
	Open Amt							
1550000								
1550000 Open QTY	Open Amt 0.000	y Sequence	Capitaliz					

- d. A screen shot of the Print Preview that results is above.
 - i. Hint- when printing, it is helpful to print a copy to Adobe PDF instead of printing a physical hardcopy. This will give an electronic copy for records and cut down on paper costs for the university as well as further the University's goal of being a green-friendly campus. If hard copy is needed though, feel free to print it out.

MANAGING A REQUISITION

1. As long as the Request has not been sourced to a PO, the requisition can be edited.



2. When editing a requisition go through NavBar>Navigator>eProcurement>Manage Requisitions.

Manage Req	uisitions							
🗢 Search Requi	sitions							
To locate requisiti	ons, edit the criteria below	and click the Se	arch button.					
Busines	ss Unit 51000		Requisiti	on Name				Q
Requisi	tion ID		Requ	est State	۲		Budget Status	T
Date	e From 04/04/2015	31		Date To 04/06/2	2015		Origin	•
Rec	uester cfstorey	Q,	En	itered By	Q,		POID	Q
Search	Clear		Show Advanc	ed Search				
Requisitions (2)								
	n and line items for a requi another action on a requisit				list and click Go			
Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
0000500036	4/2/15 Office Supplies	51000	04/05/2015	Pending	Not Chk'd		81.76 USE [Select Action]	Go
0000500035	0000500035	51000	04/05/2015	Open	Not Chk'd		71.76 USE [Select Action]	Go

- 3. ALWAYS leave the Business Unit as 51000.
 - a. If this number is changed or cleared out, no data will return when the search button is clicked.
- 4. The Manage Requisitions page gives several search functions.
 - a. Requisition ID (green box)
 - b. Date From and Date To (blue box), if the date of submission is known
 - c. Origin (purple box), such as Marketplace or Special Request
 - d. The requester name will auto-populate in the Requester field (orange box), but can be changed.
- 5. The Manage Requisitions page also gives a lot of information about the requisition.
 - a. Req ID and Requisition Name(light green box)
 - b. Available actions to take for the request (brown box); i.e. what can be done with the request.
 - c. Request State (red box), i.e. where the request is at in the process.
 - d. Budget, which is actually the Budget Status (dark blue box), i.e. if the request has passed budget check.

		n and line items for a requisit			1 I II.				
Req ID	orm a	nother action on a requisition Requisition Name	n, make a sele BU	Date Reques			Total		
000050003	6	4/2/15 Office Supplies	51000	04/05/2015 Pending	9	Not Chk'd	81.76 US	SD [Select Action]	•
		ster, Storey Catherine F cumbrance Balance		usD	erine F	Priority Med	um		
Requi	9-	Approvals	Inventory	Purchase Orders	Change Request		Returns	Invoice	Payment
Request Lif							-		1 40 40 M 4
Line mion	nauc	Description		Status	Price	Quantity	Personalize Fin UOM	Supplier	1-2 of 2 Last
Line				Densites Assesses	8.07000	USD	1.0000	PKG Staples	×
Line 1	۲	Post-it Super Sticky Full A	.d	Pending Approva	0.07000				

- 6. When the Expansion Triangle (green circle) is selected to the left of the Requisition number, more information is expands down below the Requisition name.
 - a. The Pre-Encumbrance Balance (blue box) this will remain at 0.00 until Budget status is valid.
 - b. The Lifespan of the request (yellow box).
 - i. If an icon in the Lifespan is greyed out, the request has not arrived at that point in the cycle yet.
 - ii. If an icon has been made available/colorized, the request has made it to that point in the cycle.
 - iii. Clicking on an icon that has been made available will route to a summary page of that point in the cycle. I.e. the Purchase Orders icon will route to a summary of information and give the PO number.

EDITING A REQUISITION

Re	quisitions 👔									
		an and line items for a requisit another action on a requisitior				st and click Go				
10	Req ID	Requisition Name	BU	Date	Request State	Budget	Total			
P	0000500036	4/2/15 Office Supplies	51000	04/05/2015	Pending	Not Chk'd		81.76 USD [Select Action]	•	Go
P	0000500035	0000500035	51000	04/05/2015	Open	Not Chk'd		71.76 USD Edit	•	Go

- 1. To edit an Open, Pending or Approved request,
 - a. Click the drop down menu to the far right of the requisition summary line. This drop down menu gives options such as cancel the request, edit the request, and more.
 - b. Select the Edit Option and click Go.
- 2. The system will route to the Review and Submit page of the requisition. Edit the request as needed such as:
 - a. Change description, quantity, amount, supplier; by clicking on the actual line description
 - b. Attach and/or delete documents
 - c. Add lines by clicking the yellow "Add More Items" button
 - d. Change Budget Chart Strings, Attention-To, Ship-To
 - e. Submit or re-submit for approvals
- 7. To cancel a request choose Cancel instead of the Edit option in the drop down menu on the Manage Requisitions page and click GO.
- 8. Peoplesoft Financials automatically runs a budget check every 2 hours. When a request is canceled, the system will budget check and release the pre-encumbrance back to the budget.

- Whether entering a GaFirst Marketplace or a Special Item request, the Statewide Contracts will be accessed through the GaFirst Marketplace. This list is comprehensive and the State is continually updating as contracts are renewed, inactivated, and added.
- 2. There are two ways to access Statewide Contracts.
 - a. The first being through the left hand menu. Click on the 4th Icon down (piece of paper with a pencil) to extend out the Contracts menu. Click on Search Contracts.

ñ	VALDOSTA STATE UNIVERSITY	Catherine Storey 🔻 🔺 🎽 🌲 0.00 USD 🛛 Search (Alt+Q)	۹
	Shop > Shopping > Shopping Home > Home/Shop		?
٩		Shop Everything T Go	
6	Contracts	owse: suppliers categories contracts chemicals	
h.	Contracts Contracts Search Contracts		?
	View Saved Searches	Gronov I Austimation too	
	http://www.usg.edu/gafirst- fin/training/epro_georgiafirst_marketplace		
		✓ Maintenance, Repair, & Operation	?
		GRAINGER FISTENAL ANGLE (20)	

b. The second route to access Statewide Contracts is via the direct link on the Marketplace landing page. Both links will route you to the same search page.

ñ	VALDOSTA STATE	Catherine Storey 🔻 🔺 🎽 🌲 📜 0.00 USD 🛛 Search (Alt+Q)	٩
١	Shop > Shopping > Shopping Home > Home/Shop		?
		Shop Everything Go	
	Welcome to the GeorgiaFirst Marketplace!	Go to: advanced search favorites quick order Browse: suppliers categories contracts chemicals	?
	All training videos and documentation for the GeorgiaFIRST Marketplace may be accessed here: http://www.usg.edu/gafirst-		
	fin/training/epro_georgiafirst_marketplace	✓ Maintenance, Repair, & Operation	?
		GRAINGER FASTEMAL MARGE	

3. Once in the GaFirst Marketplace, click the blue Contracts Link which is right below the Quick Search field.

ts Search Contracts Sea	rch Contracts	
Search Contra	ts	Advanced Search ?
Contract	paper	Q

- 4. To Search Contracts.
 - a. There is a basic search and an advanced search.

- b. Basic Search search by keyword or description, such as the word "paper" (do NOT order paper through Marketplace).
- c. Advanced Search

Search Contracts	- Advanced		Simple Search
			Expand All Collapse A
Contract Number			
Contract Name			
Keywords	paper		
Contract Type			
Contract Manager	Name, User Name, Email		
By Start/End Date	Effective	۲	
Supplier			
Supplier			
Class		•	
• eProcurement			
			Q Search

d. Advanced Search – search by keyword/description, mandatory or convenience contracts, supplier name, etc.

Back to Search Start Over							
Search Details ?	Contract Search Results						
Search Terms	1-5 of 5 Results			Sort by Best Match	Ţ	Per Page	150 -
Keywords paper	Contract No.	Contract Name	Renewal No.	Supplier	Start Date	End Date	Activ
Filtered by	99999-SPD-SPD0000108-0001	Rapid Copy and Digital Printing Services	0	MORE BUSINESS SOLUTIONS	3/2/2015	2/28/2017	1
By Start/End Date: Effective [remove all]		Offset Printing and Related Services	0	RR Donnelley	5/16/2014	4/30/2015	1
Active for Shopping		Custodial and Hospitality Supplies	0	Southeastern Paper Group / Atlanta	1/1/2012	12/31/2015	1
	99999-SPD-SPD0000061-0001	Custodial and Hospitality Supplies	0	DADE Paper	1/1/2012	12/31/2015	1
Refine Search Results ?	99999-001-SPD0000103-0001	General Office Supplies, Paper and Toner	0	Staples	7/6/2014	7/6/2016	1
Contract Type 🏾 🌾	1-5 of 5 Results					Per Page	150 🕶
Statewide Convenience Contract (3) Statewide Mandatory Contract (2)							

- e. The search results that appear will let show the contract number (purple box), the contract name (dark blue box), supplier name (light blue box), and how many are mandatory or convenience contracts (green box).
- f. To see the specifics of any contract, click on the Contract Number.

Header		Dates And Renewa	al de la constante de la const	
Contract Name *	Custodial and Hospitality Supplies	Start Date *	1/1/2012 12:00 AM EST	
Contract Type	Statewide Mandatory Contract	End Date *	12/31/2015 11:59 PM EST	
Supplier Name	DADE Paper	Contract Manager	s	
Contract Status	-	Trina Williams	trina.williams@doas.ga.gov +1 (404) 656-5452	
Summary Additional Details	View Summary			
	·		Date Uploaded	
Additional Details Attachments Display Order Name	·		Date Uploaded 3/27/2012	
Additional Details Attachments Display Order Name 1 © DA				
Additional Details Attachments Display Order Name 1 © DA 2 & Bee	DE Paper external website		3/27/2012	

- g. A Contract Summary will pop up. This will show the contract number (purple box), the contract name (dark blue box), supplier name (light blue box), and if the contract is a mandatory or convenience contract (green box).
- In the Contract Summary pop up, under the Attachments section, there will be a link that says "SWC Information Sheet" – SWC stands for State Wide Contract. The SWC Information Sheet gives all information about that specific contract regarding contacts, terms, ordering, remitting, discount percentages, etc.
- i. Upon clicking the blue SWC Information Sheet link, it will usually show up at the bottom of the browser as a downloaded pdf, this document will open in a new tab within the browser.

Statewide Contra Number	act	9999995F 00061	D00	NIGP Code	5	66524, 64022, 64050, 64060,
Name of Contract	Custod	ial and Ho	ospital	ity Supplies		64075
Effective Date	Januar	y 1, 2012				
Contract Table o	f Conten	ts				
Suppliers Awarded	2	2	Contr Infor	act mation:		landatory Contract
Contract Inform	ation for	Supplier			Page	Number
Dade Paper					2	
Southeastern Pa	per Grou	ID			3	
Additional Contr	act Info	mation				
General Contract	t Inform	ation			4	
Contract Renewa	als/ Exte	ensions/ C	hange	<u>s</u>	5	
DOAS Contact In	formatic				6	

j. The document that comes up gives the same over view of the contract. Contract Number (purple box), Type of Contract (green box), Supplier names (blue box), and additional information (yellow box).Clicking on one of the blue linked company names

will display specific information for that particular company.

Supplier Information Sheet Contract Information	
PeopleSoft Supplier Number	0000268086
Supplier Name & Address	
Dade Paper Company 600 Hartman Industrial Ct. SW S Austell, GA 30168 EIN# 59-0784248	Suite 200
Contract Administrator	
Kristina McSpadden Bid Specialist Office: 1-800-696-6919-ext. 4436 Cell# 770-616-0268 Website: http://www.dadepaper.co	m
Contact Details	
Secondary: <u>Stacy Clayton</u> - Bid Co	ordinator 1-800-696-6919 ext. 4435 Cay Ross - 1-800-696-6919 ext. 4586
Ordering Information	Dade Paper Company 600 Hartman Industrial Ct. SW Suite 200 Austell, GA 30168
Remitting Information	Dade Paper Company 600 Hartman Industrial Ct. SW Suite 200 Austell, GA 30168
Delivery Days	Orders will be shipped within 10 days after receipt of Purchase Order
Discounts	N/A
Payment Terms	Net 30 Days
Bid Offer includes	State and Local Government
	Supplier will accept Purchase Orders and the Purchasing Card under this

k. When clicking the Supplier name, the system will take jump to that particular company's Supplier Information Sheet within the document. This gives company information, contact information, lead times, how to order and much more.

Appendix B: Requisition/PO Status/Budget Terms and Definitions

- 1. Requisition Status Definitions:
 - a. <u>Open</u>: request has been entered and saved, but has not been submitted for approvals.
 - b. <u>Pending</u>: request has been entered, saved and submitted for approvals.
 - c. <u>Approved</u>: request has been entered, saved, submitted and all approvers have approved the request.
 - d. <u>Denied</u>: any approver has the ability to deny the request. If the request is submitted, find out what needs to be corrected or if the request needs to be cancelled then either edit the request and re-submit for approvals or cancel the request.
- 2. PO Status Definitions:
 - a. <u>PO Created</u>: request has been entered, saved, submitted, approved, passed budget check and a Buyer has sourced the requisition into a purchase order.
 - b. <u>PO Dispatched</u>: request has been entered, saved, submitted, approved, passed budget check, sourced to a purchase order, processed by a Buyer.
 - c. <u>Received</u>: The order has been completely fulfilled and has been received by VSU Central Receiving.
 - d. <u>Complete</u>: The order has been received and the invoice paid. The order is now complete and done.
 - e. <u>Canceled</u>: If the request was canceled, which can be done at any time prior to the PO being dispatched, the status will be changed to Canceled. If the request needs to be canceled and the PO has been dispatched, contact the respective buyer for your department to have the PO and Requisition closed.
- 3. Budget Status Definitions:
 - a. <u>Not Chk'd</u>: This means the request has not gone through a budget check yet. Requests are not budget checked until the request has received all approvals.
 - b. <u>Valid</u>: This means the request has been approved, passed budget check and is waiting to be sent to the supplier by the system.
 - c. <u>Error</u>: This means there is a problem with the accounting/budget being used. Please contact Budget Services to resolve the error at x5710.