



# eProcurement: GAFirst Marketplace Guide

Valdosta State University

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# eProcurement GAFirst Marketplace Request Guide

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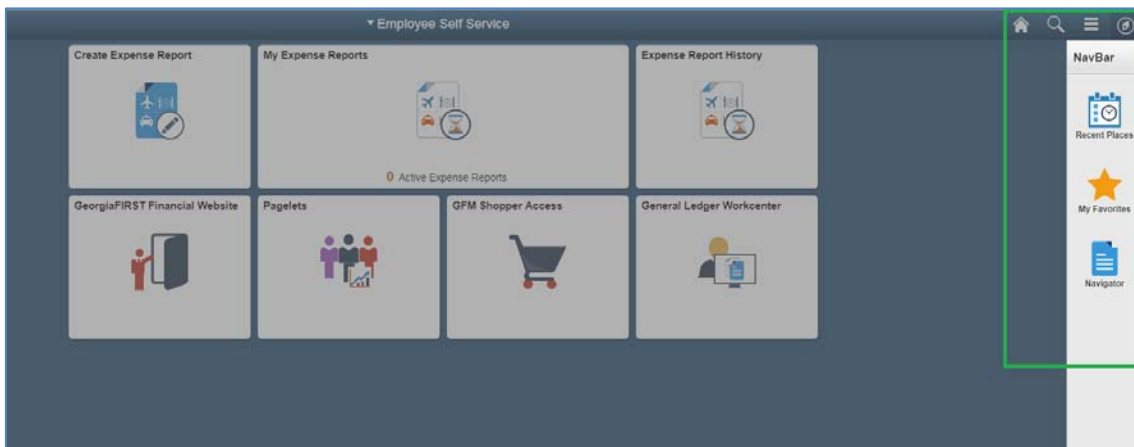
## Getting Started

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:  
<https://core.fprod.gafirst.usg.edu/psp/fprod/EMPLOYEE/ERP/?cmd=logout>
  - 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, 7<sup>th</sup> link down from the top of the list.
5. See Appendix A on how to view and review authorized active Statewide Contracts.

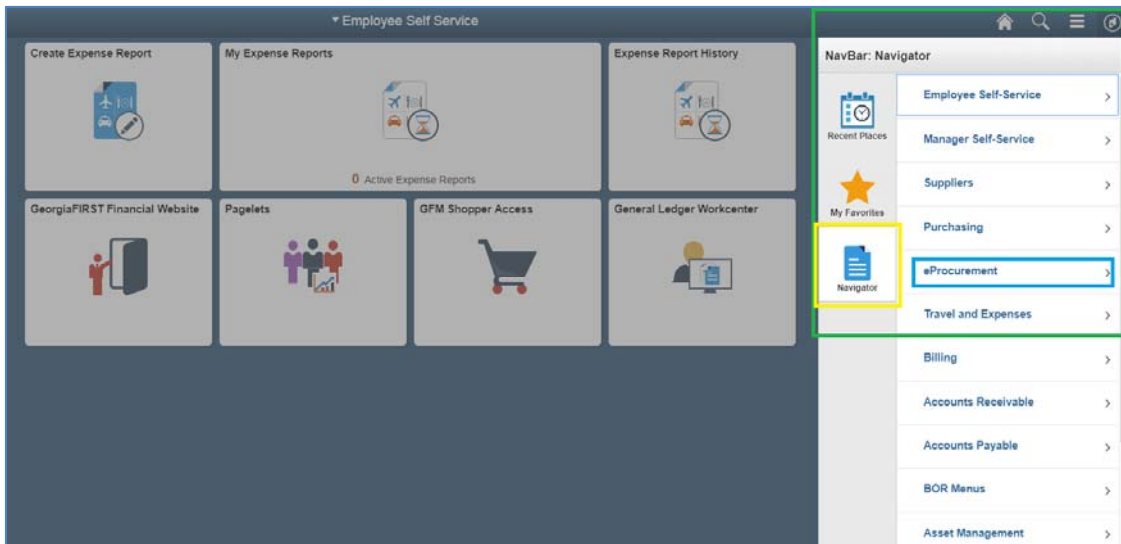
## Navigating to eProcurement



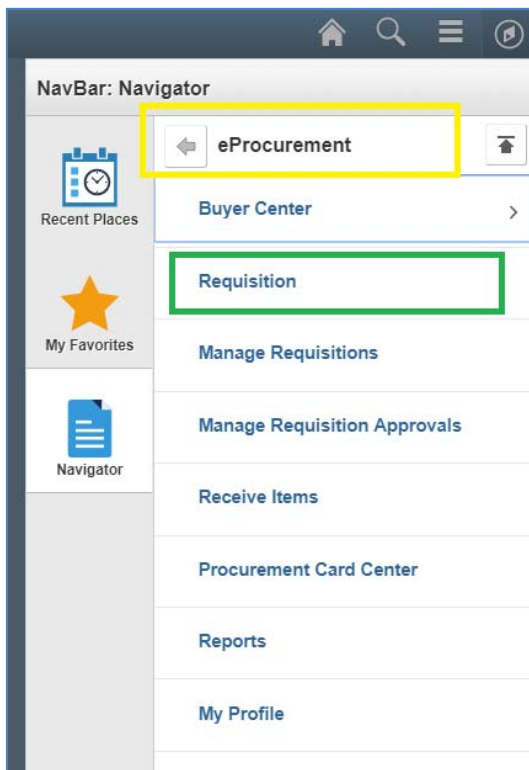
1. Upon initial login to PeopleSoft Financials you will see the Fluid Dashboard. In the top right you will see (in order left to right) the home icon, magnifying glass icon, menu icon, and compass icon.
  1. The Home Icon will always bring you back to the Fluid Dashboard.
  2. The Magnifying Glass Icon 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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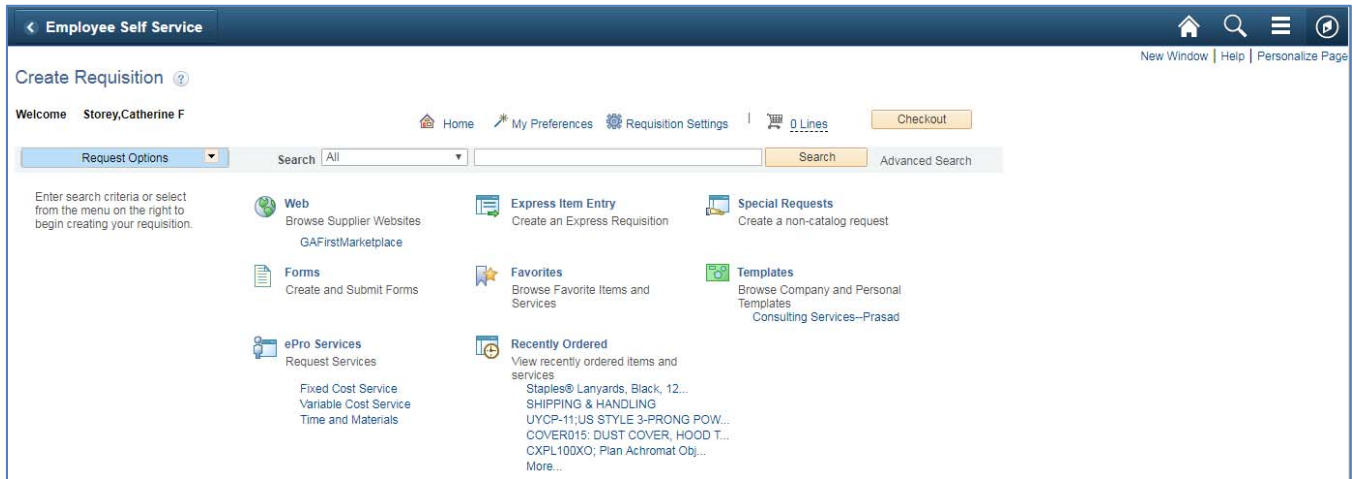


2. To access eProcurement for both Marketplace orders and Special Item Requests, you will click the Compass Icon to expand the NavBar Menu. From here you can see the Recent Places Icon (will show you the most recent links you've visited in PeopleSoft Financials), the My Favorites Icon (shows the links 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.



3. 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.

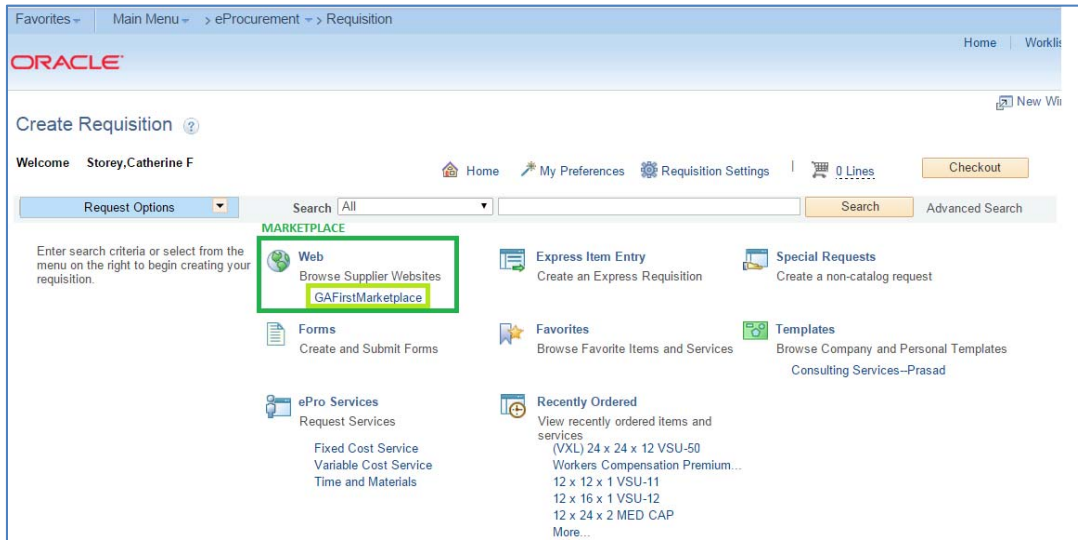
# eProcurement GAFirst Marketplace Request Guide



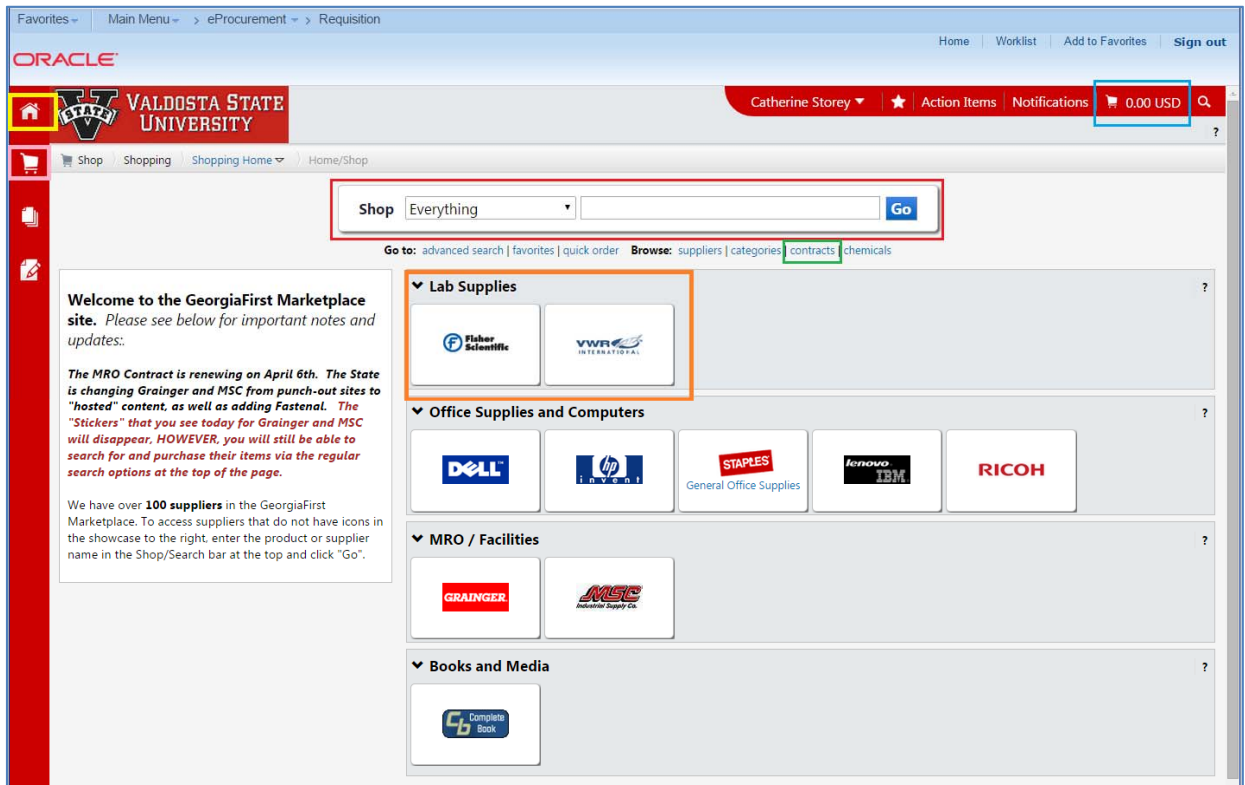
4. From the "Requisition" link the system routes to the Create Requisition page. This will be the starting point for creating both types of requisitions.

# eProcurement GAFirst Marketplace Request Guide

## STEP 1: ADD ITEMS



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.*

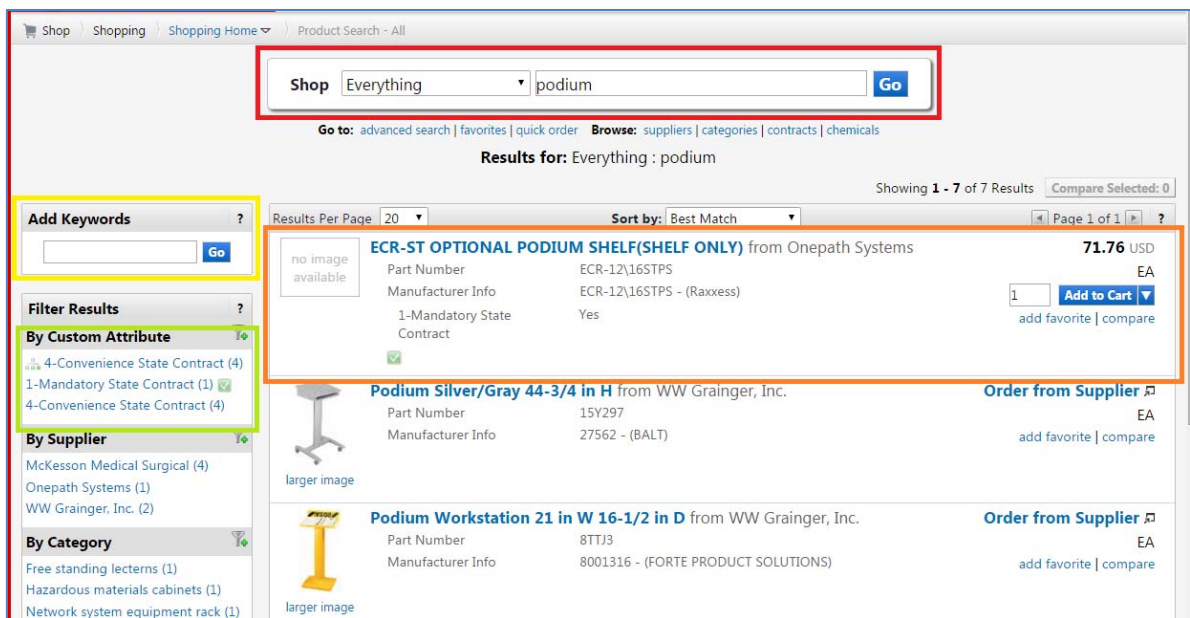


5. The system routes to is the GAFirst Marketplace dashboard. Information found here:
  - a. Home Icon(Yellow Box to the left of the V-State logo) to get back to the Home page.
  - b. Order Summary(Blue Box) will let display a summary of the order.

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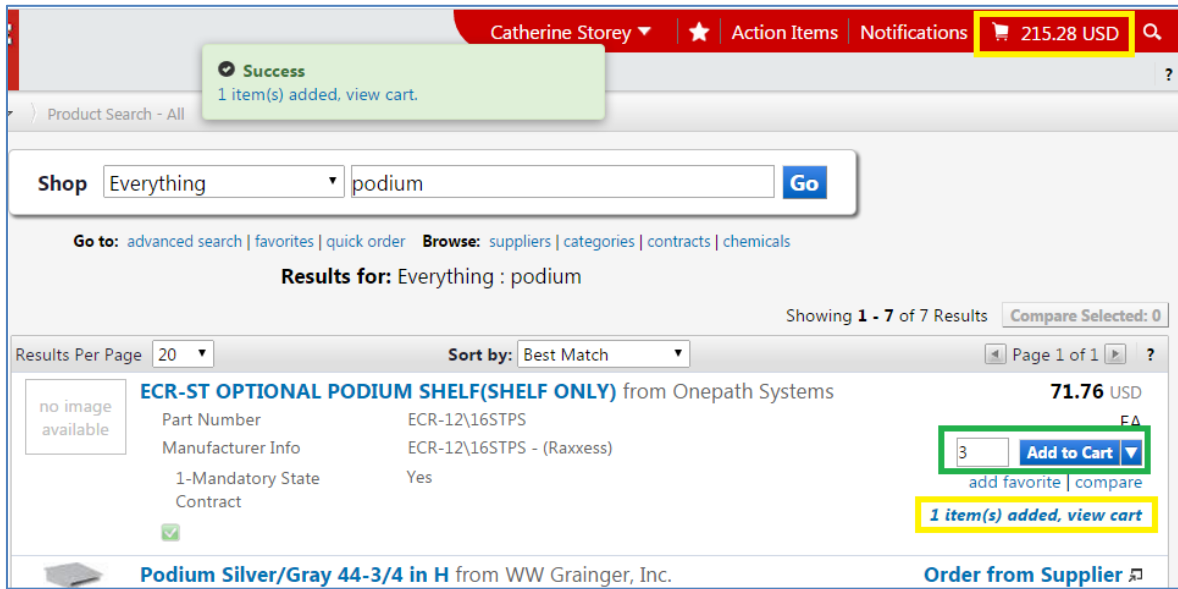
- c. Shopping Cart Icon (Pink Box) will give access to the specific actions available to take with the cart such as see past carts, draft and active carts.
- d. Quick Search (Red Box) allows searching everything on state wide contract.
  - i. *Note: Those items that are special case items or services, 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. Punch-Out Catalogs (Orange box) are catalogs that the Marketplace hosts. That means these companies have their own shopping sites that can be visited through Marketplace.
- f. Contracts Link (Green Box) allows access 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:

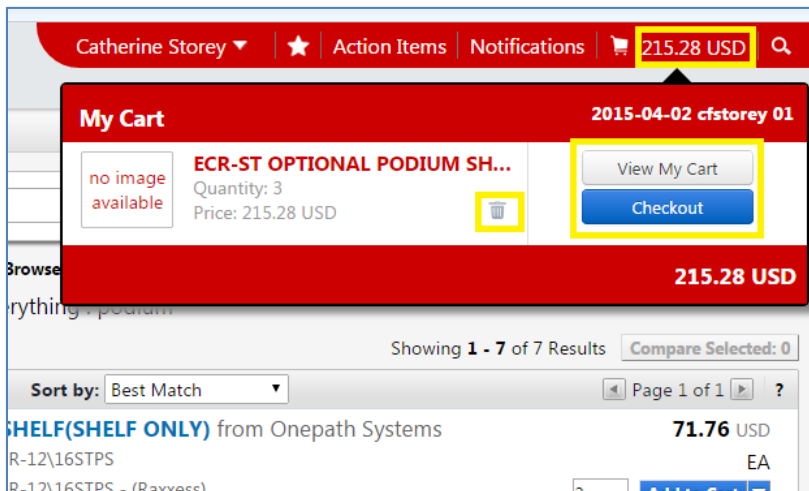


1. Start a cart with the Quick Search function. Type in what is needed in the quick search field (red box) and click the blue GO button to the right of the search field.
2. When the search results come up, the Add Keywords feature (yellow box) is now available and will allow narrowing of the search.
  - 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.

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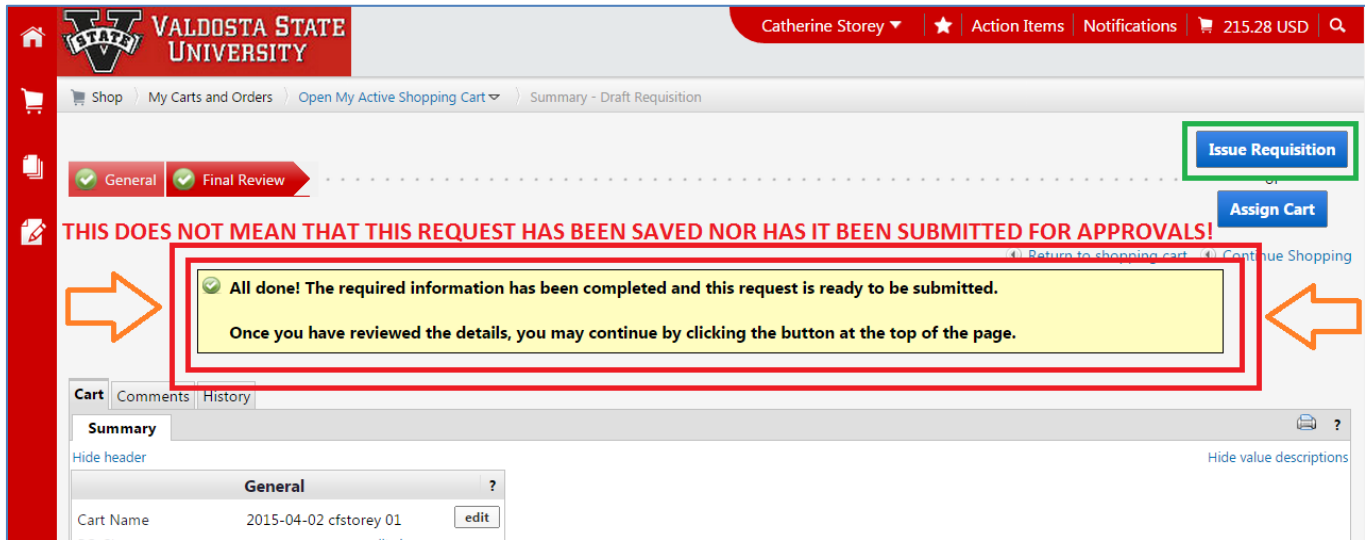
4. To change the quantity or amount of the item being requested, type 3 next to the blue “Add to Cart” button, click Add to Cart (green box).
5. Clicking “Add to Cart” adds the item to the shopping cart in the top right corner of the page (yellow Box).



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)



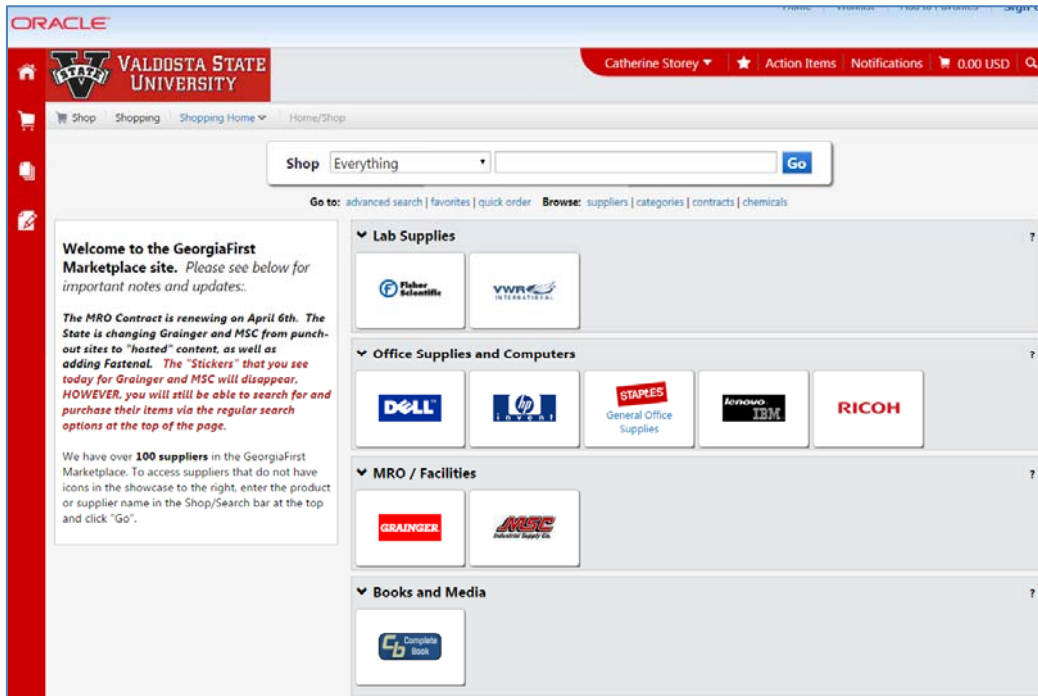
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- Once the blue Checkout button is clicked, the system goes to a summary page of the items in the cart.
  - The green check mark in the yellow box that says “All done!” does **NOT** mean the request has been saved nor does it mean the request has been submitted for approvals.
- 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.
- 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).

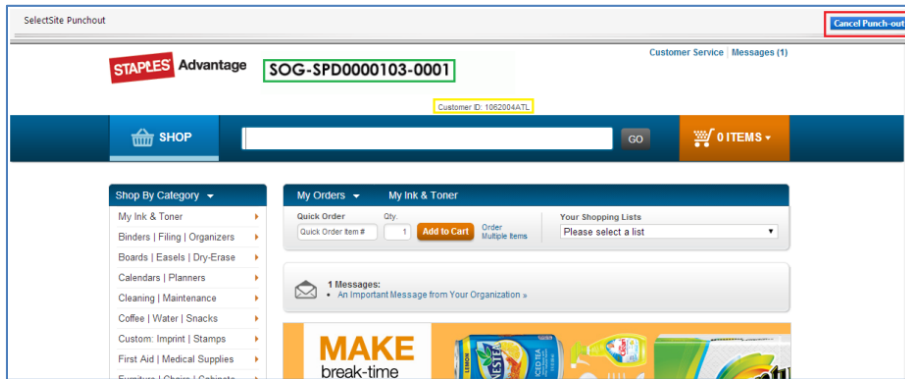
## Adding Items to a cart from a Punch-Out Catalog:

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

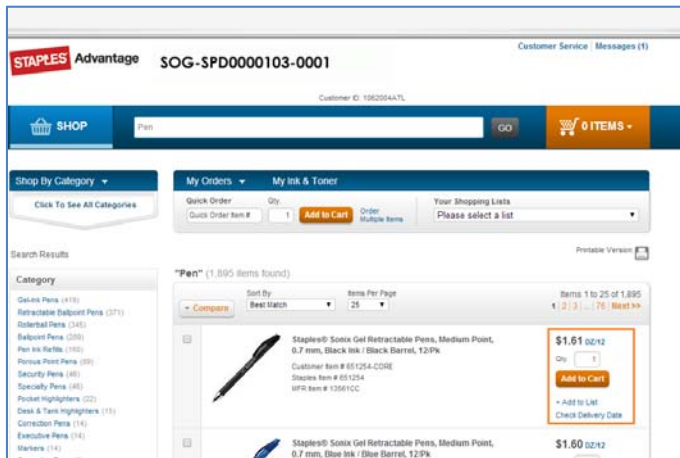


- Click on the button in the middle of the page with the Staples logo(also known as a Sticker). This will rout to the hosted shopping site for Staples through eProcurement in Peoplesoft Financials.

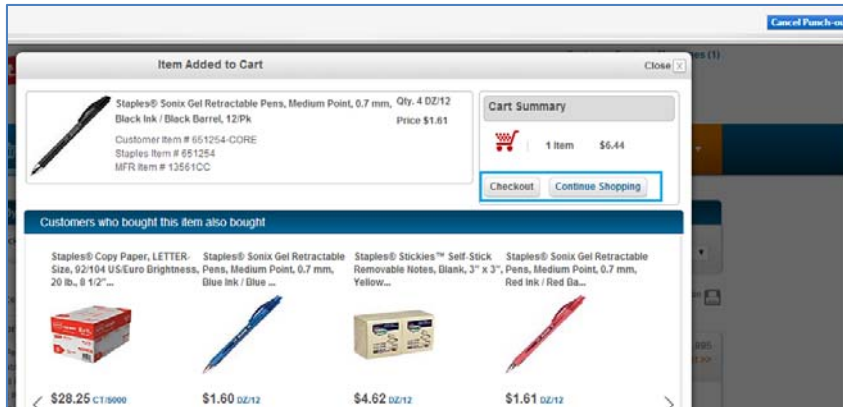
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4. The Staples Office Supply Contract number (Green box), our State Customer ID (Yellow box) as well as a button to Cancel PunchOut (Red box) will be displayed.
5. From here, shop the site as would be done with other shopping sites, such as Amazon.

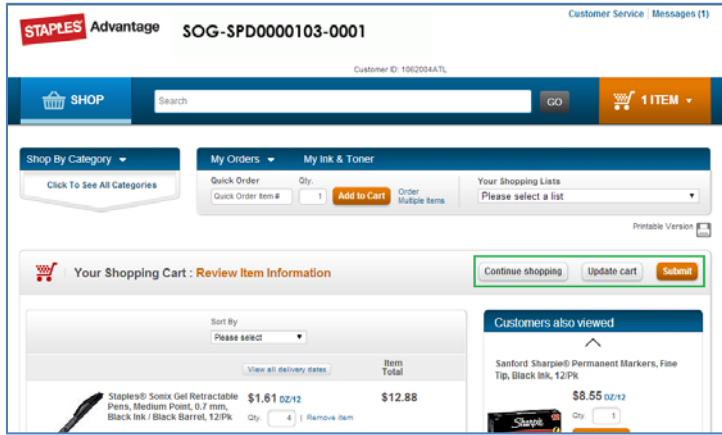


6. Enter a keyword for the item needed in the search field and click GO. This will bring up search results. If more than one is needed change the quantity to 4 and click the orange Add to Cart button.

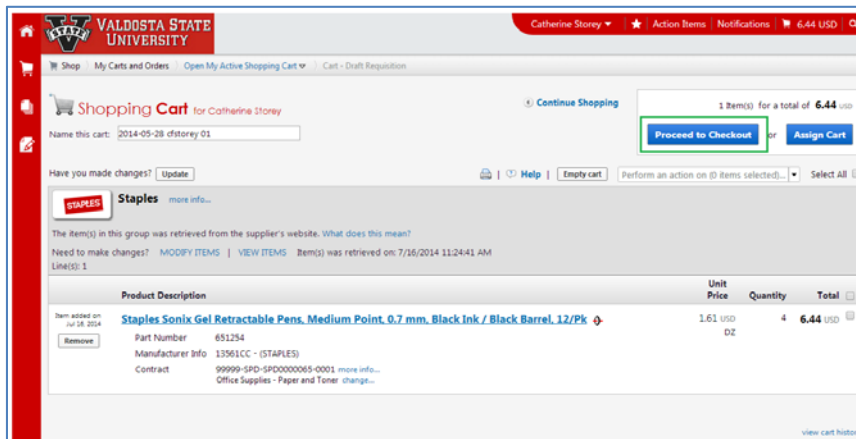


7. A pop-up window gives the option to either Checkout or Continue Shopping.
  - a. To continue shopping – click the Continue Shopping button.
  - b. To checkout- click the Checkout button:

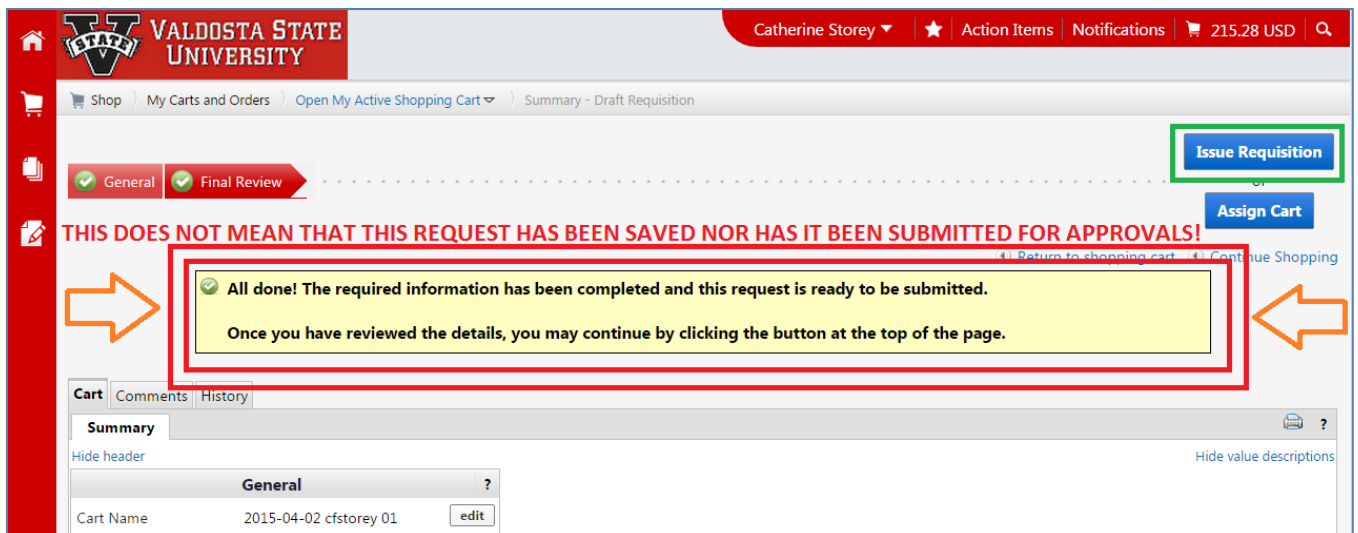
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8. An overview of items in the shopping cart will display. The options to 'Continue Shopping', 'Update your cart', or 'Submit' are available on the right hand side of the page (Green box).
  - a. **IMPORTANT:** Click the orange Submit button in order 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 only sending the items to your GaFirst Marketplace cart, you are not 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).



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

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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. Otherwise all of the items you just shopped will be lost. They no longer be in a cart status nor will they be in a requisition status.*

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## STEP 2: REVIEW AND SUBMIT

**ORACLE**

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

Requisition Summary

Business Unit: 51000 Valdosta State University  
 \*Requester: cfstorey Storey, Catherine F  
 \*Currency: USD **Who is submitting the request**

Requisition Name:   
 Priority: Medium

Cart Summary: Total Amount 71.76 USD  
 Expand lines to review shipping and accounting details

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ECR-ST OPTIONAL PODIUM SHELF(S)		Onepath Systems	1,000	Each	71.7600	71.76			

Shipping Summary

Requisition Comments

Enter requisition comments

Please see the following for our Terms and Conditions: <http://www.valdosta.edu/administration/finance-admin/business-services/purchasing/purchase-order-terms--conditions.php>

Send to Supplier Show at Receipt Shown at Voucher

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 one 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.

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Cart Summary: Total Amount 71.76 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	ECR-ST OPTIONAL PODIUM SHELF(S)		Onepath Systems	1.0000	Each	71.7600	71.76			

Shipping Line 1

\*Ship To: CENTWHSE

Address: Valdosta State University  
Central Warehouse Receiving  
2903 N Ashley St  
Valdosta, GA 31602-0206

Attention To: Storey, Catherine F

Due Date: [ ]

Accounting Lines

\*Distribute By: Qty

SpeedChart: [ ]

\*Liquidate By: Amt

Accounting Lines

Account	Fund	Dept	Program	Class	Budget Reference
714100	10500	1550000			2015

Select All / Deselect All

Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass 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.
  - b. Ship-To: Do **NOT** 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.
    - i. 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 themselves. 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 be 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 **NOT** 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.

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Requisition Summary

Business Unit: 51000 Valdosta State University Requisition Name: [ ]

\*Requester: cfstorey Storey, Catherine F Priority: Medium

\*Currency: USD

Cart Summary: Total Amount 81.76 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Post-it Super Sticky Full Adhe		Staples	1.0000	Package	8.0700	8.07		Add	
2	BANKERS BOX R-KIVE Heavy-Duty		Staples	1.0000	Carton	73.6900	73.69		Add	

Select all or some lines by check-marking the box next to the line

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

Delete all selected lines, can be all or some

Total Amount 81.76 USD

Shipping Summary

- 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.
- 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.

Edit Lines/Shipping/Accounting for Selected Lines

Line Information

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

Supplier ID Supplier Location

Buyer Category

Shipping Information

Ship To Location

Due Date

Add One Time Address

Attention Professor X

SpeedChart

Accounting Lines

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

Chartfields1 Chartfields2 Chartfields3 Details Asset Information

Percent Location GL Unit Account

1 [ ] [ ] 51000 [ ]

Load Values From Defaults

OK Cancel Refresh

- On the "Edit Lines/Shipping/Accounting for Selected Lines" pop-up:
  - Remember – **DO NOT CHANGE the Ship-To location** unless directed by a Buyer or Asset Management.
  - 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.
  - On the Chartfields1 tab, enter 51000 into the GL Unit field. 51000 is VSU's GL (general ledger) and Business Unit number (blue boxes).

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The screenshot shows the 'Accounting Lines' dialog box with the 'Chartfields2' tab selected. The 'Accounting Information' section includes a 'Fund' field with the value '10500', a 'Dept' field with '1550000', a 'Program' field with '16300', a 'Class' field with '11000', and a 'Bud Ref' field with '2015'. A green box highlights these five fields. The 'OK' button is highlighted in yellow.

Fund	Dept	Program	Class	Bud Ref
10500	1550000	16300	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.

The screenshot shows the 'Accounting Lines' dialog box with the 'Chartfields3' tab selected. The 'Project' field is highlighted with a green box. The 'OK' button is highlighted in yellow.

- 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.

The screenshot shows the 'Distribution Change Options' dialog box. The 'All Distribution Lines' radio button is selected and highlighted with a blue box. The 'OK' button is highlighted with a green box.

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.
- Replace Distribution Lines  
Remove the existing distribution lines and replace with the distribution lines changes.

- 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.



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**Requisition Comments**  
Enter requisition comments  
Please see the following for our Terms and Conditions: <http://www.valdosta.edu/administration/finance-admin/business-service>

Send to Supplier     Show at Receipt     Shown at Voucher

**Approval Justification**  
Enter approval justification for this requisition

[Check Budget](#)

[Save & submit](#)    [Save for Later](#)    [Add More Items](#)    [Preview Approvals](#)

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 NOT 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 NOT 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		

[View printable version](#)    [Edit This Requisition](#)    [Check Budget](#)

**Department and Proj. Approval**

**Line 1: Pending**  
Post-it Super Sticky Full Adhesive Notes, 3" x 3", Rio de Janeiro Collection, 12 Pads/Pack [Start 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, Letter/Legal, Stacking Strength 850 lb., White/Blue, 10"H x 12"W x 15"D, 12/Ct [Start New Path](#)

Department and Proj. Approver  
Pending  
Pilgrim, Antolina E  
Dept-Manager and Dept-Appr [+](#)

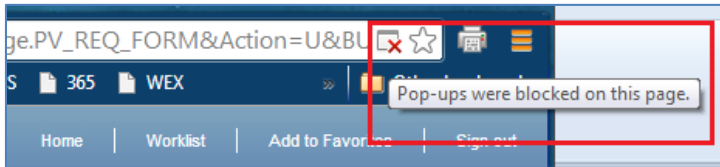
[Apply Approval Changes](#)

[Create New Requisition](#)    [Manage Requisitions](#)

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

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- b. Requisition Status (orange box)
  - c. Who the request was sent to for approvals (blue box)
  - d. View printable version link (purple box)
  - e. **DO NOT CLICK** 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. **Amount Approval:** routes assets being purchased to Asset Management for review. This approval will be added based on the price.
    - ii. **IT Approval:** 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.



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

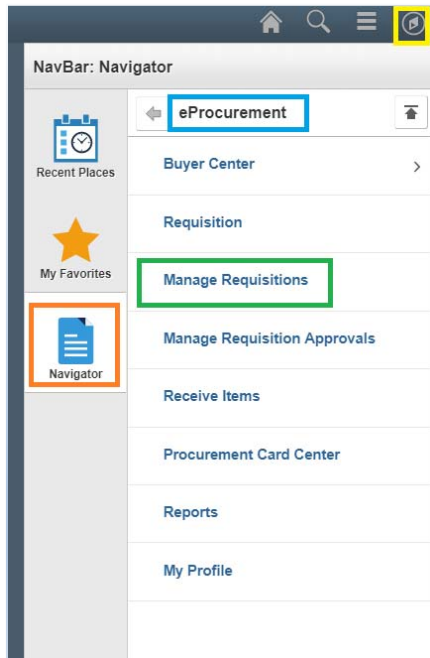
<b>Business Unit:</b> 51000	<b>Requester:</b> cfstorey	<b>Status:</b> Pending Approval					
<b>Requisition:</b> 0000500036	<b>Requested By:</b> Storey, Catherine F	<b>Currency:</b> USD					
<b>Requisition Name:</b> 4/2/15 Office Supplies	<b>Entered Date:</b> 4/5/15	<b>Requisition Total:</b> 81.76					
<b>Header Comments:</b> Please see the following for our Terms and Conditions: <a href="http://www.valdosta.edu/administration/finance-admin/business-services/purchasing/purchase-order-terms-conditions.php">http://www.valdosta.edu/administration/finance-admin/business-services/purchasing/purchase-order-terms-conditions.php</a>							
<b>Line: 1</b>	<b>Item Description:</b> Post-It Super Sticky Full Adhesive Notes, 3" x 3", Rio de Janeiro Collection, 12 Pads/Pack	<b>Quantity:</b> 1.0000	<b>UOM:</b> PKG	<b>Price:</b> 8.07	<b>Line Total:</b> 8.07		
<b>Line Status:</b> Pending							
<b>Ship Line: 1</b>	<b>Ship To:</b> CENTWHSE	<b>Address:</b> Valdosta State University Central Warehouse Receiving 2903 N Ashley St Valdosta GA 31602-0206 United States	<b>Shipping Quantity:</b> 1.0000	<b>Shipping Total:</b> 8.07			
<b>Attention:</b> Professor X	<b>Due Date:</b>						
<b>Ship Via:</b> BEST WAY	<b>Freight Terms:</b> FOB:DEST						
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	PO_MAIN	1.0000	100.00	8.07	51000	714100
<b>Dept</b>	<b>Fund</b>	<b>Program</b>	<b>Class</b>	<b>Budget Ref</b>			
1550000	10500	16300	11000	2015			
<b>Open QTY</b>	<b>Open Amt</b>						
1.0000	0.000						
<b>GL Base Amount</b>	<b>Currency</b>	<b>Sequence</b>	<b>Capitalize</b>				
8.07	USD	0	N				
<b>Line: 2</b>	<b>Item Description:</b> BANKERS BOX R-KIVE Heavy-Duty Storage Boxes, Letter/Legal, Slacking Strength 850 lb., White/Blue, 10"H x 12"W x 15"D, 12/Ct	<b>Quantity:</b> 1.0000	<b>UOM:</b> CRT	<b>Price:</b> 73.69	<b>Line Total:</b> 73.69		
<b>Line Status:</b> Pending							
<b>Ship Line: 1</b>	<b>Ship To:</b> CENTWHSE	<b>Address:</b> Valdosta State University Central Warehouse Receiving 2903 N Ashley St Valdosta GA 31602-0206 United States	<b>Shipping Quantity:</b> 1.0000	<b>Shipping Total:</b> 73.69			
<b>Attention:</b> Professor X	<b>Due Date:</b>						
<b>Ship Via:</b> BEST WAY	<b>Freight Terms:</b> FOB:DEST						
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	PO_MAIN	1.0000	100.00	73.69	51000	714100
<b>Dept</b>	<b>Fund</b>	<b>Program</b>	<b>Class</b>	<b>Budget Ref</b>			
1550000	10500	16300	11000	2015			
<b>Open QTY</b>	<b>Open Amt</b>						
1.0000	0.000						
<b>GL Base Amount</b>	<b>Currency</b>	<b>Sequence</b>	<b>Capitalize</b>				
73.69	USD	0	N				

- 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.*

# eProcurement GAFirst Marketplace Request Guide

## 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.

The screenshot shows the 'Manage Requisitions' page. At the top, there is a search bar with the text 'Search Requisitions'. Below that, there is a form with the following fields: Business Unit (51000), Requisition Name, Requisition ID (highlighted in green), Request State (Pending), Budget Status (Not Chk'd), Date From (04/04/2015), Date To (04/06/2015), Requester (cfstorey, highlighted in orange), and Origin (highlighted in purple). There are 'Search' and 'Clear' buttons, and a 'Show Advanced Search' link. Below the search form, there is a table of requisitions. The table has columns: Req ID, Requisition Name, BU, Date, Request State (highlighted in red), Budget (highlighted in dark blue), Total, and Action. The table contains two rows of data.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	Action
0000500036	4/2/15 Office Supplies	51000	04/05/2015	Pending	Not Chk'd	81.76 USD	[Select Action] Go
0000500035	0000500035	51000	04/05/2015	Open	Not Chk'd	71.76 USD	[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.

# eProcurement GAFirst Marketplace Request Guide

**Requisitions** ?

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

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000500036	4/2/15 Office Supplies	51000	04/05/2015	Pending	Not Chk'd	81.76 USD	[Select Action] Go

Requester: Storey, Catherine F Entered By: Storey, Catherine F Priority: Medium  
Pre-Encumbrance Balance: 0.00 USD

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

Line	Description	Status	Price	Quantity	UOM	Supplier	
1	Post-it Super Sticky Full Ad...	Pending Approval	8.07000	USD	1.0000	PKG Staples	✗
2	BANKERS BOX R-KIVE Heavy-Dut...	Pending Approval	73.69000	USD	1.0000	CRT Staples	✗

6. When the Expansion Triangle (green circle) is selected to the left of the Requisition number, more information is expanded 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

**Requisitions** ?

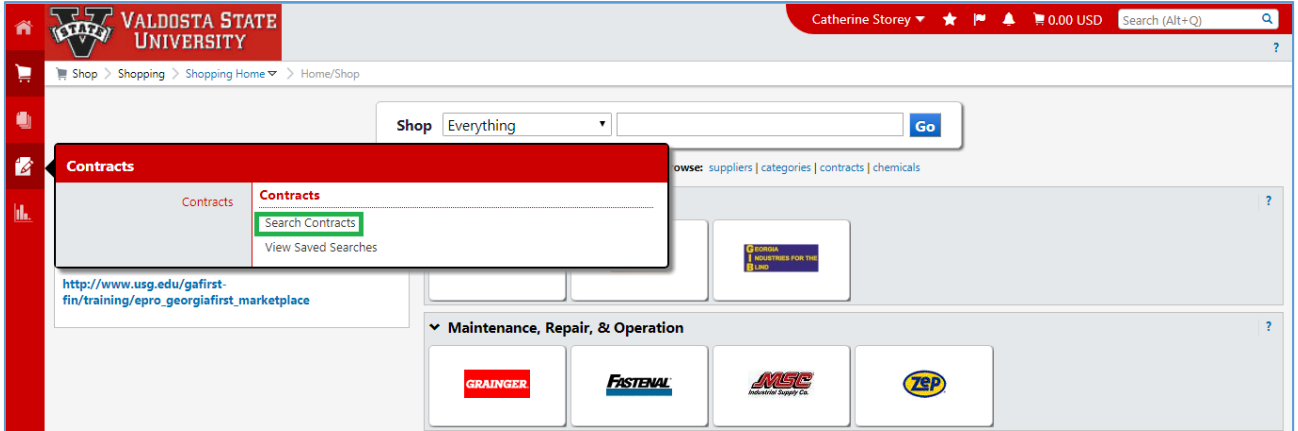
To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000500036	4/2/15 Office Supplies	51000	04/05/2015	Pending	Not Chk'd	81.76 USD	[Select Action] Go
0000500035	0000500035	51000	04/05/2015	Open	Not Chk'd	71.76 USD	Edit Go

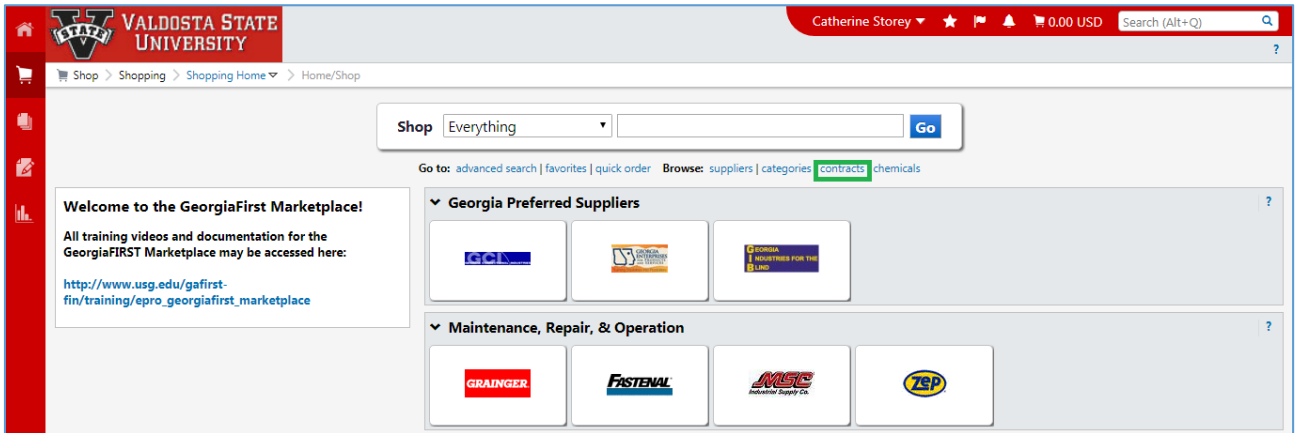
1. To edit an Open, Pending or Approved request,
  - a. Click the drop down menu to the far right of the requisition summary line. This drop down menu gives options such as cancel the request, edit the request, and more.
  - b. Select the Edit Option and click Go.
2. The system will route to the Review 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.

# Appendix A: Accessing Statewide Contracts

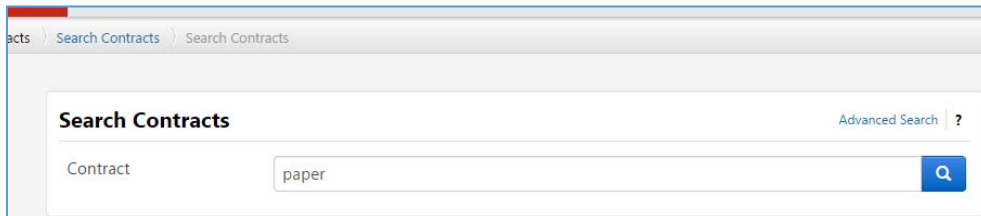
1. Whether entering a GaFirst Marketplace or a Special Item request, the Statewide Contracts will be accessed through the GaFirst Marketplace. This list is comprehensive and the State is continually updating as contracts are renewed, inactivated, and added.
2. There are two ways to access Statewide Contracts.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



- 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.



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



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

# Appendix A: Accessing Statewide Contracts

- 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 All](#)

Contract Number

Contract Name

Keywords

Contract Type

Contract Manager

By Start/End Date

▼ **Supplier**

Supplier

Class

► **eProcurement**

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

**Contract Search Results** ?

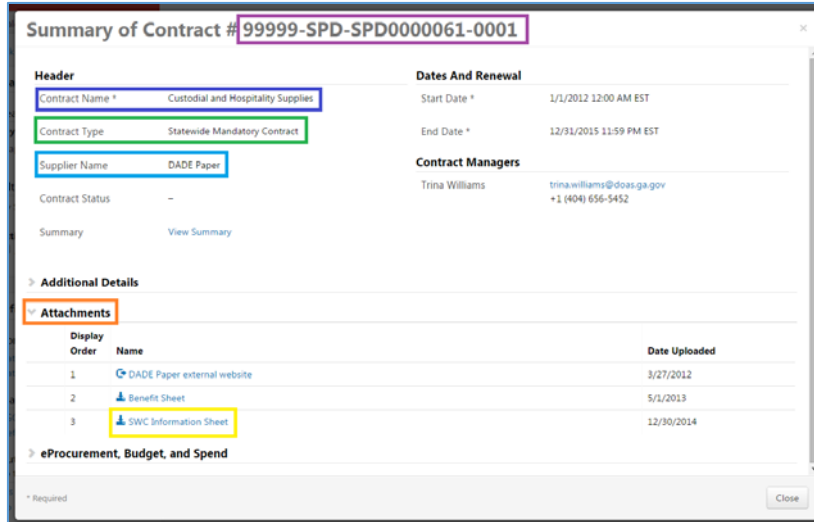
1-5 of 5 Results Sort by Best Match | Per Page 150

Contract No.	Contract Name	Renewal No.	Supplier	Start Date	End Date	Active
99999-SPD-SPD0000108-0001	Rapid Copy and Digital Printing Services	0	MORE BUSINESS SOLUTIONS	3/2/2015	2/28/2017	✓
99999-SPD-SPD0000096-0001	Offset Printing and Related Services	0	RR Donnelley	5/16/2014	4/30/2015	✓
99999-SPD-SPD0000061-0002	Custodial and Hospitality Supplies	0	Southeastern Paper Group / Atlanta	1/1/2012	12/31/2015	✓
99999-SPD-SPD0000061-0001	Custodial and Hospitality Supplies	0	DADE Paper	1/1/2012	12/31/2015	✓
99999-001-SPD0000103-0001	General Office Supplies, Paper and Toner	0	Staples	7/6/2014	7/6/2016	✓

1-5 of 5 Results Per Page 150

- 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.

# Appendix A: Accessing Statewide Contracts



- 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).
- h. 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 Contract Information Sheet			
Statewide Contract Number	99999SPD000061	NIGP Codes	66524, 64022, 64050, 64060, 64075
Name of Contract	Custodial and Hospitality Supplies		
Effective Date	January 1, 2012		
<b>Contract Table of Contents</b>			
Suppliers Awarded	2	Contract Information:	Mandatory Contract
Contract Information for Supplier		Page Number	
<a href="#">Dade Paper</a>		2	
<a href="#">Southeastern Paper Group</a>		3	
<b>Additional Contract Information</b>			
<a href="#">General Contract Information</a>		4	
<a href="#">Contract Renewals/ Extensions/ Changes</a>		5	
<a href="#">DOAS Contact Information</a>		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

# Appendix A: Accessing Statewide Contracts

will display specific information for that particular company.

Supplier Information Sheet	
<b>Contract Information</b>	
<b>Statewide Contract Number</b>	<b>99999-SPD-SPD0000061-0001</b>
<b>PeopleSoft Supplier Number</b>	<b>0000268086</b>
<b>Supplier Name &amp; Address</b>	
<b>Dade Paper Company</b> <b>600 Hartman Industrial Ct. SW Suite 200</b> <b>Austell, GA 30168</b> <a href="tel:59-0784248">EIN# 59-0784248</a>	
<b>Contract Administrator</b>	
<a href="#">Kristina McSpadden</a> Bid Specialist <b>Office:</b> 1-800-696-6919-ext. 4436 <b>Cell#</b> 770-616-0268 <b>Website:</b> <a href="http://www.dadepaper.com">http://www.dadepaper.com</a>	
<b>Contact Details</b>	
Secondary: <a href="#">Stacy Clayton</a> - Bid Coordinator 1-800-696-6919 ext. 4435 Customer Service Representative: <a href="#">Kay Ross</a> - 1-800-696-6919 ext. 4586	
<b>Ordering Information</b>	Dade Paper Company 600 Hartman Industrial Ct. SW Suite 200 Austell, GA 30168
<b>Remitting Information</b>	Dade Paper Company 600 Hartman Industrial Ct. SW Suite 200 Austell, GA 30168
<b>Delivery Days</b>	Orders will be shipped within 10 days after receipt of Purchase Order
<b>Discounts</b>	N/A
<b>Payment Terms</b>	Net 30 Days
<b>Bid Offer includes</b>	State and Local Government
<b>Acceptable payment method</b>	Supplier will accept Purchase Orders and the Purchasing Card under this contract as permitted by current policies governing the Purchasing Card program.

- 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. Open: request has been entered and saved, but has not been submitted for approvals.
  - b. Pending: request has been entered, saved and submitted for approvals.
  - c. Approved: request has been entered, saved, submitted and all approvers have approved the request.
  - d. Denied: 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. PO Created: request has been entered, saved, submitted, approved, passed budget check and a Buyer has sourced the requisition into a purchase order.
  - b. PO Dispatched: request has been entered, saved, submitted, approved, passed budget check, sourced to a purchase order, processed by a Buyer.
  - c. Received: The order has been completely fulfilled and has been received by VSU Central Receiving.
  - d. Complete: The order has been received and the invoice paid. The order is now complete and done.
  - e. Canceled: 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. Not Chk'd: 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. Valid: This means the request has been approved, passed budget check and is waiting to be sent to the supplier by the system.
  - c. Error: This means there is a problem with the accounting/budget being used. Please contact Budget Services to resolve the error at x5710.