

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.

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

How To: Perform a Simple Search

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

The screenshot displays the Oracle GeorgiaFIRST Marketplace website. At the top, the Oracle logo is visible on the left, and navigation links for Home, Worklist, Add to Favorites, and Sign out are on the right. Below the header, there's a navigation bar with links for Shop, Shopping, Dashboard, Shopping Home, and Home/Shop. A search bar is prominently featured, with a dropdown menu for product categories. The dropdown menu is open, showing options like Everything, Lab Supplies, Medical/Clinical, Office/Computer, MRO/Facilities, Furniture, Services, Supplies Manager, Manufacturing, Books, Electronics, Specialty, and Food/Food Equipment. The search bar contains the text "Enter Search Keywords Here" and a "Go" button. Below the search bar, there are several product category tiles, each with a logo and a name: Dell (Computers and Servers), HP (Computers (SWC90814)), OfficeMax, Staples, Lenovo (IBM), and CDWG. Further down, there are more category tiles for MRO / Facilities (Grainger Contract SWC1234-1234 and MSC Industrial Supply Co.) and Books and Media (Complete Book). At the bottom, there's a "My Resources" section with contact information: phone: +1 (678) 891-3325 and a Site Map link.

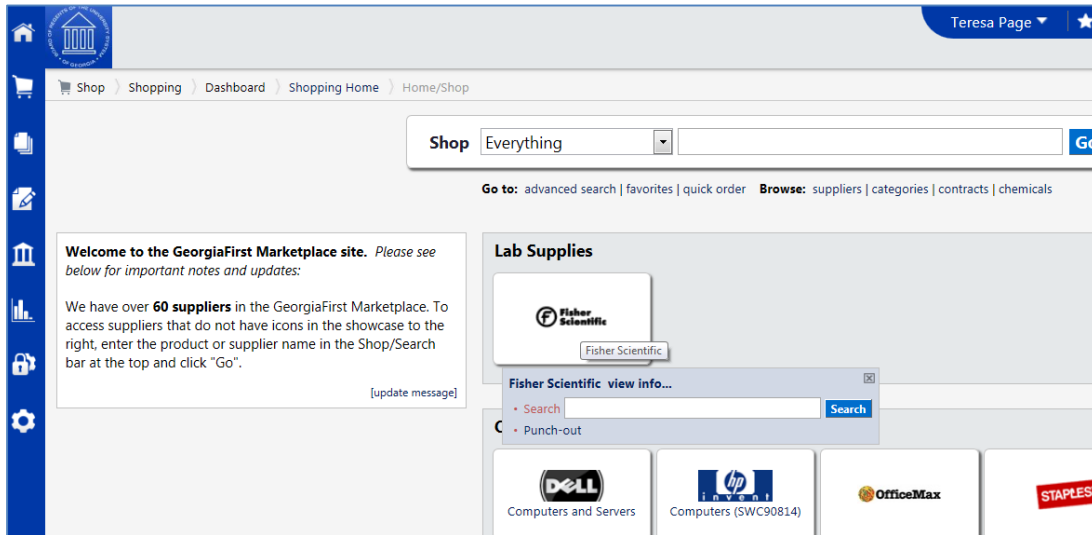
How To: Perform an Advanced Search

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

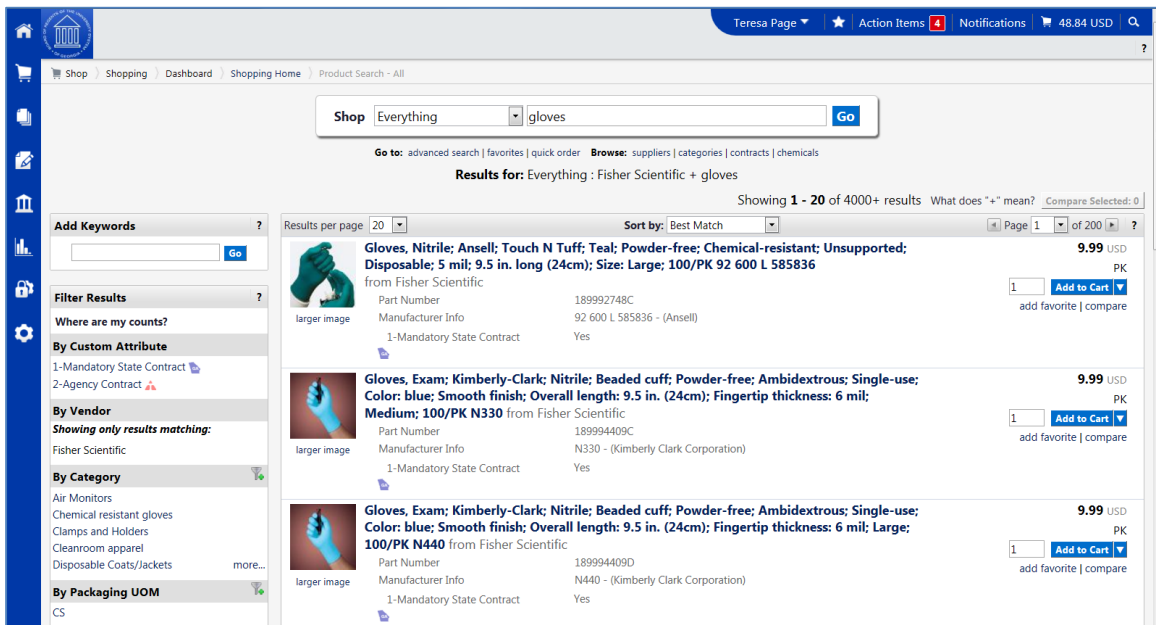
The screenshot displays the Oracle GeorgiaFIRST Marketplace interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a search bar with a dropdown menu set to 'Shop Everything' and a 'Go' button. A welcome message on the left states: 'Welcome to the GeorgiaFirst Marketplace site. Please see below for important notes and updates: We have over 60 suppliers in the GeorgiaFirst Marketplace. To access suppliers that do not have icons in the showcase to the right, enter the product or supplier name in the Shop/Search bar at the top and click "Go".' The main content area is divided into several sections: 'Lab Supplies' featuring Fisher Scientific; 'Office Supplies and Computers' featuring Dell, HP, OfficeMax, Staples, Tektronix, and CDWG; 'MRO / Facilities' featuring Grainger (Contract SWC1234-1234) and MSC Industrial Supply Co.; and 'Books and Media' featuring Complete Book. At the bottom, there is a 'My Resources' section with contact information: 'phone: +1 (678) 891-3325' and a 'Site Map' link.

How To: Search from a Showcased Supplier

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



2. Enter **keywords** in the Search field and click the **Search** button.
3. The Search Results will appear 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.

How To: Delete a Shopping Cart

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

The screenshot shows the Oracle GeorgiaFirst Marketplace interface. The top navigation bar includes the Oracle logo, Home, Worklist, Add to Favorites, and Sign out. The breadcrumb trail is: Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts. The main content area features a 'Create Cart' button and an 'Assign Substitute' link. Below this is a table titled 'My Drafts' with columns: Active Cart, GeorgiaFirst Marketplace Shopping Cart Name, Date Created, Cart Description, Total, and Delete. The first row shows a cart with a blue icon, name '2013-12-23 OIITPAGE 01', date '12/23/2013', and total '1.60 USD'. The 'Delete' button for this row is highlighted with a red box. The second row shows a cart with a white icon, name 'APRIL', date '7/12/2011', and total '402.99 USD'. Below the 'My Drafts' table is another table titled 'Drafts Assigned To Me' with columns: Active Cart, GeorgiaFirst Marketplace Shopping Cart Name, Date Created, Cart Description, Total, and Delete. The first row shows a cart with a white icon, name '2012-01-10 BFILTZ 01', date '1/10/2012', and total '44.94 USD'.

Active Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2013-12-23 OIITPAGE 01	12/23/2013		1.60 USD	Delete
	APRIL	7/12/2011		402.99 USD	Delete

Active Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Cart Description	Total	Delete
	2012-01-10 BFILTZ 01	1/10/2012		44.94 USD	Delete

How To: Assign a Cart

1. Pull up your **shopping cart**.
2. Review your shopping cart to ensure that everything is correct. Make any necessary updates to the items in your cart.
3. Select the **Proceed to Checkout** button.
4. Here you perform a final review of your shopping cart. If you need to make any updates, you can select the appropriate edit button and make changes. You can also select the **Return to shopping cart** link in the upper right corner of the page.
5. If you want to add any notes or comments, click the **Comments** tab.
 - a. Click the **Add Comment** button.
 - b. Enter your **comment** regarding the Chartfields. Keep in mind there is a 1000 character limit here.
 - c. Do not include any slashes (/) in your comments.
 - d. Click the **Add Comment** button.
 - e. Note: These comments are available to the Requester, but they are not included in the email notification.
6. When you are ready to assign your cart, click the **Assign Cart** button.
7. If you have a Default Requester in your profile, that Requester's name should appear next to "**Assign Cart To:**".
 - a. If you want to assign your cart to another Requester set up in your User Profile, select the "**Search from profile values**" link.
 - i. Using the drop down list, select the appropriate Requester.
 - b. If you do not have a Default Requester in your profile and need to search for your requester, select the "**Search for an assignee**" link.
 - i. In the User Search box, confirm your **Business Unit** appears in the Business Unit drop down list.
 - ii. If you want to refine your search by department, select your **Department** in the drop down list.
 - iii. Click the **Search** button.
 - iv. Select the **Requester** you want to assign your shopping cart to and click the **Choose Selected User** button.
8. In the **Note to Assignee** section, enter any instructions about charging Chartfields that are not your default. This note is included in the email notification to the Requester.
9. Click the **Assign** button. A shopping cart notification displays. Your shopping cart has now been assigned to your Requester.

ORACLE
Home | Worklist | Add to Favorites | Sign out
Favorites | Main Menu > GeorgiaFirst Marketplace
Teresa Page | Action Items | Notifications | 76.22 USD

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

Shopping Cart for Teresa Page
Name this cart:

Continue Shopping
2 Item(s) for a total of **76.22 USD**
 or

Have you made changes? Perform an action on (0 items selected)... Select All

10.

Assign Cart ? X

Assign Cart To: Ursula Allen
Select from profile values
Search for an assignee

Note To Assignee:

expand | clear

Note: After a cart is submitted, it can be viewed via History. Prior to being submitted, the cart can be viewed in Draft Carts and can be unassigned (withdrawn) if needed.

11.

How To: Un-Assign a Cart

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

The screenshot shows the Oracle GeorgiaFIRST Marketplace interface. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The user is logged in as 'Teresa Page'. The breadcrumb trail is 'Shop > My Carts and Orders > View Draft Shopping Carts > Shopping Cart - Drafts'. The main content area is divided into two sections: 'My Drafts' and 'My Drafts Assigned to Others'. The 'My Drafts' section contains two rows: 'Camera Accessories' (Total: 19.98 USD) and 'Furniture' (Total: 1,170.19 USD). The 'My Drafts Assigned to Others' section contains one row: 'Office Supplies' (Total: 76.22 USD) assigned to 'Ursula Allen'. The 'Unassign' button for the 'Office Supplies' row is highlighted with a red box.

My Drafts					legend ?
Active Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Cart Description	Total	Delete
	Camera Accessories	12/26/2013		19.98 USD	Delete
	Furniture	12/26/2013		1,170.19 USD	Delete

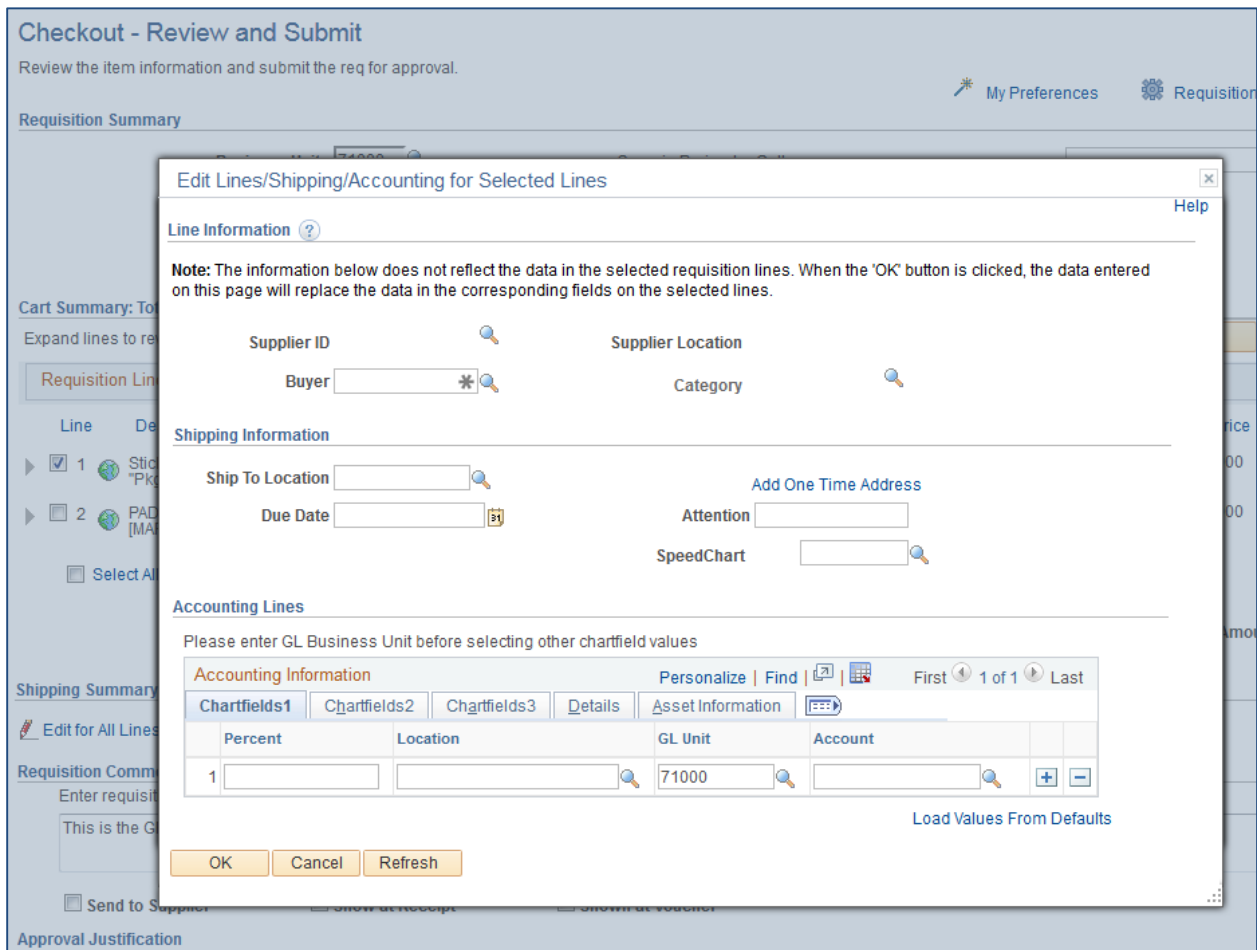
My Drafts Assigned to Others					legend ?
View Cart	GeorgiaFirst Marketplace Shopping Cart Name	Date Created	Assigned To	Total	Unassign
	Office Supplies	12/26/2013	Ursula Allen	76.22 USD	Unassign

How To: Review Line Item History

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

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

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



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

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

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

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

Business Unit Georgia Perimeter College Requisition Name

*Requester Priority

*Currency

Cart Summary: Total Amount 806.18 USD

Expand lines to review shipping and accounting details [Add More Items](#)

Requisition Lines [?](#)

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

Shipping Line 1

*Ship To Quantity
 Address Price
 Attention To
 Due Date

Price Adjustment
Pegging Inquiry
Pegging Workbench

Accounting Lines

*Distribute By SpeedChart

Accounting Lines [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | First 1-2 of 2 Last

Chartfields1	Chartfields2	Chartfields3	Details	Details 2	Asset Information	Asset Information 2	Budget Information	REF
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		CM1114	1.0000	50.0000	362.59	71000	
2	Open		CM1114	1.0000	50.0000	362.59	71000	

How To: Split Distribution for a Requisition Line

1. When you have pulled the GeorgiaFIRST Marketplace shopping cart into an eProcurement requisition, you will be returned to the **Checkout - Review and Submit page**.
2. Expand the line by clicking on its **Expand Section** button.
3. Choose whether to **Distribute** by **Amount** or **Quantity** through the drop down list.
4. Locate the **Accounting Lines** section.
5. At the end of the line under the **Chartfields1** tab, click the **Add a New Row** button (+).
6. If distributing by **Quantity**, continue. If distributing by **Amount**, go to step 7.
 - a. In the original distribution line, edit the **quantity** for the revised distribution.
 - b. **Tab** out of the Quantity field. The **Percent** field should adjust accordingly.
 - c. In the new distribution line, enter the **quantity** for the second Chartstring.
 - d. **Tab** out of the **Quantity** field. The **Percent** field will adjust accordingly.
 - e. Make the necessary **changes** to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.
7. If distributing by **Amount**, continue. Otherwise, go to step 8.
 - a. In the original distribution line, edit the **amount** for the revised distribution.
 - b. **Tab** out of the Amount field. The **Percent** field should adjust accordingly.
 - c. In the new distribution line, enter the **amount** for the second Chartstring.
 - d. **Tab** out of the Amount field. The **Percent** field will adjust accordingly.
 - e. Make the necessary **changes** to the second string of Chartfields on the Chartfields 1, Chartfields 2, and Chartfields 3 tabs.
8. Make any other necessary changes and then continue with the Marketplace Requisition by selecting the **Save and Preview Approvals** button.

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 vendor for all requisition lines, enter the **Supplier ID** or select it using the Look Up icon.
 - d. To enter a default Buyer for all requisition lines, enter the **Buyer's User ID** or select it using the Look Up icon.
 - e. Enter 00000 as the NIGP code.
 - f. If all of your line items will have the same **Unit of Measure**, enter it or select it using the Look Up icon.
 - g. 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.
 - h. In the **Accounting Defaults – Asset Information** tab, you can enter the default AM Business Unit field and Profile ID that will appear on each requisition line item. This should only be set if all requisition line items are to be tracked in the Asset Management module, and each line item requires the same Profile ID.
 - i. Click the **OK** button.
5. For each line that you want to enter, complete the following steps (some fields may have been completed through the requisition defaults – these defaults can be overwritten on this page if needed):
 - a. Enter an **Item Description**
 - b. Enter the **Price** of the item
 - c. Enter the **Quantity** requested
 - d. Enter or select the **Unit of Measure**
 - e. In the **Category** field, enter or select the NIGP Code for the item
 - f. Enter or select the **Due Date** for the item
 - g. Enter or select the **Supplier ID** for the item if you have a preferred vendor
 - h. If you have any information that needs to be sent to the vendor, shown on the receipt, and/or shown on the voucher, enter it in the **Additional Information** field and select the appropriate checkboxes.
 - i. Select the **Add to Cart** button.
 - j. Confirm the **Requisition Summary** updated with your new requisition line.
 - k. To add an addition requisition line, complete steps 7a through 7k again.
6. Select the **Checkout** button.

7. To update a requisition line's distribution information, click its **Expand** button and make necessary updates.
8. To update multiple requisition line's information simultaneously, select the lines to update with a check mark and then select the **Mass Change** link. Make all necessary updates, and apply to all selected lines.
9. To enter a **comment** on an individual requisition line, click that line's **call out** (comment) icon. Enter the comments and select where you want the comment to appear.
10. Enter any justification or comments you wish to on the requisition header in the **Justification/Comments** field and select the appropriate checkboxes. Do not include any slashes (/) in your comments.
11. Click the **Save for Later** button, then the **Preview Approvals** link.
12. Click the **Submit** button.

*****PLEASE MAKE SURE ALL REQUIRED DOCUMENTS ARE ATTACHED TO THE REQUISITION*****

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.

ORACLE

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

My Preferences Requisition Settings

Requisition Summary

Business Unit 71000 Georgia Perimeter College Requisition Name
 *Requester Priority Medium
 *Currency USD

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

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Local Newspaper Ad		THE ATLANTA JOURNAL-CONSTITUTION	4.0000	Each	425.0000	1700.00		Add
Shipping Line 1		*Ship To	RECEIVING	Quantity		4.0000			
		Address Attention To	Smith, Jackson	Price		425.0000		Price Adjustment	
		Due Date	02/26/2015					Pegging Inquiry	
								Pegging Workbench	

Accounting Lines

*Distribute By Qty SpeedChart

Accounting Lines Personalize Find View All First 1 of 1 Last

Chartfields1	Chartfields2	Chartfields3	Details	Details 2	Asset Information	Asset Information 2	Budget Information
*Account	Fund	Dept	Program	Class	Budget Reference		
751110	10600						2015

How To: Charge 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**.

The screenshot displays the Oracle Requisition Summary interface. At the top, it shows the Business Unit (71000), Georgia Perimeter College, and Requisition Name. Below this, there are fields for Requester, Priority (Medium), and Currency (USD). A summary bar indicates a total amount of 1,700.00 USD. The main section is titled 'Requisition Lines' and contains a table with columns for Line, Description, Item ID, Supplier, Quantity, UOM, Price, Total, Details, Comments, and Delete. A single line is visible for 'Local Newspaper Ad' with a quantity of 4.0000. Below the requisition lines, there are shipping and accounting details. The 'Accounting Lines' section is expanded, showing a table with columns for Line, Status, Dist Type, Location, Quantity, Percent, Merchandise Amt, GL Unit, and Entry Event. Two accounting lines are listed, both with a quantity of 2.0000 and a percent of 50.0000. A dropdown menu labeled '*Distribute By' is highlighted with a red box, and it is currently set to 'Qty'.

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

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

How To: Split Distribution for a Requisition Line

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.

How To: Manage Requisitions

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

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

Below the search criteria is a table of requisitions. A context menu is open over the first row, showing options: Approvals, Cancel, Check Budget, Copy, Edit, View Cycle, View Print, and [Select Action].

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

At the bottom of the interface, there are several navigation links: Create New Requisition, Review Change Request, Review Change Tracking, Manage Receipts, and Requisition Report.

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.

ORACLE All Search >> Advanced Search

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

My Preferences Requisition Settings

Requisition Summary

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

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

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Local Chapter HDI Memberships		HDI	10.0000	Each	75.0000	750.00		Edit	
2	Professional Level HDI Members		HDI	2.0000	Each	295.0000	590.00		Add	

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

Total Amount 1,340.00 USD

How To: Delete a Requisition Line

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

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

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

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

For the selected requisition (0000502646), a detailed view is shown. It includes a 'Request Lifespan' diagram with stages: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. Below this is a 'Line Information' table:

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

At the bottom, there are more requisitions listed with their respective details and action buttons.

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: 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.

ORACLE

All Search >> Advanced Search

Receipt Saved Successfully

You have saved receipt # 0000522114 containing the following items:

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

Return to Manage Requisitions Return to Receiving