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.

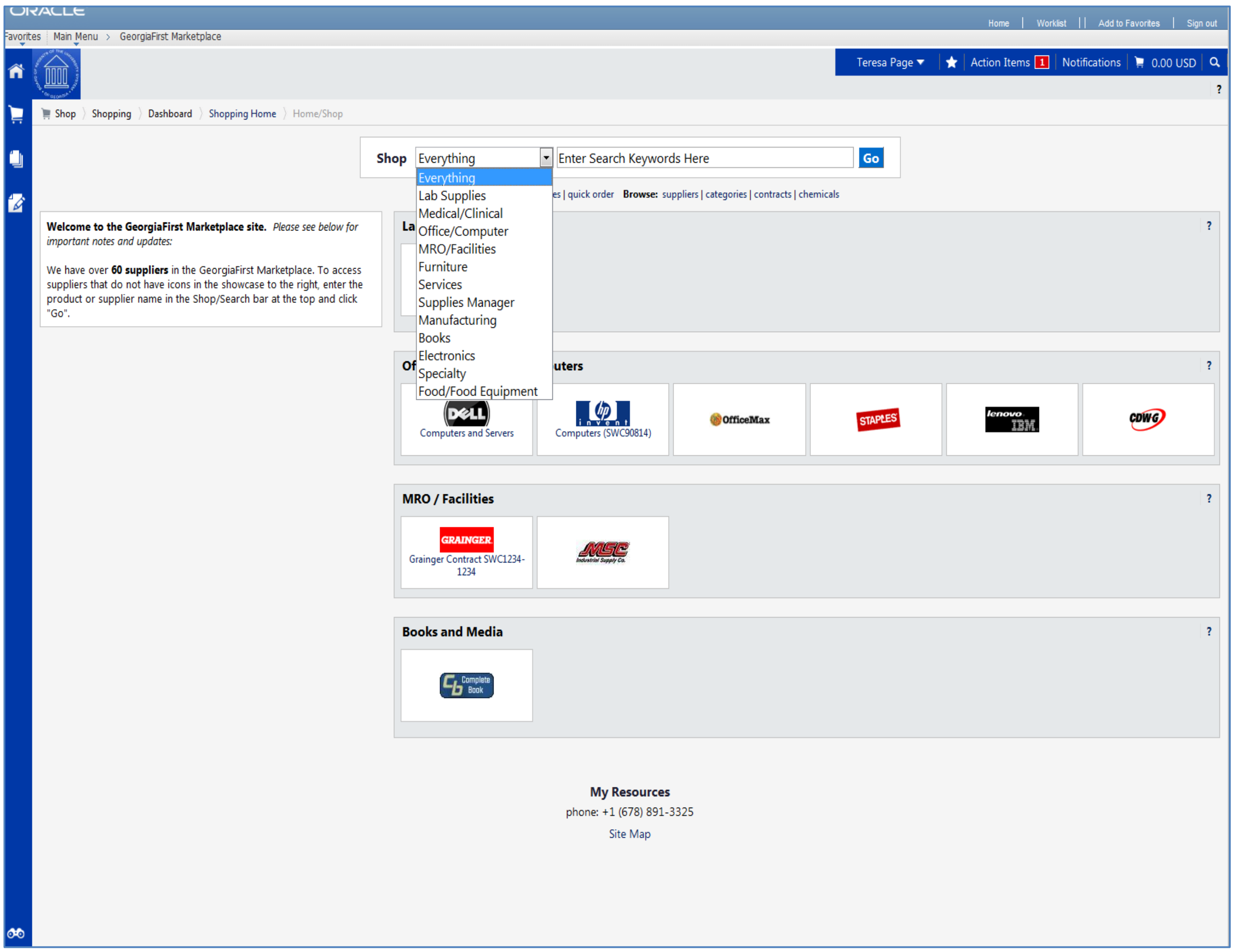
The following "How To" lists the steps of creating a basic Marketplace Requisition. Subsequent sections in this User Guide will detail additional scenarios when creating Marketplace Requisitions.

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

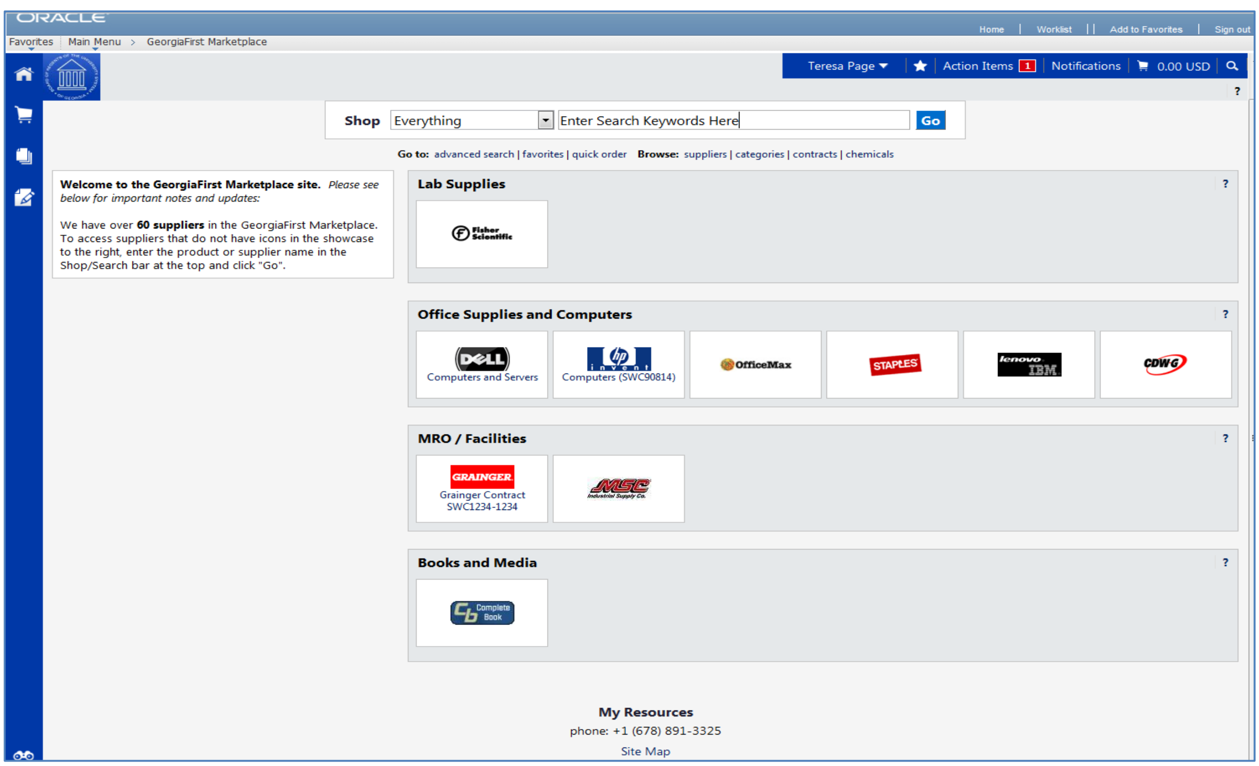
How To: Perform a Simple Search

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



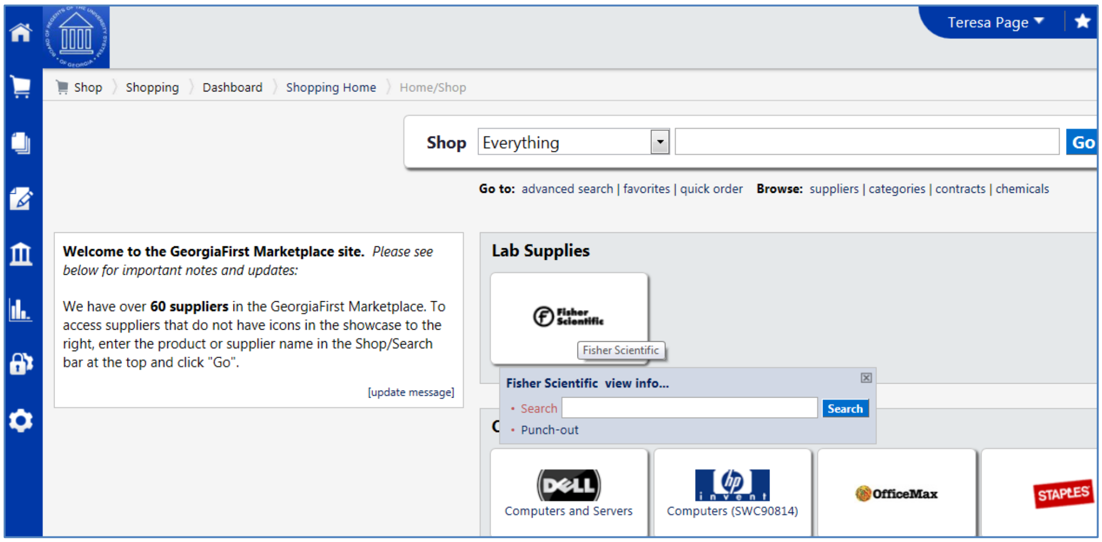
How To: Perform an Advanced Search

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

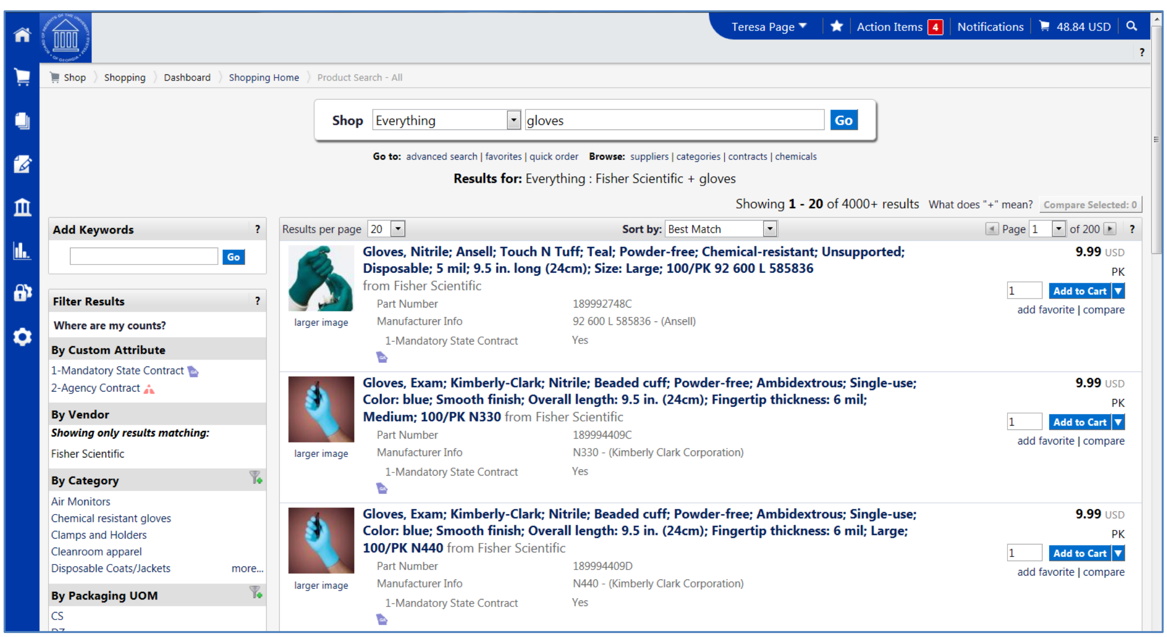


How To: Search from a Showcased Supplier

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



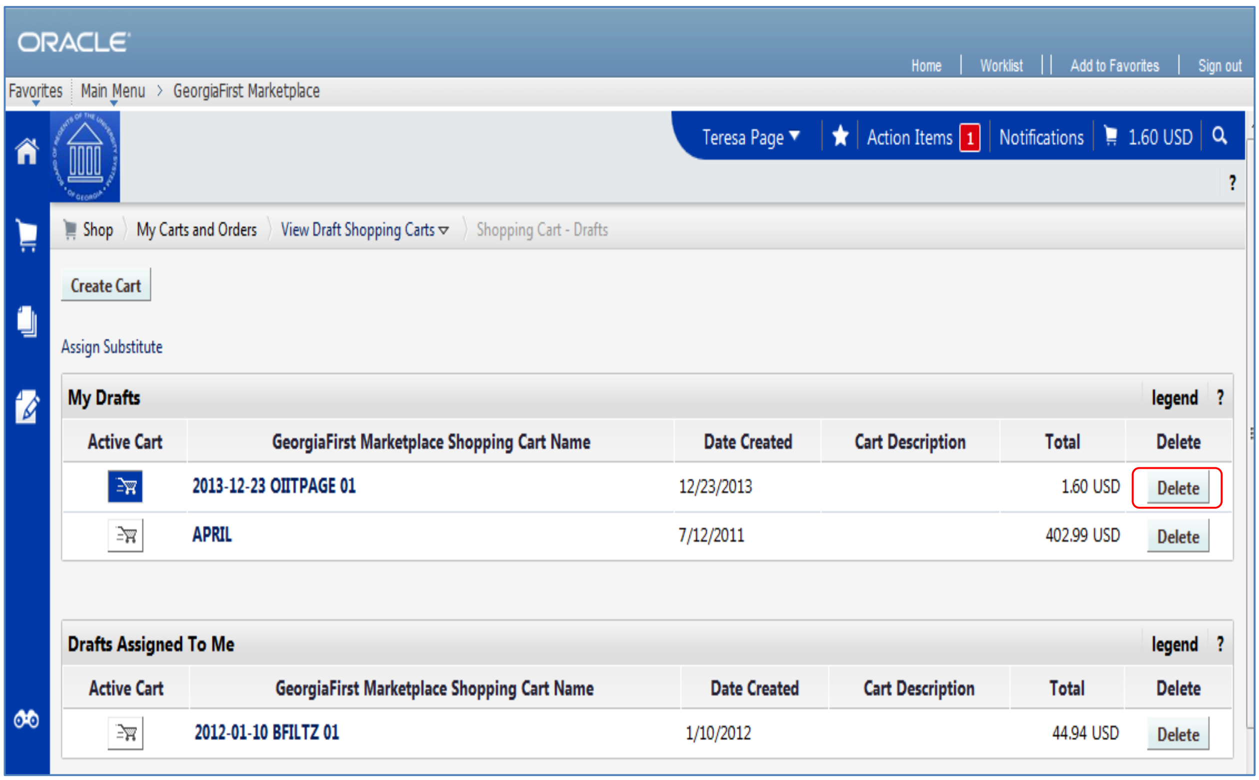
2. Enter **keywords** in the Search field and click the **Search** button.
3. The Search Results will appear and be formatted just how Simple Search and Advanced Search displays.



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

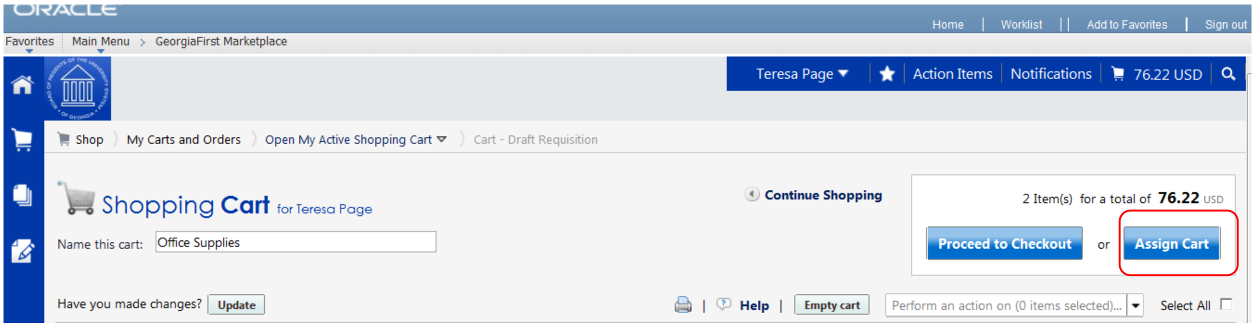
How To: Delete a Shopping Cart

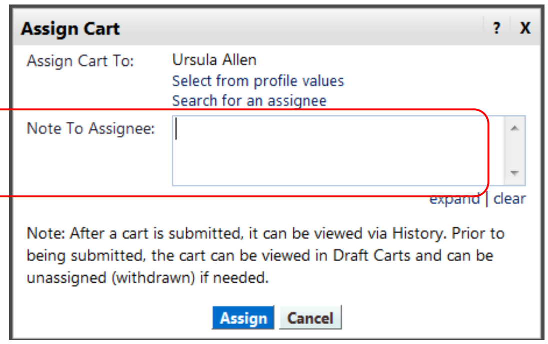
1. Select the **Shopping Cart** icon.
2. Select the **My Carts and Orders** sub-link.
3. Select the **View Draft Shopping Carts** sub link.
4. Locate the cart you want to delete.
    a. Your current (or active) cart will have an icon with a colored background.
    b. Draft carts have an icon with a white 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.



How To: Assign a Cart

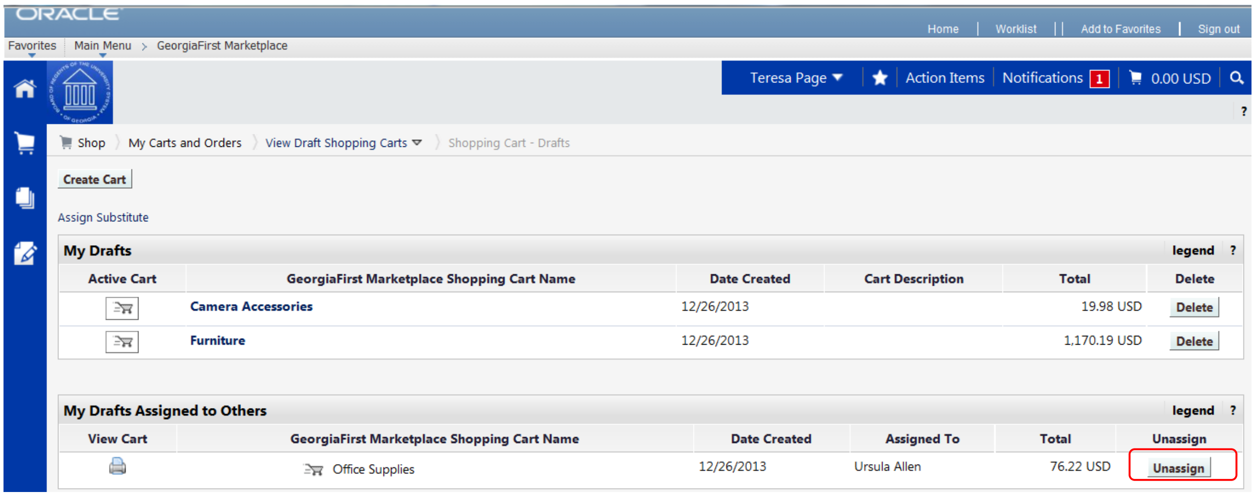
1. Pull up your **shopping cart**.
2. Review your shopping cart to ensure that everything is correct. Make any necessary updates to the items in your cart.
3. Select the **Proceed to Checkout** button.
4. Here you perform a final review of your shopping cart. If you need to make any updates, you can 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.

10. 
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
Continue Shopping
2 Item(s) for a total of 76.22 USD
Name this cart: Office Supplies
Proceed to Checkout
or
Assign Cart
Have you made changes? Update
Help
Empty cart
Perform an action on (0 items selected)...
Select All

11. 
Assign Cart
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.
Assign
Cancel

How To: Un-Assign a Cart

1. From the Georgia*FIRST* 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.

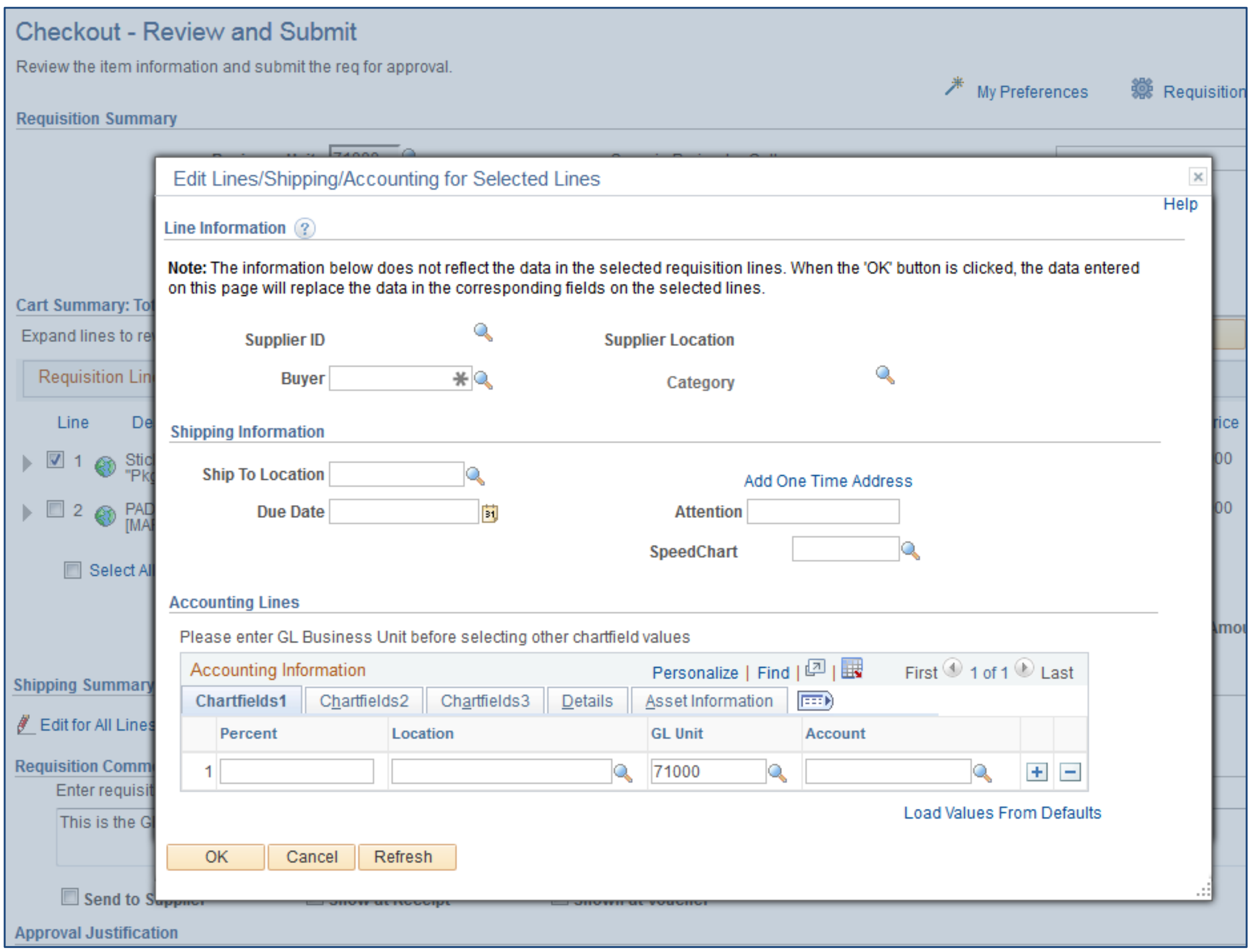


How To: Review Line Item History

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.

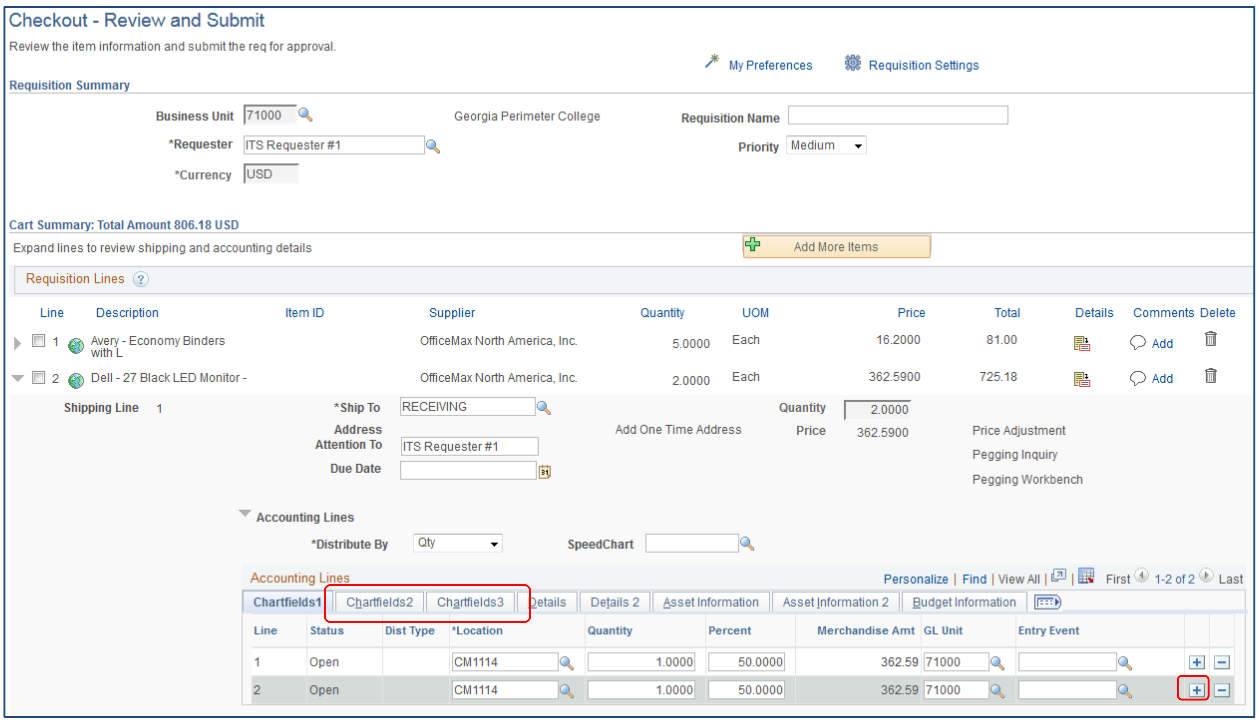
How To: Charge a Requisition Line Item to a Different Chartstring

1. When you have pulled the Georgia*FIRST* 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 **Georgia*FIRST* 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.



How To: Split Distribution for a Requisition Line

1. When you have pulled the Georgia*FIRST* 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

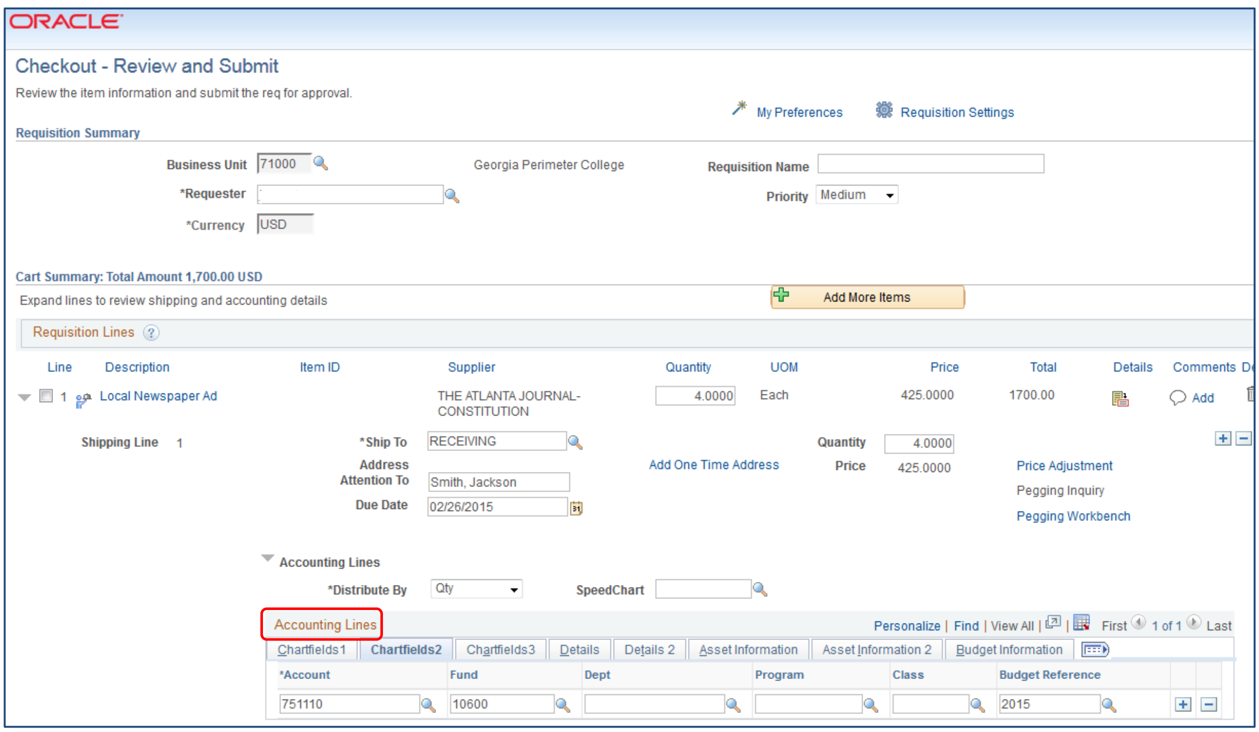
1. In PeopleSoft Financials Core System, select **eProcurement** from the menu.
2. Select **Requisitions**.
3. Select Special Requests
4. To enter Requisition Defaults, click the **Requisition Settings** link. Otherwise, go to step 4.
    a. If desired, enter a name for your requisition (if left blank, 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*****

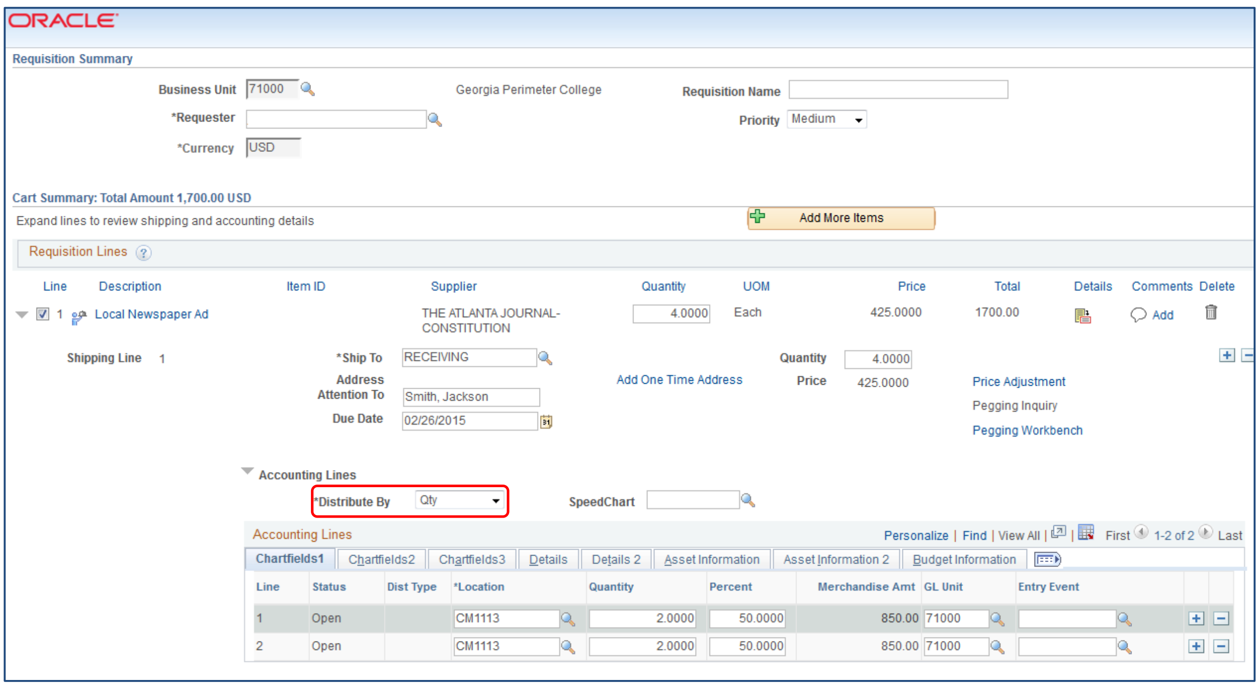
How To: Charge a Requisition Line Item to a Different Chartstring

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.



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.

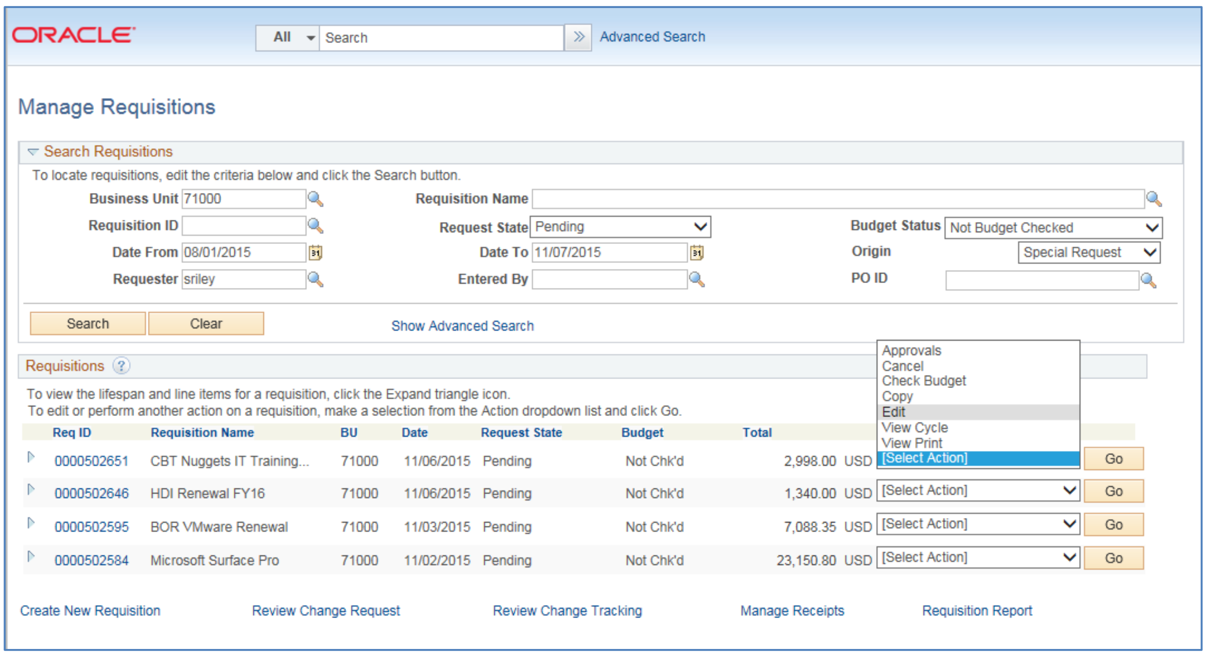


How To: Split Distribution for a Requisition Line

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**.

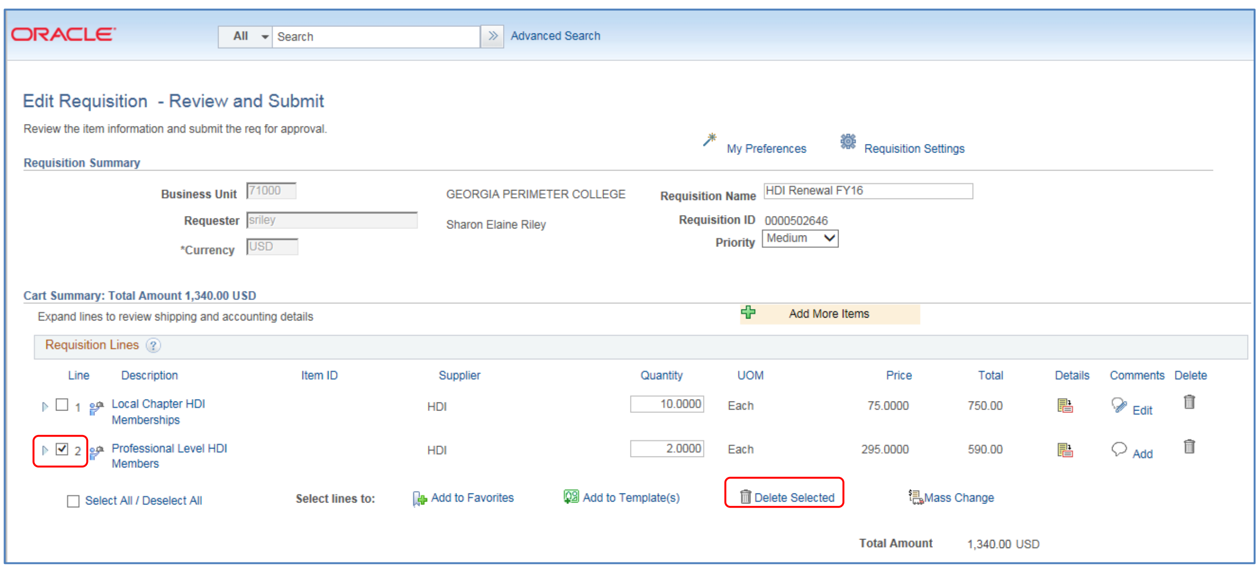
How To: Manage Requisitions

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.



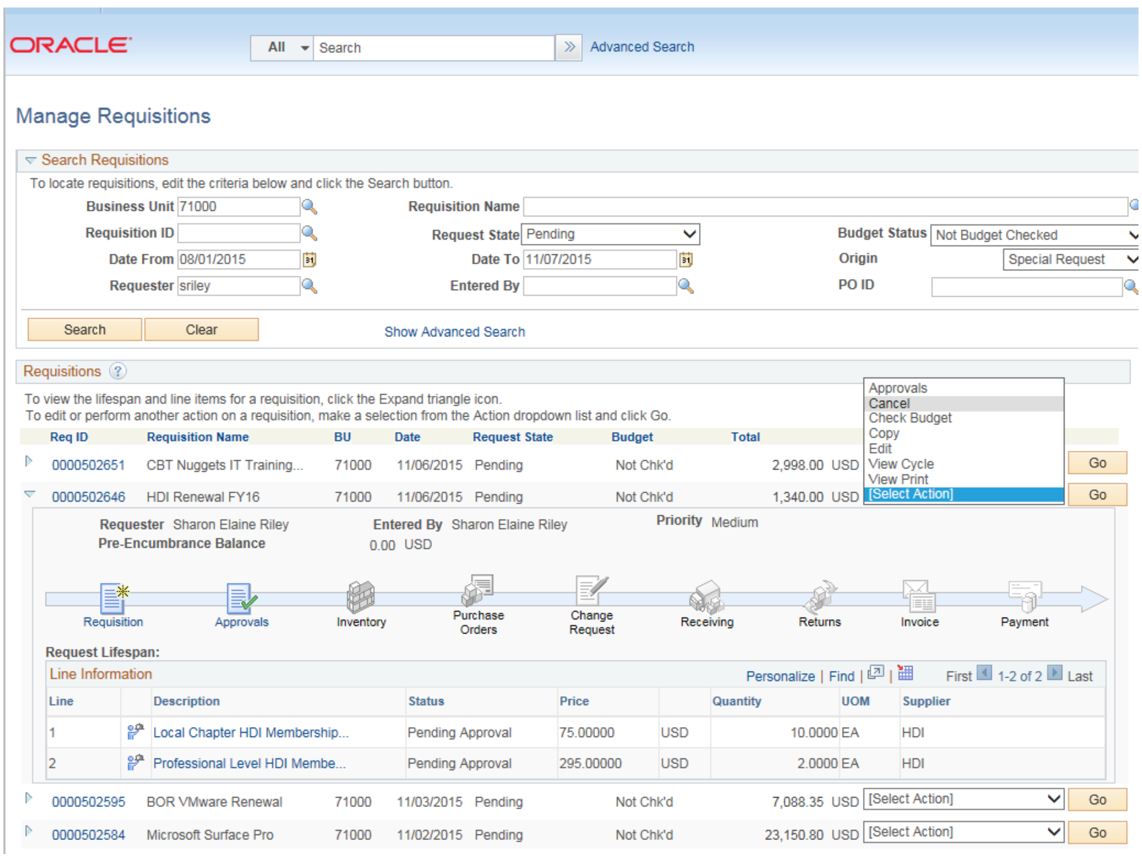
How To: Edit a Requisition

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.



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.



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.