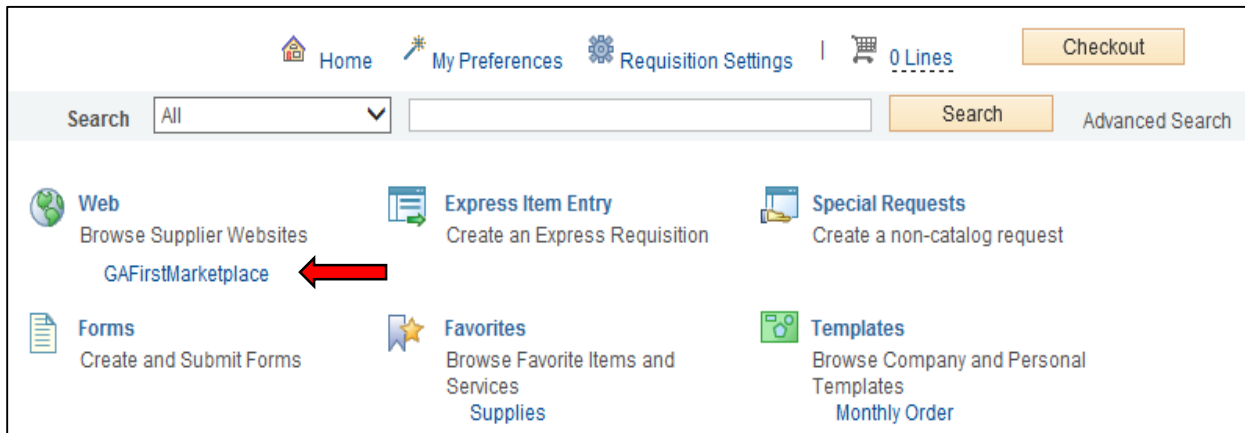




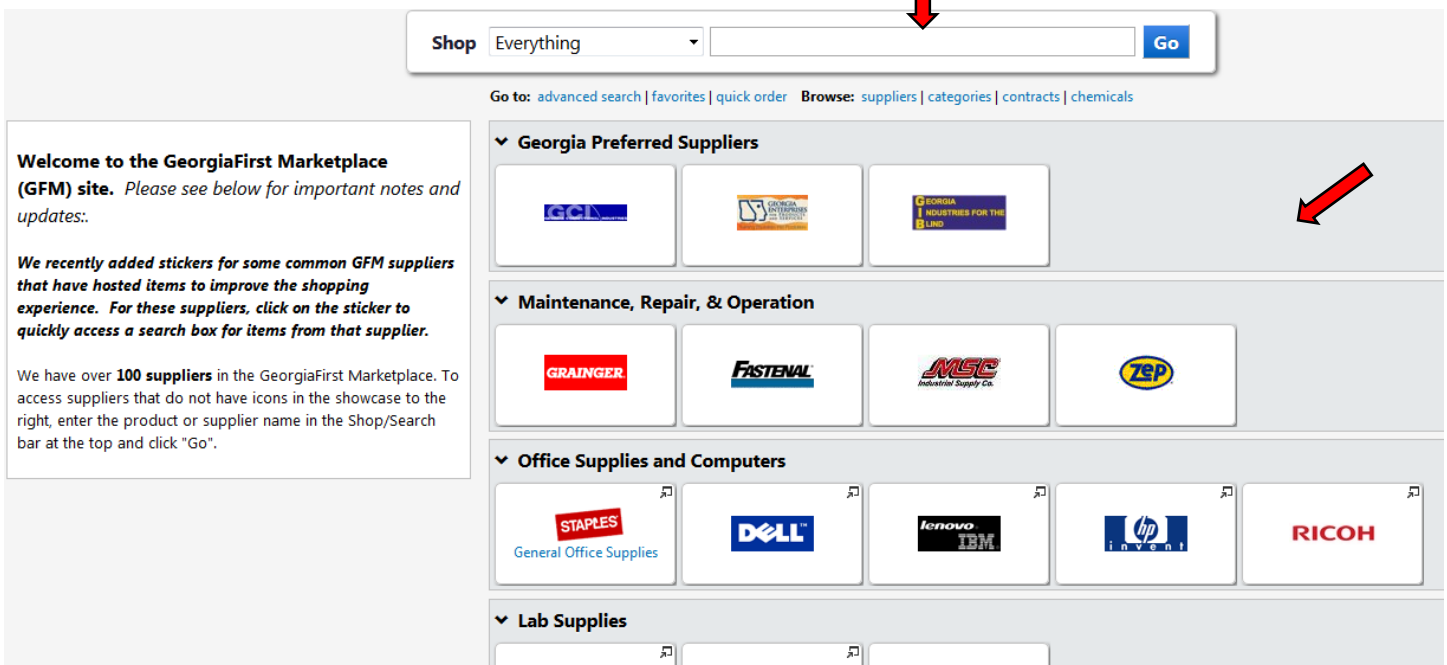
Job Aid EPC1

Create a GeorgiaFIRST Marketplace Shopping Cart & Requisition

1. Select **eProcurement** from the menu
2. Select **Requisitions**
3. Select the **GeorgiaFIRST Marketplace** link



4. Build your **shopping cart** by using the Punch-Out catalogs (i.e.: Staples, Fisher Scientific, DELL...) **OR** by searching the hosted catalogs by using the 'Shop' search field



5. Once you are finished adding items to your cart, select 'Checkout'
6. Review your cart for accuracy
7. Click 'Submit'
8. Click 'Proceed to Checkout'
9. Click 'Issue Requisition'

(Verbiage may differ for Steps 5-9 above depending on Suppliers website and/or hosted content.)

10. You will now be re-directed back into ePro to make any edits (if necessary), to add supporting documentation and to submit your Requisition into the approval process
11. Enter a name for your requisition in the **Requisition Name** field in the upper right
12. You can update the distribution/accounting information, using **one** of two methods below (*Individual Lines or Mutiple Lines*):

NOTE:

When using either option for accounting allocation changes:

If you use the SpeedChart function, you must also populate the **BudRef** field on the **Chartfields 2** tab.

If you manually enter the allocation, you must first populate the **GL Unit** field on the **Chartfields 1** tab in addition to populating the BudRef on the Chartfields 2 tab.

To Update Accounting Allocation on Individual lines:

Click the **Expand** buttons (triangles) and make necessary updates for each line

The screenshot shows the 'Requisition Lines' interface. At the top, there is a header 'Requisition Lines' with a help icon. Below it is a table with columns: Line, Description, Item ID, Supplier, Quantity, UOM, Price, Total, Details, Comments, and Delete. The first row shows 'Testing' with a quantity of 1.0000 and a price of 50.0000. A red arrow points to the expandable triangle next to the line number '1'. Below the table, there are expandable sections for 'Shipping Line 1' and 'Accounting Lines'. The 'Shipping Line 1' section shows details for 'Ship To' (KTP3700), 'Address' (KENNESAW STATE UNIVERSITY, TOWN POINT RM3700, 3391 TOWN POINT DR NW, KENNESAW, GA 30144), 'Attention To' (Bohannon, Carolyn W), and 'Due Date'. The 'Accounting Lines' section shows '*Distribute By' set to 'Qty' and 'SpeedChart' set to an empty field. Below this, there is a sub-table for 'Accounting Lines' with columns: Line, Status, Dist Type, *Location, Quantity, Percent, Merchandise Amt, GL Unit, and Entry Event. The first row in this sub-table shows '1', 'Open', an empty 'Dist Type', 'KTP3003', '1.0000', '100.0000', '50.00', '43000', and an empty 'Entry Event'. A red arrow points to the expandable triangle next to the line number '1' in this sub-table.

To Update Accounting Allocation on Multiple lines simultaneously:

Select the line checkboxes of all the lines you need to update, then select the **Mass Change** link



- Update the accounting allocation by populating the information on **Chartfields 1 – 3** tabs or by using the **SpeedChart** field/box
- Update the **Ship To Location** if necessary

Edit Lines/Shipping/Accounting for Selected Lines Help

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 that are available for sourcing.

Supplier ID Supplier Location
Buyer Category

Shipping Information

Ship To Location ← [Add One Time Address](#)
Due Date Attention
Ship Via Freight Terms
Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information

Dist	Percent	Location	GL Unit	Account		
1	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

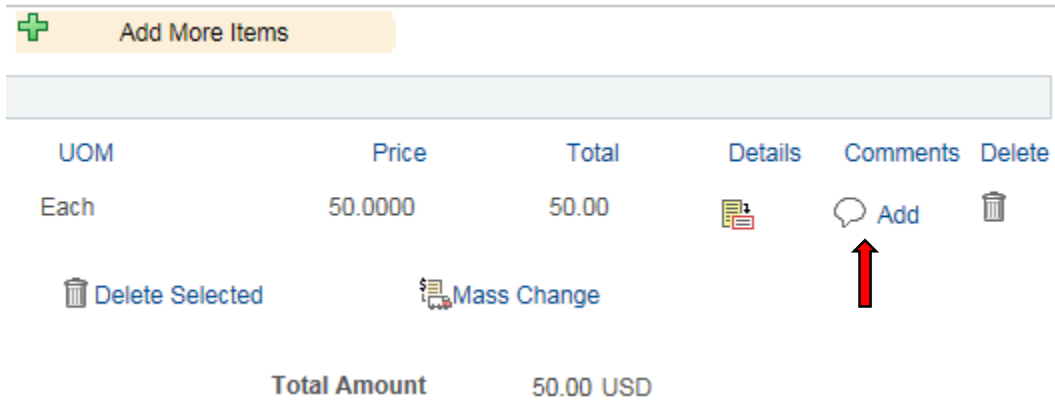
[Load Values From Defaults](#)

OK Cancel Refresh

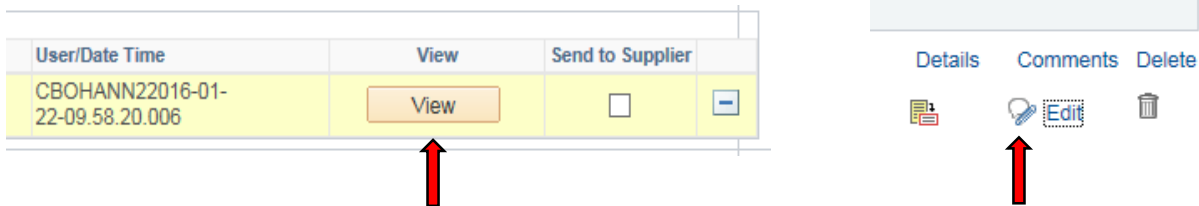


- Click **'OK'**
- Click **'OK'** for **All Distribution Lines** to apply to all selected lines

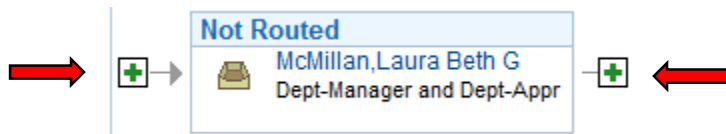
- To add supporting documentation, click on the Comments bubble or the Add link at the end of the first line of your requisition; **DO NOT** use the *"Add More Comments and Attachments"* link at the bottom of the screen.



- Click **'Add Attachments'** and **Browse** for the saved scanned documents on your computer
- Once located, click on your file then click **'Open'**
- Click **'Upload'** and then **'OK'**
- To verify you have attached your document(s), you will be able to see a **'View'** button on the screen where you added the document and you will see a paperclip attached to your Comment bubble on the line when you return to the **'Review and Submit'** screen



- Enter the business purpose or any comments necessary in the **Approval Justification** field (**NOTE:** Do not include any slashes / in your comments)
- Select the checkboxes for **'Show at Receipt'** and **'Shown at Voucher'**
- To insert any additional approvers (if requested or required),** click **'Save for Later'** then the **Preview Approvals** link
- Click on a green plus sign to search for the **User ID** of the Approver you would like to insert, click **'Insert'**



- Click **'Apply Approval Changes'** button
- Click **'Save & Submit'** to start the requisition lines into the approval workflow