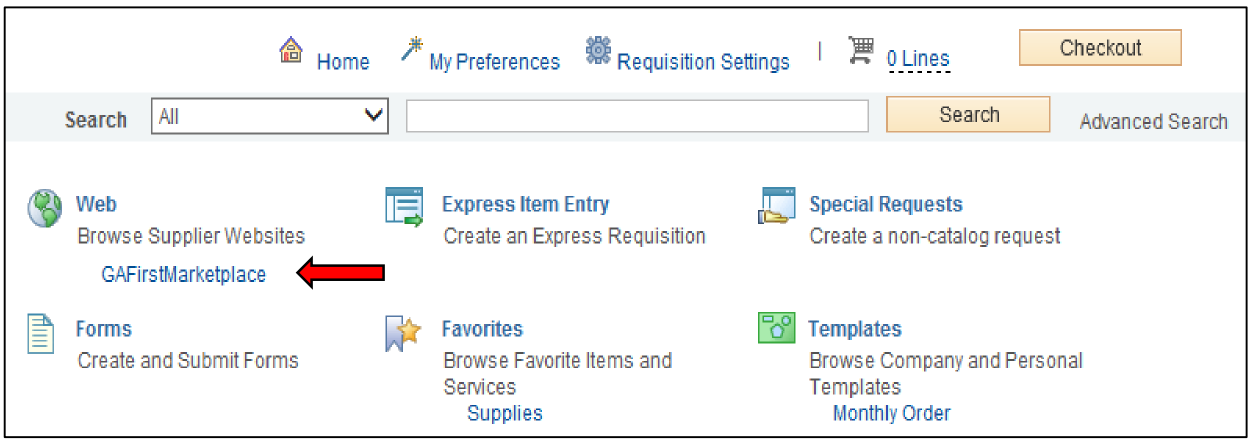
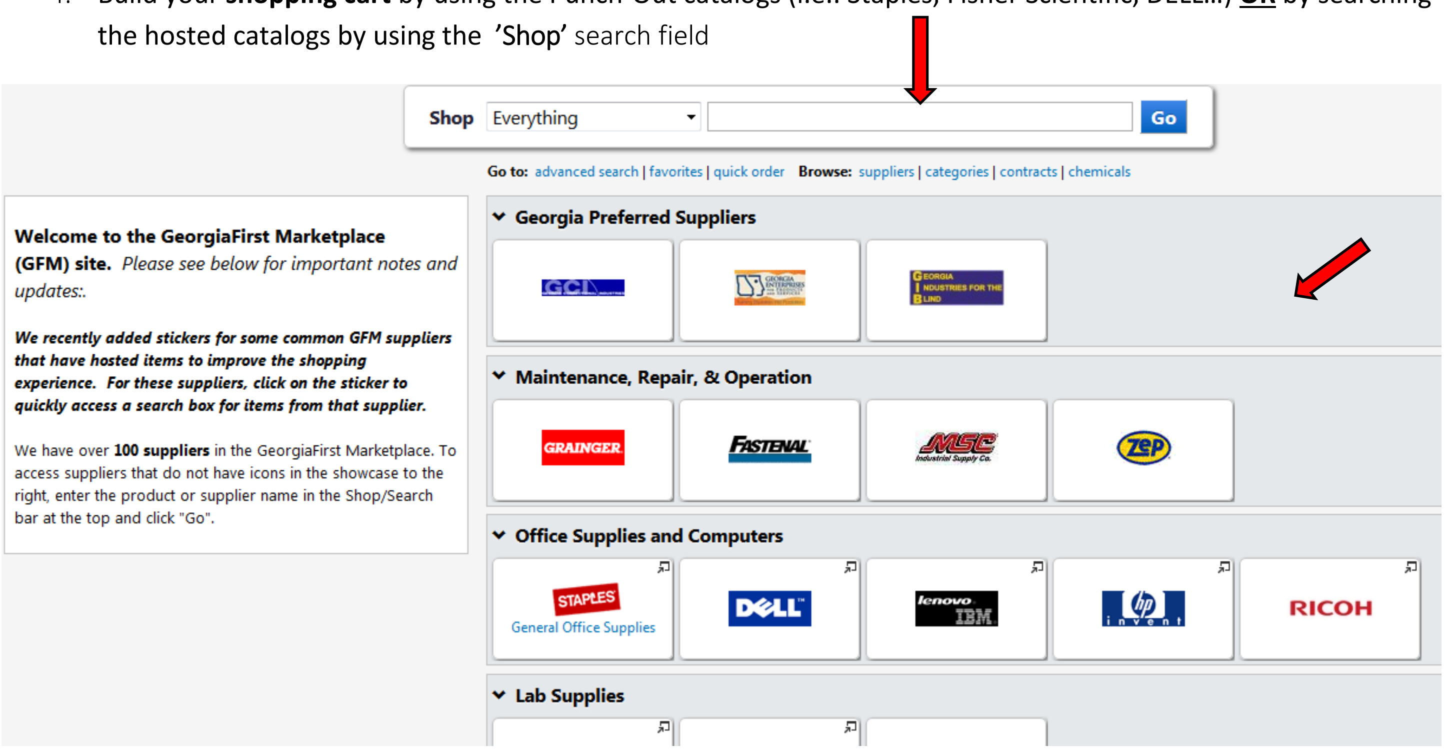
Job Aid EPC1

Create a Georgia*FIRST* Marketplace Shopping Cart & Requisition

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



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

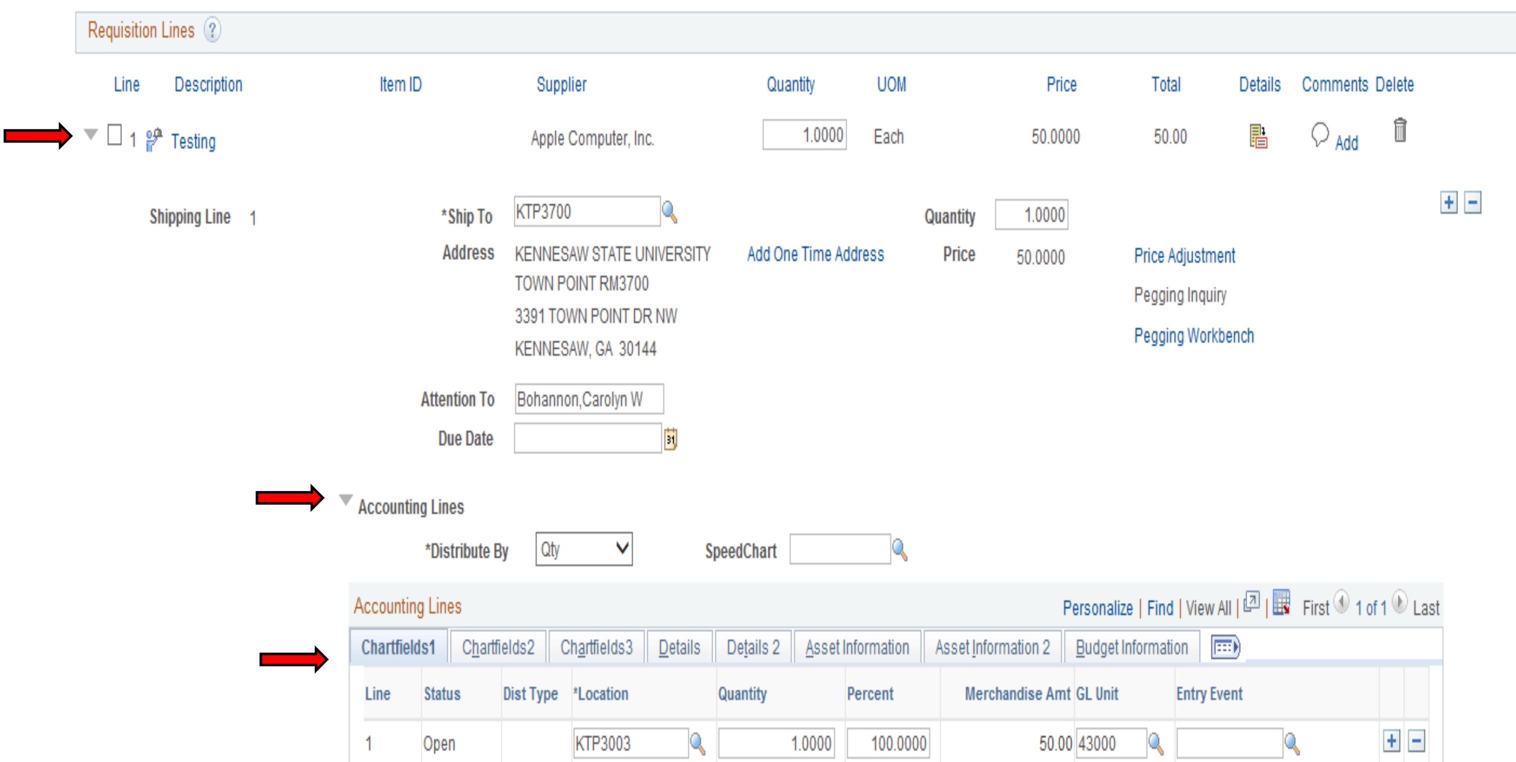


5. Once you are finished adding items to your cart, select **'Checkout'**
6. Review your cart for accuracy
7. Click **'Submit'**
8. Click **'Proceed to Checkout'**
9. Click **'Issue Requisition'**
   (Verbiage may differ for Steps 5-9 above depending on Suppliers website and/or hosted content.)

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

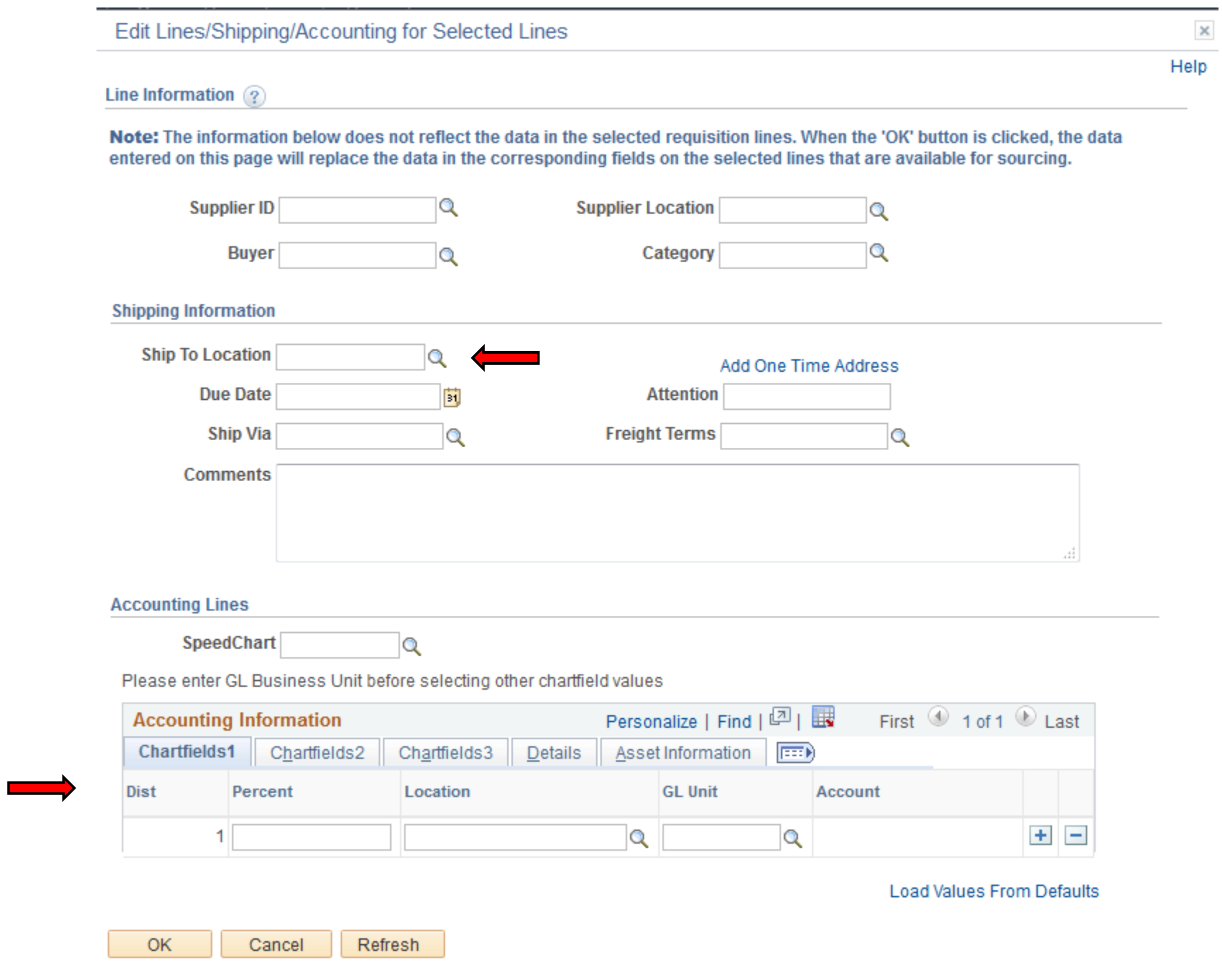


To Update Accounting Allocation on Multiple lines simultaneously:

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

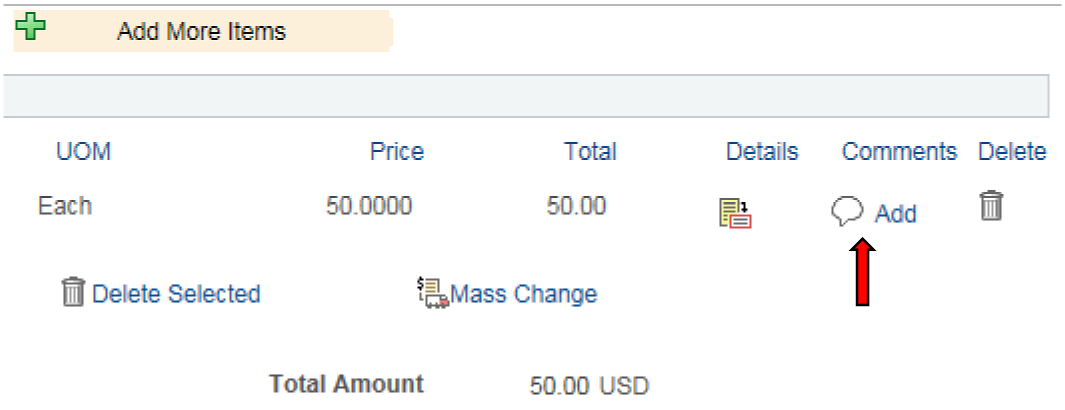
-Update the **Ship To Location** if necessary



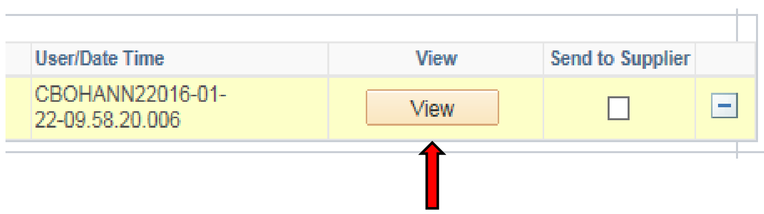
-Click **'OK'**

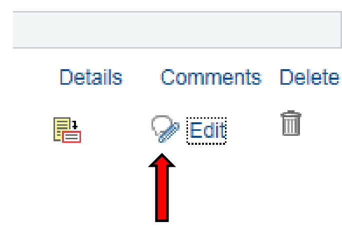
-Click **'Ok'** for **All Distribution Lines** to apply to all selected lines

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

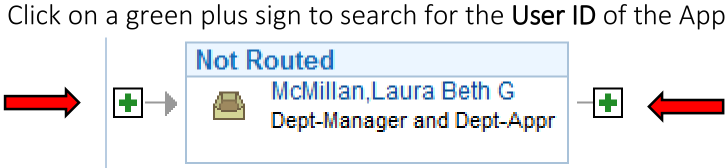


14. Click **'Add Attachments'** and **Browse** for the saved scanned documents on your computer
15. Once located, click on your file then click **'Open'**
16. Click **'Upload'** and then **'OK'**
17. To verify you have attached your document(s), you will be able to see a ***'View'*** button on the screen 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





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



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