Welcome to ePro!

An Introduction to eProcurement and GeorgiaFIRST Marketplace

Presented by
The Office of Procurement and Contracting
What is eProcurement?

- Module within PeopleSoft Financials
- Used to create and manage requisitions to procure goods and services for the University
- Routed to various Approvers
- All workflow actions are date and time stamped
- Requests are sourced to a Purchase Order once fully approved and successfully pass budget check
Benefits of ePro and the GeorgiaFIRST Marketplace

- Reduction in paper
- Faster routing for approvals
- Online browsing and comparison shopping in the GeorgiaFIRST Marketplace (GFM)
- All GeorgiaFIRST Marketplace items are contractually approved (State-wide contracts)
Reference Information

• Procurement and Contracting
  http://www.kennesaw.edu/procurement/

• eProcurement
  http://procurement.kennesaw.edu/eproresources.php
  Job aids
  Reference materials
  Training presentations
Being a Requester

• Creates and submits requisitions for processing
• Ensures correct distribution information and supporting documentation is associated with request (i.e.: accounting information, Ship To location, quotes, etc.)
• Monitors the lifecycle of the requisition for yourself and the departmental approver(s) using Manage Requisitions
• Marks items as ‘received’ using Desktop Receiving or other methods if necessary
Being an Approver

• Responsible for reviewing all documentation associated with a requisition; including the accounting allocation and supporting backup

• Approves or denies requisitions

• When denying a requisition, a comment must be included explaining why and any directive necessary for the Requester

• Sets Alternate Approver rule for times the Approver will be unable to take action on requests
Two Types of Requisitions

- **Marketplace**
  
  Items are selected from the GeorgiaFIRST Marketplace (GFM) and pulled into ePro to create a requisition.

  Automatically sourced to a PO once fully approved and passes Budget Check.

  POs are sent directly to the Suppliers without routing to Procurement.

- **Special Request**
  
  Used for goods and/or services that are not found in the GeorgiaFIRST Marketplace.

  Items are manually entered into a Requisition.

  Assigned to a Buyer to review and source to a PO once fully approved and passes budget check.
Approval Routings

Requisition approval paths can determined by:

- Department and Project (*mandatory)
- Requisition type
- Item type and/or Item cost
- NIGP/Category Codes

(Approval workflow is customizable by each institution)
Approval Stages & Paths

Stage 1: Department and Project / Business Managers

Stage 2: Agency Funds (Fund 60000)

Stage 3: Amounts

Stage 4: NIGP/Category Code – Special Routings

- Assets
- Chemical/Hazardous Material (EHS)
- Communication and Marketing *(f/k/a University Relations)*
- Facilities Planning & Design
- Grants/Research
- Human Resources
- Information Technology (UITS)/Audio Visual (AVTS)
- Pharmaceutical

Stage 5: Buyer
Escalation Period

• Requisitions will remain with an Approver pending action for six calendar days
• Requisitions with no activity/action will escalate to the ePro Administrator on the seventh day
• The ePro Administrator will reassign it back to the pending Approver
• Reassignments will happen two times. On the third escalation, the Requisition will be denied
Demo in eProcurement

ORACLE

PEOPLESOFT ENTERPRISE

GeorgiaFIRST PeopleSoft Financials

User ID
Password

Sign In

Notice to Users of this Computer System

This is a University System of Georgia computer system. This computer system, including all related equipment, networks and network devices (including internet access), is provided only for authorized University System of Georgia use. Unauthorized use may subject you to criminal prosecution. All information, including personal information, placed on or sent over this system may be monitored. Use of this system constitutes consent to these terms of usage.
Time for a BREAK
Receiving Methods
Options:

• Desktop Receiving *(EPR1)*
  – In eProcurement module
  – 95% of actions

• Receiving Assets *(EPR2)*
  – In Purchasing module
  – Asset Tag ID and Serial Numbers necessary

• Receiving via Purchasing *(EPR3)*
  – In Purchasing module
  – Not commonly used method
Receiving Tips

• Only mark the quantity of what you actually receive or the amount on the invoice; do not receive more than what’s stated.

• If you receive an email asking you to receive items in, do not mark as such if you do not have the goods or services have not been provided; or if the goods should be received in by Central Distribution.
Using “Manage Requisitions”
‘Manage Requisitions’

*aka*: Your personal assistant...

<table>
<thead>
<tr>
<th>Main Menu: eProcurement</th>
<th></th>
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<tbody>
<tr>
<td><strong>Requisition</strong></td>
<td><strong>Manage Requisitions</strong></td>
</tr>
<tr>
<td>Create a new requisition by browsing or searching company or external catalogs.</td>
<td>Review requisitions, edit or view status, cancel, receive, and Return To Vendor (Supplier).</td>
</tr>
<tr>
<td><strong>Buyer Center</strong></td>
<td><strong>Manage Requisition Approvals</strong></td>
</tr>
<tr>
<td>Create/edit/approve purchase order, source requisition, process change request.</td>
<td>Take actions on requisitions that require your approval.</td>
</tr>
<tr>
<td>Manage Purchase Orders</td>
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<tr>
<td>Expedite Requisitions</td>
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<tr>
<td>Quick Source Requisitions</td>
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<tr>
<td>7 More...</td>
<td></td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td><strong>Procurement Card Center</strong></td>
</tr>
<tr>
<td>Create a report of purchase orders, requisitions, and catalog-item usage.</td>
<td>Request procurement card, view transactions, maintain merchant cross-reference.</td>
</tr>
<tr>
<td><strong>My Profile</strong></td>
<td></td>
</tr>
<tr>
<td>Modify personal information and preferences.</td>
<td></td>
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</tbody>
</table>
A few tips:
Searching for information can sometimes be tricky because of system default settings:
- 'Request State' set to “All but Complete”
- Range in ‘Date From’ to ‘Date To’ is only a 7-day window
- ‘Origin’ set to “Special Request”
Requisition Status:
Review ‘Request State’ often for key information:

- Open
- Pending
- PO(s) Dispatched
- Approved
- Received
- Denied

Requisitions

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<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
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<tbody>
<tr>
<td>0000504505</td>
<td>0000504505</td>
<td>43000</td>
<td>01/13/2016</td>
<td>Pending</td>
<td>Not Chkd</td>
<td>2,640.00 USD</td>
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<td>0000504297</td>
<td>0000504297</td>
<td>43000</td>
<td>12/17/2015</td>
<td>Open</td>
<td>Not Chkd</td>
<td>13.17 USD</td>
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<tr>
<td>0000504274</td>
<td>Motorsports</td>
<td>43000</td>
<td>12/15/2015</td>
<td>Received</td>
<td>Valid</td>
<td>212.36 USD</td>
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<tr>
<td>0000503439</td>
<td>Owl-a-ween inflatable</td>
<td>43000</td>
<td>10/16/2015</td>
<td>Canceled</td>
<td>Valid</td>
<td>0.00 USD</td>
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</table>

<table>
<thead>
<tr>
<th>Req ID</th>
<th>Requisition Name</th>
<th>BU</th>
<th>Date</th>
<th>Request State</th>
<th>Budget</th>
<th>Total</th>
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<tbody>
<tr>
<td>0000504228</td>
<td>EQuote 1021539727142</td>
<td>43000</td>
<td>12/11/2015</td>
<td>Received</td>
<td>Valid</td>
<td>1,147.03 USD</td>
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<td>0000504226</td>
<td>0000504226</td>
<td>43000</td>
<td>12/11/2015</td>
<td>PO(s) Dispatched</td>
<td>Valid</td>
<td>1,115.37 USD</td>
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<tr>
<td>0000504218</td>
<td>0000504218</td>
<td>43000</td>
<td>12/11/2015</td>
<td>PO(s) Dispatched</td>
<td>Valid</td>
<td>6,135.00 USD</td>
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Kennesaw State University
Lifecycle Information

Each step (link) will give you information:
Action Items

Multiple actions are available for a Requisition using (Select Action):

- Approvals
- Copy
- Edit
- View Print
- Receive
Working Tips:

- **Creating Requisitions:**
  - ‘Requisition Settings’ for multi-line requisitions (use for Supplier and Category Code, UOM only)
  - **To access GFM:** eProcurement > Requisition > GFM link
  - “Item ID” will always be blank
  - Split allocate by Amount and Quantity
  - Hard-keying allocations > populate the **GL Unit** and **BudRef**
  - SpeedChart function > populate the **BudRef**
  - ‘Denied’ does not mean ‘Canceled’
  - Do not populate zeros (00000) in accounting fields that are not used
  - If documentation file will not upload, shorten the file name
Discussion Points:

• The keys to success are the P2P Decision Matrix & your Buying Partner
• Bookmark the PeopleSoft link in your browser(s); the link is and will not be published
• Do not use another person’s log-in to create or approve on their behalf
• Changes in budget ownership must go to the Office of Budget and Planning or the Office of Research/Grants before any updates will reflect in ePro routings
• Talk to and utilize your Business Managers
Resource URL Links

- University Information Technology Services (UITS)  
  http://uits.kennesaw.edu/support/forms.php

- Office of Strategic Communications and Marketing  
  http://www.kennesaw.edu/styleguide/

- Chemical/Hazardous Material  
  http://www.kennesaw.edu/ehs/

- Facilities Planning & Design/Furniture  
  https://web.kennesaw.edu/facilities/

- Office of Research and Grants  
  http://www.kennesaw.edu/research/

- Office of Budget and Planning  
  http://www.kennesaw.edu/budget/

- Office of Finance and Accounting  
  http://www.kennesaw.edu/finance/

- Policy at KSU (Policy Portal)  
  https://policy.kennesaw.edu/
Contact Information

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Leadership Team – Office of Procurement and Contracting

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<thead>
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Thank you for attending!

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