9.2 Financials Upgrade

eProcurement
Agenda

• Navigation
• Procurement WorkCenter
• Creating a Requisition
• Approving a Requisition
• Managing Requisitions
• Requisition Selection
• Questions
Log on with your current user id/password combination.
Home Page
Click on the Procurement tile
Click on the Procurement tile to go to the Procurement WorkCenter

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Welcome to Financials 9.2 Upgrade Training Database

Please take a note of the following:

1. The UAT environment is a test environment; performance may not be the same as production.
2. Batch processes will be run daily at 4 pm starting on Monday, June 18th.
3. The data in UAT is a copy of Production from March 29th, 2018. Anything added to Production since March 29th will NOT be in the UAT environment.
4. The current open period for the UAT environment is Period 12 & 1 (June & July 2018).
5. Please copy and paste the Luminist Test URL to your web browser: https://rhbil.t.gas.gov/luminist/luminist.html. Please allow 30 minutes to see your report.
6. For any issues, please send an email to FS97Upgrade@sao.ga.gov. The team will
Procurement WorkCenter menu is based on your security profile. You will see the options that are set up for your profile. To scroll through the options, put your cursor on the gray scroll bar.
To create a requisition, click on the Requisition menu option under the eProcurement menu.
Requisition Settings page
Create Requisition page

Welcome: Pauline Barnett 404/212-4718

Options:
- Request Options
- Search: Web

Web:
- Georgia Virtual Catalogs
- Express Item Entry
- Special Requests
- Favorites
- Templates
- ePro Services
- Fixed Cost Service
- Variable Cost Service
- Time and Materials

Web Information:

Georgia Virtual Catalogs

Team Georgia Marketplace virtual catalogs contain goods and services that are available via statewide contracts or agency specific contracts. The virtual catalogs allow requesters to search Georgia-specific catalogs available through our marketplace.
Adding Items
Adding Items
Enter the required item information. Look up the NIGP code if needed. Click Add to Cart.
Items in your Shopping Cart

Procurement WorkCenter

Create Requisition

Welcome Pauline Barnett 464/212/4718

Request Options

Search

Special Requests

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description

*Price

*Quantity

*Category

Supplier

Supplier ID

Supplier Name

Supplier ID

Manufacturer

Mtng ID

Special Requests Entry

Favorites

Templates

ePro Services

Fixed Cost Service

Variable Cost Service

Time and Materials

Hover cursor over Lines link

Click on Lines link

Shopping Cart

Description

Qty

UOM

GREEN WIDGETS

10

EA

WHITE WIDGETS

10

EA

Total Lines

2

Total Amount

$400.00

Close

Checkout

NIGP LOOKUP
When all items are entered, click on the Checkout button
Confirmation page

**Confirmation**

Your requisition has been submitted.

**Requested For:** Pauline Barnett 404/212-4718

**Requisition Name:** 9.2 DEMO

**Requisition ID:** 0000110025

**Business Unit:** 44100

**Status:** Pending

**Priority:** Medium

**Budget Status:** Not Checked

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**Origin Stage**

- **9.2 DEMO: Pending**
  - Pending
  - Multiple Approvers
  - BU Origin - A

- **Not Routen**
  - Multiple Approvers
  - BU Origin - B

- **Not Routen**
  - Multiple Approvers
  - Timothy Swink 404/631-1367
  - PCard User List

---

**Actions:**

- [View printable version]
- [Edit This Requisition]
- [Check Budget]
- [Apply Approval Changes]
- [Create New Requisition]
- [Manage Requisitions]
Create a Virtual Catalog Requisition

News and Announcements

Financials 9.2 Upgrade Introductory Videos
1. Homepage (1:35)
2. WorkCenters (2:06)
3. Mobile Approvals (1:23)
For additional information visit the 9.2 Upgrade page at https://sao.georgia.gov/financials-92-upgrade

Welcome to Financials 9.2 Upgrade Training Database

Please Take a Note of The Following:
1) The UAT environment is a test environment: Performance may not be the same as Production.
2) Batch processes will run daily at 4 pm starting on Monday, June 18th.
3) The data in UAT is a copy of Production from March 29th, 2018. Anything added to Production since March 29th will NOT be in the UAT environment.
4) The current open period for the UAT environment is Period 12 & 1 (June & July 2018).
5) Please copy and paste the Luminist Test URL to your web browser: https://ebill.tga.gov/luminist/luminist.html. Please allow for 30 minutes to see your report.
6) For any issues, please send an email to F592Upgrade@sao.ga.gov The team will work to resolve your issues as soon as possible.
7) The URL will be different than the current URL, SAO will send the new Production URL link on the Go-Live day.
8) Please remember to note down your Favorites as you will need to re-enter in Production when we go live.

On Behalf of SAO TeamWorks team, I would like to Thank you for your ongoing support.
Requisition Settings page

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>44100</td>
</tr>
<tr>
<td>Requester</td>
<td>BARNPAU2</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>Card Number</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Expiration Date</td>
<td>09/30/2019</td>
</tr>
<tr>
<td>Requisition Name</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Account Name</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Priority</td>
<td>Medium</td>
</tr>
<tr>
<td>Authorized EPA</td>
<td>No</td>
</tr>
<tr>
<td>Accounting Date</td>
<td>09/27/2018</td>
</tr>
</tbody>
</table>

**Default Options**
- **Default**: Select this if you want the defaults specified below to be applied when there are no predefined values for these fields.
- **Override**: Select this if you want the defaults to override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults**
- **Supplier**
- **Supplier Location**
- **Unit of Measure**
- **Category**
- **Buyer**

**Shipping Defaults**
- **Ship To**: PO_016003
- **Due Date**
- **Attention**

**Distribution Defaults**
- **SpeedChart**

**Accounting Defaults**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dist</td>
<td>1</td>
</tr>
<tr>
<td>Percent</td>
<td>100</td>
</tr>
<tr>
<td>Location</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>GL Unit</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Account</td>
<td>514003</td>
</tr>
<tr>
<td>Fund</td>
<td>10100</td>
</tr>
<tr>
<td>Dept</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Fund Src</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Program</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>Class</td>
<td><strong>HIDDEN</strong></td>
</tr>
<tr>
<td>PC Bus Unit</td>
<td><strong>HIDDEN</strong></td>
</tr>
</tbody>
</table>

**Options**
- **OK**
- **Cancel**
Click on the Georgia Virtual Catalog link
The Virtual Catalog page displays. There are no changes in the Virtual Catalog. This will look the same as it does today.
Review Cart and Submit Order

My Cart

Items for Delivery

- **BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink. 50/Pack (GSM609-BLK)**
  - Price: $7.38 PK/60
  - Quantity: 1
  - Total: $7.38
  - ON CONTRACT

- **Post-It® Super Sticky Notes, 3" x 3" Canary Yellow, 90 Sheets/Pad, 12 Pads/Pack (65412SSCY)**
  - Price: $13.52 PK/12
  - Quantity: 1
  - Total: $13.52

Subtotal: $52.65
Total: $52.65

[SUBMIT ORDER]
Confirm Cart and Click Proceed to Checkout then Assign Cart
Confirmation

Your requisition has been submitted.

Requested For: Pauline Barnett 404/212-4718
Requisition Name: 9.2 WEBINAR
Requisition ID: 0080100026
Business Unit: 44100
Status: Pending
Priority: Medium
Budget Status: Not Checked

Number of Lines: 3
Total Amount: 52.65 USD

 Origin Stage

9.2 WEBINAR: Pending

Origin
Pending
Multiple Approvers
BU Origin - A

Not Routed
Multiple Approvers
BU Origin - B

Not Routed
Timothy Swink 404/631-1367
PCard User List
Mobile Requisition – For Use Off-Site with a Mobile Device
### My Orders

**My Orders displays – Requisitions created by the user**

<table>
<thead>
<tr>
<th>Requisition Name</th>
<th>Business Unit/Requisition ID</th>
<th>Requisition Date</th>
<th>Requester</th>
<th>Request State</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDX 1</td>
<td>48400/0000068869</td>
<td>09/26/2018</td>
<td>TASWINK</td>
<td>PO(s) Dispatched</td>
<td>18.88 USD</td>
</tr>
<tr>
<td>EDX TEST</td>
<td>48400/0000068868</td>
<td>09/26/2018</td>
<td>TASWINK</td>
<td>PO(s) Dispatched</td>
<td>45.27 USD</td>
</tr>
<tr>
<td>EDX 2</td>
<td>48400/0000068870</td>
<td>09/26/2018</td>
<td>TASWINK</td>
<td>PO(s) Dispatched</td>
<td>45.27 USD</td>
</tr>
<tr>
<td>TEST</td>
<td>48400/0000068867</td>
<td>09/13/2018</td>
<td>TASWINK</td>
<td>Approved</td>
<td>150.00 USD</td>
</tr>
<tr>
<td>TEST</td>
<td>48400/0000068866</td>
<td>09/13/2018</td>
<td>TASWINK</td>
<td>Approved</td>
<td>120.00 USD</td>
</tr>
<tr>
<td>0000068864</td>
<td>48400/0000068864</td>
<td>09/10/2018</td>
<td>TASWINK</td>
<td>Pending</td>
<td>100.00 USD</td>
</tr>
<tr>
<td>0000068865</td>
<td>48400/0000068865</td>
<td>09/10/2018</td>
<td>TASWINK</td>
<td>Pending</td>
<td>100.00 USD</td>
</tr>
<tr>
<td>0000068863</td>
<td>48400/0000068863</td>
<td>09/07/2018</td>
<td>TASWINK</td>
<td>Pending</td>
<td>150.00 USD</td>
</tr>
<tr>
<td>0000068862</td>
<td>48400/0000068862</td>
<td>08/01/2018</td>
<td>TASWINK</td>
<td>Approved</td>
<td>9.00 USD</td>
</tr>
<tr>
<td>0000068857</td>
<td>48400/0000068857</td>
<td>05/31/2018</td>
<td>TASWINK</td>
<td>Approved</td>
<td>269.66 USD</td>
</tr>
</tbody>
</table>

**Recently Ordered Items**

- **Favorites**
- **Web Suppliers**
- **Special Requests**
Requisition Approvals – Click on the Homepage Approvals tile
Pending Approvals list displays – Click a requisition to approve it

<table>
<thead>
<tr>
<th>Requisition</th>
<th>Description</th>
<th>Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>164.05 USD</td>
<td>March Office 2016 - 44100 / 0000078667 Angel Ford 404/243-2110</td>
<td>Medium Priority</td>
<td>03/22/2016</td>
</tr>
<tr>
<td>390.48 USD</td>
<td>018 SWCC Staples Supplies - 44100 / 0000082218 Kimberly Otelus 404/244-2938</td>
<td>Medium Priority</td>
<td>06/16/2016</td>
</tr>
<tr>
<td>200.00 USD</td>
<td>SSPHA - Dr. Charles Li - 44100 / 0000086592 Angel Ford 404/243-2110</td>
<td>Medium Priority</td>
<td>09/07/2016</td>
</tr>
<tr>
<td>974.68 USD</td>
<td>018-SWC-STAPLES-SUPPLIES - 44100 / 0000092511 Kecia Boyd 404/212-3659</td>
<td>Medium Priority</td>
<td>03/06/2017</td>
</tr>
<tr>
<td>380.80 USD</td>
<td>016-SWC-STAPLES - 44100 / 0000094020 Shawn Silvera 404/212-3650</td>
<td>Medium Priority</td>
<td>04/12/2017</td>
</tr>
<tr>
<td>424.59 USD</td>
<td>016-SWC-GRAINGER-SUPPLIES - 44100 / 0000095353 Lynn Bayonne 404/212-4784</td>
<td>Medium Priority</td>
<td>05/12/2017</td>
</tr>
<tr>
<td>99.35 USD</td>
<td>017-SWC-DELL - 44100 / 0000096600 Champagne Tucker 404/212-4817</td>
<td>Medium Priority</td>
<td>06/09/2017</td>
</tr>
<tr>
<td>615.02 USD</td>
<td>016-SWC-STAPLES-SUPPLIES - 44100 / 0000098337 Keyonna Jiggetts 404/212-5485</td>
<td>Medium Priority</td>
<td>08/22/2017</td>
</tr>
<tr>
<td>2,568.97 USD</td>
<td>018-SWCC-Staples supplies - 44100 / 0000100159 Clark-McDaniel, Dianne 404/243-2110</td>
<td>Medium Priority</td>
<td>08/28/2017</td>
</tr>
</tbody>
</table>

Some transactions are not displayed.
Requisition – top half of page

Request for 016-SWCC-Grainger-Supplies
842.06 USD

☐ Header is pending your approval

Summary

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>44100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routed Date</td>
<td>March 28, 2018</td>
</tr>
<tr>
<td>Requester</td>
<td>Sandra Sheppard 404/212-4690</td>
</tr>
<tr>
<td>Approval Justification</td>
<td>2018-03-28 SHEPSANZ 01 018-SWCC-Grainger 99999-001-SPD0000114-003 Sandra Sheppard 661 Supplies are needed for daily use in EVS Department</td>
</tr>
<tr>
<td>Origin</td>
<td>016</td>
</tr>
</tbody>
</table>

Requisition ID 0000106948
Requisition Date March 28, 2018
Entered by Sandra Sheppard 404/212-4690
Budget Header Status Valid

More Information

Card Number
Name