



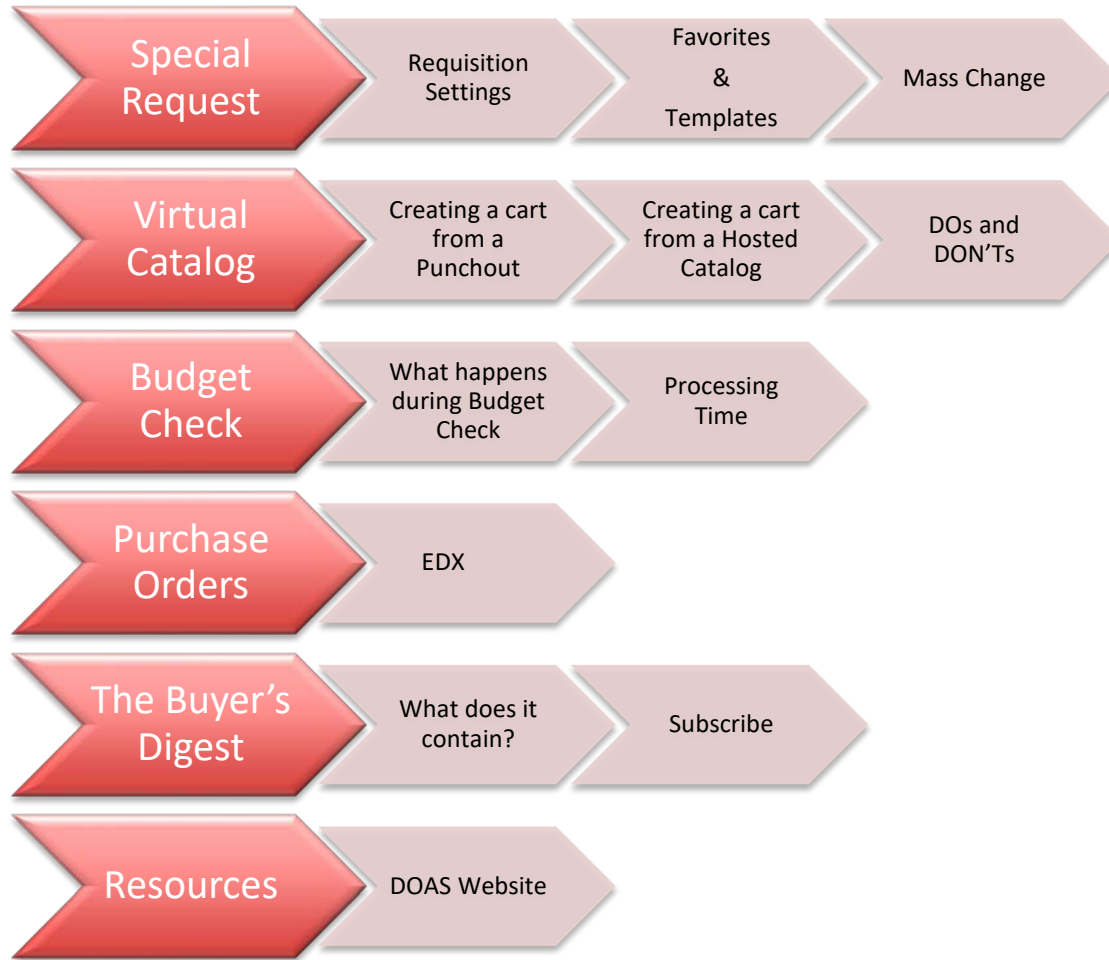
ePro Requisition Review

Margaret Robert, IT Business Analyst, SPD

October 5 and 7, 2019



Agenda





Log in



Financial Systems

TeamWorks FSCM



User ID

Password

Sign In



Click on the Procurement Tile

TeamWorks

▼ Home


News and Announcements



Asset Management




Commitment Control



Payables




Procurement



Purchase Orders




Approvals



6

My Favorites



My Sourcing Events



Requisition



Procurement Workcenter

Procurement WorkCenter

Main

Reports/Queries

Pagelets

Links

eProcurement

Requisition

- Manage Requisitions
- Manage Requisition Approvals
- DOAS Quick Reference Guide List

Pcard

- Reconcile Statement
- Review Disputes
- Cardholder Profile
- Assign Proxies
- Assign SpeedCharts
- Load Voucher Stage

Purchasing

- Requisition Selection
- Add/Update POs
- Review Purchase Orders

Welcome to the Buyer WorkCenter

Welcome to the WorkCenter. This WorkCenter has one "Task Panel" and one "Work Area". The "Task Panel" is on the side displaying the pagelets assigned to the WorkCenter page and the "Work Area" displays transaction pages such as this page.

Each pagelet may have the following actions depending on its configuration: Hide/Show, Reload, Personalize.

Within each pagelet there may be "Open the content in a new window", "Collapses a group of links" and "Expands a group of links" actions available depending on the pagelet.

Requisition settings

Requisition Settings

Business Unit Administrative Services, Dept
***Requester** Margaret Robert
***Currency** Authorized DPA
Accounting Date
Requisition Name
Priority
Card Number
Expiration Date
 Use Procurement Card

Default Options

- Default** If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- Override** If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Supplier
Supplier Location
Buyer
Category
Unit of Measure

Shipping Defaults

Ship To
Due Date
Attention

Distribution Defaults

SpeedChart

| Accounting Defaults | | | | | | | | | | | Personalize Find <input type="button" value="Q"/> <input type="button" value="B1"/> |
|---------------------|-------------------------------|---|---|--|---|--|---|---|---|------------------------------------|---|
| Chartfields1 | | | | | | | | | | | First <input type="button" value="◀"/> 1 of 1 <input type="button" value="▶"/> Last |
| Details | | | | | | | | | | | <input type="button" value="B1"/> |
| Asset Information | | | | | | | | | | | <input type="button" value="B1"/> |
| Dist | Percent | Location | GL Unit | Account | Fund | Dept | Fund Src | Program | Class | PC Bus Un | |
| 1 | <input type="text" value=""/> | <input type="text" value="PO_224001"/> <input type="button" value="Q"/> | <input type="text" value="40300"/> <input type="button" value="Q"/> | <input type="text" value="100001"/> <input type="button" value="Q"/> | <input type="text" value="10000"/> <input type="button" value="Q"/> | <input type="text" value="4030204000"/> <input type="button" value="Q"/> | <input type="text" value="02100"/> <input type="button" value="Q"/> | <input type="text" value="0000114"/> <input type="button" value="Q"/> | <input type="text" value="438"/> <input type="button" value="Q"/> | <input type="text" value="40300"/> | |

Special Request Requisition

DEMO

Create a Special Request Requisition for landscaping items

- The supplier has an Agency contract
- Order sod, flowering plants, and green shrubs
- Supplier ID is: 0000593376
- Contract ID is: 40300-401-0000003697

You will learn:

- Adding a Supplier ID to a requisition
- Adding a Contract ID to a requisition line
- Mass Change

Create a Requisition

Create Requisition ?

Welcome Margaret Robert



Home



My Preferences



Requisition Settings



0 Lines

Checkout

Request Options

Search Web

Search

Advanced Search

Web

Georgia Virtual Catalogs

Express Item Entry

Special Requests

Favorites

Templates


ePro Services

Fixed Cost Service

Variable Cost Service

Time and Materials

Web ?

| Merchant | Description |
|--|--|
|  Team Georgia Marketplace | 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. |

Add a Requisition Line

Special Requests ?

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

Item Details

| | | | |
|-------------------|------------------------------------|------------------|----------------------------------|
| *Item Description | <input type="text" value="SOD"/> | | |
| *Price | <input type="text" value="30.00"/> | *Currency | <input type="text" value="USD"/> |
| *Quantity | <input type="text" value="30."/> | *Unit of Measure | <input type="text" value="EA"/> |
| *Category | <input type="text"/> | Due Date | <input type="text"/> |

NIGP LOOKUP

Supplier

| | |
|------------------|----------------------|
| Supplier ID | <input type="text"/> |
| Supplier Name | <input type="text"/> |
| Supplier Item ID | <input type="text"/> |

[Suggest New Supplier](#)

- Enter the Item Description, the Price, the Quantity, and the Unit of Measure
- To look up the NIGP code, click on NIGP LOOKUP – a new tab will open

NIGP Lookup

- Enter keyword search and click NIGP SEARCH
- Choose the 5-digit NIGP that is appropriate for your item
- Close the NIGP search tab to return to your requisition

The screenshot shows the 'NIGP KEY WORD SEARCH' interface on the Georgia Procurement Registry website. The header includes the 'Team Georgia Marketplace' logo and the 'Georgia Procurement Registry' title, along with the 'Georgia Department of Administrative Services' logo. The main content area contains instructions for searching NIGP descriptions at both the 3-digit and 5-digit levels. It provides a text input field for a keyword search, followed by two radio button options: 'and' and 'or'. Below this, there are two more text input fields, each with its own 'and' and 'or' radio button options. At the bottom of the form, there are two buttons: 'NIGP SEARCH' and 'Reset'. The URL 'PR_nigp_keyword_selectionPUBLIC.jsp' is visible in the bottom right corner of the page.

Team Georgia Marketplace
Georgia Procurement Registry

Georgia
Department of Administrative Services

NIGP KEY WORD SEARCH

The NIGP descriptions at both the 3 digit and 5 digit level will be searched.

Please enter key word or phrase in the appropriate box.
Partial word search criteria may be used.
Words and phrases are NOT case sensitive.
Up to three words or phrases connected by "and" or "or" may be used for each search.

and or

and or

PR_nigp_keyword_selectionPUBLIC.jsp

Checkout

- Enter all requisition lines.
- Click Checkout when done

Home | My Preferences | Requisition Settings | 3 Lines | **Checkout**

Search All Search Advanced Search

Special Requests ?

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

Item Details

| | |
|-------------------|----------------------|
| *Item Description | <input type="text"/> |
| *Price | <input type="text"/> |
| *Quantity | <input type="text"/> |
| *Category | <input type="text"/> |
| *Currency | USD |
| *Unit of Measure | <input type="text"/> |
| Due Date | <input type="text"/> |

NIGP LOOKUP

Create a Template

You can create a template which is a collection of items that you may order on a regular basis.


- This is for Special Request Requisitions only, not items from the Virtual Catalog
- Check each item that you would like to add to the Template
- Click on the Add to Template(s) link

Checkout - Review and Submit

Review the item information and submit the req for approval.


 My Preferences 

Requisition Summary




| | | | | |
|-----------------------------|---|---|---|---|
| Business Unit | <input type="text" value="40300"/> | Administrative Services, Dept | Requisition Name | <input type="text"/> |
| *Requester | <input type="text" value="ROBEMAR"/> | Margaret Robert | Priority | <input type="text" value="Medium"/> |
| *Currency | <input type="text" value="USD"/> | <input type="checkbox"/> Authorized DPA | | |
| Card Number Expiration Date | <input type="text"/> | Accounting Date | <input type="text" value="11/13/2019"/> |  |
| | <input type="checkbox"/> Use Procurement Card | | | |




Cart Summary: Total Amount 1,325.00 USD

Expand lines to review shipping and accounting details

 Add More Item

Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM |
|---|------------------|---------|----------|--------------------------------------|------|
| <input checked="" type="checkbox"/> 1  | SOD | | | <input type="text" value="30.0000"/> | Each |
| <input checked="" type="checkbox"/> 2  | FLOWERING PLANTS | | | <input type="text" value="20.0000"/> | Each |
| <input checked="" type="checkbox"/> 3  | GREEN SHRUBS | | | <input type="text" value="10.0000"/> | Each |

Select All / Deselect All Select lines to:  Add to Favorites  Add to Template(s)  Delete Selected

Create a Template

- Enter a Template Name and Description
- Click OK

*Currency USD

Add items to Templates

Add Selected Items to Template(s)

You have no Personal Template(s).

Add a new template

Template Name LANDSCAPING ITEMS

Description SOD, FLOWERING PLANTS, SHRUBS

OK Cancel


Add Items to Favorites

You can add items to a list of Favorites that you may order on a regular basis.

- This is for Special Request Requisitions only, not items from the Virtual Catalog
- Check each item that you would like to add to your Favorites list
- Click on the Add to Favorites link
- Click Ok on the confirmation window

Checkout - Review and Submit

Review the item information and submit the req for approval.

 My Preferences

Requisition Summary

| | | | | |
|---|--------------------------------------|---|---|----------------------------------|
| Business Unit | <input type="text" value="40300"/> | Administrative Services, Dept | Requisition Name | <input type="text"/> |
| *Requester | <input type="text" value="ROBEMAR"/> | Margaret Robert | Priority | <input type="text" value="Med"/> |
| *Currency | <input type="text" value="USD"/> | <input type="checkbox"/> Authorized DPA | | |
| Card Number | <input type="text"/> | Accounting Date | <input type="text" value="11/13/2019"/> | <input type="text"/> |
| Expiration Date | <input type="text"/> | | | |
| <input type="checkbox"/> Use Procurement Card | | | | |



Cart Summary: Total Amount 1,325.00 USD

Expand lines to review shipping and accounting details

 Add

Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM |
|---------------------------------------|------------------|---------|----------|--------------------------------------|------|
| <input type="checkbox"/> 1 | SOD | | | <input type="text" value="30.0000"/> | Each |
| <input type="checkbox"/> 2 | FLOWERING PLANTS | | | <input type="text" value="20.0000"/> | Each |
| <input checked="" type="checkbox"/> 3 | GREEN SHRUBS | | | <input type="text" value="10.0000"/> | Each |

Select All / Deselect All Select lines to:  Add to Favorites  Add to Template(s)  Delete

Use a Template or Favorites

Templates and Favorites are used on Special Request Requisitions only. **Do not create templates or favorites in PeopleSoft for Virtual Catalog items.**

- On the Create Requisition page, select Templates.
- Click on the chevron next to the Template description to view the items in the Template
- When items are saved as a Template, it includes the original quantity, price, and NIGP

Create Requisition ?

Welcome Margaret Robert

[Home](#) [My Preferences](#) [Requisition Settings](#)

Request Options

Search Templates

Search

Web
Georgia Virtual Catalogs

Express Item Entry

Special Requests

Favorites


Templates

ePro Services
Fixed Cost Service
Variable Cost Service
Time and Materials

Templates ?

Quantity

 SOD, FLOWERING PLANTS, SHRUBS

 Add

Personal Template Items

Fir



SOD

Item ID
Supplier Item ID
Mfg Item ID
Price 30.0000 USD
UOM Each
Quantity 30.0000

Supplier Name
Supplier ID
Manufacturer
Manufacturer ID
Lead Time Days



FLOWERING PLANTS

Item ID
Supplier Item ID
Mfg Item ID
Price 15.0000 USD
UOM Each
Quantity 20.0000

Supplier Name
Supplier ID
Manufacturer
Manufacturer ID
Lead Time Days



GREEN SHRUBS

Item ID
Supplier Item ID
Mfg Item ID
Price 12.5000 USD
UOM Each
Quantity 10.0000

Supplier Name
Supplier ID
Manufacturer
Manufacturer ID
Lead Time Days

Use Templates or Favorites

Templates and Favorites are used on Special Request Requisitions only. **Do not create templates or favorites in PeopleSoft for Virtual Catalog items.**

- On the Create Requisition page, select Favorites.
- Click on the chevron next to the Template description to view the items in the Template
- When items are saved as a Favorite, it includes the original quantity and price
- Check the box next to the Favorite you are adding to the requisition
- Enter the Quantity wanted and click Add.

Create Requisition ?

Welcome Margaret Robert

[Home](#) [My Preferences](#) [Requisition Settings](#)

Request Options

Search Favorites

Search

Manage Favorites Group

Web
Georgia Virtual Catalogs

Express Item Entry

Special Requests

Favorites

Templates

ePro Services

Fixed Cost Service
Variable Cost Service
Time and Materials

Favorites ?

Ungrouped Items

Favorites

GREEN SHRUBS

Item ID
Supplier Item ID
Mfg Item ID

Price 12.50

USD

UOM Each

Supplier
Supplier ID
Manufacturer
Manufacturer ID
Lead Time Days

Quantity

Add

Review and Submit – Mass Change

Mass Change can be used if the same change needs to be made to two or more lines

- Select the lines to be changed
- Click on the Mass Change link

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit Administrative Services, Dept Requisition Name

*Requester Margaret Robert Priority

*Currency Authorized DPA

Accounting Date

Card Number Expiration Date

Use Procurement Card

Cart Summary: Total Amount 1,325.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total |
|---------------------------------------|------------------|---------|----------|--------------------------------------|------|---------|--------|
| <input checked="" type="checkbox"/> 1 | SOD | | | <input type="text" value="30.0000"/> | Each | 30.0000 | 900.00 |
| <input type="checkbox"/> 2 | FLOWERING PLANTS | | | <input type="text" value="20.0000"/> | Each | 15.0000 | 300.00 |
| <input checked="" type="checkbox"/> 3 | GREEN SHRUBS | | | <input type="text" value="10.0000"/> | Each | 12.5000 | 125.00 |

Select All / Deselect All

Select lines to:

[Add to Favorites](#)

[Add to Template\(s\)](#)

[Delete Selected](#)

[Mass Change](#)



Mass Change

In this DEMO, we know that the Supplier ID is 0000593376. Using Mass Change, the Supplier ID can be added to each line.

- When you click the Mass Change link, the Edit Lines/Shipping/Accounting for Selected Lines window displays
- In this example, enter the Supplier ID, 0000593376, and click on the magnifying glass
- The Supplier Search will display.
- Click next to the Supplier ID to select and then click Select

Mass Change

view and S **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.

Business U

*Request **Supplier ID** 0000593376 Supplier Location

*Current Buyer Category

Card Numbr
Expiration D Shipping Information

Supplier Search

Supplier ID 0000593376 Find

Name Reset

Short Supplier Name

Alternate Supp Name

City

Country State

Postal Code

Search Results Personalize | Find | View All | First 1 of 1 Last

| | Supplier ID | Supplier Name | Default Location | Default Location Description | Address | City | State | |
|-------------------------------------|--------------|--------------------------------------|------------------|------------------------------|-------------|--------|-------|--|
| <input checked="" type="checkbox"/> | 1 0000593376 | ATLANTA PROFESSIONAL LANDSCAPING LLC | 000001 | ACH PRIMARY | PO BOX 2633 | SMYRNA | GA | |

Select Cancel

Attention To

Mass Change

- Click OK from the Mass Change window to go back to the Review and Submit page.
The Supplier is now on every line that was selected for Mass Change.

Checkout - Review and Submit

Review the item information and submit the req for approval.



My Preferences



Requisition Settings

Requisition Summary

| | | | | |
|-----------------|---|---|---|-------------------------------------|
| Business Unit | <input type="text" value="40300"/> | Administrative Services, Dept | Requisition Name | <input type="text"/> |
| *Requester | <input type="text" value="ROBEMAR"/> | Margaret Robert | Priority | <input type="text" value="Medium"/> |
| *Currency | <input type="text" value="USD"/> | <input type="checkbox"/> Authorized DPA | | |
| Card Number | <input type="text"/> | Accounting Date | <input type="text" value="11/13/2019"/> | |
| Expiration Date | <input type="text"/> | | | |
| | <input type="checkbox"/> Use Procurement Card | | | |

Cart Summary: Total Amount 1,325.00 USD

Expand lines to review shipping and accounting details



Add More Items






Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price |
|----------------------------|------------------|---------|--------------------------------------|--------------------------------------|------|--------|
| <input type="checkbox"/> 1 | SOD | | ATLANTA PROFESSIONAL LANDSCAPING LLC | <input type="text" value="30.0000"/> | Each | 30.000 |
| <input type="checkbox"/> 2 | FLOWERING PLANTS | | ATLANTA PROFESSIONAL LANDSCAPING LLC | <input type="text" value="20.0000"/> | Each | 15.000 |
| <input type="checkbox"/> 3 | GREEN SHRUBS | | ATLANTA PROFESSIONAL LANDSCAPING LLC | <input type="text" value="10.0000"/> | Each | 12.500 |

Add a Contract to a Line

- To add a Contract ID to a requisition line, click on the Line Details icon.
- To add a Contract ID to multiple lines, you will need to go into the Line Details of each line.

Requisition Lines

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details |
|--|------------------|---------|--|--------------------------------------|------|--------|--------|---|
| ▶ <input type="checkbox"/> 1  | SOD | | ATLANTA PROFESSIONAL LANDSCAPING LLC | <input type="text" value="30.0000"/> | Each | 30.000 | 900.00 |  |
| ▶ <input type="checkbox"/> 2  | FLOWERING PLANTS | | ATLANTA PROFESSIONAL LANDSCAPING LLC | <input type="text" value="20.0000"/> | Each | 15.000 | 300.00 |  |
| ▶ <input type="checkbox"/> 3  | GREEN SHRUBS | | ATLANTA PROFESSIONAL LANDSCAPING LLC | <input type="text" value="10.0000"/> | Each | 12.500 | 125.00 |  |

Add a Contract to a Line – Line Details

We added the Supplier ID using Mass Change.

- On the Line Details window, click on the magnifying glass next to the Contract ID
- A window will open displaying every contract for the Supplier ID.
- Click on the Contract ID to select it then click OK to back to the Review and Submit page.
- Do this for each line.

The screenshot shows the 'Line Details' window with a 'Look Up Contract ID' dialog box. The dialog box has the following fields:

- SetID: STATE
- Contract ID: begins with
- Short Supplier Name: begins with
- Description: begins with

Buttons: Look Up, Clear, Cancel, Basic Lookup

Search Results:

| Supplier SetID | Supplier ID | Contract ID | Short Supplier Name | Contract Status | Description | Contract Beginning Date |
|----------------|-------------|----------------------|---------------------|-----------------|--------------------------|-------------------------|
| STATE | 0000593376 | 40300-401-0000003697 | ATLANTAPRO-012 | Approved | GAA LANDSCAPING SERVICES | 07/01/2019 |

Below the dialog box, the 'Contract ID' field in the main window has a magnifying glass icon next to it. A red arrow points to this icon. Another red arrow points to the 'Contract ID' field in the dialog box.

Supplier Information:

- Supplier ID: 0000593376 (ATLANTA PROFESSIONAL LANDSCAPING LLC)
- Supplier Location: 000001 (MACH PRIMARY)

Preview Approvals

Click on Preview Approvals to view the Approval Workflow

- Ad Hoc Approvers can be added on this window.

NOTE: this is the only page where an Ad Hoc Approver can be added as the first Approver

- Click on the + sign to insert an Approver.
- The existing workflow cannot be changed. Click Return or Apply to go back to the Review and Submit page.

The screenshot displays the 'Preview Approvals' interface. At the top, there are navigation links: 'Select lines to:', '+ Add to Favorites', '+ Add to Template(s)', and 'Delete Selected'. Below this, the 'Preview Approvals' title is shown. The main content area contains requisition details:

| | | | |
|------------------|-----------------|-----------------|--------------|
| Requested For | Margaret Robert | Number of Lines | 3 |
| Requisition Name | 0000003904 | Total Amount | 1,325.00 USD |
| Requisition ID | 0000003904 | | |
| Business Unit | 40300 | | |
| Status | Open | | |
| Priority | Medium | | |
| Budget Status | Not Checked | | |

Below the details is the 'Origin Stage' section, titled 'Requisition 0000003904:Initiated' with a '+ Start New Path' button. The workflow diagram shows two 'Not Routed' stages:

```
graph LR; A[Not Routed  
Multiple Approvers  
BU Origin - A] --> B[Not Routed  
Multiple Approvers  
BU Origin - B];
```

Red arrows point to the '+' signs at the beginning and end of the workflow, indicating where new approvers can be added. At the bottom, there are two buttons: 'Return' and 'Apply Approval Changes'.

Confirmation

- When the Requisition creation is complete, click the Save and Submit button to go to the Confirmation
- This page gives you the Requisition ID, the Approval Workflow, etc.
- Ad Hoc Approvers can be inserted on this page, except in the first position
- You can perform the Budget Check from this page

Confirmation

Your requisition has been submitted.

Requested For Margaret Robert

Requisition Name 0000003904

Requisition ID 0000003904

Business Unit 40300

Status Pending

Priority Medium

Budget Status Not Checked



[View printable version](#)



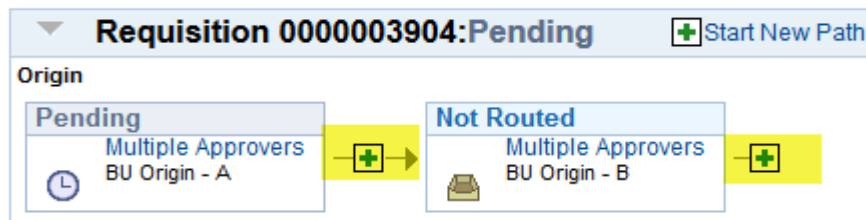
[Edit This Requisition](#)



[Check Budget](#)



Origin Stage



Budget Check

What does it do?

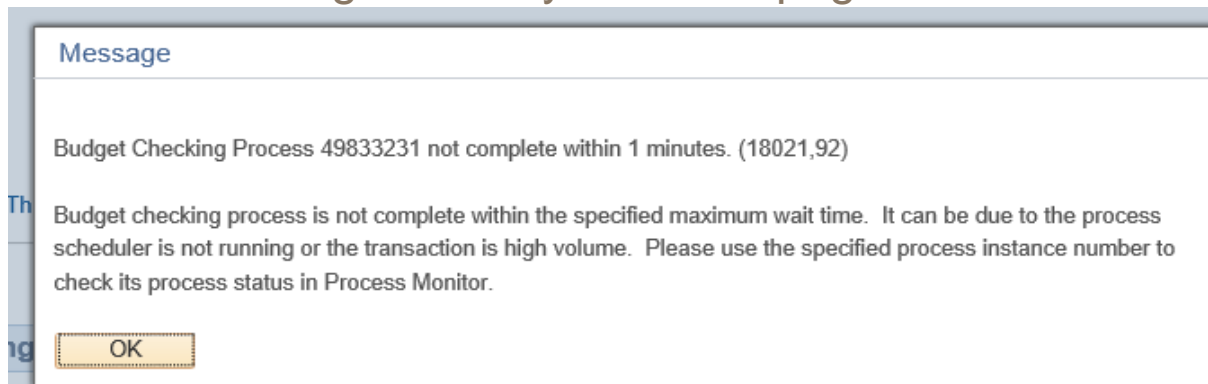
- On a requisition, it checks the validity of the chartfields
- On a PO, it checks to make sure there are funds available and encumbrances those funds

Budget Check Change

The processing time for the Budget Check was reduced from 3 minutes to 1 minute. This was changed in order to improve system performance.

What does this mean:

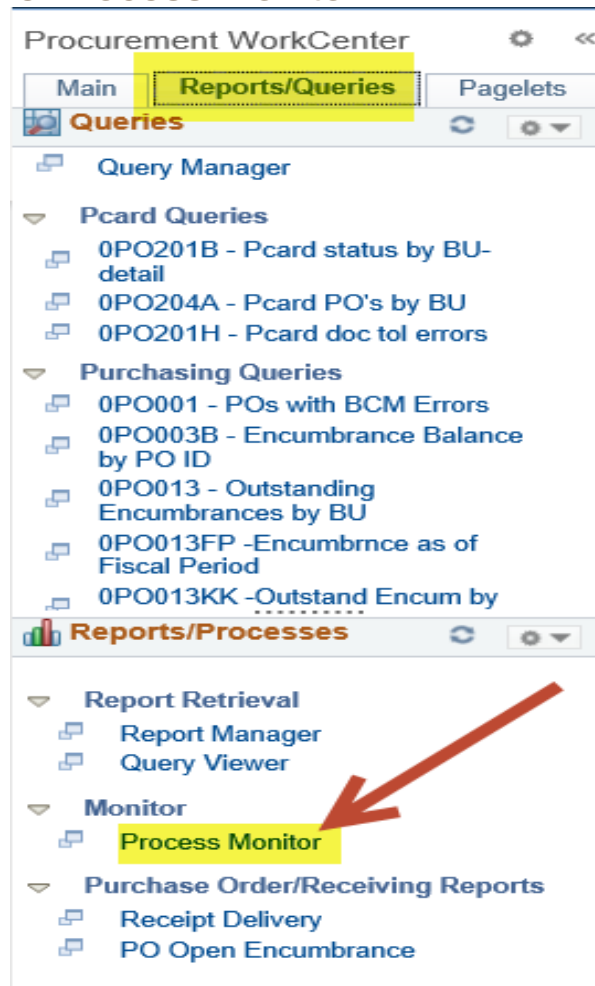
- When you click on the Budget Check option, it will process for one minute and if it is not complete, your screen will stop 'spinning' and you will still be on the Requisition Confirmation page. The Budget Check status will display as Not Checked.
- The Budget Check process did not stop. It is now running in the background.
- When the Budget Check is finished, the status will go from Not Checked to Checked.
- **Do not** edit a requisition until the Budget Check has finished running – you may receive a message that says that the page is inconsistent with data.



Budget Check

How to check the Process Monitor for the Budget Check process:

- Click on the Procurement tile.
- Click on the Reports/Queries tab.
- Scroll down and click on the Process Monitor.



The screenshot displays the Procurement WorkCenter interface. The top navigation bar includes 'Main', 'Reports/Queries', and 'Pagelets'. The 'Reports/Queries' tab is active and highlighted in yellow. Below the navigation bar, there are two main sections: 'Queries' and 'Reports/Processes'. The 'Queries' section is expanded, showing a list of queries under 'Pcard Queries' and 'Purchasing Queries'. The 'Reports/Processes' section is also expanded, showing a list of reports and processes. The 'Monitor' section is expanded, and the 'Process Monitor' option is highlighted in yellow. A red arrow points to the 'Process Monitor' option.

Budget Check

Process List tab

- It will default to your user id – if you submitted the Budget Check, leave this field populated
- Enter the search criteria – Choose Date Range or Last. Last allows you to set the criteria to Hours, Days, etc.
- The Process Name for Budget Check is FS_BP.
- Click Refresh

Process List | Server List

View Process Request For

User ID [redacted] Type [dropdown] Date Range Last [dropdown] 1 Hours [dropdown] Refresh

Server [dropdown] Name FS_BP Instance From [dropdown] Instance To [dropdown]

Run Status [dropdown] Distribution Status [dropdown] Save On Refresh

- The Budget Check Process Name is: FS_BP. In this example, the job is still processing. Click on the Refresh button to update the status. When complete, the Run Status should display Successful.

| Select | Instance | Seq. | Process Type | Process Name | User | Run Date/Time | Run Status | Distribution Status | Details |
|--------------------------|----------|------|--------------------|--------------|------------|--------------------------|------------|---------------------|---------|
| <input type="checkbox"/> | 47153195 | | Application Engine | FS_BP | [redacted] | 11/03/2019 7:56:40PM EST | Processing | N/A | Details |

Virtual Catalog – Punchout Order

On the Create Requisition page, click on the Georgia Virtual Catalogs link.

Create Requisition ?

Welcome Margaret Robert



Home



My Preferences

Request Options ▼

Search

Web

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Web ?

Merchant

De



Team
Georgia
Marketplace

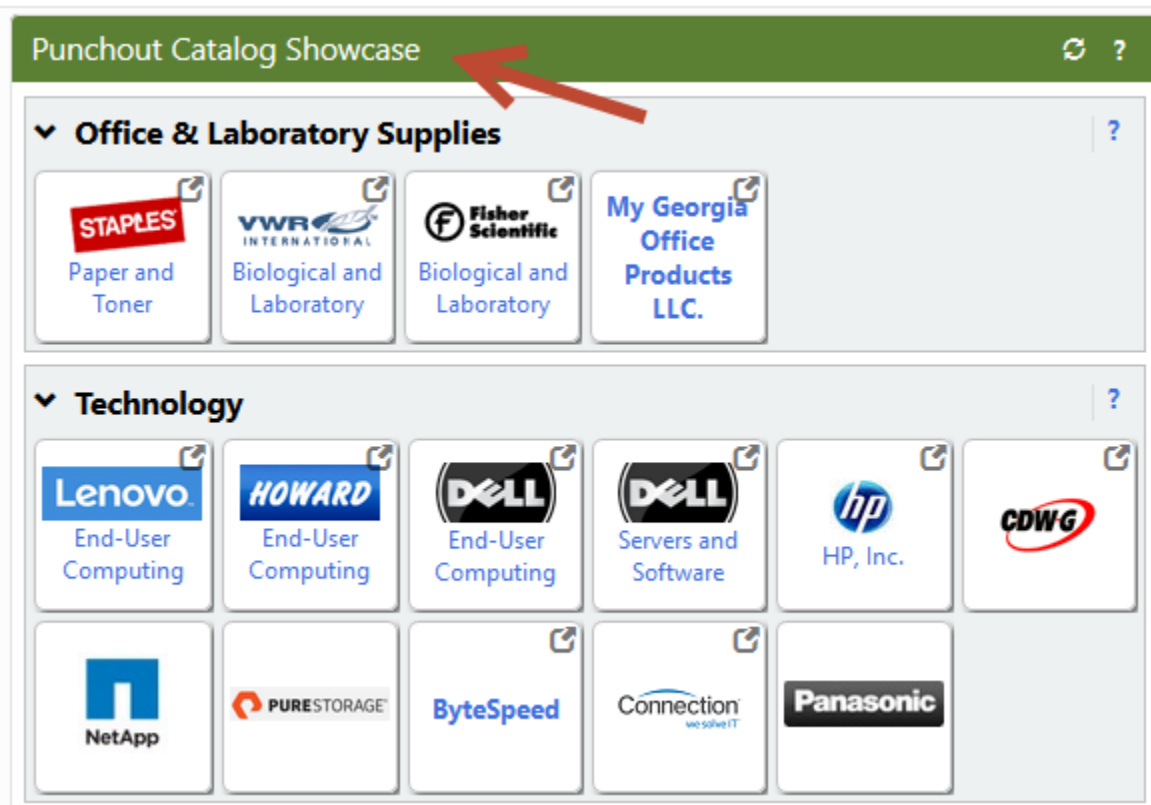
[Georgia Virtual Catalogs](#)



Punchout Order

This example is a demo of creating a requisition from a Punchout Supplier from the Virtual Catalog.

- The Punchout Catalog Showcase displays all the Suppliers that have Punchout Catalogs.
- Punchout means when you click on a supplier, you leave the Virtual Catalog and go to the Supplier's website.
- These websites are usually created for the State of Georgia only.
- The screen shot below is not all the Suppliers in the Punchout Catalog Showcase – example only.

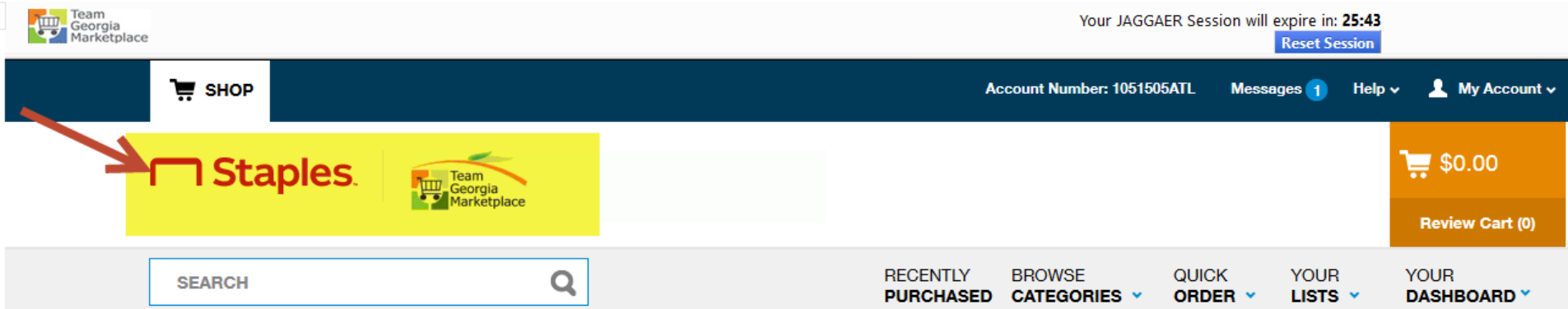


Punchout Order

- This demo is for a Staples order.
- Click on the Staples tile to go to the Staples website

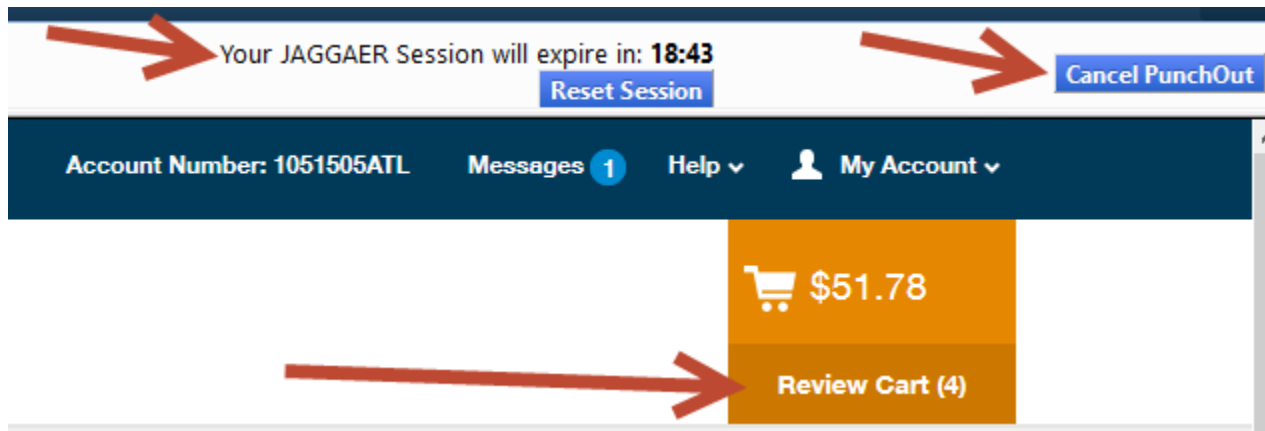


- The Staples website will display.



Punchout Order


- Add items to your cart.
- Use the search functionality to search for items.
- When done, click Review Cart
- If necessary, you can click on the Cancel Punchout button which will take you back to the Virtual Catalog home page
- There is a timer at the top of the page. It is counting down to the timeout of your session.




Punchout Order

- Review your order.
- Click Submit Order to bring the order back to the Virtual Catalog

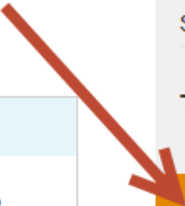
My Cart

 Print as PDF

Items for Delivery

| | | | | |
|--|--|--------------|--------------------------------|------------------------|
|  | BIC Round Stic Xtra-Life Ballpoint Pens, Medium Point, Black Ink, 60/Pack (GSM609- | \$7.38 PK/60 | <input type="text" value="1"/> | \$7.38 |
| | | | | Remove |

| | |
|------------------------------|----------------|
| Subtotal | \$51.78 |
| TOTAL | \$51.78 |
| SUBMIT ORDER | |



Punchout Order




- The cart is brought over into the Virtual Catalog.
- Items from your cart can be added to your Favorites.
- Click the checkbox next to the item(s)
- Click on the dropdown
- Select Add to Favorites

Team Georgia Marketplace™ Shopping Cart for Margaret Robert Continue Shopping

Name this cart: 4 Item(s) for a total of 51.78 USD

Proceed to Checkout or Assign Cart

Have you made changes? Update Help Add Non-Catalog Item Empty Cart Create New Cart Perform an action on (4 items selected)... Select All

 **Staples**   [more info...](#)

Fulfillment Address 1
3040 Route 50 North, N Saratoga Springs, NY 12866 US

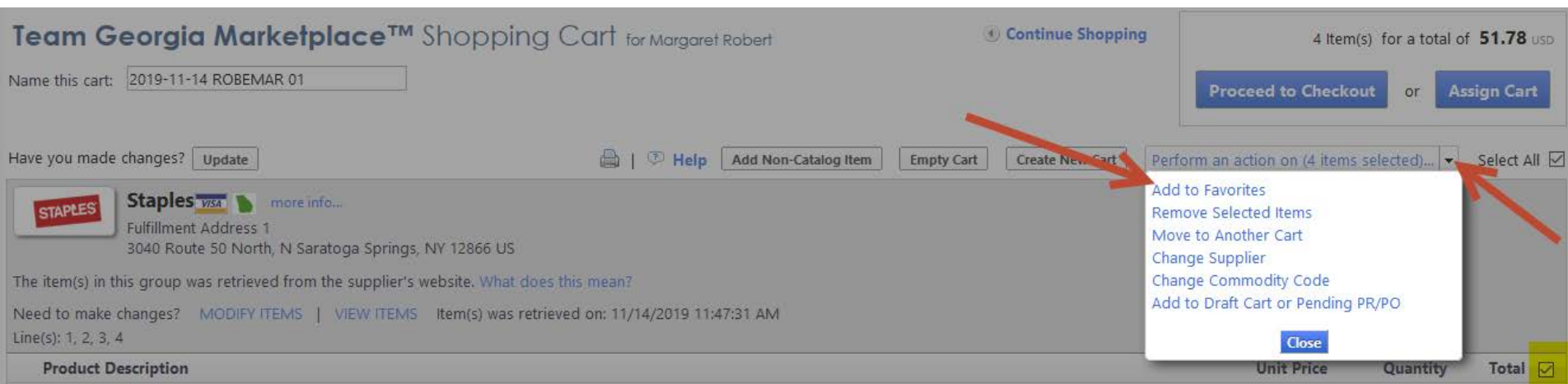
The item(s) in this group was retrieved from the supplier's website. [What does this mean?](#)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 11/14/2019 11:47:31 AM

Line(s): 1, 2, 3, 4

| Product Description | Unit Price | Quantity | Total |
|---------------------|------------|----------|-------------------------------------|
| | | | <input checked="" type="checkbox"/> |

Close



Punchout Order

- Click Proceed to Checkout

Team Georgia Marketplace™ Shopping Cart for Margaret Robert

Name this cart:

Have you made changes?

[Print](#) | [Help](#)

4 Item(s) for a total of **51.78** USD

[Continue Shopping](#) or

Perform an action on (0 items selected)...

- This page gives you a final review of your cart.
- Click Assign Cart to bring the order back into PeopleSoft

Orders > Search > [Search Documents](#) > Summary - Draft Requisition

General Final Review

[Return to shopping cart](#) [Continue Shopping](#)

Shoppers: You can add comments and/or attachments at this point and assign your cart for approval or review.

Approvers: You can signify your approval by assigning this cart to a Requester for submission.

Requesters: Once you have reviewed the details, you may submit the cart by clicking on the "Assign Cart" button at the top right of this page.

Punchout Order

- The items in the cart are brought over as line items in the Requisition.
- Comments and/or attachments can be added to the Requisition Line by clicking on Add

Requisition Lines [?](#)

| Line | Description | Item ID | Supplier | Quantity | UOM | Price | Total | Details | Comments | Delete |
|----------------------------|--------------------------------|---------|-----------------------------------|----------|----------|---------|-------|---------|----------|--------|
| <input type="checkbox"/> 1 | Staples Notepads, 8.5" x 11.75 | | STAPLES CONTRACT & COMMERCIAL INC | 1.0000 | Dozen | 3.2100 | 3.21 | | Add | |
| <input type="checkbox"/> 2 | TRU RED 8.5" x 11" Printer Pap | | STAPLES CONTRACT & COMMERCIAL INC | 1.0000 | Cartons | 31.7500 | 31.75 | | Add | |
| <input type="checkbox"/> 3 | Sharpie Permanent Markers, Fin | | STAPLES CONTRACT & COMMERCIAL INC | 1.0000 | Dozen | 9.4400 | 9.44 | | Add | |
| <input type="checkbox"/> 4 | BIC Round Stic Xtra-Life Ballp | | STAPLES CONTRACT & COMMERCIAL INC | 1.0000 | Packages | 7.3800 | 7.38 | | Add | |

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 51.78 USD

- Comments/Attachments can be added to the Requisition Header

Requisition Comments and Attachments

Enter requisition comments

2019-11-14 ROBEMAR 01

Send to Supplier

Show at Receipt

Shown at Voucher

[Edit more Comments and Attachments](#)

Punchout Order

- Click Preview Approvals to Ad Hoc in any additional approvers – to insert an Approver in the first position, it must be done on this screen
- Click Save and Submit
- Check Budget from the Confirmation page

REMEMBER

- **Do not** edit/change any items on the Requisition for orders from the Virtual Catalog
- **Do not** edit/change the Supplier ID
- **Do not** edit/change/remove the Contract ID

Virtual Catalog – Hosted Catalog Order

- A Hosted Catalog order is created without leaving the Virtual Catalog.
- Suppliers have their catalogs within the Virtual Catalog – there is no link to the Supplier's Website
- In the Virtual Catalog, do a search for the item(s) you wish to purchase
- Select the desired items to add to your cart
- Click the Proceed to Checkout button
- Click the Assign Cart button to bring your cart back into the PeopleSoft Requisition
- Click Preview Approvals to insert any Ad Hoc Approvers
- Click Save and Submit
- On the Confirmation page, click Check Budget

REMEMBER

- **Do not** edit/change any items on the Requisition for orders from the Virtual Catalog
- **Do not** edit/change the Supplier ID
- **Do not** edit/change/remove the Contract ID



Virtual Catalog Requisitions

These pointers will help prevent EDX transmission failures

- Remember that partial quantities are not allowed
- When sourcing a Virtual Catalog requisition to a PO, do not change the Supplier ID or the Contract ID.
- Do not copy Virtual Catalog requisitions into a PO
- Do not add non-catalog lines onto an EDX PO
- Do not change the Dispatch Method on an EDX PO to Print in order to obtain a printed copy of the PO. Wait until the EDX PO has been transmitted and the PO status has changed to Dispatched.
- **IMPORTANT** – the cart items, Supplier ID, and Contract ID that are brought over from the Virtual Catalog into PeopleSoft must not be changed in order for the PO to be transmitted back through the Virtual Catalog to the Supplier.

Buyer's Digest

Buyer's Digest

- Check for expiring contracts
 - Sourcing a requisition to a PO with an expired contract on a line will not be successful
 - Remember to source all requisitions to POs and dispatch all POs prior to the expiration of a contract
- Check for upcoming classes
 - Link to the LMS to register
- To subscribe, send an email to procurementhelp@doas.ga.gov

STAY INFORMED!

DOAS Website

State
Purchasing
Division page

StateWide
Contract
Index

Order of
Precedence

Purchasing
Education
and Training

Team Georgia
Marketplace
page

TGM for
State
Agencies

A horizontal red ribbon graphic with a white outline and a slight 3D effect. The ribbon is wider on the left side and tapers to a point on the right side. The word "QUESTIONS?" is written in white, uppercase letters in the center of the ribbon.

QUESTIONS?



State Purchasing

Procurement Help 404.657.6000