



eProcurement and GeorgiaFIRST Marketplace
User's Guide
for
eProcurement Administrator

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Chapter 1: eProcurement and Georgia FIRSTMarketplace Overview

What is eProcurement?

eProcurement (ePro) is a module in PeopleSoft Financials that has a primary function of creating electronic requisitions and routing them for approval. In this PSFIN module is used to create requisitions for goods and services, a requisition is simply an official request to purchase goods and services.

Previously, your institution may have used paper requisitions, or some other format, to request an item to be purchased. That hardcopy requisition had to be routed for approval signatures and then sent to the purchasing department. The purchasing department had to rekey the information into the system to create a purchase order to send to the supplier.

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Within ePro, users will not be able to combine items from the GeorgiaFIRST Marketplace with items from a Special Request Requisition into one requisition. Each requisition must be completely either from the Marketplace (CAT) or from a Special Request Requisition (ONL).

Benefits of ePro and the GeorgiaFIRST Marketplace

With this system of online shopping and electronic requisitioning, you will see some immediate benefits, including:

- Reduction in paper forms routing through different offices
- Online browsing and shopping for items
- Comparison shopping
- Request goods from multiple suppliers through one shopping cart
- Items in the GeorgiaFIRST Marketplace are contractually approved items
- Faster routing for approvals
- Ability to save items as 'favorites' in the GeorgiaFIRST Marketplace
- Automatic batch processing of approved requisitions

Types of Roles Involved

In order for the ePro and GeorgiaFIRST Marketplace functionality to work properly, users are set up with specific roles and responsibilities. They include:

- **Marketplace Browser:** User without any GeorgiaFIRST Marketplace roles assigned will default to a Marketplace Browser. A Browser can view items, contracts, and pricing in the Marketplace but cannot add items to a cart or create requisitions.
- **Shopper:** User can select items to purchase, add them to a cart, and assign that cart to a Requester for further processing. This type of user cannot create a requisition in PeopleSoft.
- **Requester:** User can perform all functions that a Shopper can, with the added permissions to be able to create the actual requisition in PeopleSoft.
- **Approver:** User with the permissions and roles necessary to approve ePro requisitions.
- **Buyer:** User responsible for ensuring approved requisitions are sourced into a purchase order and dispatched to the supplier
- **Accounts Payable:** Responsible for building electronic invoices

Chapter 2: eProcurement Approvals

A critical component of the eProcurement process is the ability to submit requisitions for approval electronically. Because approvals are handled online within the PeopleSoft Financials system, each institution can customize the approval process to their own specifications. In this chapter, we will

1 < 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

eProcurement Approvals

Again, your institution may set up multiple approvers to serve as the Amount Approver. Each Amount Approver will have the role BOR_EP_CAT_AMOUNT_APPR. The institution will determine whether all amount approvers must approve the requisition or whether only one from a group of multiple approvers has to approve it. The institution does not have to use the \$10,000 threshold and can edit this if needed.

If the requisition was not generated from the Georgia FIRST Marketplace, it will bypass this approval

eProcurement Approvals

- **Stage 4, Path 7: Default NIGP Code – 00000**
 The seventh approval path in Stage 4 will route to a Buyer Approver in the event that a GeorgiaFIRST Marketplace Requisition line does not have an NIGP code. If the line item does not have an NIGP code, it will default to the “00000” NIGP code. This requisition line will automatically route to a Buyer Approver for correction.
- **Stage 4, Path 8: Furniture Approver**
 This path is optional. The Furniture Approver must have the role “BOR_FURNITURE_APPR”. If your institution chooses to use the Furniture Approver path, there can be multiple approvers in this path. The institution will determine whether all Furniture Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for Furniture approval, and they may add monetary amount criteria.
- **Stage 4, Path 9: Human Resource Approver**
 This path is optional. The Human Resource Approver must have the role “BOR_HR_APPR”. If your institution chooses to use the Human Resource Approver path, there can be multiple approvers in this path. The institution will determine whether all Human Resource Approvers must approve the requisition, or if only one from the group of approvers must approve it. In addition, institutions may i

Stage 5: Federal Fund Approval

The Federal Fund Approval stage is an optional one. The system will route all requisitions that have a class code of 61000 defined. The purpose of this stage is to assist institutions in identifying requisitions where federal funds have been used.

If your institution chooses to employ the Federal Fund Approval stage, the approver must have the role BOR_FEDERAL_FUND_APPR.

Stage 6: Buyer Approval

In Approval Stage 6, the system will route all Special Request Requisitions (those requisitions not built from the GeorgiaFIRST Marketplace) to the person designated to give buyer approval. This stage is primarily used for Special Request Requisitions since they are not built from approved catalogs. The Buyer Approver can then ensure the line item meets procurement policies.

Institutions may choose to have multiple Buyer Approvers. In addition, the institution can choose whether all Buyer Approvers must approve the requisition or whether one needs to act on it. Finally, the institution may choose to inactivate this stage or include it for all requisitions.

Approval Time Limits

Within the system, there are built-in time limits that an Approver has to act on the requisition. This ensures that ePro requisitions do not sit around waiting for an Approver an indefinite amount of time.

When a requisition is submitted for approval, the system sends it to the first Approver's Worklist within PeopleSoft Financials. The Worklist is a queue which holds items waiting for approval. Once an Approver works a transaction, it is removed from the Worklist.

Once the requisition hits an Approver's Worklist, that Approver has three days to either approve or deny it before they receive a reminder notification from the system. If the requisition sits in an Approver's Worklist for four days without being approved or denied, the system removes the requisition from that Approver's Worklist, and you as the ePro Administrator will need to reassign the transaction to another Approver. After the Approver has approved the requisition, the system automatically moves it onto the next Approver's Worklist. If an Approver denies a requisition, the system returns it to the Requester. Denied requisition lines can be edited and resubmitted for approval.

If an Approver will be out of the office for an extended period of time and will be unable to work the requisitions in their Worklist, they have the ability to assign an alternate to serve in their place. This way, their Worklist does not build up while they are out of the office, and requisition approval is not delayed. As the ePro Administrator, you will also have this ability if you need to assign an alternate approver.


ePro Monitoring and Maintenance

Line Details

		Business Unit	Requisition ID	Line Number
1	<input checked="" type="checkbox"/>	39000	0000511246	1

Reassign Pending Tasks

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.



The newly assigned approver should be able to see the requisition in their Worklist. **Approval Comment History** section, the history of the ePro Admin reassigning the requisition is captured.

14. You can search for the requisition again on the **Monitor Approvals** page to verify that it is no longer assigned to the ePro Admin.

Assigning an Alternate Approver

Approvers have been given instructions on how to set up an alternate approver for their requisitions when they will be away from the office and unable to work requisitions. There may be occasions when they will not be able to do this, and you will need to set up an alternate approver for them.

When you assign an alternate approver, you specify the appropriate date range. For example, if you received word that Approver "A" had to take emergency leave and will be out of the office for the next two weeks, you set up an alternate approver for those two weeks.

Assigning an alternate approver will only affect future requisitions. If there are currently requisitions in the original approver's Worklist, they will not be affected. You should not use the "Reassign Work" section of this page. Instead, you can use the procedure for reassigning requisitions (page 10) rather than searching for requisitions for the ePro Admin; you can search for requisitions for this approver.

The dates that you enter for the alternate approver mean that at 12:00 a.m. on the "From, Date"

