

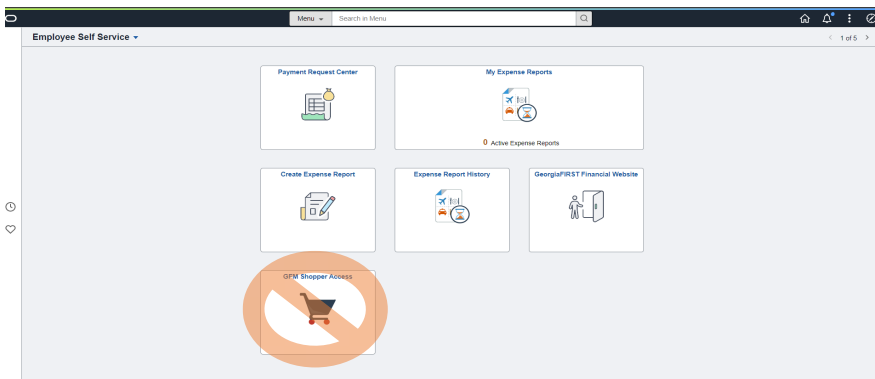


HOW TO

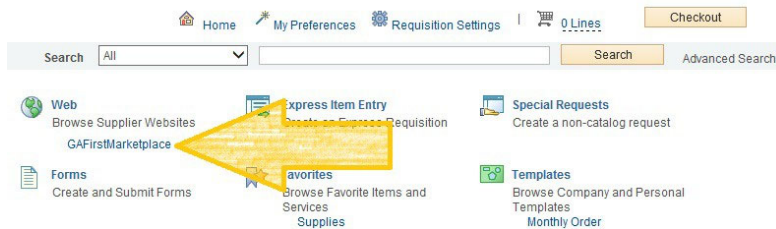
Purchase Items via the GeorgiaFIRST Marketplace

This job aid will go through the steps on how to purchase goods from the GeorgiaFIRST Marketplace; an online shopping tool created by the University System of Georgia to make purchasing through agency contract vendors efficient and easy. If you are unable to find the item(s) you want to buy in the marketplace, see the [How to Create a Special Requisition job aid](#).

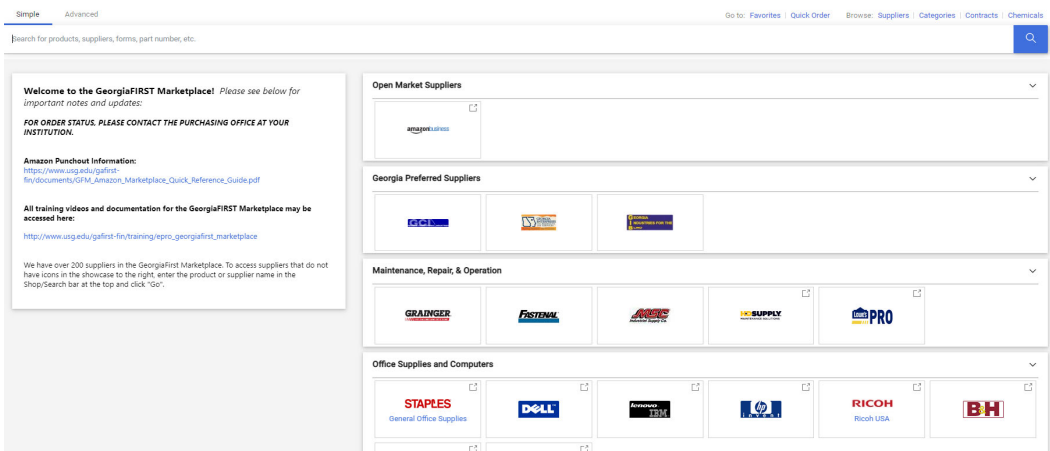
1. Log in to PeopleSoft via <https://www.usg.edu/gafirst-fin/> by clicking GeorgiaFIRST Financials under Core Users on the right of the page. You will be prompted to log in using Duo.
2. Click the compass icon at the top right of the page. This opens the NavBar menu.
 - a. NOTE: Do not click the GFM Shopper Access tile to get to the marketplace. It routes you through "Window Shopper" mode, through which you will not be able to complete your order.



3. On the NavBar menu, click Navigator > eProcurement > Requisition.
4. On this new page, under Web, select the GeorgiaFIRST Marketplace link.



5. Build your **shopping cart** by using the Punch-Out catalogs (i.e. Staples, Fisher Scientific, Dell) **OR** by searching the hosted catalogs by using the Shop search field.



6. Once you are finished adding items to your cart, select Checkout.

7. Review your cart for accuracy, then click Submit > Proceed to Checkout > Issue Requisition. You will be redirected to make any edits (if necessary), to add supporting documentation, and to submit your requisition into the approval process.
8. Enter a name for your requisition in the Requisition Name field in the upper right.
9. You can update the distribution/accounting information, using one of two methods below (Individual Lines or Multiple 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.

The screenshot shows the 'Requisition Lines' interface. The first line is expanded to show details for 'Shipping Line 1'. The shipping information includes Supplier (Amazon Business), Quantity (2,0000), UOM (Each), Price (22.7200), and Total (45.44). The shipping address is Georgia Highlands College, 3175 Cedartown Hwy SE, Rome, GA 30161. The accounting information shows a quantity of 2,0000 and a price of 22.7200. The 'Accounting Lines' section is visible at the bottom, with tabs for Chartfields1, Chartfields2, Chartfields3, Details, Details 2, and Asset Information. The Chartfields1 tab is active, showing a table with columns for Line, Status, Dist Type, Location, Quantity, Percent, Merchandise Amt, GL Unit, and Entry Event.

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.

The screenshot shows the 'Mass Change' button in the interface, which is highlighted with a blue arrow. The button is located in the bottom right corner of the interface, next to other action buttons like 'Select All / Deselect All', 'Add to Favorites', 'Add to Template(s)', and 'Delete Selected'.

Update the Ship To Location if necessary.

Click OK.

Click OK for All Distribution Lines To apply To All selected lines.

10. To add supporting documentation, click on the Comments bubble or the Add link at the end of the first line of your requisition; DO NOT use the "Add More Comments and Attachments" link at the bottom of the screen.
 - a. On the next screen click Add Attachments and Browse for the saved scanned documents on your computer.
 - b. Once located, click on the file you want to upload and click Open > Upload > OK.
 - c. 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 when you return to the Review and Submit screen.

The screenshot shows the 'Edit Lines/Shipping/Accounting for Selected Lines' form. The 'Shipping Information' section includes fields for Ship To Location, Due Date, Ship Via, Attention, and Freight Terms. The 'Accounting Lines' section includes a SpeedChart field and an Accounting Information table. The Accounting Information table has columns for Line, Percent, Location, GL Unit, and Account. A yellow arrow points to the 'Ship To Location' field, and another yellow arrow points to the 'GL Unit' field in the Accounting Information table. The 'OK' button is highlighted at the bottom of the form.

11. Enter the business purpose or any comments necessary in the Approval Justification field (NOTE: Do not include any slashes (This: /) in your comments).

+ Add More Items					
UOM	Price	Total	Details	Comments	Delete
Each	50.0000	50.00		Add	
Delete Selected		Mass Change			
Total Amount		50.00 USD			



12. Select checkboxes for Show at Receipt and Shown at Voucher.

13. To insert any additional approvers (if requested or required), click Save for Later, then the Preview Approvals link. Click on a green plus sign to search for the User ID of the Approver you would like to insert, when entered click Insert.

14. Click the Apply Approval Changes button.

15. Click Save & Submit to submit the requisition lines into the approval workflow.

Department and Proj. Approver

Pending

Loveless, Stephanie P

Req-Dept Mgr-Line Level