

# Welcome to ePro!

An Introduction to  
eProcurement and Georgia*FIRST* Marketplace

Presented by  
The Office of Fiscal Services



# 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 electronically
- All workflow actions are date and time stamped
- Requests are sourced to a Purchase Order once fully approved and successfully pass budget check

# 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 the department and departmental approver(s) using Manage Requisitions
- Marks items as 'received' using Item 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
- To deny a requisition a comment must be entered. Recommended to only enter a comment if the requisition is being denied.
- 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.

All GeorgiaFIRST Marketplace items are contractually approved (State-wide contracts).

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 Stages & Paths

## **Stage 1: Department and Project Budget Owner**

- Department Head and Business Manager (always required)
- Project Manager for Project ID (optional, depending on department setup)

## **Stage 2: Fund Type:**

- Agency Fund (Fund 60000) or Grants (Fund 20000)

## **Stage 3: Item-Type Approvals based on Category Codes**

- University Information Technology Services Approver
- Chemical Approver
- Facilities Planning and Design Approver
- Human Resources Approver
- Design Approval

## **Stage 4: Buyer Approval (Special Requests only)**

# 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
- ePro Administrator will reassign it back to the pending Approver
- Reassignments will happen two times. On the third escalation, the Requisition will be denied

# Receiving Methods:

- Desktop Receiving (*Job Aid EPR1*)
  - In eProcurement module
  - 95% of actions
- Receiving Assets (*Job Aid EPR2*)
  - In Purchasing module
  - Asset Tag ID and Serial Numbers necessary
- Receiving via Purchasing (*Job Aid EPR3*)
  - In Purchasing module
  - Not commonly used method

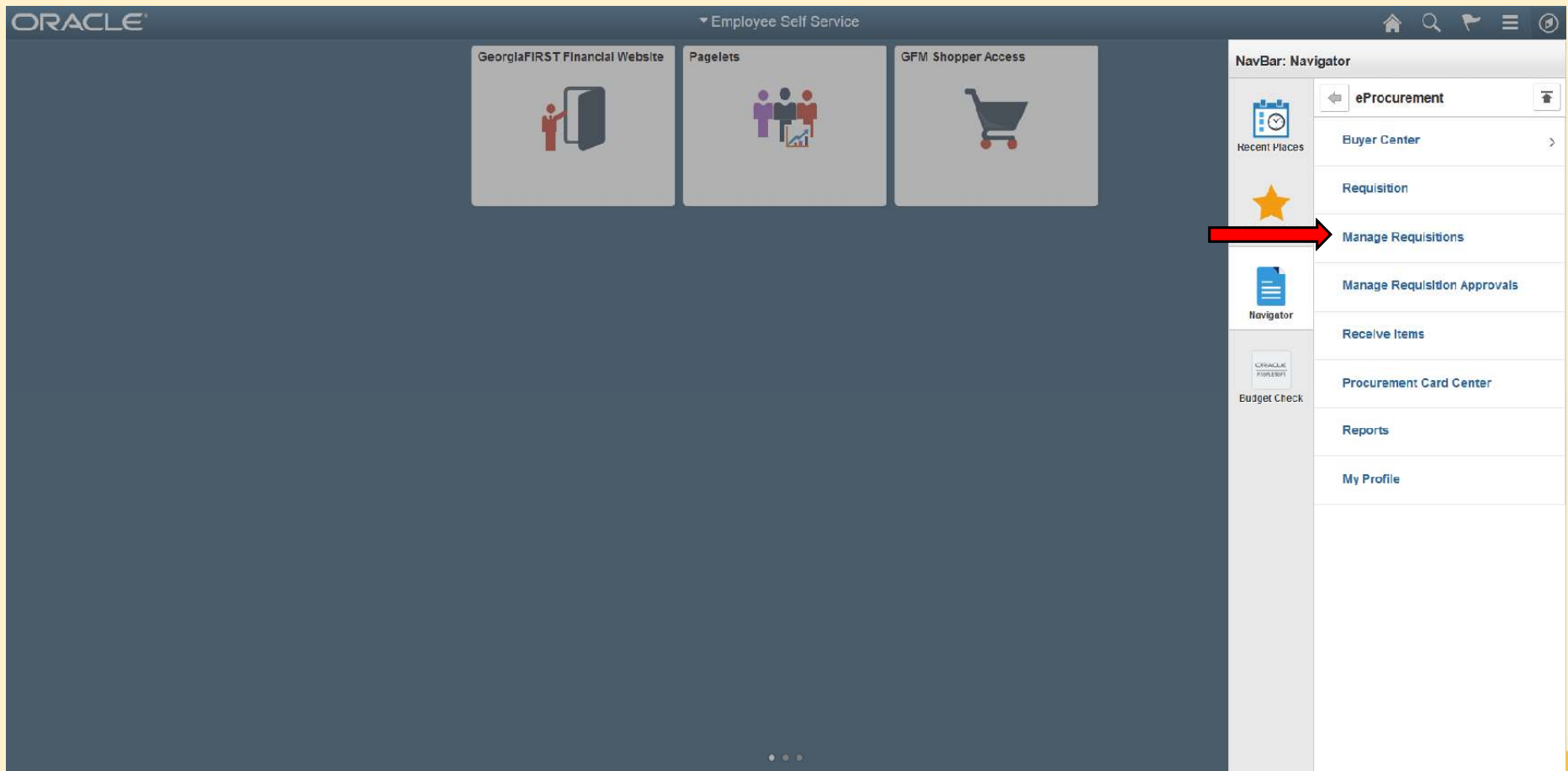


# Receiving Tips

- Only mark the quantity of what you actually receive or the amount on the invoice; do not receive more than what's stated.
  - Do not mark as 'Received' just to clear your Worklist
  - If you receive an email asking you to receive items in, do not mark them received if you do not have the goods or the services have not been provided; or if the goods should be received in by Central Distribution (IT items).

# Using 'Manage Requisitions'

*aka: Your personal assistant...*



# 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”

The screenshot shows the 'Manage Requisitions' search interface. A red arrow points down to the 'Request State' dropdown menu, which is set to 'All but Complete'. Another red arrow points from the 'Date From' field (08/19/2015) to the 'Date To' field (08/26/2015), indicating a 7-day window. A third red arrow points from the 'Origin' dropdown menu to the 'Special Request' option. The interface includes fields for Business Unit (43000), Requisition ID, Date From, Date To, Requester, Entered By, Budget Status, and PO ID. There are 'Search', 'Clear', and 'Show Advanced Search' buttons at the bottom.

These items may have to be changed if you're not finding the requisition you're looking for.

# Requisition Status:

Review 'Request State' often for key information:

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

**Requisitions** ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000504505	0000504505	43000	01/13/2016	Pending	Not Chk'd	2,640.00 USD	[Select Action] ▼	Go
▶ 0000504297	0000504297	43000	12/17/2015	Open	Not Chk'd	13.17 USD	[Select Action] ▼	Go
▶ 0000504274	Motorsports	43000	12/15/2015	Received	Valid	212.36 USD	[Select Action] ▼	Go
▶ 0000503439	Owl-a-ween inflatable	43000	10/16/2015	Canceled	Valid	0.00 USD	[Select Action] ▼	Go

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000504228	EQuote 1021537927142 Me...	43000	12/11/2015	Received	Valid	1,147.03 USD	[Select Action] ▼	Go
▶ 0000504226	0000504226	43000	12/11/2015	PO(s) Dispatched	Valid	1,115.37 USD	[Select Action] ▼	Go
▶ 0000504218	0000504218	43000	12/11/2015	PO(s) Dispatched	Valid	6,135.00 USD	[Select Action] ▼	Go

# Lifecycle Information

Each step (link) will give you information:

**Requisitions** ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000424061	PO - Flood Brothers	43000	11/20/2013	Complete	Valid	1,584.14 USD	[Select Action] Go

Requester [REDACTED] Entered By [REDACTED] Priority Medium  
Pre-Encumbrance Balance 0.00 USD

Request Lifespan:

Line Information

Line	Description	Status	Price	Quantity	UOM	Supplier
1	PO - Flood Brothers	Closed	1584.14000		1.0000 JOB	

Personalize | Find | First 1 1 Last

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment



# Action Items

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

> Approvals   > Copy   > Edit   > View Print   > Receive

**Manage Requisitions**

**Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	43000	Requisition Name	
Requisition ID	0000504299	Request State	
Date From		Date To	01/15/2016
Requester		Entered By	
		Budget Status	
		Origin	
		PO ID	

[Search](#) [Clear](#) [Show Advanced Search](#)

**Requisitions** ?

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To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
▶ 0000504299	0000504299	43000	12/17/2015	Approved	Not Chk'd	2,620.36 USD	<div>[Select Action] <a href="#">Go</a></div>

[Create New Requisition](#) [Review Change Request](#) [Review Change Tracking](#) [Manage Receipts](#) [Requisition Report](#)

# Discussion Points:

- Do not use another person's User ID to log-in, to create Requisitions or to 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

# Contact Information

Office of Fiscal Services

Town Point ~ Suite 3700

470-578-6214

<https://kennesaw.service-now.com/ofs>



Thank you for attending!