KENNESAW STATE UNIVERSITY
OFFICE OF FISCAL SERVICES

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.*

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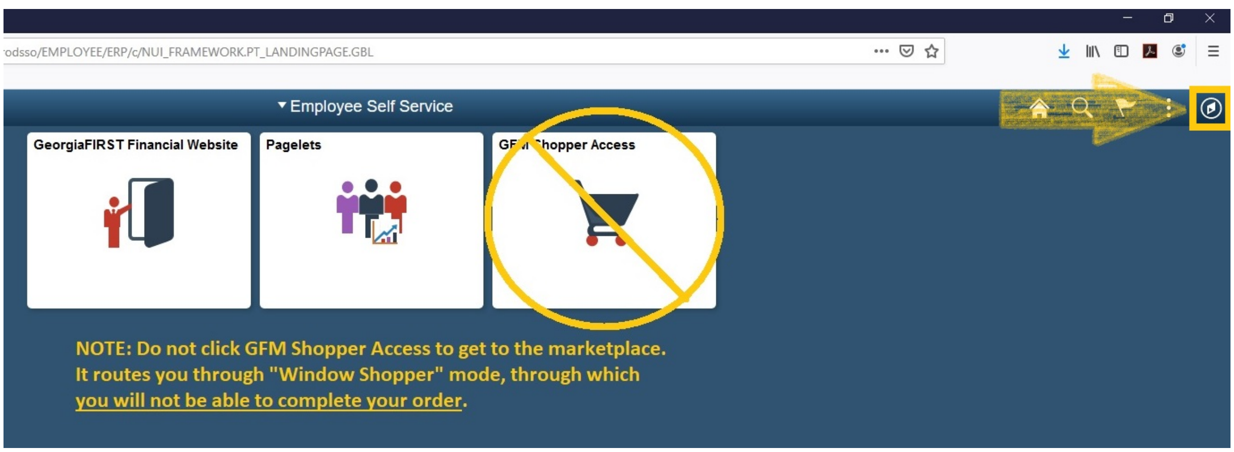
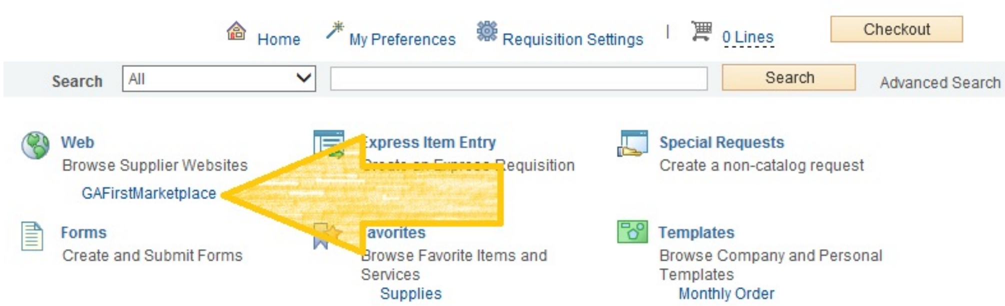
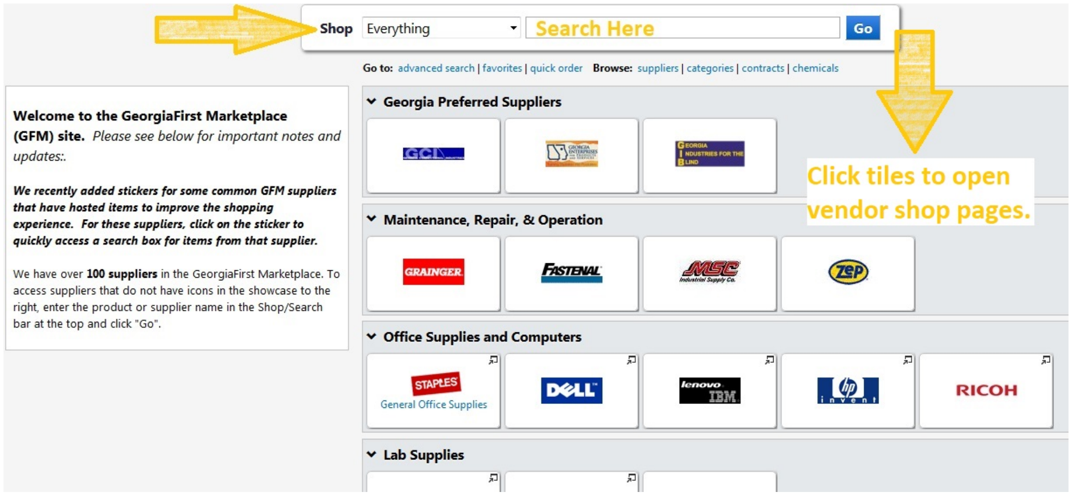
1. Log in to **PeopleSoft** via https://www.usg.edu/gafirst-fin/ by clicking **GeorgiaFIRST Financials** under **Core Users** on the right of the page. You will be prompted to log in using **Duo**.
2. Click the compass icon at the top right of the page. This opens the NavBar menu.
   a. NOTE: Do not 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) **<u>OR</u>** by searching the hosted catalogs by using the **Shop** search field.



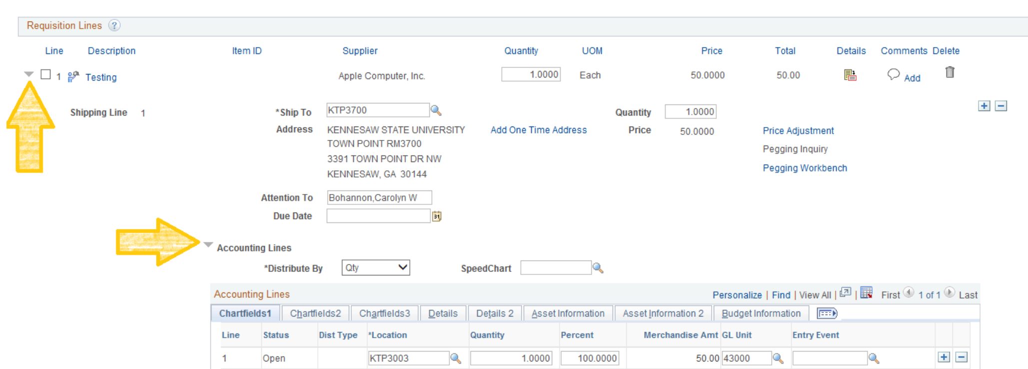
6. Once you are finished adding items to your cart, select **Checkout.**
7. Review your cart for accuracy, then click **Submit > Proceed to Checkout > Issue Requisition.** You will be redirected to make any edits *(if necessary)*, to add supporting documentation, and to submit your requisition into the 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 <u>one</u> of two methods below ***(Individual Lines or Mutiple Lines)***:

   NOTE: When using <u>either</u> option for accounting allocation changes:

   - If you use the <u>SpeedChart function</u>, you must also populate the **BudRef** field on the **Chartfields 2** tab.
   - If you <u>manually enter the allocation</u>, you must first populate the **GL Unit** field on the **Chartfields 1** tab in addition to populating the BudRef on the Chartfields 2 tab.

<u>To Update Accounting Allocation on Individual lines:</u>

Click the **Expand** buttons (triangles) and make necessary updates for each line.



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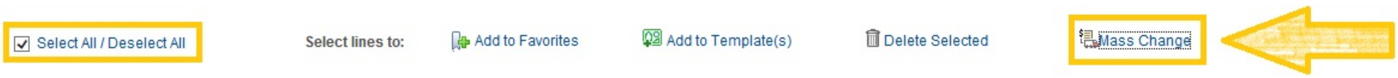
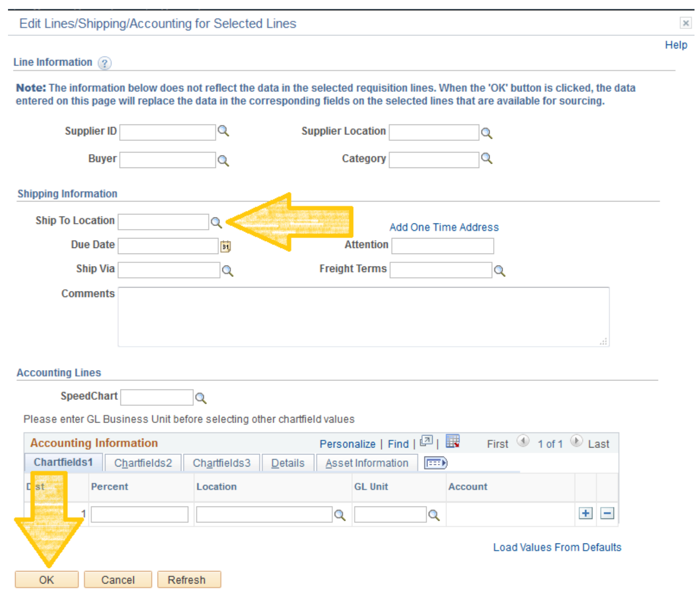
To Update Accounting Allocation on Multiple lines simultaneously:

Select the line checkboxes of all the lines you need to update, then select the **Mass Change** link.



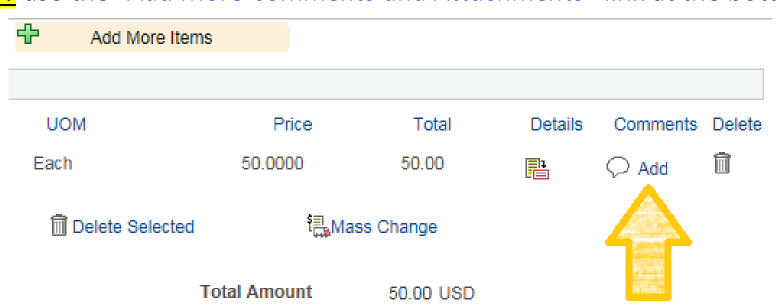
-Update the **Ship To Location** if necessary.



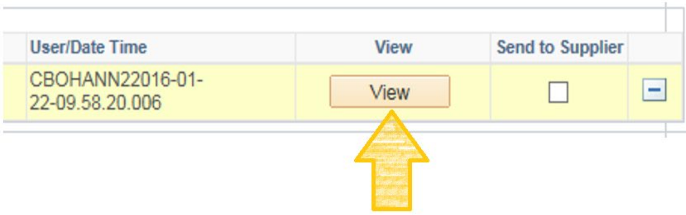
-Click **OK.**

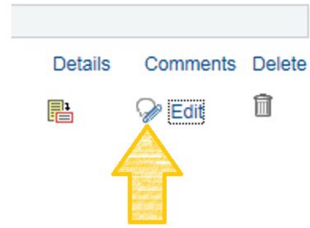
-Click **OK** for **All Distribution Lines** to apply to all selected lines.

10. To add supporting documentation, click on the **Comments** bubble <u>or</u> the **Add** link at the end of the first line of your requisition; <u>DO NOT</u> use the *"Add More Comments and Attachments"* link at the bottom of the screen.

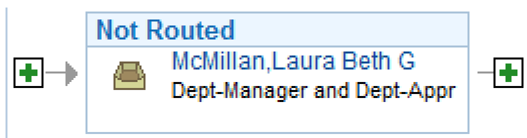


   a. On the next screen click **Add Attachments** and **Browse** for the saved scanned documents on your computer.
   b. Once located, click on the file you want to upload and click **Open > Upload > OK.**
   c. To verify you have attached your document(s), you will be able to see a **View** button on 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.





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