

eProcurement and Georgia *FIRST* Marketplace
User's Guide
for
Approvers

Introduction

This User's Guide is designed for Approvers who will be responsible for approving requisitions coming from the eProcurement module in PeopleSoft Financials.

In this User's Guide, you will find an overview of the eProcurement module and the function of the Georgia Marketplace. You will also learn the responsibilities you have as an Approver.

Topics Covered in this User's Guide Include:

- Overview of eProcurement and the Georgia Marketplace
- Approving and denying requisitions in your worklist
- Setting up an alternate approver
- Basic procurement policies

Chapter 2: eProcurement Approvals

A critical component to the whole 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.

A requester builds a requisition in ePro. Each item on a requisition is actually placed on its own requisition line. Theoretically, each line in a requisition can be charged to a different set of Chartfields (though, as a best practice, these scenarios should be limited). Therefore, there may be different approval paths for each line on a requisition.

Once the requester submits the requisition for approval, each line has its own approval path. This approval path is determined by a number of factors. At a minimum, each requisition line will go to the Department Manager and Project Manager (if a Project is to be charged). These are the managers that are tied into the Department and Project Chartfields on that requisition line.

Depending on how your institution has set up approvals for eProcurement, the requisition line may go

Here is a summary of each stage:

This is a mandatory approval stage for all requisition lines. Each requisition line must be charged to a Department. In addition, requisition lines can be charged to a Project. The requisition line is routed to the Department Manager (as entered in PeopleSoft) for approval. If the Project Chartfield is used on the requisition line, the system also routes it to the Project Manager.

This approval stage is optional for institutions.

Agency Fund Approval is set up so that any requisition line charged to an Agency Fund Code must go to an individual specified for Agency Fund Approvals. Agency funds are used to account for resources held by an institution as custodian or fiscal agent for individual students, fa

Request requisitions as well. Institutions have the following options when using Amount Approval and may select either option or both:

- If the monetary amount is \$10,000 or more per line, route to Amount Approver.
- If the total monetary amount of the requisition is \$10,000 or more, route to Amount Approver and have a monetary amount of \$10,000 or more per line.

Again, your institution may set up multiple approvers to serve as the Amount Approver. Each Amount Approver will have the role BOR_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 Marketplace, it will bypass this approval stage (this can be changed by the institution). If the requisition is below the set threshold and was generated from the Georgia Marketplace, it will also bypass this approval stage.

In Approval Stage 4, approvals are based upon the type of item being requested. Within this stage, there are eleven potential approval paths. Each path is optional for the institutions.

- If the item on a Requisition line is an asset and charged to an Asset Account, it will be routed to the person set up as the Asset Approver. The accounts included in this path are 743200, 744200, and 800000 through 899999.

An Asset Approver must have the role "BOR_ASSET_A

In PeopleSoft, the Category ID is tied into the NIGP Code. In the Georgia Marketplace, the

- This approval path is for any IT hardware or software approvals and is also optional. For any requisition line that is for a computer hardware or software purchase or service (based on NIGP Code), the system routes the line to the IT Approver.

An IT Approver must have the role "BOR_IT_APPR". If your institution chooses to use the IT Approver path, there can be multiple approvers in this path. The institution will determine whether all IT Approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for IT approval, and they may add monetary amount criteria.

- The sixth approval path in stage 4 is also optional and is for the University Relations Approver. For any requisition line that relates to media contact, logo use or copyright items (based on NIGP code), the system routes it to the University Relations Approver.

The University Relations Approver must have the role "BOR_UNIVREL_APPR". If your institution chooses to use the University Relations Approver path, there can be multiple approvers in this path. The institution will determine whether all University Relations Approvers must approve the requisition or whether only one from the group of approvers must approve it. In addition, institutions may identify additional NIGP codes for University Relations approval, and they may add monetary amount criteria.

- *(formerly Default NIGP Code 00000)*
As of July 1, 2024, the Invalid NIGP Code path will be mandatory for all institutions. This approval path will route to a Buyer Approver in the event that a requisition line does not have a valid NIGP code. Invalid codes include those that end in more than one zero. Additionally, if a Georgia Marketplace Requisition line item does not have an NIGP code, it will default to the "00000" NIGP code. In this case, the requisition line will automatically route to a Buyer Approver for correction.

- 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 whether 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.

Here's a brief description of what is on the page:

- The Business Unit, Requisition ID, and Priority are also listed.
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The “Requester’s Comments” call-out icon appears for those lines that have line comments or attachments. To review these comments, you can select the call-out icon.

Here, you can review the line comments and attachments. To return to the line information, select the “Return to Previous Page” link.

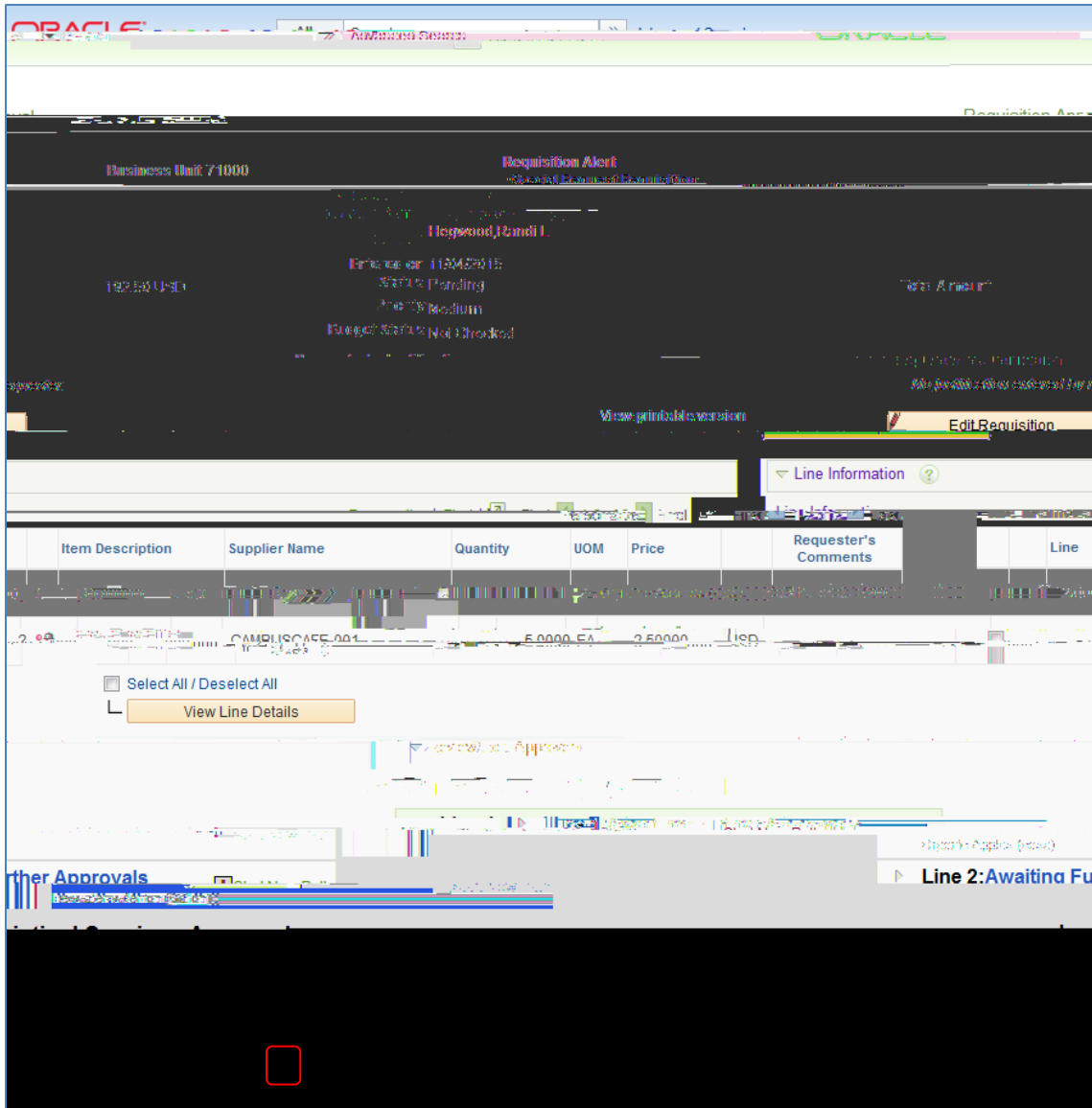
To see the approval path for a requisition, select the “ ” icon next to .

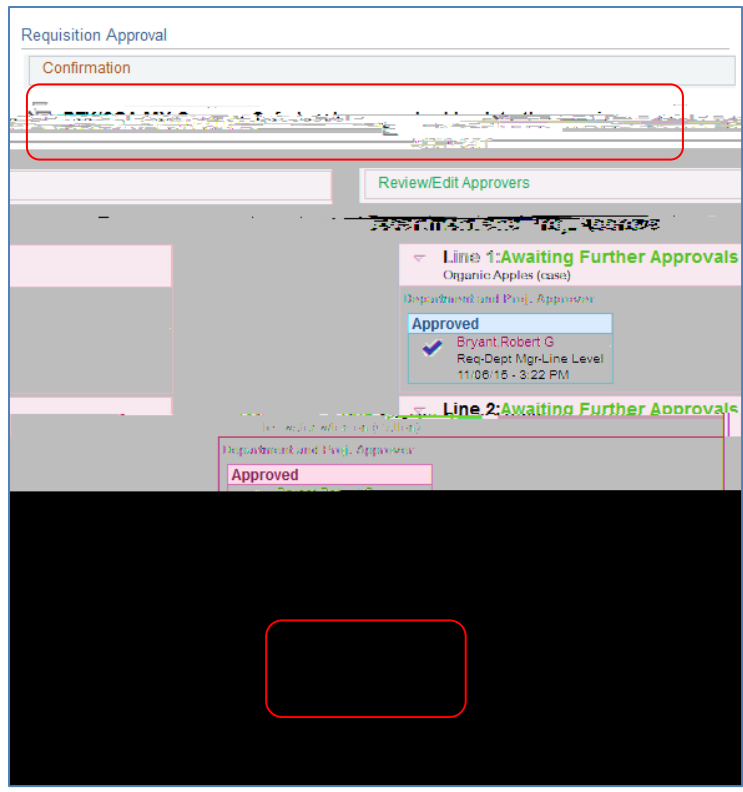
[How to Access your Worklist](#)

1. Log into PeopleSoft Financials Core System with your and .
2. Click tTf1tgmr ID

eProcurement gives you the ability to insert additional approvers if you feel it is necessary. After reviewing a requisition's approval path, you can insert additional approvers if you have the security role.

While you are reviewing the approval path for a requisition, you can insert the ad hoc approver wherever you see a (+).





As the approver who receives a pushed back requisition, you will easily be able to see that it was pushed back and you can review the comments to determine why it was pushed back.

Requisition Approval

Business Unit 71000
Requisition ID 0000502603
Requisition Name PTK/SGA MY-Campus Cafe
Requester Hegwood,Randi L
Entered on 11/04/2015
Status Pending
Priority Medium
Budget Status Not Checked

Total Amount 192.50 USD

Requisition Alert
-Special Request Requisition
-This requisition was pushed back to you. Review previous approver comments for details.

Logistical Services Approval

PTK/SGA MY.Campus Cafe:Pending

You can then perform the necessary actions and either approve or deny the requisition. If you approve it, it will proceed on the approval path.

Chapter 4: Worklist Maintenance

As a requisition approver, you are responsible for approving the purchase of items. If you are unable to perform this task due to the fact you may be out of the office on leave or out of town, you can assign an alternate approver while you are away.

When you assign an alternate approver, you are telling the system that whenever your Worklist receives new requisitions to work, you want them routed to the alternate approver during the time frame specified. The system will then automatically forward any new Worklist items to your Alternate User during that specified time. You will not be able to reassign the items already in your Worklist.

