

# EPro

<https://www.usg.edu/gafirst-fin/>

UNIVERSITY SYSTEM OF GEORGIA

Search [magnifying glass icon]

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## Delivering Trusted Financial Management Solutions

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PeopleSoft Financials was implemented at the teaching institutions of the University System of Georgia, along with the University System Office (USO), under the project name "GeorgiaFIRST" in January 1998. The GeorgiaFIRST PeopleSoft Financials application model is a fully integrated, Oracle-based technology suite of software applications managing the financial data that meet BOR and USG institutional needs for information used in decision-making. The single application model and a consolidated database containing the data for all institutions are centrally hosted at ITS, and ITS distributes all software upgrades and releases. This web site provides information relevant to the model application, including business processes and changes or updates to the model, as well as many informational aids and tips.

Some pages in this site contain proprietary information and are restricted to University System of Georgia personnel. To obtain a user name and password, contact the ITS Helpdesk.

### Subscribe to our mailing list

This list is intended for all customers of the GeorgiaFIRST PeopleSoft Financials application. If you are a Budget User responsible for creating/maintaining budgets at your institution, please click the radio button at the bottom of this form to also sign up for the first-[fb@listserv.usg.edu](mailto:fb@listserv.usg.edu) listserv.

\* indicates required

Email Address \*

Active GeorgiaFIRST Financials User Self-Service Users

Enter Travel, Approve ePro Requisitions and other Worklist Items.

GeorgiaFIRST Self-Service

Core Users

Enter and process financial transactions, run reports or queries, analyze financial data.

GeorgiaFIRST Financials

New GeorgiaFIRST Financials User

Register as a new Self-Service user.

Register For My Account

Click on the hyperlink Georgia First Financials

### Core Users

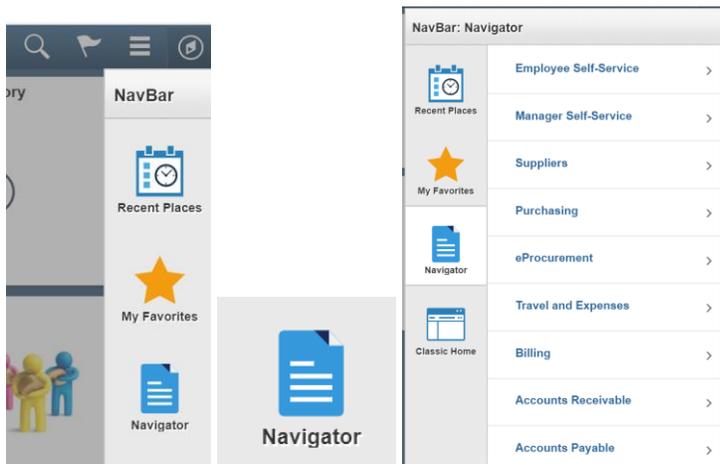
Enter and process financial transactions, run reports or queries, analyze financial data.

GeorgiaFIRST Financials

Follow the steps and use the login that you used to login to your PC.

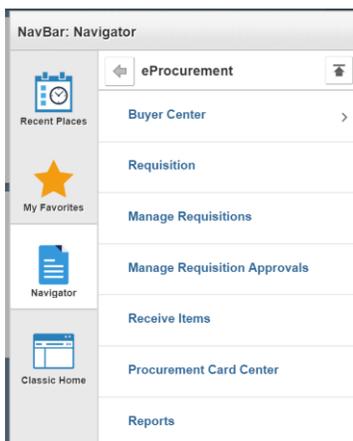


In order to access ePro please do not click on the GFM Shopper Access Tile – you will be a requester and you will not be able to create a requisition from the shopper tile. Please note the circle in the upper right hand corner of the screen. Once you click on it the NavBar displays. Now proceed in clicking the Navigator Link.

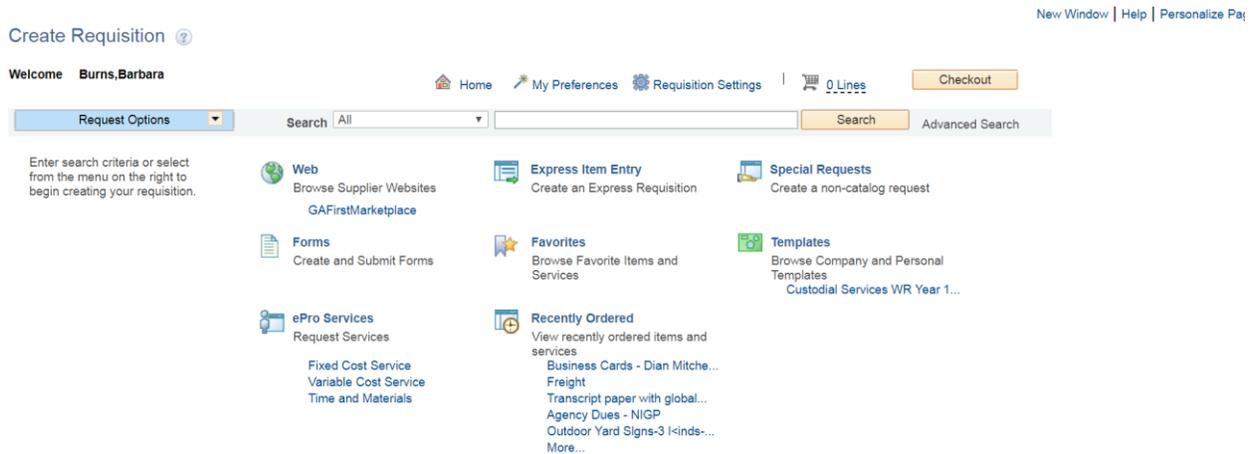


A new menu displays. Please note that you will be accessing eProcurement, but if you do not know the supplier ID prior to entering your ePro special request requisition you can use the 'Suppliers' Menu to look it up.

Let's go to eProcurement



In order to create a requisition – click the requisition button. The following screen will appear:

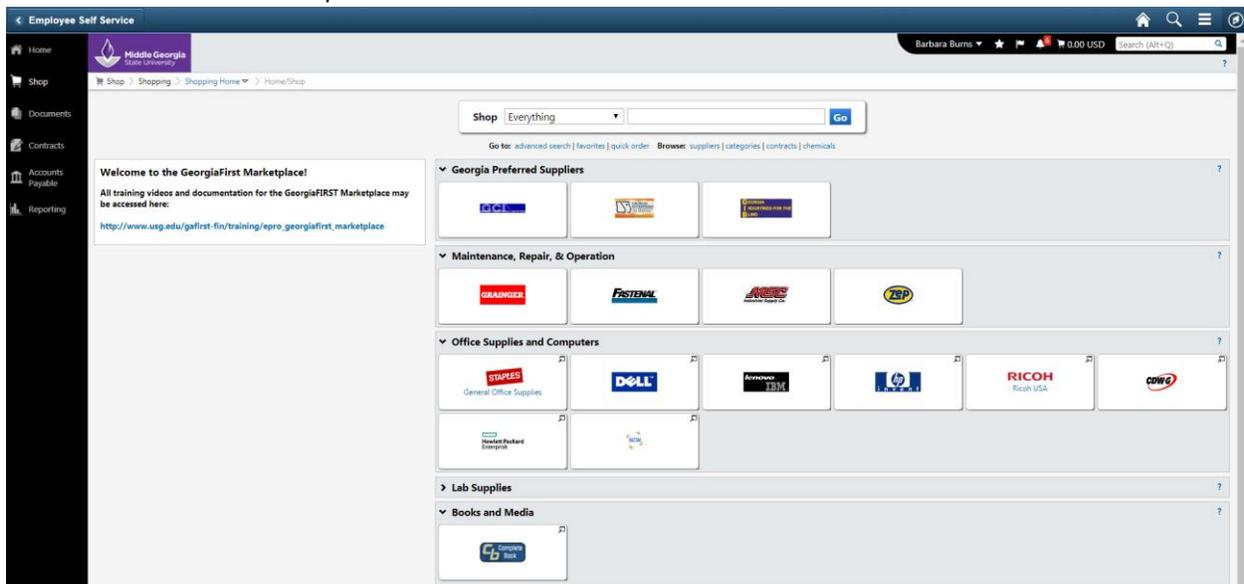


You can create your favorites and templates, but for the most part you will either create a Georgia First Marketplace Requisition (supplies purchased from a statewide contract) or enter a special request requisition.



## Creating Georgia First Marketplace Requisition

Click on the GAFirstMarketplace link.



Here you can punch out to the supplier website by clicking on the respective tile or search catalog items of supplier products that do not have a punch-out site. In addition, you can look up statewide contracts by clicking on the contracts link below the search bar.

Let's punch out to Staples.

SelectSite PunchOut Cancel PunchOut

SHOP Account Number: 1082004ATL Messages 1 Help My Account

STAPLES Business Advantage SOG-SPD0000103-0001 \$0.00 Review Cart (0)

SEARCH BROWSE CATEGORIES QUICK ORDER YOUR LISTS YOUR DASHBOARD

furniture upgrades =  
upgraded performance [SHOP NOW](#)  
Set your team up for success with spaces that improve productivity.

RECOMMENDED FOR YOU

- Staples® Copy Paper, 8-1/2x11", Letter Size
- Sharpie® Fine Point Permanent Markers, Black, 1/Dz (30001)
- Staples® Perforated Notepad, Wide Ruled, White, 8-1/2" x 11-3/4"...
- Staples® Manila File Folders, Letter, 3 Tab, Assorted Position, 100/...
- BIC® Round Stic® Xtra-Life Ballpoint Pens, Black Ink, Medium ...
- Clorox® Disinfecting Wipes Value Pack, Fresh Scent and Citrus Blend...

Let's look up copy paper. You can either click on the box displayed or:

SHOP Account Number: 1082004ATL Messages 1 Help My Account

STAPLES Business Advantage SOG-SPD0000103-0001 \$0.00 Review Cart (0)

hammermill copy paper BROWSE CATEGORIES QUICK ORDER YOUR LISTS YOUR DASHBOARD

PRINT AS PDF PRINT

"Hammermill Copy Paper" (69 items found)  
Related Searches: hammermill color copy digital, hammermill color copy paper, hammermill laser print paper  
VIEW RESULTS BY: [Grid] [List]  
SHOW ONLY:  RECENTLY PURCHASED SORT BY: BEST MATCH

Save more with Staples Brand Products

- Staples® Copy Paper, 8-1/2x11", Letter Size \$28.26 CT/5000
- Staples® Pastels 30% Recycled Colored Copy Paper, ... \$3.51 RM/500
- Staples® Pastels 30% Recycled Colored Copy Paper, ... \$3.51 RM/500
- Staples Copy Paper, 8-1/2" x 11", 94 Bright, 20 LB. \$50.58 CT/5000
- Staples® Pastels 30% Recycled Colored Copy Paper, ... \$3.51 RM/500
- Staples® Pastels 30% Recycled Colored Copy Paper, ... \$3.51 RM/500

NARROW BY:

- Category +
- Brand +
- Show Only +
- Sheet Dimension +
- Paper Weight lbs +
- Brightness +
- Recycled +

Hammermill Copy Plus Copy Paper, 8-1/2" x 11", 92 Bright, 20 LB., 10 Reams of 500 Sheets  
\$28.08 CT/5000  
Staples Item # 122374 | MFR Item #105007CT/27061 | Customer Item # 122374  
 Compare  
Check Delivery Date

Items Per Page 25 Items 1 to 25 of 59

Not every item is cheaper on this contract site – do due diligence and compare prices especially for toner. Selecting a larger quantity will not guarantee better pricing:

Home / Paper & Stationery / Paper & Stationery / Paper & Stationery / POS Paper

[< Back](#)

## Staples® Adding Machine Roll Tape, 2 1/4"W x 150'L, 1/RI

Staples Item # 531178 | MFR Item #18303CC | Customer Item #531178

Brand Name/Manufacturer: Staples



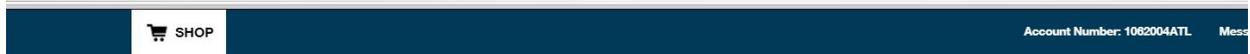
\$0.15 RL/1

 Add to List

Delivery

1  Add

So one roll costs 15 cents – you would be paying 91 cents per roll if you select the dozen.



**STAPLES**  
Business Advantage

SOG-SPD0000103-0001

SEARCH 

BROWSE CATEGORIES  QUICK ORDER  Y L

Home / Paper & Stationery / Paper & Stationery / Paper & Stationery / POS Paper

[< Back](#)

## Staples® Single-Ply Point-of-Sale/Calculator/Cash Register Rolls, 2.25"W x 150'L, 12/Pk

Staples Item # 492005 | MFR Item #18301CC | Customer Item #492005

Brand Name/Manufacturer: Staples



\$10.91 DZ/12

 Add to List

Delivery

1  Add

So let's select the copy paper and the adding machine paper for this order:

✓ Added to Cart



Staples® Adding Machine Roll Tape, 2 1/4"W x 150"L, 1/RI  
Customer Item # 531178   Staples Item # 531178   MFR Item # 18303CC  
1 @ \$0.15 RL/1   **Item total: \$0.15**

Review & Checkout

Continue Shopping

Employee Self Service

SelectSite PunchOut

STAPLES Business Advantage

SEARCH

BROWSE CATEGORIES   QUICK ORDER   YOUR LISTS   YOUR DASHBOARD

My Cart

Items for Delivery

	Hammermill Copy Plus Copy Paper, 8-1/2" x 11", 92 Bright, 20 LB, 10 Reams of 500 Sheets Staples Item # 122374 MFR Item # 105007CT/27061 Customer Item # 122374	\$28.08 CT/5000	1	\$28.08
	Staples® Adding Machine Roll Tape, 2 1/4"W x 150"L, 1/RI Staples Item # 531178 MFR Item # 18303CC Customer Item # 531178	\$0.15 RL/1	1	\$0.15

Subtotal: \$28.23  
TOTAL: \$28.23  
SUBMIT ORDER

Clear Cart   Update Cart

Subtotal: \$28.23  
TOTAL: \$28.23

Let's increase the quantities and submit order.

Employee Self Service

Home   Middle Georgia State University   Barbara Burns   281.70 USD

Shop   Documents   Contracts   Accounts Payable   Suppliers   Reporting

Shopping Cart

Name this cart: 2018-05-03 BBURNS 02

2 Item(s) for a total of 281.70 USD

Proceed to Checkout or Assign Cart

Have you made changes? Update

Empty Cart   Create New Cart   Perform an action on (0) items selected...   Select All

Staples  
Fulfillment Address 1  
3040 Route 50 North, N Saratoga Springs, NY 12866 US

The item(s) in this group was retrieved from the supplier's website. What does this mean?  
You can no longer access this item(s) on the supplier's website. What does this mean?

Product Description	Unit Price	Quantity	Total
Staples Adding Machine Roll Tape, 2 1/4"W x 150"L, 1/RI Part Number: 531178 Manufacturer Info: 18303CC - (TST Impreso) Contract: 99999-001-SPO0000103-0001 more info... Office Supplies: change...	0.15 USD RL	6	0.90 USD
Hammermill Copy Plus Copy Paper, 8-1/2" x 11", 92 Bright, 20 LB, 10 Reams of 500 Sheets Part Number: 122374 Manufacturer Info: 105007CT/27061 - (INTERNATIONAL PAPER) Contract: 99999-001-SPO0000103-0001 more info... Office Supplies: change...	28.08 USD CT	10	280.80 USD

Vendor subtotal: 281.70 USD

Have you made changes? Update

2 Item(s) for a total of 281.70 USD

Proceed to Checkout or Assign Cart

Once reviewed and you are ready to submit – click proceed to checkout.

Employee Self Service

Home | Shop | Documents | Contracts | Accounts Payable | Suppliers | Reporting

Barbara Burns | 281.70 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Summary - Draft Requisition

General | Final Review

Issue Requisition  
Assign Cart

Return to shopping cart | Continue Shopping

**All done! The required information has been completed and this request is ready to be submitted.**  
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Cart | Comments | History

Summary

Hide header

General

Cart Name: 2018-05-03 BBURNS 02 [edit]

PO Clauses: [edit clauses...]

Business Unit: Middle Georgia State University (83000)

Vendor / Line Item Details

Hide line details

For selected line items: Add to Favorites [Go]

Staples [more info...]

Fulfillment Address 1 [Edit]

3040 Route 50 North, N Saratoga Springs, NY 12866 US

The item(s) in this group was retrieved from the supplier's website. What does this mean?  
You can no longer access this item(s) on the supplier's website. What does this mean?

Line(s): 1, 2

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Staples Adding Machine Roll Tape, 2 1/4" W x 150' L, 1/RI [more info...]	531178	RL	0.15	6 RL	0.90 USD
Manufacturer Name: TST Impreso	Commodity Code: 61503				
Manufacturer Part Number: 18303CC	Adding Machine and Calculator Paper - Rolls				
Vendor Part Auxiliary ID: 531178					
PO Clauses: [edit clauses...]					

You are done on the punch-out site but you have not issued a requisition yet – let's do that by clicking the 'Issue Requisition' button.

All Request Options | Checkout - Review and Submit

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences | Requisition Settings

Requisition Summary

Business Unit: 83000 MIDDLE GA STATE UNIVERSITY

Requester: BBURNS Burns, Barbara

Requisition Name: [ ]

Priority: Medium

Currency: USD

Cart Summary: Total Amount 281.70 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UCM	Price	Total	Details	Comments	Delete
1	Staples Adding Machine Roll Tape		Staples	6.0000	Roll	0.1500	0.90		Add	
2	Hammermill Copy Plus Copy Paper		Staples	10.0000	Carton	28.0800	280.80		Add	

Select All / Deselect All | Select lines to: Add to Favorites | Add to Template(s) | Delete Selected | Mass Change

Total Amount: 281.70 USD

Shipping Summary

Edit for All Lines

Ship To Location: MACON

Address: Middle GA State University  
100 University Parkway  
Macon, GA 31206

Attention To: Burns, Barbara

Comments: [ ]

Requisition Comments and Attachments

Enter requisition comments

Send to Supplier | Show at Receipt | Shown at Voucher

Add more Comments and Attachments

On this screen we can edit the ship to location, the attention to and the accounting/expense chartfield information. Normally you have been set up with a default and can just click 'Save and Submit'

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ 1	Staples Adding Machine Roll Ta		Staples	6.0000	Roll	0.1500	0.90		Add	
▶ 2	Hammermill Copy Plus Copy Page		Staples	10.0000	Carton	28.0800	280.60		Add	

Select All / Deselect All     
 Select lines to:   
  Add to Favorites   
  Add to Template(s)   
  Delete Selected   
  Mass Change

**Total Amount**    281.70 USD

**Shipping Summary**

Edit for All Lines

**Ship To Location**    MACON  
**Address**            Middle GA State University  
                              100 University Parkway  
                              Macon, GA 31206  
**Attention To**       Burns, Barbara  
**Comments**

**Requisition Comments and Attachments**

Enter requisition comments

Send to Supplier   
  Show at Receipt   
  Shown at Voucher

[Add more Comments and Attachments](#)

**Approval Justification**

Enter approval justification for this requisition

Check Budget

You can follow up on your requisition by checking 'Manage Requisitions':

Click back to the NavBar and Navigator, eProcurement and Manage Requisitions

The screenshot shows the top navigation bar (NavBar) with icons for Home, Search, Notifications, Menu, and Logout. Below it is the 'NavBar: Navigator' section, which is currently set to 'eProcurement'. The menu items listed are:

- Recent Places
- My Favorites
- Navigator
- Classic Home
- eProcurement (selected)
- Buyer Center
- Requisition
- Manage Requisitions
- Manage Requisition Approvals
- Receive Items
- Procurement Card Center
- Reports
- My Profile

## Manage Requisitions

**Requisition Search**

**Search Requisitions**

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

Business Unit:

Requisition Name:

Requisition ID:

Request State:

Date From:

Date To:

Requester:

Entered By:

Budget Status:

Origin:

PO ID:

**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.

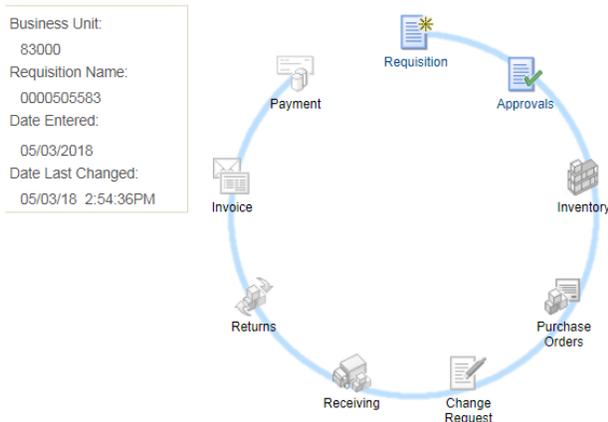
Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▶ 0000505583	0000505583	83000	05/03/2018	Pending	Not Chk'd	281.70 USD	<input type="text" value="[Select Action]"/>	<input type="button" value="Go"/>
▶ 0000505582	0000505582	83000	05/03/2018	Pending	Not Chk'd	35.00 USD	<input type="text" value="[Select Action]"/>	<input type="button" value="Go"/>
▶ 0000505581	0000505581	83000	05/03/2018	Pending	Not Chk'd	87.29 USD	<input type="text" value="[Select Action]"/>	<input type="button" value="Go"/>
▶ 0000505580	0000505580	83000	02/15/2018	Pending	Not Chk'd	95.00 USD	<input type="text" value="[Select Action]"/>	<input type="button" value="Go"/>

In order to see the Marketplace requisitions as well as the special requests – change the origin box to blank as above. If you are reviewing older requisitions blank out the date from box as shown above. Click search if the information doesn't display. The GFM requisition we created is on top of the list REQ 0000505583 – we could have changed the requisition name on the submit screen but it is not necessary.

On the right hand side there is a box with the words "Select Action" click on it. You can select to view approvals, cancel the requisition, check budget (Procurement will do this once approved), edit – although you cannot change the quantities or items for a GFM requisition but if the shipping address is incorrect or a different budget should be used - you can edit those. You can view the cycle status of the requisition and view a print.

This is the cycle for our requisition:

Requisition Cycle for: Burns, Barbara



[Manage Requisitions](#) [Manage Approvals](#)

We are still in the beginning of the requisition cycle and only the requisition and approval stops are highlighted. If we purchased an asset – a single item in the amount of \$3000 or above then the inventory stop would come into play and once

the purchase order stop is in color you can look up the purchase order number. Once the items come in and an invoice has been processed the invoice and payment stops with highlight as well and you can review payment information.

If you click to view a print with distribution details then this information will display:

<b>Business Unit:</b> 83000		<b>Requester:</b> BBURNS		<b>Status:</b> Pending			
<b>Requisition:</b> 0000505583		<b>Requested By:</b> Burns,Barbara		<b>Currency:</b> USD			
<b>Requisition Name:</b> 0000505583		<b>Entered Date:</b> 5/3/18		<b>Requisition Total:</b> 281.70			
<b>Line:</b> 1	<b>Item Description:</b> Staples Adding Machine Roll Tape, 2 1/4"W x 150'L, 1/Rl	<b>Quantity:</b> 6.0000	<b>UOM:</b> RL	<b>Price:</b> 0.1500	<b>Line Total:</b> 0.90		
<b>Line Status:</b> Pending Approval							
<b>Ship Line:</b> 1		<b>Ship To:</b> COC		<b>Address:</b>			
<b>Attention:</b> Pam Lockerman		<b>Due Date:</b>		<b>Shipping Quantity:</b> 6.0000			
<b>Ship Via:</b> VENDOR		<b>Freight Terms:</b> FOB:DEST		<b>Shipping Total:</b> 0.90			
Middle GA State University 1100 Second Street S.E. Cochran GA 31014 United States							
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	RECEIVING	6.0000	100.00	0.90	83000	714100
<b>Dept</b>	<b>Fund</b>	<b>Program</b>	<b>Class</b>	<b>Budget Ref</b>			
1606010	10500	16200	11000	2018			
<b>Open QTY</b>			<b>Open Amt</b>				
6.0000			0.000				
<b>GL Base Amount</b>		<b>Currency</b>	<b>Sequence</b>	<b>Capitalize</b>			
0.90		USD	0	N			
<b>Line:</b> 2	<b>Item Description:</b> Hammermill Copy Plus Copy Paper, 8-1/2" x 11", 92 Bright, 20 LB, 10 Reams of 500 Sheets	<b>Quantity:</b> 10.0000	<b>UOM:</b> CRT	<b>Price:</b> 28.0800	<b>Line Total:</b> 280.80		
<b>Line Status:</b> Pending Approval							
<b>Ship Line:</b> 1		<b>Ship To:</b> COC		<b>Address:</b>			
<b>Attention:</b> Pam Lockerman		<b>Due Date:</b>		<b>Shipping Quantity:</b> 10.0000			
<b>Ship Via:</b> VENDOR		<b>Freight Terms:</b> FOB:DEST		<b>Shipping Total:</b> 280.80			
Middle GA State University 1100 Second Street S.E. Cochran GA 31014 United States							
<b>Dist</b>	<b>Status</b>	<b>Location</b>	<b>Qty</b>	<b>PCT</b>	<b>Amount</b>	<b>GL Unit</b>	<b>Account</b>
1	Open	RECEIVING	10.0000	100.00	280.80	83000	714100
<b>Dept</b>	<b>Fund</b>	<b>Program</b>	<b>Class</b>	<b>Budget Ref</b>			
1606010	10500	16200	11000	2018			
<b>Open QTY</b>			<b>Open Amt</b>				
10.0000			0.000				
<b>GL Base Amount</b>		<b>Currency</b>	<b>Sequence</b>	<b>Capitalize</b>			
280.80		USD	0	N			

# Creating a Special Request Requisition



## Special Requests

Create a non-catalog request

let's not click this quite yet

Let's go through a checklist first:

1. I have a quote in pdf format ready to attach
2. I know what I am purchasing and I have looked up the Category/Commodity aka NIGP Code
  - a. [http://ssl.doas.state.ga.us/PRSapp/PR\\_nigp\\_list.jsp?whereFrom=public](http://ssl.doas.state.ga.us/PRSapp/PR_nigp_list.jsp?whereFrom=public)
  - b. Or go to the Procurement Office website and click on NIGP Code Directory ( do not look up NIGP codes in PeopleSoft – slow process and you do not see all the necessary information to choose the correct code
  - c. Check with the Procurement Office if you are uncertain which one to pick
3. I know my supplier ID and the supplier is in the system
  - a. If not let' see if the supplier is in the system  

If we cannot find the supplier in our system – let's contact the supplier and ask for their tax ID before we send them the supplier registration form to complete. The name of the supplier's business and how it is listed with the Secretary of State can differ.

Note: No purchase can be created from a requisition without a valid supplier ID
4. I have reviewed the order of precedence and other purchasing regulations – amount does not require the bid process, I am using the correct mandatory statewide contract or no contract exists (check for MGA contracts) and I am ready to enter the special request requisition.

Now we are ready to click the Special Requests button.

Create Requisition

Welcome Burns, Barbara

Request Options Search All Search Advanced Search

- All Request Options
- Web
  - GAFirstMarketplace
- Express Item Entry
- Special Requests
- Forms
- Favorites
- Templates
- ePro Services
  - Fixed Cost Service
  - Variable Cost Service
  - Time and Materials
- Recently Ordered

Special Requests

Enter information about the non-catalog item you would like to order.

**Item Details**

\*Item Description

\*Price  \*Currency

\*Quantity  \*Unit of Measure

\*Category  Due Date

**Supplier**

Supplier ID  Supplier Name  Suggest New Supplier

Supplier Item ID

**Manufacturer**

Mfg ID

Manufacturer

Mfg Item ID

**Additional Information**

Send to Supplier  Show at Receipt  Show at Voucher

**Request New Item**

Request New Item A notification will be sent to a buyer regarding this new item request.

Special Requests

Enter information about the non-catalog item you would like to order.

**Item Details**

\*Item Description

\*Price  \*Currency

\*Quantity  \*Unit of Measure

\*Category  Due Date

**Supplier**

Supplier ID  Supplier Name  Suggest New Supplier

Supplier Item ID

**Manufacturer**

Mfg ID

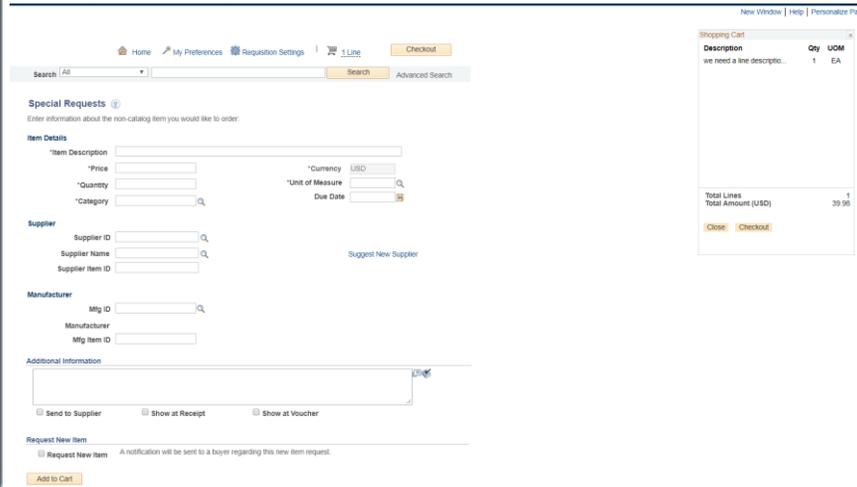
Manufacturer

Mfg Item ID

**Additional Information**

The line description should be in line with the category code chosen. Unit of measure – please do not use the following: USD or Lot. We are already paying in US currency so the unit of measure should not be USD. In very rare instances is lot the correct unit of measure – e.g. a lot of shirts – is not a ‘lot’ unit of

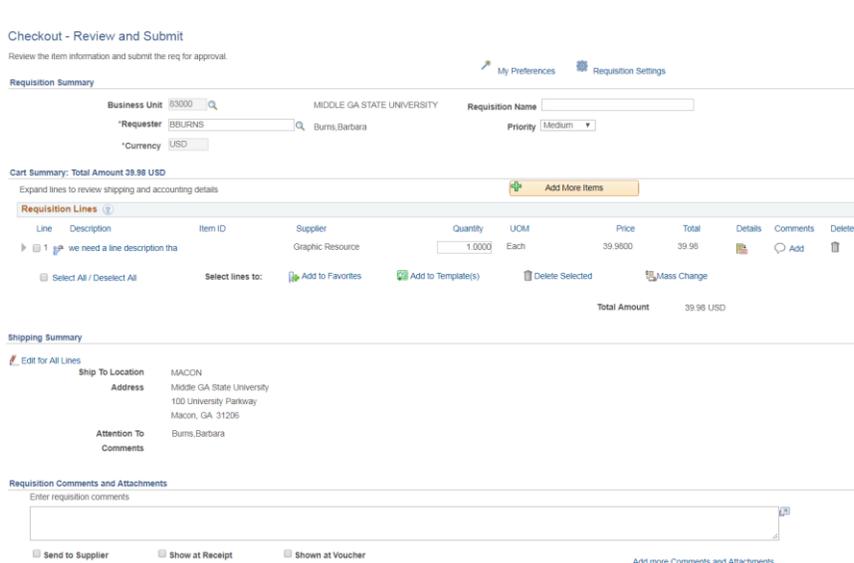
measure. You can look up the correct term by clicking on the magnifying glass next to the field.



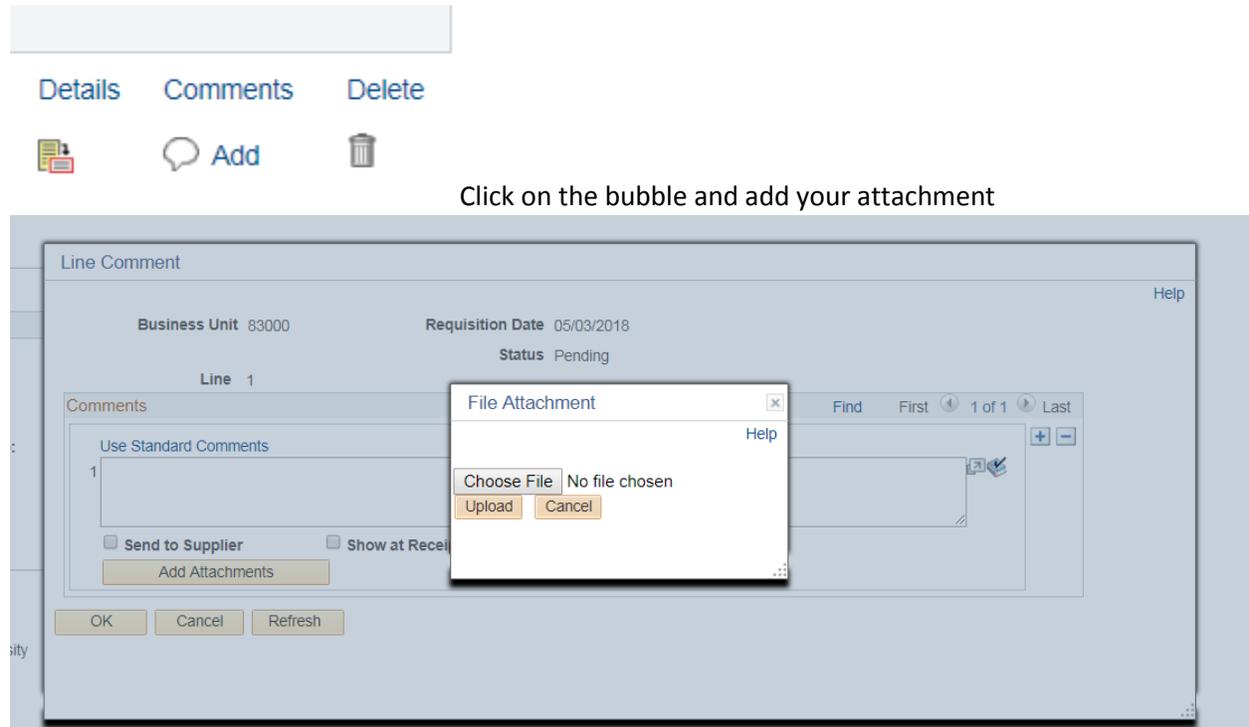
Please see above for the fields that require information. You can enter additional lines, but please make sure that you use one requisition for one supplier and do not order different items from multiple suppliers. The follow-up would be exponentially harder. Procurement will not process a requisition that is to go to multiple suppliers. This is a MGA rule based on past experience.

Let's leave it as one line and after we entered the information click 'add to cart'. The screen above displays and we can click 'checkout'.

Now the screen is the same as previous seen for a GFM requisition, but this time we need to attach our quote:

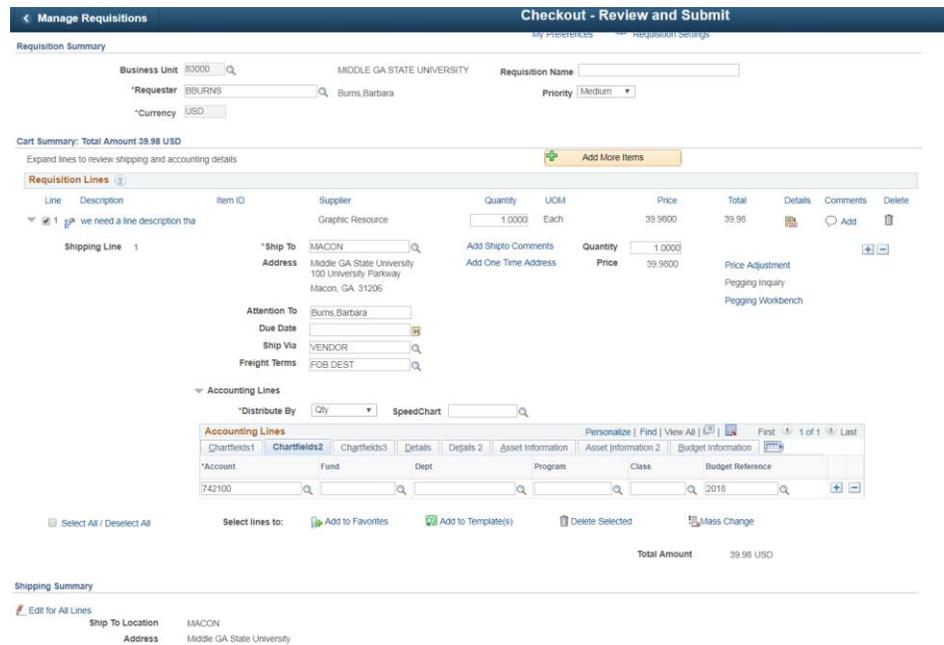


Let's see if you can spot a cartoon bubble under the word 'Comments'. This is the only place that the approver can see the attachment on the approval screen.



Click on the bubble and add your attachment

Once done you will be returned to the previous screen. Make it a habit to verify the chart field / accounting / expense information. The NIGP or Category code triggers the expense account but not always correctly. Click on the triangle to the left of the line and verify the fields by clicking again on the triangle next to the accounting line.



Most common expense codes are:

714100 – Supplies and materials

714102 – Lab Supplies

714111 – Shipping and Handling coincides with NIGP code 96286

714114 – IT Supplies

714120 – Supplies and Materials other

715100 – Labor – coincides with NIGP codes beginning with the number '9'

714106 – Printing

742100 – only for GCI letterhead and envelope printing

714125 – should only be used by Student Activities

727100 – other operating expense

727110 – Registration fees – coincides with NIGP 96364

727120 – Subscriptions – only periodicals

727130 – Memberships – coincides with NIGP 96348

753100 – contracts - many sub-contracts mostly used by Plant OPS

753112 – contracts – charter bus services

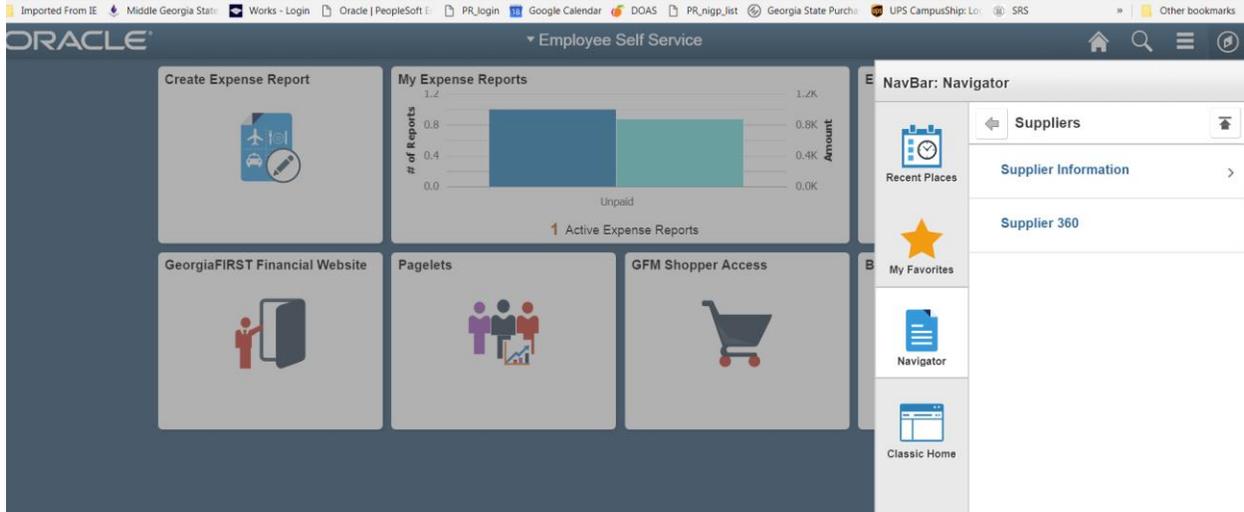
753190 – misc contracts – for Student Activities

751110 – per diem and fees

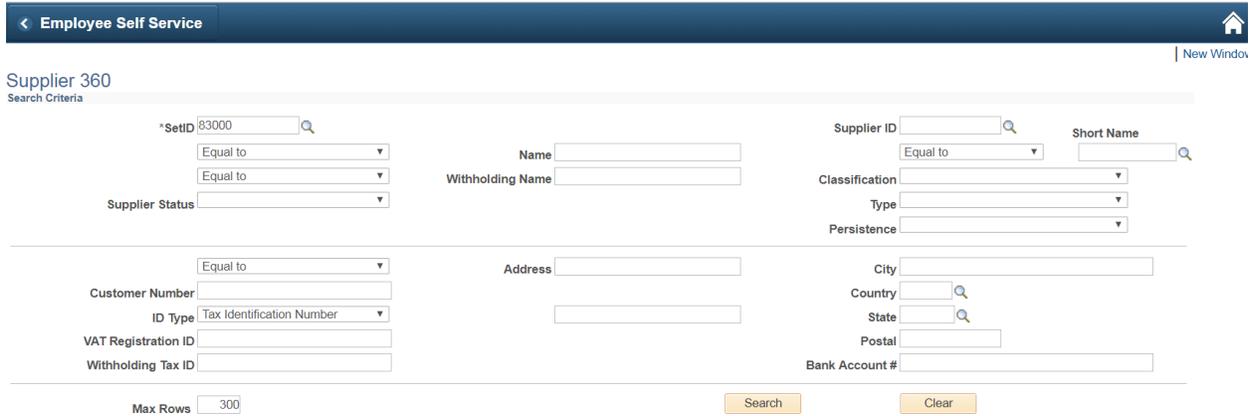
751108 – consultants – look in the 7511 range for the best match

# Looking up a supplier in PeopleSoft

In order to find a supplier ID – we return to the NavBar and Navigator and then click on Suppliers:



Let's click on Supplier 360 and this screen will display:



In order to obtain any results, we must change the SetID from 83000 to Share. Please note that we no longer enter our suppliers in the PeopleSoft system, but that this is done by Shared Services for USG institutions that have consolidated. So if another USG institution has used the supplier – it should be already in the system unless they are the Research institutions or have not gone through consolidation yet.

Tips on looking up suppliers:

Change the name from Equal to – to Contains. Don't provide too much information. You can narrow the search meaning don't include the word Inc. – you don't know if they are listed as Inc. or Inc without the period.

If the name search does not provide results – try the address by just entering the numbers of the street address or P.O. Box. Please keep in mind that this is not error proof. I am aware of one supplier who resides at the same address but does have two different companies which we both use.

The best and error-proof way is to look up a supplier by the Tax identification number also know as FEIN.

If you encounter problems, contact the Procurement office and we will try to help. If we cannot find the supplier in the system then they will need to complete the supplier registration form and submit it to Shared Services.

Please note a W-9 is not sufficient. However a foreign supplier will not need to complete the supplier registration form but has to submit a W-8ben form.