

PO.020.790 – ADDING/MAINTAINING LOCATIONS

Purpose	To add and maintain Location Codes that are used within the eProcurement and Purchasing modules.
Description	Location Codes contain address and phone information for physical locations.
Security Role	BOR_PO_SETUP_CONFIG
Dependencies/ Constraints	None
Additional Information	<p>Important: Locations are used by many different modules and great care should be taken when modifying.</p> <p>A Location Code must exist in the system before a Ship To location can be added.</p> <p>Location Codes used with the GeorgiaFIRST Marketplace are required to be entered in a specific format.</p>

Procedure

Below are step by step instructions on how to create a location.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Click the Common Definitions link.
5.	Click the Location link.
6.	Click the Setting Up Locations link.
7.	Click the Add a New Value tab.
8.	Enter the location code in the Location Code field.
9.	Click the Add button. The system navigates to the Location page.
10.	Enter location Description in the Descr field.
11.	If needed, enter the phone number in the Phone field. <i>Note: The Prefix field is used for international telephone codes only.</i>
12.	If needed, enter the fax number in the Fax field.
13.	Enter the institution name in the Address 1 field. <i>Note: This is required for Locations used in the GeorgiaFIRST Marketplace.</i>
14.	Enter the physical street address in the Address 2 field. <i>Note: This is required for Locations used in the GeorgiaFIRST Marketplace.</i>
15.	Users can enter additional information in the Address 3 field.
16.	Enter city in the City field.
17.	Enter County/BLDG information. If the institution would like to include the building number on the Location in the GeorgiaFIRST Marketplace, enter the building name or number in this field. <i>Note: PeopleSoft does not pass the information entered in the Building # field on this page to the GeorgiaFIRST Marketplace.</i>
18.	Enter zip code in the Postal field.
19.	Enter state in the State field.

Step	Action
20.	If needed, enter the building number in the Building # field. <i>Note: Information entered in this field does not pass to the GeorgiaFIRST Marketplace.</i>
21.	If needed, enter the building floor number in the Floor # field. <i>Note: Information entered in this field does not pass to the GeorgiaFIRST Marketplace.</i>
22.	If needed, enter the sector number in the Sector field. <i>Note: Information entered in this field does not pass to the GeorgiaFIRST Marketplace.</i>
23.	Click the Save button.

Below are step by step instructions on how to update an existing location.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Set Up Financials/Supply Chain link.
4.	Click the Common Definitions link.
5.	Click the Location link.
6.	Click the Setting Up Locations link.
7.	Click the Find and Existing Value tab.
8.	Enter the Location Code in the Location Code field.
9.	Click the Search button.
10.	Important: enter a new effective dated row when making a change to the Location.
11.	Update Location information as needed.
12.	Click the Save button.