

eProcure Quick Reference Guide

eProcure will not open

Mozilla Firefox, Google Chrome and Internet Explorer work with eProcure. **Safari will not work.**
Allow pop-up blockers for this site
Banner Self-Service (Personal Information) ~add your CofC office phone

Complete Profile

Add department name
Add shipping information ~ enter street # and search to find list of pre-populated addresses; room number is a required
Add your PCard to payment options in your profile (*Default User Settings*)
Approvers - enter PIN to utilize the email approval function

New Supplier

If supplier is not in eProcure, use "Unknown" as vendor on the "Non-Catalog Form"
Attach completed *New Supplier Request or Change* form and IRS Form W-9 under internal notes/attachments during the check-out process

Non-catalog Form

Check the "taxable" box when ordering goods
Commodity code must be entered
To enter multiple non-catalog items for one order, choose "Add to cart and Return"
Add a separate line item for shipping & handling, taxable, estimate 10%

PO Renewal

Purchase Orders are not renewed, submit new requisition for next fiscal year
Check Favorites for CofC shared forms (i.e. *Xerox Order Form*)
Change fiscal year to July 1, 20xx ~ billing tab
-Only required when current & new fiscal year is open simultaneously (JUNE)

Receipt

Create a **quantity or cost receipt** for goods received by the department
Locate the PO in the "Orders & Documents" page, select from available actions drop-down menu
No receipt needed if purchased with PCard or shipped to Central Stores or IT

Requisition errors

Make sure to check the cart out after filling your cart
Clear all the alerts or errors on the progress bar (all section will have green checkmarks)
Click on "Final Review" to illuminate the "Place Order" button

Requisition returned

Check bottom of email for reason and instructions to correct
Order split between 2 or more indices ~ assign cart to Procurement 1st

Shortcuts

Orders to different vendors can be created using one requisition ~ different POs will be generated
Use Favorites for frequent purchases and shared college's favorites
Rename cart to describe contents
Copy old requisitions for yearly renewals, make changes and place order

Changes to existing PO

Increases/decreases/changes in FOAPAL/cancellations are initiated by submitting a *PO Change Request* form in eProcure
Add form to an **EMPTY** shopping cart. Follow normal "check-out" procedures to submit request