

## *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

### Changes to existing PO

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

### Contracts

Search for goods and services on College contracts on the home page  
Select pre-populated form from search results

### Complete Profile

Add department name  
Add shipping information ~ enter street # and search to find list of pre-populated addresses; room & phone number are 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'

### PO Renewal

Purchase Orders are not renewed, submit new requisition for next fiscal year  
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; partial receipts are allowed  
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 adding all your items  
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

Use Favorites for frequent purchases and shared college's favorites  
Rename cart to describe contents

### Shopper Only

PCard purchases – click on the 'Place Order' button  
All other purchases – assign to an approver to click on the 'Place Order' button