ePro FAQ

Revised April 10, 2017

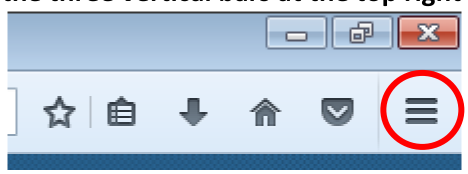
Clearing the Browser Cache:

Clearing the browser cache can solve most problems, such as attachments not uploading. Below are the steps for various browsers:

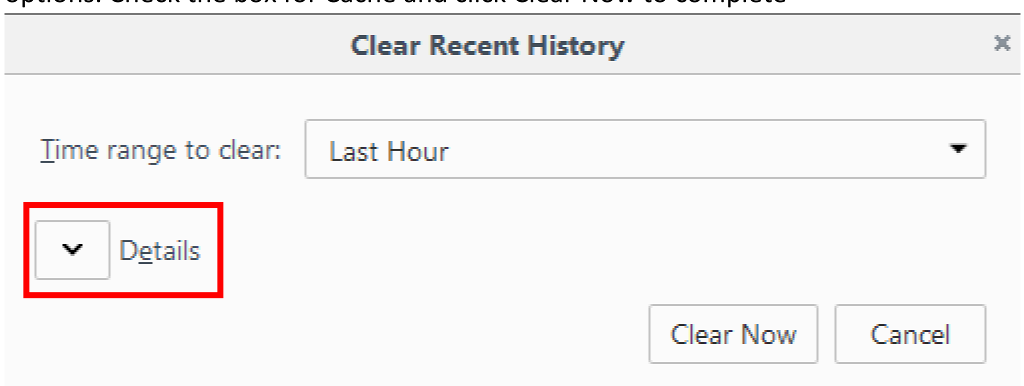
- **Google Chrome (click on the three vertical dots at the top right of the screen):**

  - Navigate to Settings > Show Advanced Settings > Privacy > Clear Browsing Data. Check the boxes for Browsing History and Cached Images and Files, then click Clear Browsing Data to complete

- **Mozilla Firefox (click on the three vertical bars at the top right of the screen):**



  - Click on Options, then select Privacy and click on the hyperlink titled "clear your recent history". Click the arrow next to Details in order to bring up more options. Check the box for Cache and click Clear Now to complete

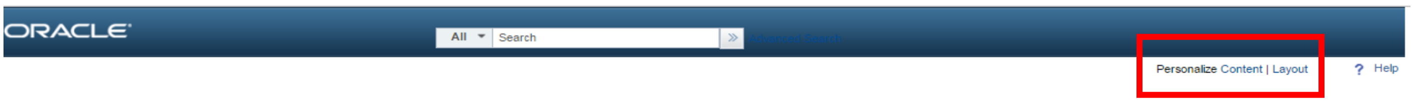


- **Internet Explorer (select the gear icon, then click on Internet Options)**

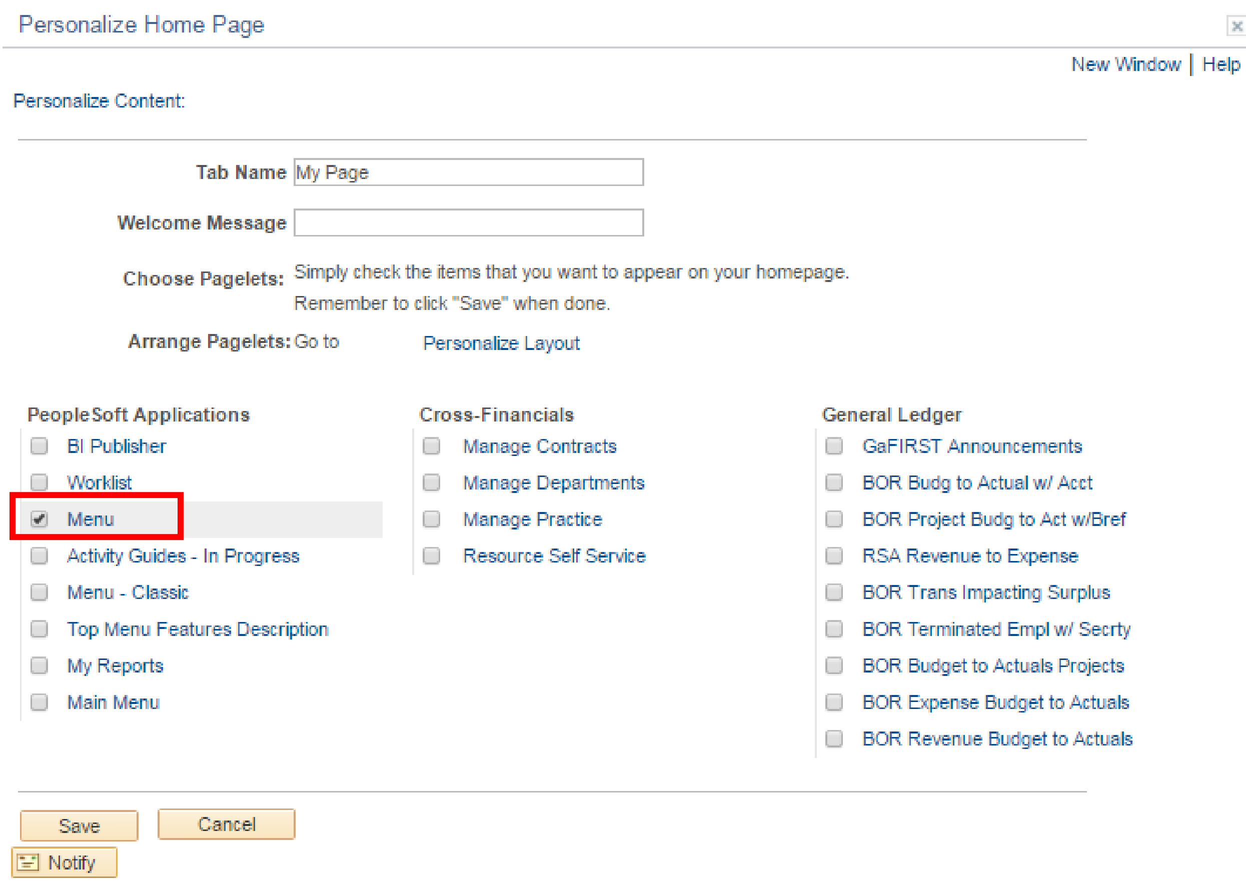
  - Click on Delete under Browsing History and select Temporary Internet Files and Website Files, Cookies and Website data, and History. Click Delete, then Apply, to complete

The main screen is blank (no menu present):

- When first accessing ePro, sometimes the home screen will resemble the image below (only the top bar is present):



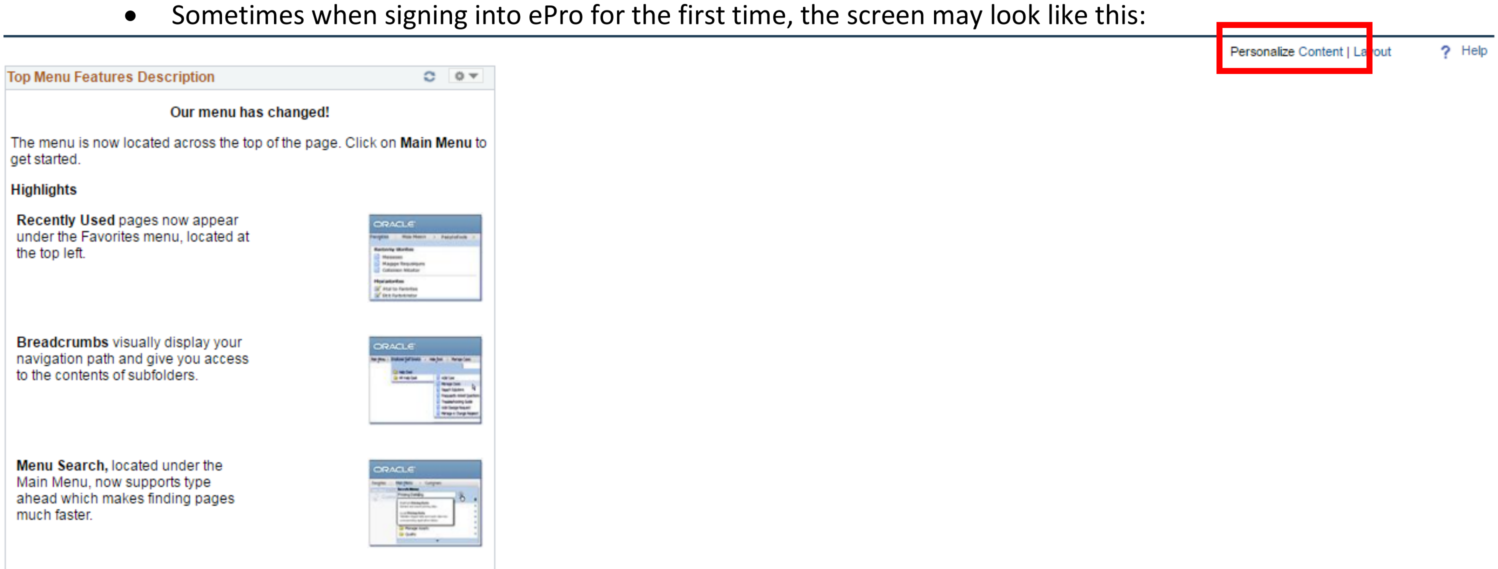
- To add the menu back to the home screen, select Content, located next to Personalize, as seen in the red box above
  - Selecting Layout instead of Content will allow you to personalize the location of each item selected above
- After selecting Content, a new screen will pop up that will allow you to select the Menu



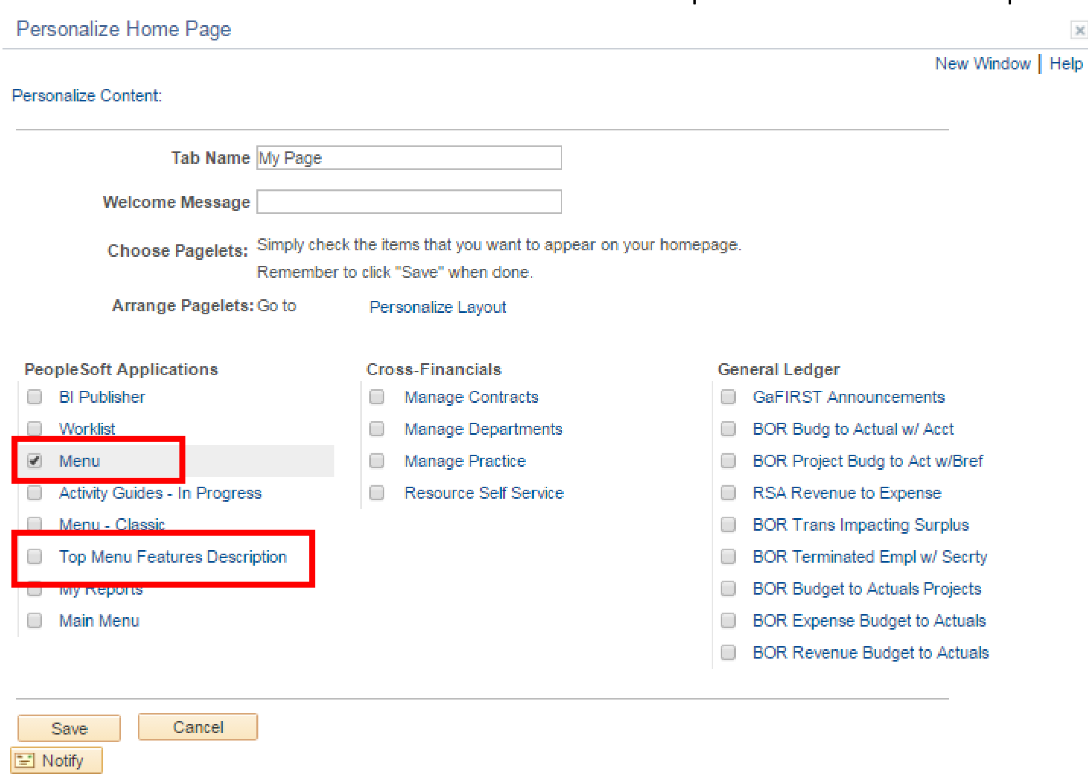
- Once the checkbox for Menu is selected, click Save and the screen will refresh, adding in the Menu to the left side of the screen

The screen is missing the menu and a notice that the menu has changed appears:

- Sometimes when signing into ePro for the first time, the screen may look like this:



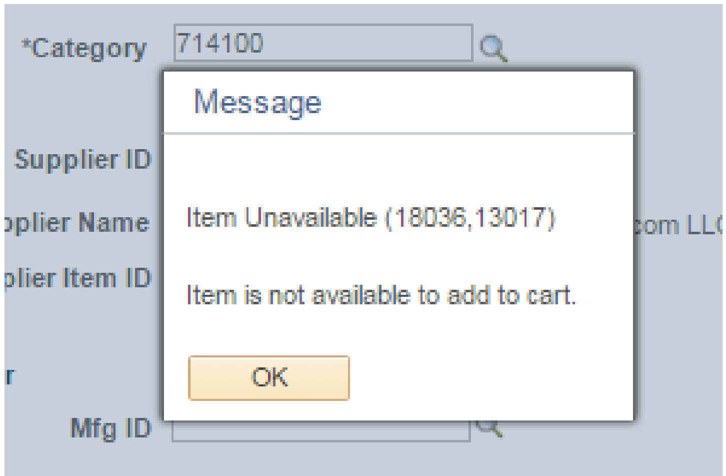
- Click on Content (next to Personalize), as shown above, to bring up the content menu
- Select the checkbox for Menu and deselect the one for Top Menu Featureless Description



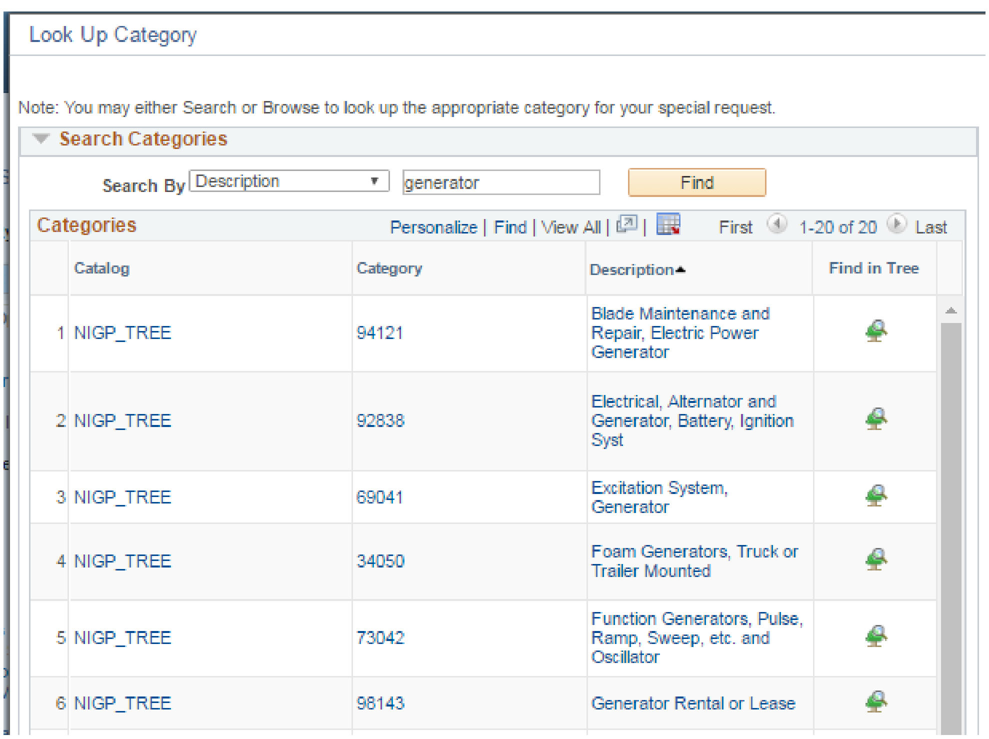
- Click save once finished to reload the main screen

Error adding an item to the cart:

- When adding an item to the cart in Special Request, you receive an error that the item is unavailable and it cannot be added to the cart:

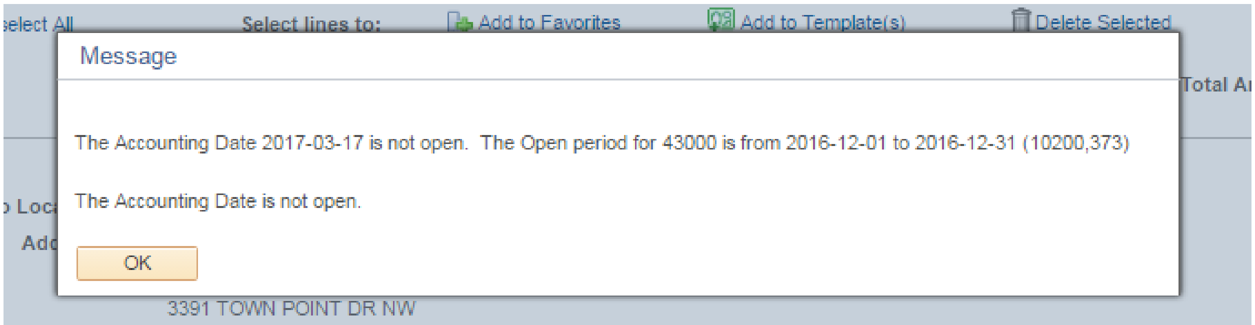


- This is due to the KSU Accounting Codes being used in place of the Category Codes (NIGP Codes)
    - To remedy this, please click on the magnifying glass next to the Category field to search for the proper NIGP Code
        - After clicking the magnifying glass, change the Search By field to Description, then search for the item that way



Accounting Date Error

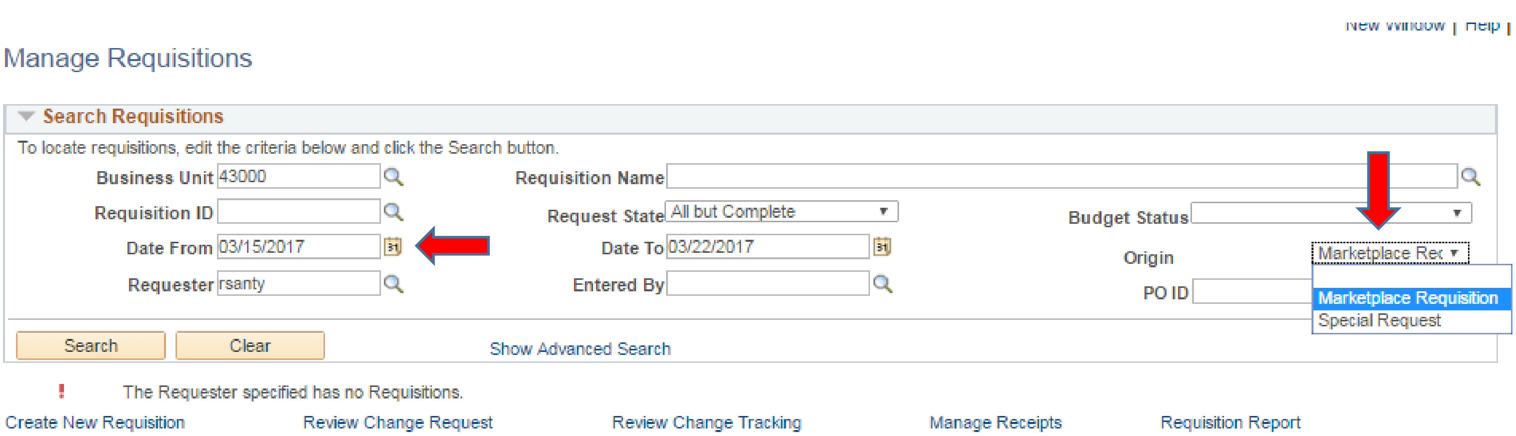
- When editing a requisition, you receive an error that the Accounting Date is not open, similar to the screenshot below:



- The accounting period for each month closes at the end of the month. Any requisitions created in a prior month are locked to the accounting period in which they were created
  - You will need to contact Ryan Santy (rsanty@kennesaw.edu, x6474) to have the requisition accounting date reopened

The Requisition cannot be found using Manage Requisitions:

- When searching for a requisition, the default search in ePro is seven days
- To search for requisitions older than 7 days, you will need to clear the Date From field
  - The default Origin is set to Special Request. If the requisition is a Marketplace requisition, the Origin field will need to be changed to Marketplace or blank, as shown below

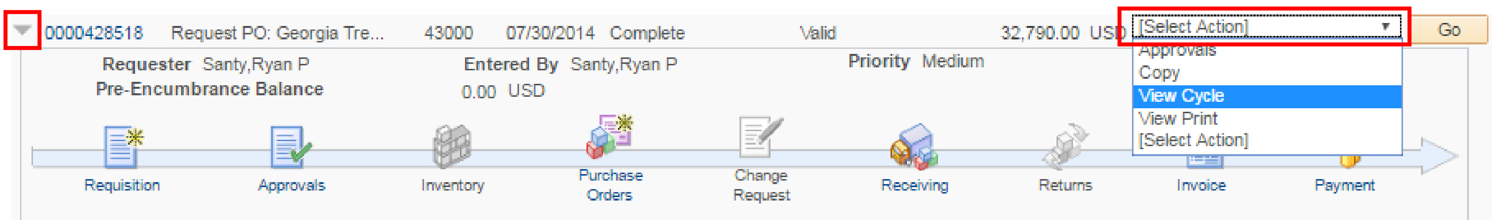


- After clearing the Date From field, you should be able to see all of your requisitions that have not been closed out

Click here to return to the main page

Different Requisition Statuses:

- To check the status of the requisition, navigate to eProcurement > Manage Requisitions. From here, you can search for the requisition using the Requisition ID field
    - Clear the Date From field and the Origin field if the Requisition ID is unknown, then click Search to pull up any Requisition still active
- To see the cycle of the requisition, change the Select Action to View Cycle then click Go
    - Alternately, you can click the grey arrow next to the Requisition ID to pull up the different steps in the requisition cycle.

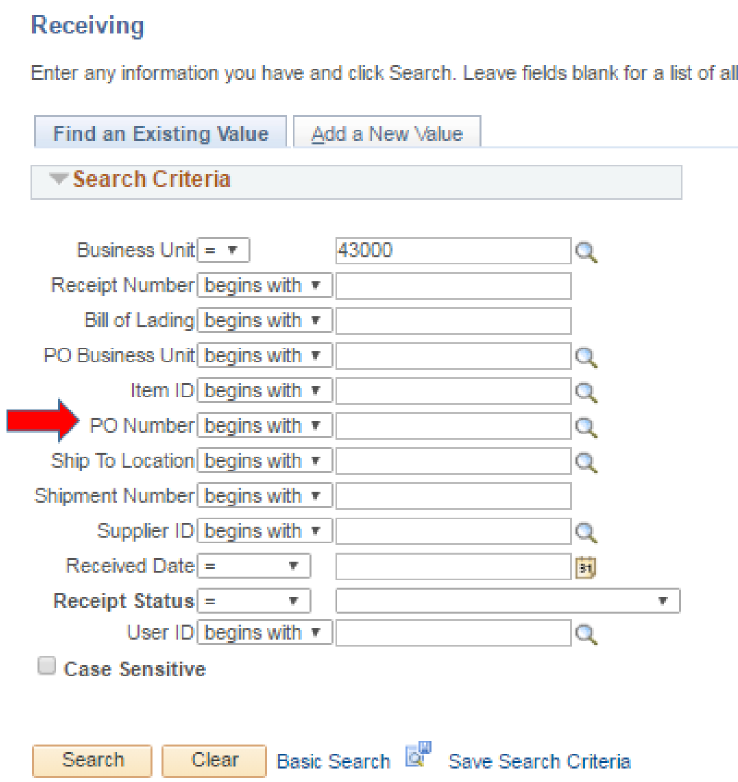


    - Below are various statuses and what they mean, as seen under the Request State below

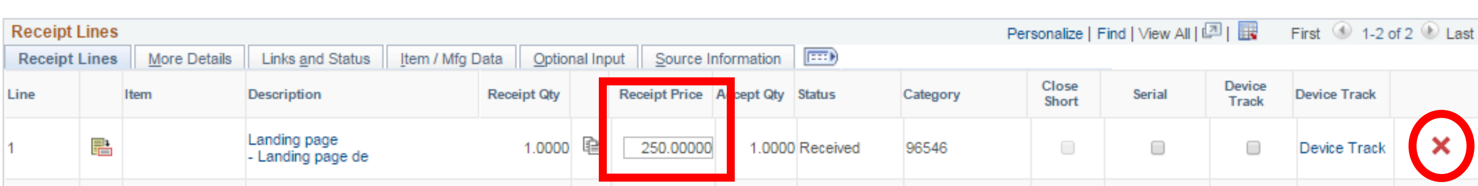
        - Pending
            - The requisition is still in the approval process and a purchase order has not been created
            - The remaining approvals can be viewed by clicking on the Approvals icon
        - Open
            - The requisition has not been submitted for approval. It cannot proceed to a purchase order until the requisition has been saved and submitted
        - Denied
            - The requisition has been denied by one or more approvers in the approval chain and must be resubmitted after editing and must be re-edited or cancelled
        - See Lines
            - The edited requisition has not gone back through the approval process. To fix this, simply edit the requisition and change the quantities of the items to a different number, then click Save for Later. Edit the requisition and return the quantities to their original amount, then click Save and Submit
        - PO(s) Created
            - A purchase order has been created
                - The status will change to PO(s) dispatched when completed. Dispatched usually means the PO has been sent to the vendor
            - The PO Number can be viewed by clicking on the Purchase Orders icon

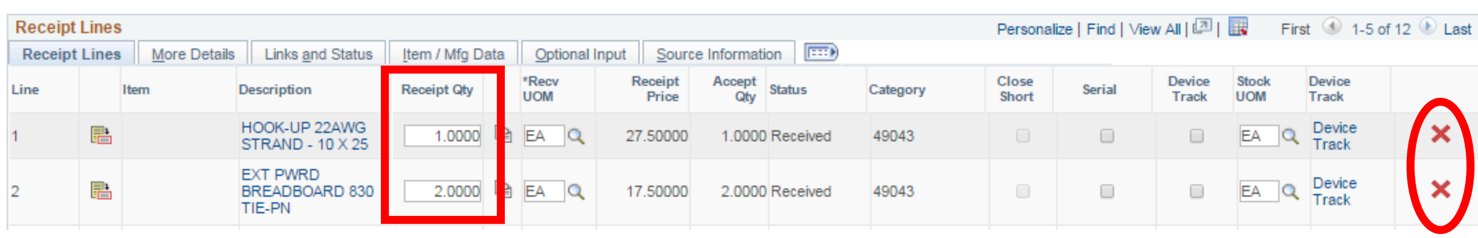
Un-receiving a PO or Changing the Amount Received:

- To check to see if the item has been fully received instead of a specific quantity or amount, navigate to Purchasing > Receipts > Add/Update Receipts
  - Select Find an Existing Value, rather than Add a New Value. Enter the PO Number and click Search to display all receipts for that PO



  - The quantity or amount can be changed to the correct amount
  - The receipt can be cancelled (un-received) using the red X's
    - A message will pop up that says, "Canceling Item cannot be reversed. Do you wish to continue? (10300,46). Click Yes to continue (you're only canceling the receipt, not the actual line item). Click Save to complete





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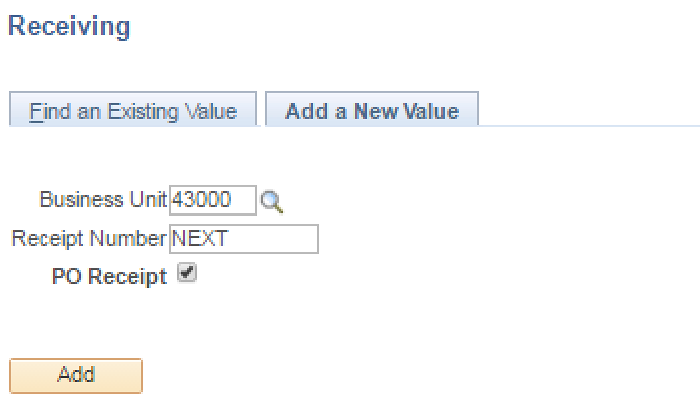
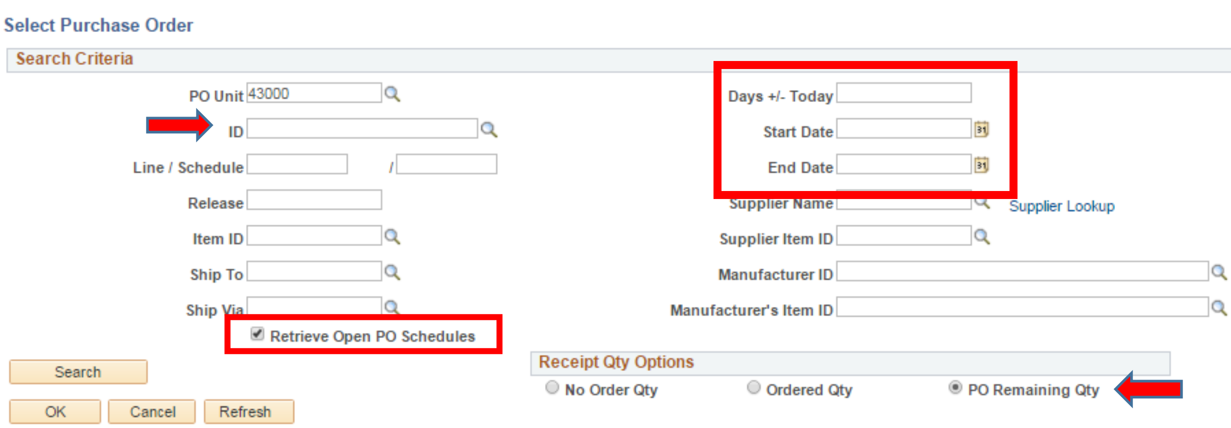
The line you are trying to receive is missing in receive items (Receive through Purchasing):

- Sometimes, the item can only be received through the Purchasing Module
  - The instructions to Receive Via Purchasing can also be found here: http://procurement.kennesaw.edu/docs/JobAidEPR3.pdf
- You'll need to receive via the Purchasing Module by navigating to Purchasing > Receipts > Add/Update Receipts, but this time you'll choose Add a New Value
- It should default to the values in the screenshot below. Change the values to the correct ones if they don't match the screenshot, then click Add:

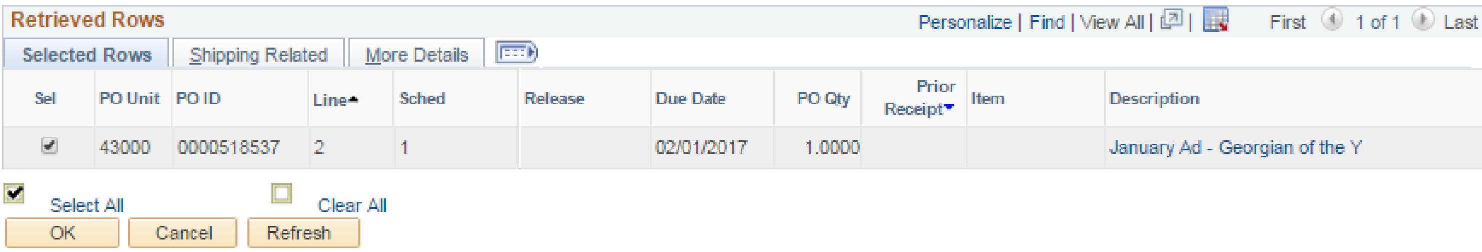


- On the next screen, clear the fields on the right side (Days +/- Today, Start Date, and End Date) and enter the PO Number in the PO ID field. The Receipt Qty Options radio button labeled "PO Remaining Qty" and the Retrieve Open PO Schedules box should both be selected:
  - Searching for the PO ID using the magnifying glass next to the ID field will clear out the fields on the right automatically rather than having to manually clear them out



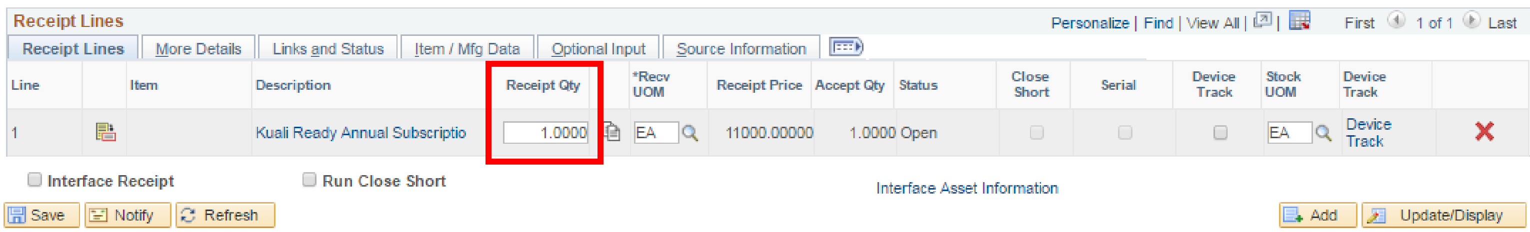
Receiving through Purchasing – continued:

- The lines open for receiving will now populate. Select the lines to receive, and then click OK to proceed.

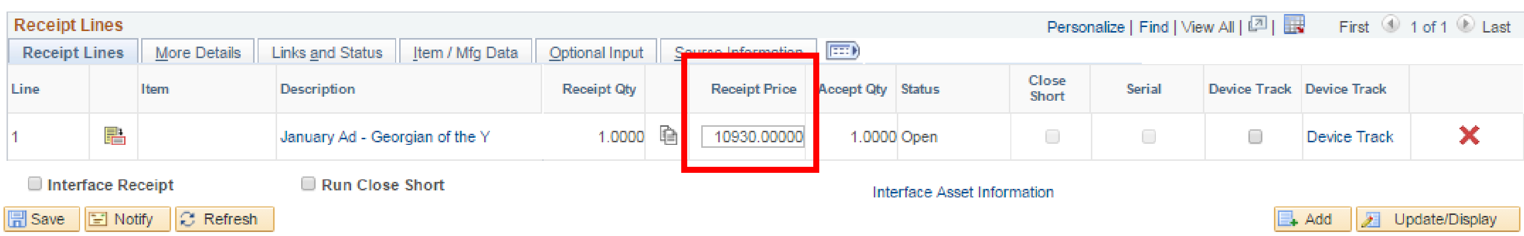


- Depending on how the PO is setup, you will either change the quantity or the amount, as seen below:

Receiving by Quantity:



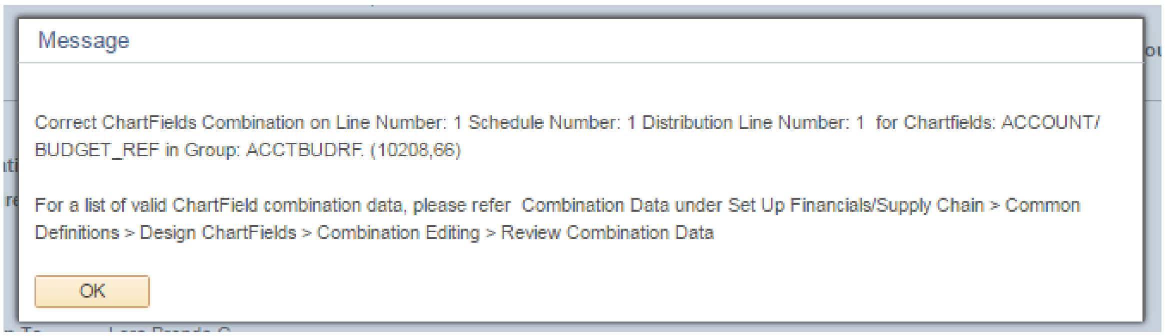
Receiving by Amount:



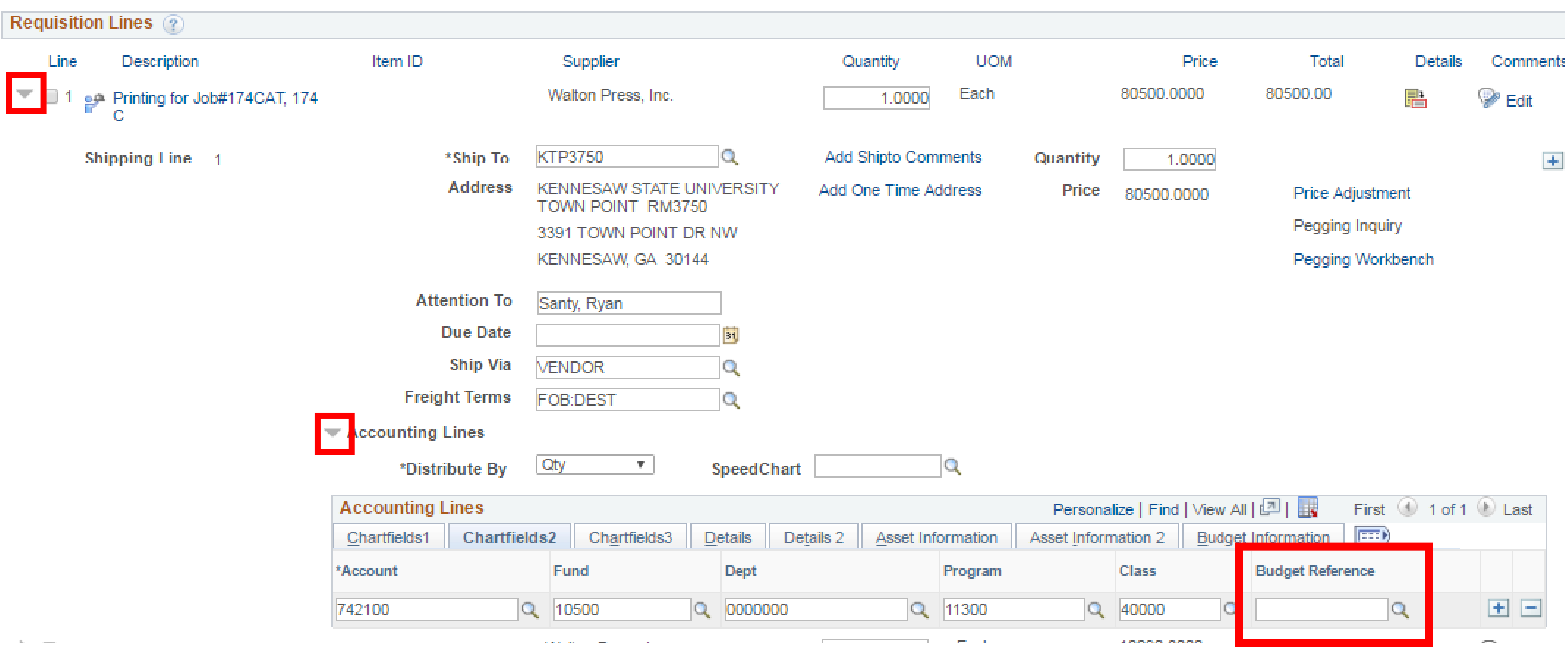
- Both the quantity and the amount automatically default to the remaining quantity or amount on the PO
- In order to avoid fully receiving the PO, change the quantity or amount to reflect the total received. For instance:
  - If there are nine items remaining on a line and only three have arrived, the quantity needs to be changed to three
  - If there is $5,000 remaining on the line and the invoice comes in for $3,800, the amount will need to be changed to $3,800

ACCOUNT/BUDGET_REF Error:

- Sometimes when changing the Speedchart number for all lines from the default Speedchart number, the Budget Reference (fiscal year) will clear out, causing an error, similar to below:



- Most errors similar to this will tell you two important things:
    - The fields that are causing the issue and the Line Number on which the error occurred:
        - For instance, the error is with the Account field and the Budget Reference field (ACCOUNT/BUDGET_REF) and it is on Line Number 1
            - Since the Account field is filled in, then the Budget Reference field must be the error
            - Knowing the line number can help you narrow down which line(s) to update
- To fix this, navigate to the Accounting Lines > Chartfields2 > Budget Reference and click the magnifying glass to select 2017



- After updating the Budget Reference to the current Fiscal Year, click Save and Submit to send the Requisition through the approval process

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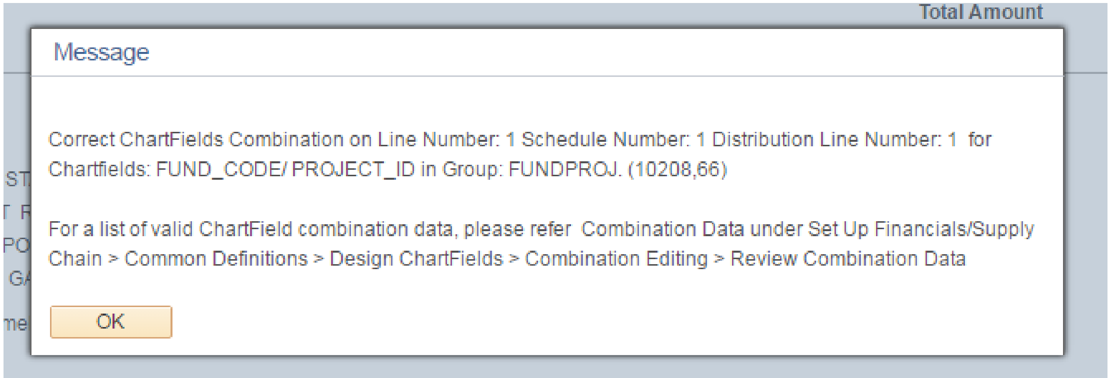
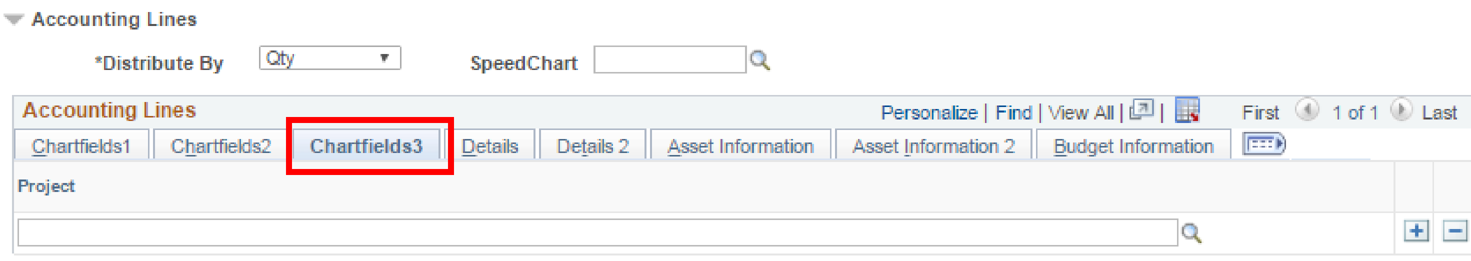
FUND_CODE/PROJECT_ID Error:

- Certain Fund IDs will require a Project ID to proceed. The above error message for the Budget Reference will change from ACCOUNT/BUDGET_REF to FUND_CODE/PROJECT_ID, like below:



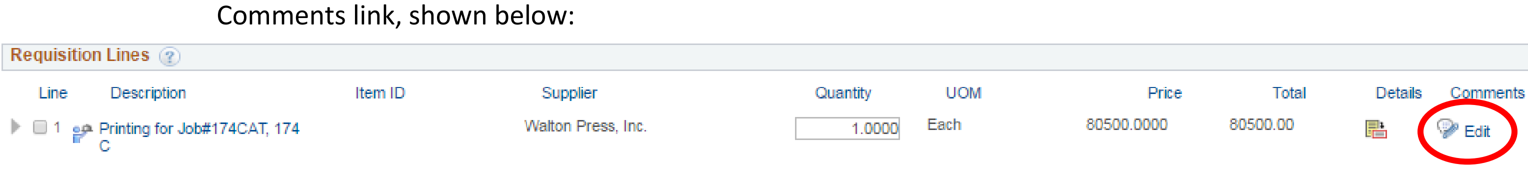
- Navigate to the Accounting Lines and click on Chartfields3 to bring up the Project ID field



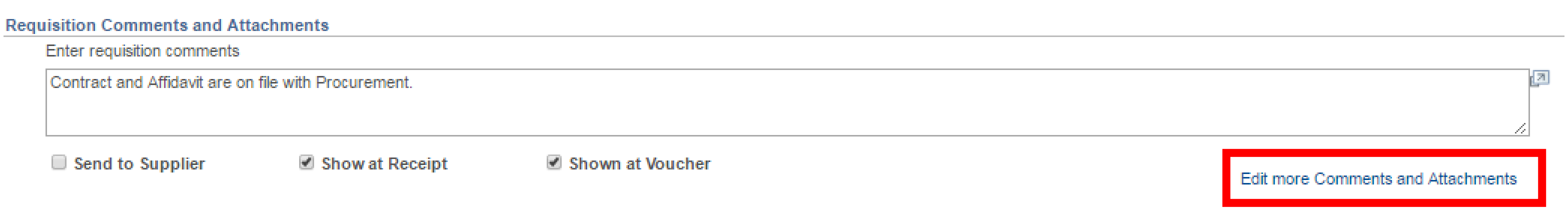
- Click the magnifying glass next to the Project ID field and select the appropriate Project ID

Adding Attachments to the Requisition:

- When adding attachments to the Requisition, the attachments should only be added using the Comments link, shown below:



  - This will ensure that the attachment is added to the correct location
- Do not add attachments under the Requisition Comments and Attachments section, as seen below:



  - Adding the attachments in the Requisition Comments and Attachments section will not properly add the attachments, causing them to be excluded from the Requisition

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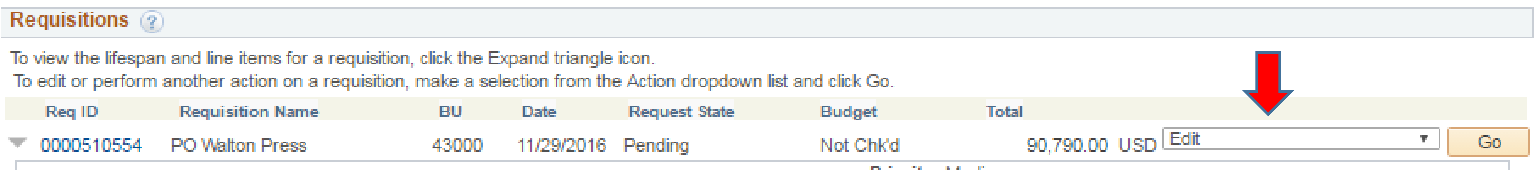
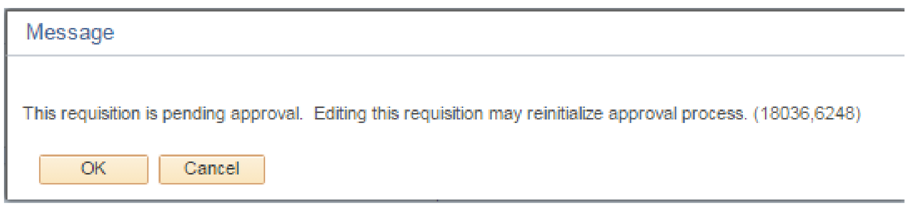
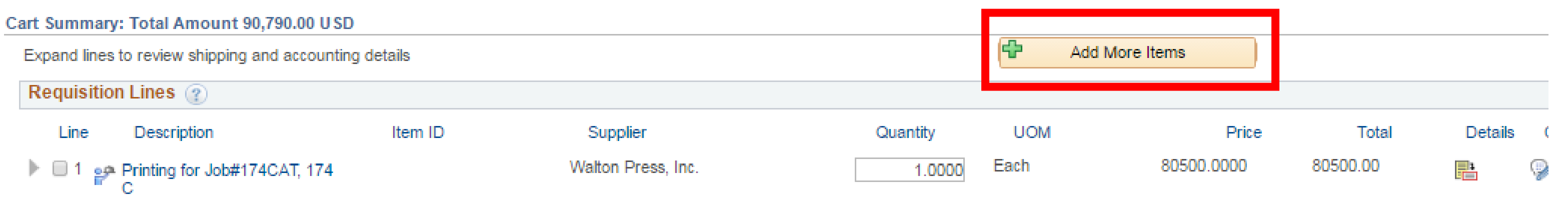
Adding Lines to the Requisition:

- Under eProcurement > Manage Requisitions, select the Requisition to edit, then select the drop down box on the right side and change it from Select Action to Edit, then click Go

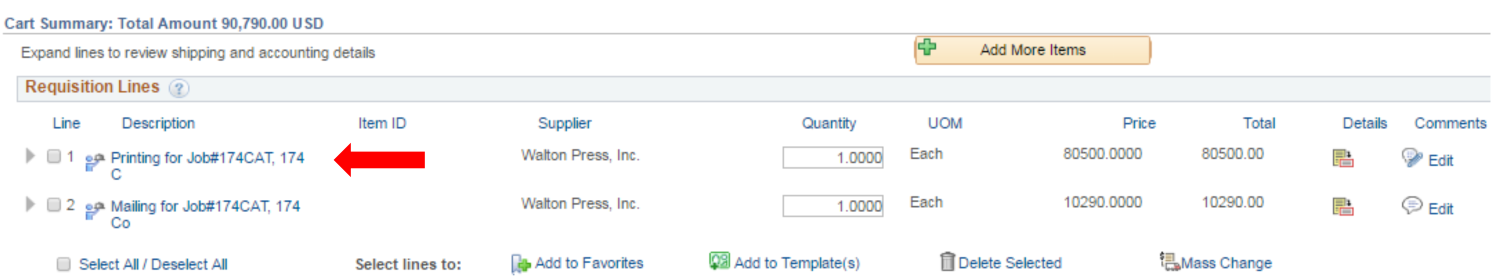


- A message will alert you that editing a requisition will cause the approval process to restart, similar to below. Click OK to continue:





- Select Special Requests to advance to the Item Details screen
  - Enter the information for each item needing to be added, then click Checkout when finished
- If the price of the original item on the Requisition needs to be changed, click the item description hyperlink to be taken to the Item Details screen for that item



- From here, the price, quantity, Category Code, etc. can be changed
  - Click Checkout once finished editing
- Once all edits have been made, and all items added, click Save and Submit to send the Requisition back through the approval process

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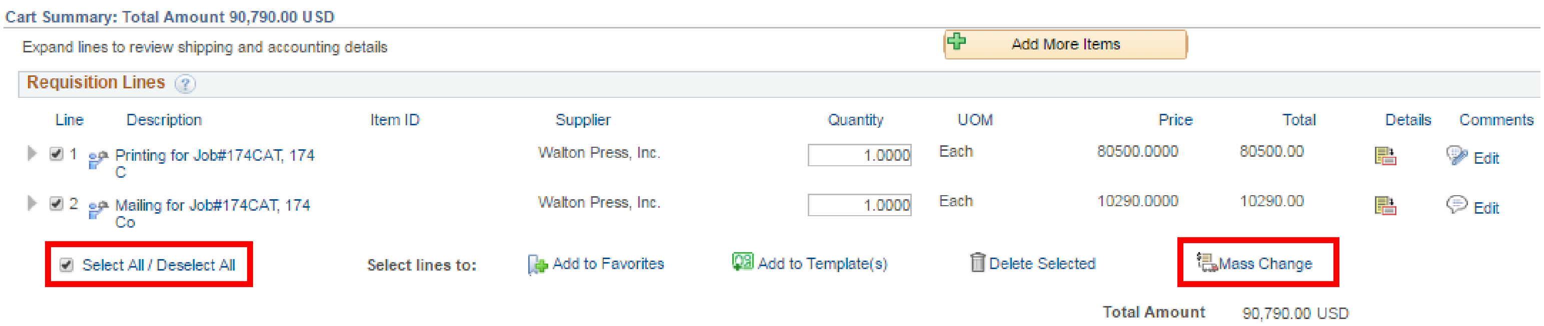
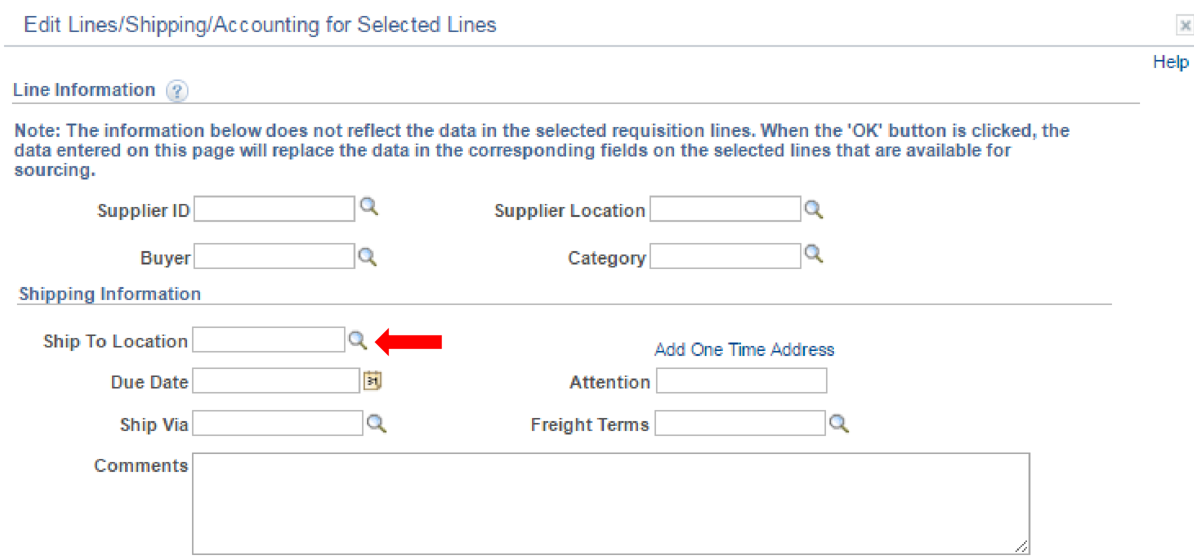
Changing the Ship To Location (Edit for All Lines):

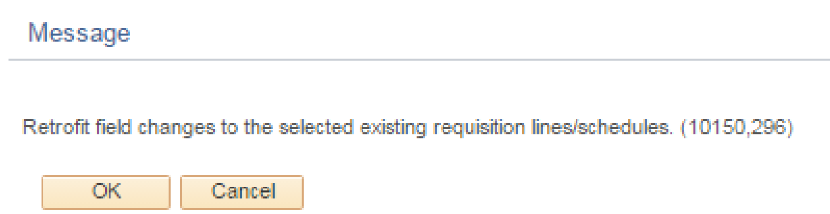
- To change the shipping location for all lines at once, use the Mass Change button after selecting the lines needing to be changed:



  - Click the magnifying glass next to the Ship To Location field to search for the shipping location and enter the location
  - *Until the Campus Addressing Project is complete, all Marietta Campus Ship To Locations will need to be set to MCR (Marietta Central Receiving). If this is a Special Request, you can note the correct shipping location in the comments section. If it's a GA First Marketplace order, it will have to be shipped to Marietta Central Receiving*



  - Click OK to apply the new location to all lines. The following message will appear (click OK to accept):



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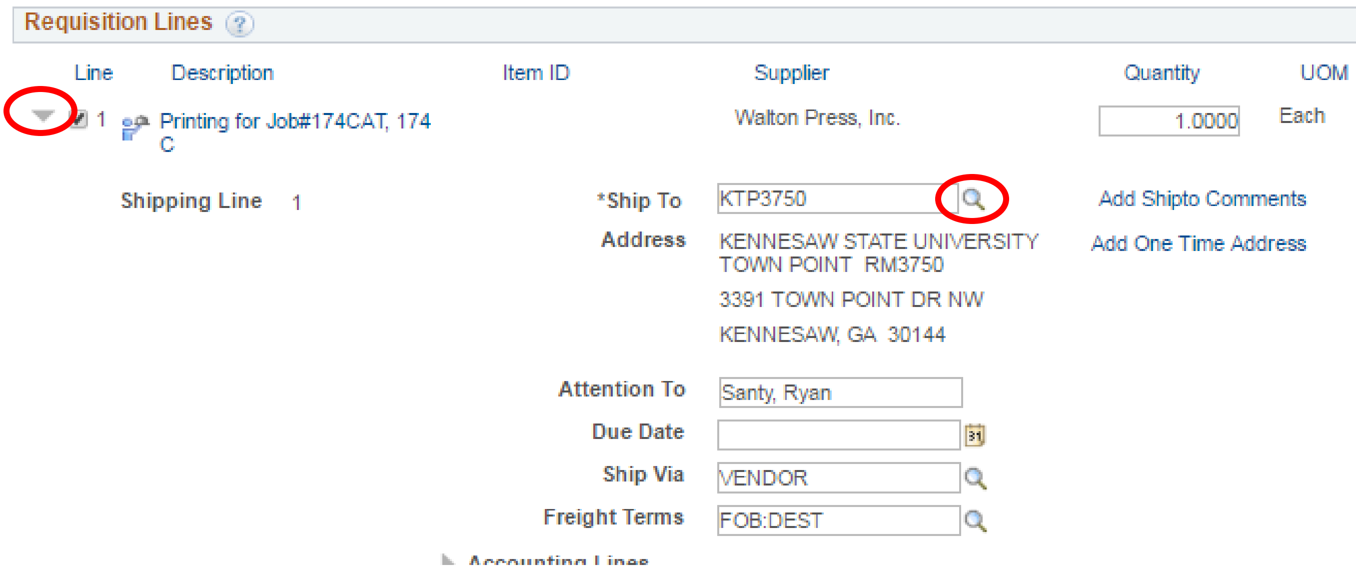
Changing the Ship To Location (Single Line Change):

- The other way to change the Ship To Location is to change the lines individually:
  - Next to each line number is a grey arrow that will display more information once clicked, similar to below:



  - From here, the shipping location can be changed by clicking on the magnifying glass and selecting the correct shipping location
  - This will then update the shipping location without prompting to accept
  - After making the shipping location changes, click Save and Submit to submit the Requisition through the approval process
  - *Until the Campus Addressing Project is complete, all Marietta Campus Ship To Locations will need to be set to MCR (Marietta Central Receiving). If this is a Special Request, you can note the correct shipping location in the comments section. If it's a GA First Marketplace order, it will have to be shipped to Marietta Central Receiving*