

## ePro FAQ

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Distribution Line Number: 1 for Chartfields: ACCOUNT/BUDGET\_REF...**

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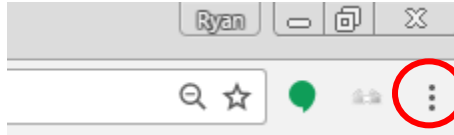
[Changing the Ship To Location \(All Lines\)](#)

[Changing the Ship To Location \(Single Line\)](#)

# 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):**

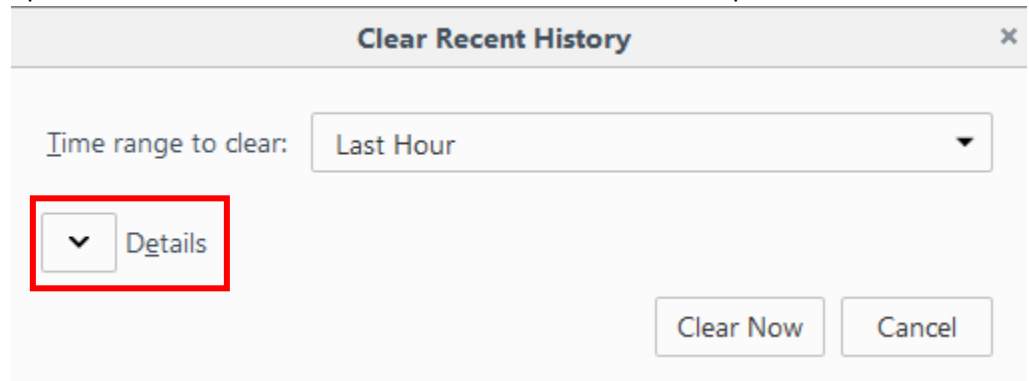


- Navigate to Settings > Show Advanced Settings > Privacy > Clear Browsing Data. Check the boxes for Browsing History and Cached Images and Files, then click Clear Browsing Data to complete

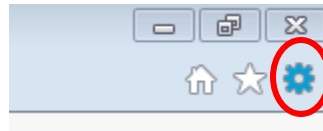
- **Mozilla Firefox (click on the three vertical bars at the top right of the screen):**



- 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



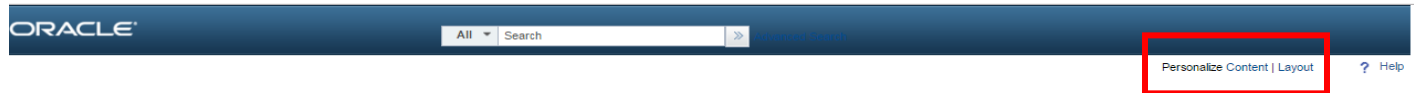
- **Internet Explorer (select the gear icon, then click on Internet Options)**



- 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

[Personalize Home Page](#) New Window | Help

Personalize Content:

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

Arrange Pagelets: [Go to](#) [Personalize Layout](#)

<b>PeopleSoft Applications</b>	<b>Cross-Financials</b>	<b>General Ledger</b>
<input type="checkbox"/> BI Publisher	<input type="checkbox"/> Manage Contracts	<input type="checkbox"/> GaFIRST Announcements
<input type="checkbox"/> Worklist	<input type="checkbox"/> Manage Departments	<input type="checkbox"/> BOR Budg to Actual w/ Acct
<input checked="" type="checkbox"/> <b>Menu</b>	<input type="checkbox"/> Manage Practice	<input type="checkbox"/> BOR Project Budg to Act w/Bref
<input type="checkbox"/> Activity Guides - In Progress	<input type="checkbox"/> Resource Self Service	<input type="checkbox"/> RSA Revenue to Expense
<input type="checkbox"/> Menu - Classic		<input type="checkbox"/> BOR Trans Impacting Surplus
<input type="checkbox"/> Top Menu Features Description		<input type="checkbox"/> BOR Terminated Empl w/ Secry
<input type="checkbox"/> My Reports		<input type="checkbox"/> BOR Budget to Actuals Projects
<input type="checkbox"/> Main Menu		<input type="checkbox"/> BOR Expense Budget to Actuals
		<input type="checkbox"/> BOR Revenue Budget to Actuals

- 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:

Personalize Content | Layout ? Help

**Top Menu Features Description**

**Our menu has changed!**

The menu is now located across the top of the page. Click on **Main Menu** to get started.

**Highlights**

**Recently Used** pages now appear under the Favorites menu, located at the top left.

**Breadcrumbs** visually display your navigation path and give you access to the contents of subfolders.

**Menu Search**, located under the Main Menu, now supports type ahead which makes finding pages much faster.

- 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

Personalize Home Page [X]

New Window | Help

Personalize Content:

Tab Name: My Page

Welcome Message:

Choose Pagelets: Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

Arrange Pagelets: Go to Personalize Layout

**PeopleSoft Applications**

- BI Publisher
- Worklist
- Menu**
- Activity Guides - In Progress
- Menu - Classic
- Top Menu Features Description**
- My Reports
- Main Menu

**Cross-Financials**

- Manage Contracts
- Manage Departments
- Manage Practice
- Resource Self Service

**General Ledger**

- GaFIRST Announcements
- BOR Budg to Actual w/ Acct
- BOR Project Budg to Act w/Bref
- RSA Revenue to Expense
- BOR Trans Impacting Surplus
- BOR Terminated Empl w/ Secrty
- BOR Budget to Actuals Projects
- BOR Expense Budget to Actuals
- BOR Revenue Budget to Actuals

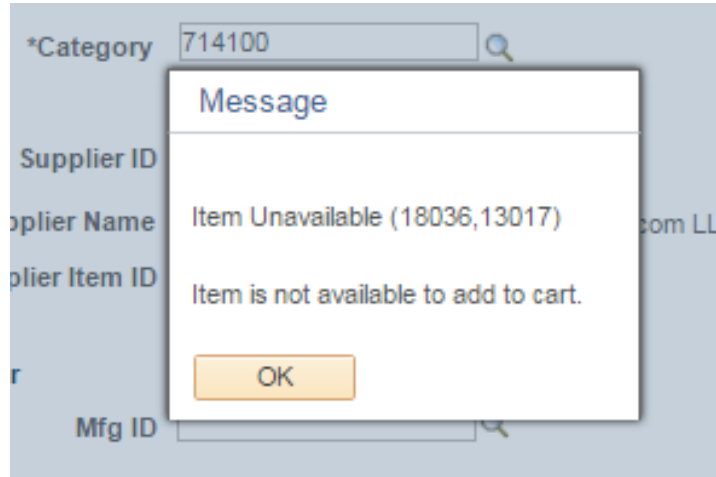
Save Cancel

Notify

- 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

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

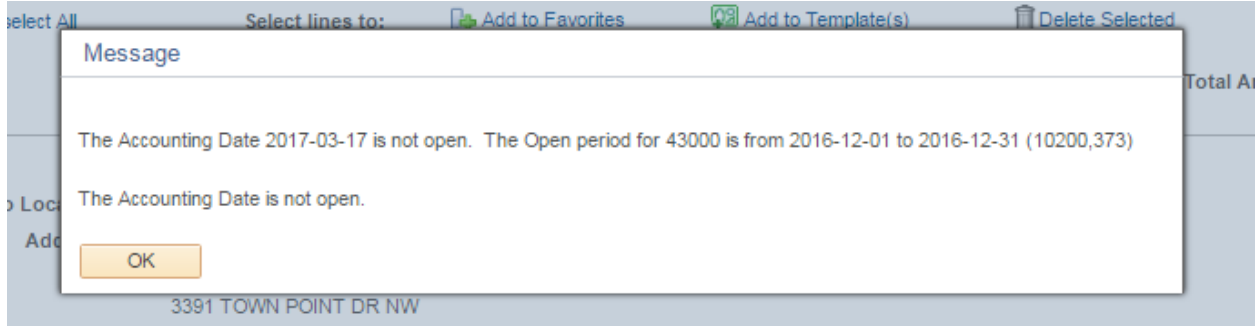
Search Categories

Search By

Categories	Personalize	Find	View All	First	1-20 of 20	Last
Catalog	Category	Description	Find in Tree			
1 NIGP_TREE	94121	Blade Maintenance and Repair, Electric Power Generator				
2 NIGP_TREE	92838	Electrical, Alternator and Generator, Battery, Ignition Syst				
3 NIGP_TREE	69041	Excitation System, Generator				
4 NIGP_TREE	34050	Foam Generators, Truck or Trailer Mounted				
5 NIGP_TREE	73042	Function Generators, Pulse, Ramp, Sweep, etc. and Oscillator				
6 NIGP_TREE	98143	Generator Rental or Lease				

# 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](mailto: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

## Manage Requisitions

**Search Requisitions**

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

Business Unit: 43000  
Requisition ID:   
Date From: 03/15/2017  
Requester: rsanty

Requisition Name:   
Request State: All but Complete  
Date To: 03/22/2017  
Entered By:   
Budget Status:   
Origin: Marketplace Rec  
PO ID:

Search Clear Show Advanced Search

! The Requester specified has no Requisitions.

Create New Requisition Review Change Request Review Change Tracking Manage Receipts Requisition Report

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

## 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.

The screenshot shows a requisition record for ID 0000428518. A dropdown menu is open next to the 'Select Action' field, showing options: Approvals, Copy, View Cycle (highlighted), View Print, and [Select Action]. Below the menu is a process flow diagram with steps: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment.

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

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
0000512293	Lonestar Painting MC Ho...	43000	03/14/2017	PO(s) Created	Valid	3,840.00 USD	[Select Action] Go

- 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

## Receiving

Enter any information you have and click Search. Leave fields blank for a list of all

▼ Search Criteria


Business Unit =

Receipt Number

Bill of Lading

PO Business Unit

Item ID


 PO Number

Ship To Location

Shipment Number

Supplier ID

Received Date =

Receipt Status =

User ID

Case Sensitive

- 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

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Device Track	
1		Landing page de	1.0000	250.00000	1.0000	Received	96546				Device Track	X

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Category	Close Short	Serial	Device Track	Stock UOM	Device Track	
1		HOOK-UP 22AWG STRAND - 10 X 25	1.0000	EA	27.50000	1.0000	Received	49043				EA	Device Track	X
2		EXT PWRD BREADBOARD 830 TIE-PN	2.0000	EA	17.50000	2.0000	Received	49043				EA	Device Track	X



# 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:

**Receiving**

Business Unit

Receipt Number

PO Receipt

- 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

**Select Purchase Order**

Search Criteria

PO Unit

ID

Line / Schedule:  /

Release:

Item ID

Ship To

Ship Via

Retrieve Open PO Schedules

Days +/- Today

Start Date

End Date

Supplier Name   [Supplier Lookup](#)

Supplier Item ID

Manufacturer ID

Manufacturer's Item ID

Receipt Qty Options

No Order Qty  Ordered Qty  PO Remaining Qty

# Receiving through Purchasing – continued:

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

Retrieved Rows										
Selected Rows	Shipping Related	More Details								
Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	43000	0000518537	2	1		02/01/2017	1.0000			January Ad - Georgian of the Y

Select All     Clear All  
       

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

## Receiving by Quantity:

Receipt Lines													
Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information								
Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track	
1		Kuali Ready Annual Subscriptio	1.0000	EA	11000.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track	<input checked="" type="checkbox"/>

Interface Receipt     Run Close Short                   

## Receiving by Amount:

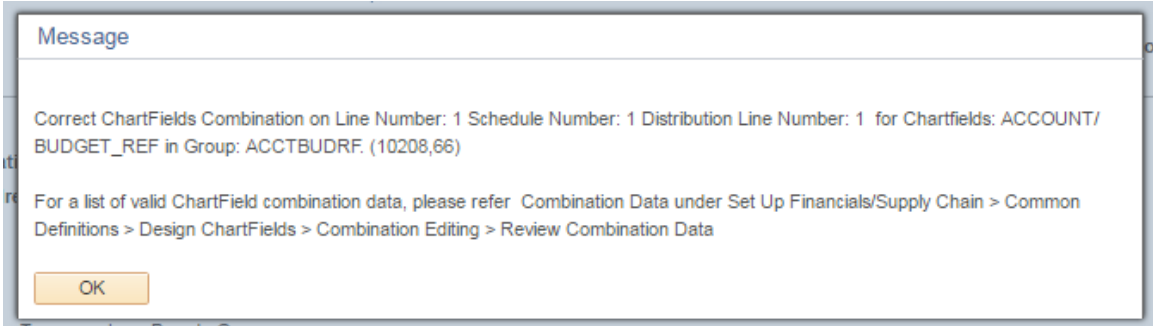
Receipt Lines													
Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information								
Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Device Track	Device Track	Device Track	
1		January Ad - Georgian of the Y	1.0000	10930.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Track	Device Track	Device Track	<input checked="" type="checkbox"/>

Interface Receipt     Run Close Short                   

- 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

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Printing for Job#174CAT, 174		Walton Press, Inc.	1.0000	Each	80500.0000	80500.00		Edit
Shipping Line 1		*Ship To	KTP3750	Add Shipto Comments		Quantity	1.0000		
		Address	KENNESAW STATE UNIVERSITY TOWN POINT RM3750 3391 TOWN POINT DR NW KENNESAW, GA 30144	Add One Time Address		Price	80500.0000	Price Adjustment Pegging Inquiry Pegging Workbench	
		Attention To	Santy, Ryan						
		Due Date							
		Ship Via	VENDOR						
		Freight Terms	FOB:DEST						
		Accounting Lines							
		*Distribute By	Qty	SpeedChart					

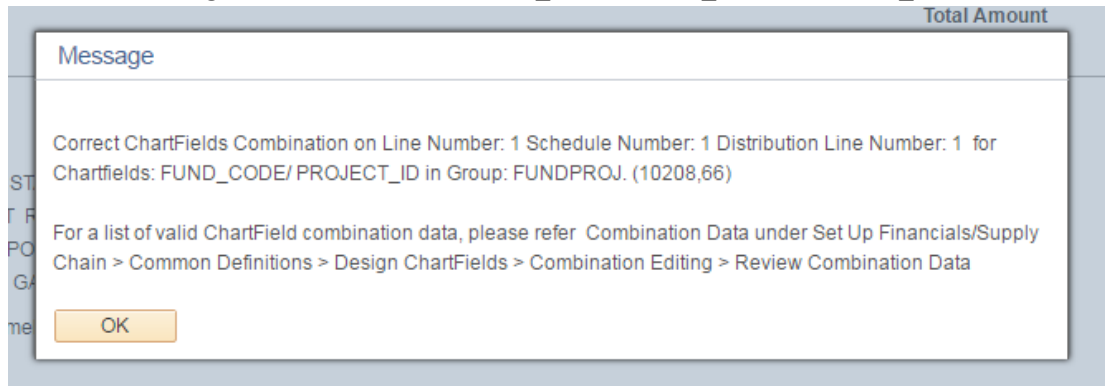
  

Accounting Lines						Personalize   Find   View All   First   1 of 1   Last
Chartfields1	Chartfields2	Chartfields3	Details	Details 2	Asset Information	Budget Information
*Account	Fund	Dept	Program	Class	Budget Reference	
742100	10500	0000000	11300	40000		

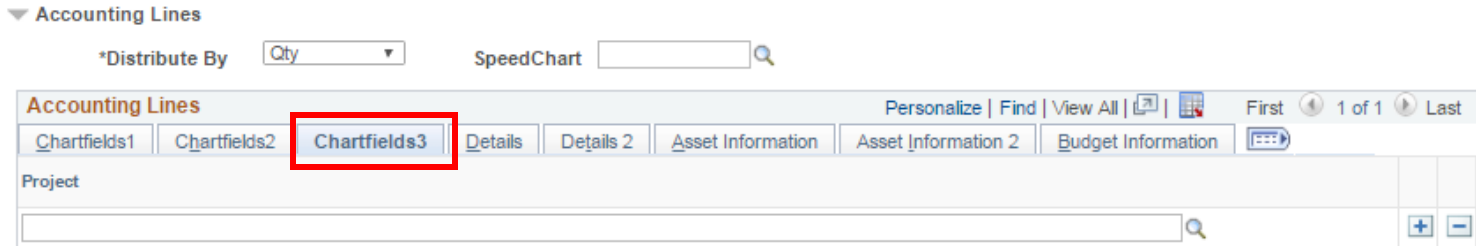
- After updating the Budget Reference to the current Fiscal Year, click Save and Submit to send the Requisition through the approval process

## 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:

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Printing for Job#174CAT, 174		Walton Press, Inc.	1.0000	Each	80500.0000	80500.00		

- 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:

**Requisition Comments and Attachments**

Enter requisition comments

Contract and Affidavit are on file with Procurement.

Send to Supplier     Show at Receipt     Shown at Voucher

[Edit more Comments and Attachments](#)

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

# 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

**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	
0000510554	PO Walton Press	43000	11/29/2016	Pending	Not Chk'd	90,790.00 USD	<div style="display: flex; align-items: center;"> <span style="margin-right: 5px;">▼</span> <div style="border: 1px solid #ccc; padding: 2px;">Edit</div> <span style="margin-left: 5px;">Go</span> </div>



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

**Message**

This requisition is pending approval. Editing this requisition may reinitialize approval process. (18036,6248)

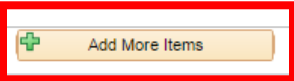
**Cart Summary: Total Amount 90,790.00 USD**

Expand lines to review shipping and accounting details

+ Add More Items

**Requisition Lines** ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details
1	Printing for Job#174CAT, 174		Walton Press, Inc.	1.0000	Each	80500.0000	80500.00	



- 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

**Cart Summary: Total Amount 90,790.00 USD**

Expand lines to review shipping and accounting details

+ Add More Items

**Requisition Lines** ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Printing for Job#174CAT, 174		Walton Press, Inc.	1.0000	Each	80500.0000	80500.00		
2	Mailing for Job#174CAT, 174		Walton Press, Inc.	1.0000	Each	10290.0000	10290.00		

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



- 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

# 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:

Cart Summary: Total Amount 90,790.00 USD

Expand lines to review shipping and accounting details + Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments
1	Printing for Job#174CAT, 174 C		Walton Press, Inc.	1.0000	Each	80500.0000	80500.00		Edit
2	Mailing for Job#174CAT, 174 Co		Walton Press, Inc.	1.0000	Each	10290.0000	10290.00		Edit

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

Total Amount 90,790.00 USD

- 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*

Edit Lines/Shipping/Accounting for Selected Lines x

Line Information Help

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID       Supplier Location

Buyer       Category

Shipping Information

Ship To Location

Due Date       Add One Time Address      Attention

Ship Via       Freight Terms

Comments

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

Message

---

Retrofit field changes to the selected existing requisition lines/schedules. (10150,296)

## 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:

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM
1	Printing for Job#174CAT, 174 C		Walton Press, Inc.	1.0000	Each
Shipping Line 1		*Ship To	KTP3750		Add Shipto Comments
		Address	KENNESAW STATE UNIVERSITY TOWN POINT RM3750 3391 TOWN POINT DR NW KENNESAW, GA 30144		Add One Time Address
		Attention To	Santy, Ryan		
		Due Date			31
		Ship Via	VENDOR		
		Freight Terms	FOB:DEST		

Accounting Lines

- 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*