Logging in:
Go to Galaxy Portal.
Enter your NetID and Password.
Click eProcurement.

Updating Profile Info:
Click your name in the top right corner (1). From the drop-down menu, select View My Profile.

Your Name, Phone Number, Email, etc. cannot be updated in eProcurement, but alert the PeopleSoft Security team if anything is inaccurate.

Click on “Default User Settings” to create or modify default ship-to addresses, cart assignees (Requestors), or to set a default cost center for future carts that you might build yourself. As an Approver, you can build carts, but you must assign them to a Requestor to put them into workflow for you. They will then come to you for approval. This ensures separation of duties.

Inquire within your department which users have the Requestor role, and consider setting them up as Cart Assignees (below).

To set up new Ship-To addresses:
Click on “Default Addresses”, then click the button on the right labeled “Select Addresses for Profile”. From the “Select Address Template” drop-down menu, choose your desired campus (if main campus, select Service Building). Modify the Attn: and Room/Bldg fields as appropriate, then click Save.

You may repeat this to set up multiple ship-to addresses which can be chosen from at checkout – valuable if you do work and need supplies at more than one location.

To set up Cart Assignees (Requestors):
Click on “Cart Assignees”, then click the “Add Assignee” button. Search for your Requestor by last name – even just part of the last name will work. In the search results, click [select] to the right of the person’s name. You can repeat this to add more requestors as needed/desired. You can also set a requestor as “preferred” to make him/her your default.

To add cost centers to your profile:
Click on Custom Field and Accounting Code Defaults, then on the “Accounting Codes” tab on the right. Find the field name “Speedchart Key” and click Edit.

Click Create New Value, type the cost center into the “Value” field and click Search. Click the checkbox to the left of your desired search result, then click Add Values. You can repeat this to add several cost centers to your profile.

Click on an added cost center, check the “Default” box and click Save to automatically assign it to your future orders. (You can change the cost center during the checkout process, if needed.)

To view in-app status alerts:
Click Notifications (3) to review a summary of your alerts. Click on them for more information. Call x5235 if you have questions about any of them.

If a cart is assigned to you:
You cannot take action on carts, only requisitions. Call x5235 for assistance on either returning the cart to its originator or forwarding it on to a Requestor who can handle it.

Building your own orders:
You have the same cart-building permissions as a Shopper. Refer to the Shopper’s Quick Guide for instructions.
**Approving and Rejecting Requisitions:**

If you have transactions to approve, you will see a number next to the “Action Items” link (2, front page). The simplest way to reach them is to click the Documents logo (2a, front page), then click on “Approvals” and then on “My Approvals”. This will bring up a screen similar to Figure 1.

Click “Expand All” if needed to see all the requisitions waiting for you. Click the **Assign** button to assign an order to yourself. This will move the requisition to your “My PR Approvals” folder (Figure 2), which ensures no one else can take action on it at the same time. This is a required step if you need to reject the requisition.

Click the requisition number to view the order details.

**Approving a Requisition:**

Scroll to the top of the requisition, and find the “Available Actions” drop down menu on the right. Select “Approve/Complete & Show Next”, then click **Go**. This requisition will move forward in workflow, and the next one you need to approve will appear. If you get an error “No Documents Found”, that just means there aren’t any more orders for you to approve at this time.

**Rejecting a Requisition:**

If you have assigned the requisition to yourself as described above, one of the “Available Actions” will be to “Reject Requisition”. You will be prompted for a reason. This is not mandatory, but will be loaded into the document’s history and included in any email alert the cart’s builder may have elected to receive, so it is strongly recommended. Click **Reject Requisition** to finish the process.

If only minor changes are needed to a requisition before you would approve it, you are able to make those yourself rather than rejecting the requisition and making the cart’s builder start over.

**To change the package destination:**

Find the double row of tabs on the requisition, and click **Shipping**. Click the **Edit** button and make your changes. You can do this manually or use any address in your profile. Your default address will not automatically populate.

**To change the cost center to another one that you control:**

Find the double row of tabs on the requisition, and click **Accounting Codes**. Click the **Edit** button and make your changes. Refer to the Requestor’s Quick guide for more information.

**To reject only some line items on the requisition:**

Find and click the check box to the right of the line item(s) you wish to reject. Find the drop-down menu on the right labeled “For Selected Line Items”. The default action should be “Reject Selected Items”. Click **Go**. You will be prompted for a reason, then click **Reject Line Item**. The items will not vanish from the requisition, but they will not be printed on the Purchase Order or counted toward the funds encumbered.

**To change quantities or prices:**

This can only be done if the order was not done via a Punch-Out catalog (e.g. Staples, Dell). Click on the line item’s description and make changes as needed.

If the order is from a punch-out vendor, reject the line item altogether since it can’t be changed.

**If you need assistance:**

Our primary resource for eProcurement assistance is Katie Simpson, x4872, katies@utdallas.edu. If you do not receive a timely reply, or if you get an out-of-office message, you can also email purchasing@utdallas.edu and someone else will help you.