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, or to set a default cost center for future purchases that you initiate yourself. (The Requestor role means you can create a cart *and* submit it to workflow. All other user roles must assign their carts to a Requestor first.)

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 order for multiple users in different offices or labs, and/or at multiple campuses.

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.)

Taking action on assigned carts:
Click Action Items (2), then click on Carts Assigned to Me. You can also click the cart logo on the left (2a), then on My Carts & Orders and View Draft Carts.

Click on a cart’s name to open it. If you ever navigate away from the cart while working on it, click the cart logo (4) to return to it.

To change the contents of a cart:
If the order is from a punch-out catalog, very little can be changed except for removing an item from the order. Locate and click the Remove button to the left of the line item. There is no confirmation prompt for this action.

If the order is not from a punch-out catalog, you can change a line item by clicking on its description. This is how you alter price and quantity as well as the item description itself. Click Save when done.

If you need to add a line item to a cart, contact Purchasing for assistance.

If the cart’s contents are as intended, click Proceed to Checkout. The checkout phase will initially direct you to any required fields that are missing, but you can review any step by clicking its name on the runway (see reverse, bottom).
To add or change a shipping address:

Click the “Shipping” step on the runway.

In the “Ship To” box, click Edit. Make your desired changes and click Save. You can make the change manually or use any address in your profile, though your default will not automatically populate.

To add or change a cost center:

Click the “Accounting Codes” section on the runway. If you have error messages about missing fields, you can click on the message; otherwise, find and click Edit.

Under the field labeled “Speedchart Key”, you can click Select from Profile Values to apply one of the cost centers you set up in your profile (described earlier). If you do not have your desired cost center in your profile, click Select from all values, then type in the desired cost center in the “Value” field. Click Search, then click [select] next to your desired search result. This will populate all but one field (Account).

You can type in the desired Account number if you know it, or you can select from all values as with the speedchart. You can see most of the values you will need by only entering “6” as the value.

To charge an order to multiple cost centers:

Please obtain and refer to the job aid dealing specifically with transaction splitting. Contact Purchasing if you have questions.

Once all steps on the runway have a green check mark, you may click “Submit to Workflow” to begin the approval process.

Tracking an order:

After you submit the cart to workflow and it becomes a requisition, you can track its progress within its workflow. Click the magnifying glass on the Home/Shop page (5, front page). Select “Requisition Number” from the drop-down menu, type in the requisition number, then press Enter.

If a requisition’s status is “Pending”, you can click the “PR Approvals” tab to see where it is in workflow. A green check means the step has been completed; tumbling blue arrows means the requisition is waiting at this step. You will see a “View Approvers” link on the current step, which you can click to see who needs to approve the requisition. This is valuable if the order is time-sensitive and you need to urge people to take action.

Building carts:

As a Requestor, you can shop and build orders the same way a Shopper can, with the exception that you can submit your own orders into workflow (and thus you need to ensure that eProcurement has all the shipping and accounting data for the order.) Refer to the Shopper’s Quick Guide for detailed guidance.

Configuring email alerts:

If you feel you are getting too many or too few alerts about your orders in process, you can change this in your profile. Click View My Profile as described before, then click on Notification Preferences.

Click on Shopping, Carts & Requisitions to view which events currently trigger email alerts. Find the Edit Section link near the top right of the page, and click on it.

To get more information on a type of alert, click the next to it. To make changes, first click the “Override” radio button, then make your selection from the drop-down menu.

The “Notification” option refers to an in-app alert. These alerts do not pop up or interrupt you when using eProcurement. To view your notifications, click the “Notifications” link on the Home/Shop page (3, front page). You can click on a notification to view the requisition in question.

Once you have made your desired changes, click Save to make sure they happen.

Setting a substitute:

You can automatically route carts to someone else if you will be away for a while. Click the cart logo (2a, front page), then click “My Carts and Orders”, then click “View Draft Shopping Carts”.

Find the “Assign Substitute” link on the left side of the page. Search for your desired recipient, then click [select] to the right of their name.

This person will receive all carts assigned to you until you come back to this screen and click “End Substitution”.

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.