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 and cart assignees (Requestors). As a Shopper, you must assign your carts to a Requestor to be put into workflow. Ask within your department to find out which people have the Requestor role.

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 work and need supplies at multiple campuses.

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 view in-app status alerts about carts you’ve built:
Click Notifications (2) to review a summary of your alerts. Click on them for more information. Call x5235 if you have questions about any of them.

Shopping for Items:
Using the Punch-Out catalogs:
Click the sticker for the desired vendor and shop their UTD-specific website. Check out on the vendor’s site to return the order to eProcurement.

Your order will stay in your cart until you assign it. If you navigate away from your cart at any point, you can return to it by clicking the cart logo (3).

Note: punch-out orders are final once they’re in ePro, and accidentally putting multiple orders in a cart will cause errors. Assign your carts as soon as possible to avoid “mashups” (see reverse).

Comparison Shopping:
Type a part number or brief item name into the “Shop Hosted Catalogs” search bar (4) to check all eProcurement catalogs for your desired item.

From a non-Punch-Out vendor:
Click on either Non-Catalog Item or New Vendor Needed (5). The former allows you to search for a supplier if you think UTD has done business with them in the past; type in part of the vendor’s name to search, and click on the result you want. If you don’t see the vendor you want, type “New Vendor” and click on that search result instead. The New Vendor Needed button will automatically select “New Vendor” for you.
In the “Product Description” field, type in the first item you wish to order. “Catalog No.” is not a required field, but if you have do one to enter, it will help the vendor confirm which item you are purchasing.

Skip the Product Size fields unless you know they are relevant.

Enter the quantity of items desired, and enter the UNIT price in the “Price Estimate” field. Do not use $ or , in the Price Estimate.

Enter “1” in the “Packaging” field unless you are certain a different value is more appropriate.

The remaining fields are optional but will be useful to Purchasing in the event they need to assist with this order. If you have more line items to order, click Save and Add Another to repeat this process. When you are done, click Save and Close to return to the Home/Shop page.

Click on the cart logo (3, front page) to see a brief summary of your cart, then click View My Cart.

To assign a cart:

Inside your shopping cart, on the right, you will see two buttons: Proceed to Checkout and Assign Cart. Click Assign Cart. If you set up any cart assignees in your profile (see front), they will appear in a drop-down menu. If you need to assign it to a Requestor not on the list, click the “Search for an assignee” radio button and then click the “Search for an assignee” link that appears. Search for your desired assignee, and click [select] to the right of their name.

Typing in the “Note to Assignee” box will include the message in any email alert your Requestor receives. If the information is critical, consider sending it via other means as well. When you are ready, click Assign.

Tracking an order:

After you assign the cart, you should get an email alert containing the requisition number. You can view the requisition at any point by clicking the magnifying glass on the Home/Shop page (6, front page). Select “Requisition Number” from the drop-down menu, type in the requisition number, then press Enter. (If no results are found, it is still a cart waiting to be put in to workflow by your Requestor.)

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 awaiting the next 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.

If a requisition is rejected:

If you get an email saying a requisition has been rejected, search for the requisition as described above. Click the “History” tab to view a chronology of steps and messages (most recent will be on top).

Find the step where the cart was rejected, then look to the right for any messages about the rejection. Common causes are “Vendor not active in PeopleSoft” (the vendor hasn't been used in a while and PeopleSoft has forgotten about it). It may also be rejected by any person involved in the workflow; a reason for rejection is not mandatory, so you may need to call the person in question to find out why.

If the order was for a punch-out vendor, you will need to start over once the issue has been resolved. Trying to copy the cart will give you unfixable errors.

If the order was NOT for a punch-out vendor, eProcurement can copy the cart data into a new cart for you to submit. Search for the requisition as described above, then find the “Available Actions” drop-down menu on the right. Select “Copy to New Cart” and click Go. You can then assign this new cart to your Requestor.

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. Click Save Changes when you are done.

If you need assistance:

Our primary resource for eProcurement assistance is Katie Simpson, x4872, katties@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.