ePro 101:
From Implementation to Creating and Processing Reqs

Georgia*FIRST* Wimba Training Series

Agenda

- Wimba Ground Rules

- Review Objectives

- ePro 101 Implementation

- Navigating the Requisition Process in ePro

- Review

- Q & A

Wimba Ground Rules

- Submit questions to "Main Room"
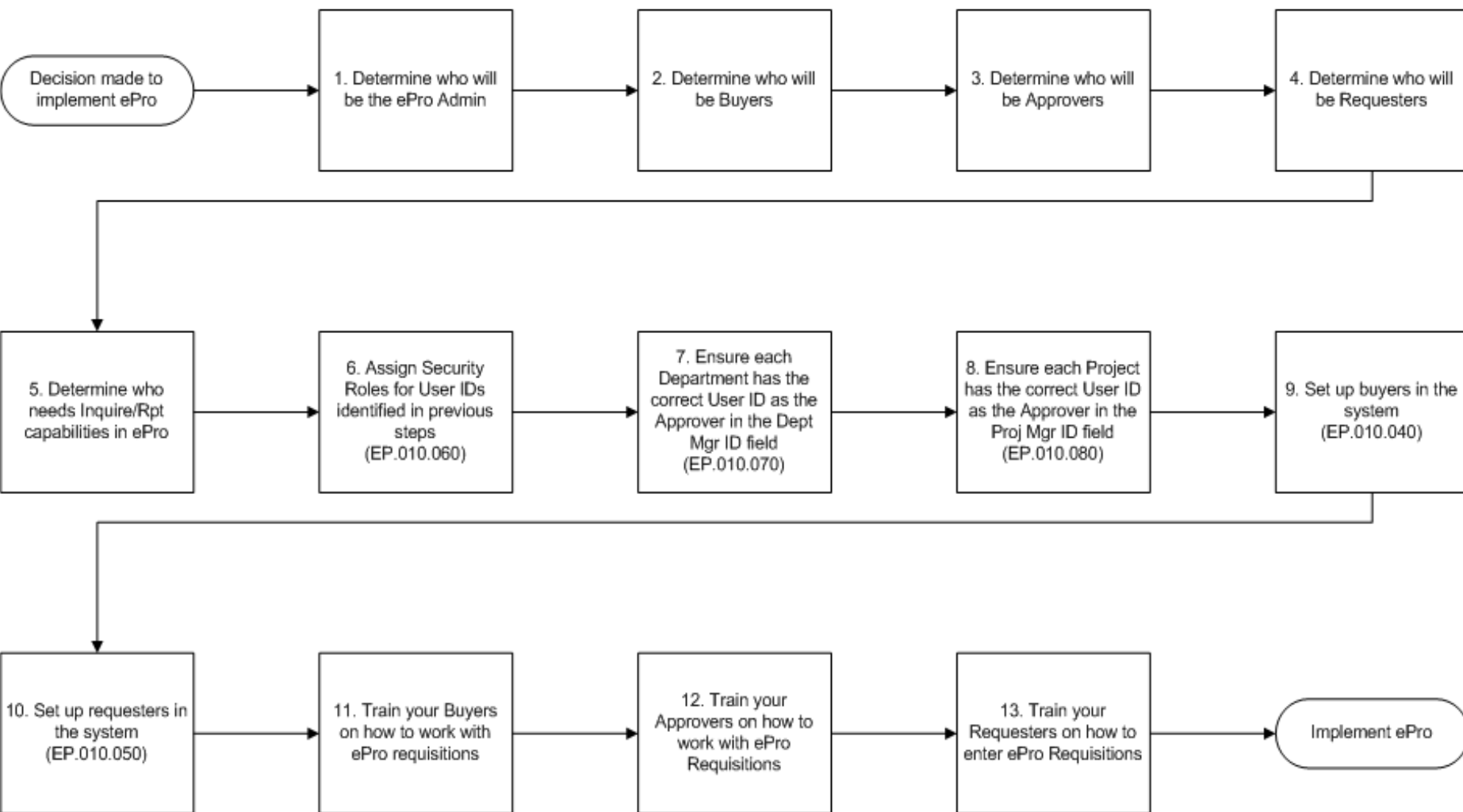- We may hold some questions to the end of the session

Objectives

In this training, participants will learn:

1. The steps for implementing the ePro module

2. The benefits and efficiencies of using ePro

3. The security roles for ePro users

4. How to create and process a requisition (including workflow) through the system

Benefits of eProcurement

- Reduction of manual effort required by Procurement staff

- The requisition is automatically tied into all of its related documents

- Flexible approval workflow

- Confirmation of available funds

- Ability to track the requisition's lifecycle

- Multiple sourcing options

Implementing
eProcurement

```
Decision made to
implement ePro
```
→
```
1. Determine who will
be the ePro Admin
```
→
```
2. Determine who will
be Buyers
```
→
```
3. Determine who will
be Approvers
```
→
```
4. Determine who will
be Requesters
```

```
5. Determine who
needs Inquire/Rpt
capabilities in ePro
```
→
```
6. Assign Security
Roles for User IDs
identified in previous
steps
(EP.010.060)
```
→
```
7. Ensure each
Department has the
correct User ID as the
Approver in the Dept
Mgr ID field
(EP.010.070)
```
→
```
8. Ensure each Project
has the correct User ID
as the Approver in the
Proj Mgr ID field
(EP.010.080)
```
→
```
9. Set up buyers in the
system
(EP.010.040)
```

```
10. Set up requesters in
the system
(EP.010.050)
```
→
```
11. Train your Buyers
on how to work with
ePro requisitions
```
→
```
12. Train your
Approvers on how to
work with ePro
Requisitions
```
→
```
13. Train your
Requesters on how to
enter ePro Requisitions
```
→
```
Implement ePro
```

Creating & Submitting a Req

- Three Step Process

- Order by Item Description

- Updating Req Lines including Distribs

- Save and Preview vs Submit

- How to Print an ePro Req

Creating an ePro Requisition

DEMO

Approving & Processing a Req

- Worklist

- Approval Email Notifications

- Budget Checking

- Sourcing using Expedite Requisition Process

- Batch Options

Creating an ePro Requisition

DEMO

Next Steps

- GeorgiaFirst Marketplace

    - SHARE Catalog Vendors

    - Access to SWC information

    - Workflow Options

- Next Marketplace Training October 18 – 19 @ ITS

Questions?

Please submit your questions via the Wimba chat function.

Wrap Up

- Archive

- Evaluation