eProcurement: Small Order Process

**Purpose:** To purchase items with 2xxx or 35xx object codes from a UNC non-designated vendor.


**Prerequisites:** None.

**Find Help:** For training contact financetrainer@unc.edu. For help, contact the Help Desk.
- Call 919-962-HELP, or
- Submit an online help request:
  2. Click the **Request IT Support** link near the top of the page.
  3. Log in with your onyen and password.
  4. In the Type of Help Needed field, choose CONNECTCAROLINA_ePRO, and then in the Problem Description field type a description of the help you need.
  5. Click Submit.

**Note:** If you receive an error message, copy and paste the error message (or a screenshot) to a Microsoft Word file on your computer. This will be helpful to have when the Connect Carolina team responds to you.

Support is available Monday through Friday, 8:00 a.m. to 5:00 p.m. excluding University holidays.
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About the Small Order Process

The Small Order Process (SOP) portion of ePro replaces the purchase of supplies and repairs & maintenance through the Check Request System. For information on approving SOP documents, refer to the Approve Orders manual. See the Vendor Catalog manual for information on searching for requisitions, adding approvers or reviewers, seeing if a requisition has been approved, resubmitting a denied requisition, and printing.

Starting ePro and Signing in

1. Start eProcurement by going to the following website:  https://epro.unc.edu
2. Enter your ONYEN user name and password and click Sign In:

⚠️ IMPORTANT: To protect your personal information, you must close every instance of this browser that is open on your computer when you log out.
Creating an Order

1. To start the order process, click **eProcurement, Create Order:**

2. Click the **Small Order Process** tab:

3. Click **Small Order Process:**

Result: ePro displays the Small Order Process screen, which lets you enter line items:
4. Fill in these fields for the invoice:

<table>
<thead>
<tr>
<th>In this field ...</th>
<th>Do this ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Req Name</td>
<td>Optional. Type a name to help you identify the requisition later.</td>
</tr>
<tr>
<td>Vendor ID</td>
<td>Type the Vendor ID number or click the icon to search for it. If the vendor is not listed, create a Web Vendor Request in Finance Central.</td>
</tr>
<tr>
<td>Received Date</td>
<td>Type or choose the date the goods were received.</td>
</tr>
<tr>
<td>Address ID</td>
<td>Click the icon to see the addresses available for the selected vendor and then select the appropriate address. If you don’t see the appropriate address, use the Web Vendor Request system in Finance Central to have the vendor’s address added.</td>
</tr>
<tr>
<td>Discount</td>
<td>If you received a discount off the invoice total, type the dollar amount of the discount.</td>
</tr>
</tbody>
</table>
| Invoice Total     | Type the total amount of the invoice.  
*Note: This total is used to match against the system-calculated total for all the line items you entered, to help catch data entry errors.* |
5. Fill in these fields for the line item:

<table>
<thead>
<tr>
<th>In this field ...</th>
<th>Do this ...</th>
</tr>
</thead>
</table>
| Vendor Item ID    | Type the vendor’s ID for the item. This information can be found on the invoice. If there is no vendor or manufacturer part number, type n/a.  
\textit{Note}: For certain vendors, when you enter the item number and press enter, ePro automatically fills in the description, category code, and unit of measure. |
| Description       | Type a description for the line item. This description will be used to help you select the category code. |
| Quantity          | Type the quantity you received of the line item. |
| UOM               | Type or choose the unit of measure. Click the \( \text{ icon to view a list of available options.} \) |
| Price             | Type the per item price. |
| Category          | Click the \( \text{ icon to see a list of categories.} \) 
\text{Result: ePro displays a list of categories that relate to the information you put in the Description field. You can type in a new description and click Search to see more categories. Click on the category number that corresponds to that line item. If you can’t find the category, try using fewer words or synonyms. If you can’t find the category you need, call the Help Desk.} |

6. Do one of the following:

- To add another line item, Click the \( \text{ icon to add a new row and repeat step 5.} \)
- To delete a line item, click the \( \text{ icon to delete a row.} \)
- If you are finished adding line items, go to the next step.

\text{Note: You can copy and paste information from one line to the next to help save time.} \)

7. After you finish adding line items, verify that the number in the Difference field is zero, and then click \textbf{OK}:
Small Order Process

Result: ePro displays a screen where you can make changes to the account and object codes, if needed. See the *Vendor Catalog* manual for more information on changing accounts and object codes.

"Vendor Item ID"  "Description"  "Quantity"  "UOM"  "Price"  "Category"
1 00412  Wiper Blades  2.0000  EA  16.5000  26171507
2 00401  Wiper Pump  1.0000  EA  25.0000  25171506

Line Item(s) Total: 58.00

Discount: 0.00

Invoice Total: 58.00

Difference: 0.00

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Small Order Process

Revision Date: 04.03.13

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8. If you want to add comments to the SOP document, do the following:

- Click the icon to make comments related to that line item, such as the name of the person you are ordering the item for. If you enter a comment, the icon has gray lines in it to show a comment exists for the line.
- Type any notes you want to include with the SOP document in the Comments field at the bottom.

9. If you need to add any special handling comments, do the following:

   *Note: Special handling comments are instructions you want to send to the Accounts Payable Office. Examples include asking that the check needs to be returned to your department for mailing, or that an enclosure needs to be sent with the check. These comments are similar to the Notepad field in the Check Request System.*

- Click the Special Handling checkbox.

   Result: ePro displays a new box for you to type special handling instructions.

- Type the instructions you need to give to the Accounts Payable department in the new box.

10. Click **Save & preview approvals:**

    Results: ePro

    - displays a confirmation page, and
    - creates an “S number.”

11. Click **Generate Barcode:**
Confirmation

Requested For: Troy Howell    Number of Lines: 2
Requisition Name: For Auto Shop    Invoice Amount: 55.00
Requisition ID: S0000003088

eProcurement Approvals

For Auto Shop: Initiated
Small Order Approval
Not Routed
Submit  Edit Requisition  Apply Approval Changes
Start New Path

Result: ePro displays a barcoded cover sheet in a new window:

UNC DISBURSEMENT SERVICES FAX COVER PAGE
CHECK REQUEST
S089

FAX COVER PAGE WITH ATTACHMENTS TO DISBURSEMENT SERVICES
919.843.2419
Fax Server is not available from 2 AM to 4 AM Eastern Time.
12. Print the barcoded cover sheet, write the S number on the invoice, and fax them (barcode first and invoice after) to Disbursement Services at the number printed on the barcode page.

**Notes:**

- *If you need to fax multiple invoices, you can fax them together in a stack. Just be sure to place the fax cover sheet that goes with each invoice above that invoice.*

- *Do not use a highlighter or place Post-It notes on the invoice.*

**Results:** After the barcode page and invoice have been received, ePro:

- adds a new View Invoice Image link above the vendor name on the SOP document, and

- sends you an email informing you that the document was successfully received:

```
13. After the image has been received, verify that the image is correct by following these steps:

- If you are still on the confirmation page, click **Edit Requisition**. If you have moved away from the confirmation page, use the Manage Orders option to search for the order and then click **Edit Requisition**.

- Click **View Invoice Image** (above the vendor name).

**Note:** Refer to the Vendor Catalog manual for instructions on searching for orders.
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14. Do one of the following:

- If the image is correct, you **must** click the **Accept Images** button to accept the image. Do **not** simply close the browser because that would prevent Disbursement Services from viewing the document.

- If the image is not correct, click the **Delete Images** button and repeat steps 12 through 14 (you do not need to reprint the fax cover sheet).

Note: If you need to print the images, you should first use the navigation arrows in the gray bar near the top of the page to cycle through all pages. Clicking on the print icon before doing this may cause only some pages to print due to cache issues.

15. Click **Save and Submit**.

Results:

- ePro sends an email to your approver letting him or her know an SOP document needs approval.

- If you approve SOP documents for your department, ePro automatically approves the SOP document.

- If your SOP document is approved (either by your approver or automatically by ePro), you receive an email letting you know.
If your SOP document is denied, you receive an email that lets you know and that contains a link to the requisition so you can make changes and resubmit. When the SOP document is approved, the order is sent to Disbursement Services to be paid. ePro displays a confirmation page:

Working with Requisitions Before They Are Submitted

If needed, you can make the following changes to SOP documents:

- change the account number for the entire SOP document.
- change the account number or object code for one or more line items.
- delete lines from the SOP document.

The steps for each of these tasks are on the following pages.

Changing the Account Number for the Entire SOP Document

1. To charge the entire SOP document to a single account number that is different than your default account, click Adjust Distributions:
Result: eProcurement displays the Adjust Distributions screen.

2. Click to see a list of the accounts you have access to.

   **Note:** If you have access to more than 300 accounts, ePro only displays the first 300.

3. If you don’t see the account you need, follow these steps to search for it:
   - In the Description field, change “begins with” to “contains.”
   - Beside “contains”, type a word or two to describe the account and click **Look Up**.
• Click the link of the account number you need.

  **Note:** You only see the accounts you have access to. To change your access, contact your department’s FACS Coordinator.

  Result: ePro returns to the Adjust Distributions page showing the account you chose.

**Changing the Account Number or Object Code for a Line Item**

1. Click the button next to the line you need to change the account or object code for.

   Result: ePro expands the section to show a row of accounting fields, including the account and object code currently assigned to the line.

   **Note:** Click the **Expand All** button to expand all lines at one time. Click the **Collapse All** button to collapse all of the lines after one or more have been expanded.

   **Important:** eProcurement displays a set of Cost Codes fields that feed to InDEPtH for Small Order Process documents (they don’t for Vendor Catalog orders).

2. To charge the line item to a different account than the one shown, click the icon to the right of the Speed Type Key box and select the appropriate account.

3. To change the object code for a line item, click the icon to the right of the Object box and select the appropriate object code.

**Deleting Lines from a Requisition**

1. Check the box beside the line you want to delete.

2. Click the Delete icon at the bottom of the page:
Result: ePro displays a message asking if you’re sure you want to delete the line.

3. Click **Yes**.
Printing SOP Documents

Follow these steps to print an SOP document:

1. Do one of the following:
   - On the Confirmation page click **View Printable Version**.
   - Use the Manage Orders option to search for the SOP document you need to print, and then click the **icon located on the corresponding line.**
Result: ePro displays a new window showing a version of the SOP document that is formatted for printing.

2. Click **Print** and choose the printing options you need:

   ![View Printable Order/Req](image)

   **Order Information:**
   - Requisition ID: S000003088 For Auto Shop
   - Requisition Date: 11/22/2010
   - Requestor: Troy Howell
   - Department: 2265 Enterprise Resource Planning
   - Phone: 919843-3069
   - Affiliation:

   **Shipping Information:**
   - Troy Howell
   - Unk of North Carolina-Chapel Hill
   - 104 Airport Dr
   - Rm: 3106A, Administrative Office Bldg
   - Chapel Hill NC 27599

   **WALKER AUTO STORES**
   - P O BOX 19348
   - RALEIGH NC 27619

<table>
<thead>
<tr>
<th>Line#</th>
<th>Item Description</th>
<th>Price</th>
<th>UOM</th>
<th>Qty</th>
<th>Recvd</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wiper Blades</td>
<td>15.50</td>
<td>EA</td>
<td>2.00</td>
<td>0.00</td>
<td>33.00</td>
</tr>
</tbody>
</table>

3. When you finish printing, close the window.
Copying an Existing SOP Document

If you need to enter an invoice that is similar to one you’ve already entered, follow these steps to copy an SOP document:

1. On the Small Order Process screen, click **Copy From Existing Order**:

   ![Small Order Process](image)

   2. Search for the order you want to copy by using the icon (optional) to find and enter information such as Requester Name, Vendor ID, and Requisition ID.

3. Click **Search**:

   ![Select Requisition to Copy](image)

   Result: ePro displays a list of SOP documents that match the search criteria you specified under the blue Requisition line near the bottom of the page.
4. Make sure that there is a check mark in the Sel column of the order you wish to copy and click **OK**:

Result: ePro returns to the SOP document entry screen, showing the line item information from the SOP document you copied:

5. Type or choose the received date and the invoice total, and make any other changes you need to.
Creating an “S Number”

Instead of "K numbers," SOP documents are assigned “S numbers.” If you often need to generate “S numbers” (empty SOP documents), it saves time to create one blank document and then copy the document each time you need to generate another “S number.”

Creating the “S Number” Template

1. Click eProcurement > Create Order.
2. Click the Small Order Process tab.
3. Click the Small Order Process link.
4. Fill in these fields for the invoice, typing arbitrary information if needed:
   - Vendor ID
   - Received Date
   - Address ID
   - Invoice Total
5. Add at least one line item, filling in arbitrary information if needed (you can change it later):
   - Vendor Item ID
   - Description (you may want to type “template” or another word you’ll remember when you need to search for it)
   - Quantity
   - Price
   - Category
6. Click Save & Preview Approvals.

Result: ePro saves the SOP document and displays the number assigned to the SOP document:

**Confirmation**

- Requested For: Martha J Pendergrass
- Requisition Name: ACR SUPPLY COMPANY
- Requisition ID: 9000003097
Copying the “S Number” Template

1. Click eProcurement > Create Order.
2. Click the Small Order Process tab.
3. Click the Small Order Process link.
   Result: ePro displays the Small Order Process Screen.
4. Click the Copy From Existing Order button.
   Result: ePro displays a page to let you search for and choose the small order process document you want to copy.
5. Search for the template you created, for example by typing template in the Item Description field and clicking Search.
6. Click to put a checkmark beside the SOP document you want to copy, and click OK.
   Result: ePro returns to the Small Order Process screen, showing the vendor and line item from the SOP document you copied.
7. Enter an invoice total and a Received Date.
8. Click Save & Preview Approvals.

Completing the SOP Document

When you are ready to enter the invoice for the empty “S Number” document, follow these steps:

1. Click eProcurement > Manage Orders.
2. Find and open the SOP document you need to complete.
3. Click the Edit Requisition button.
4. Click the Add New Items button.
5. Complete the SOP document as usual.