

University of Wisconsin System

eProcurement Training

February 2017



Agenda

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- Training Roles
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 - eProcurement Buyer
 - eProcurement Business Unit Administrator

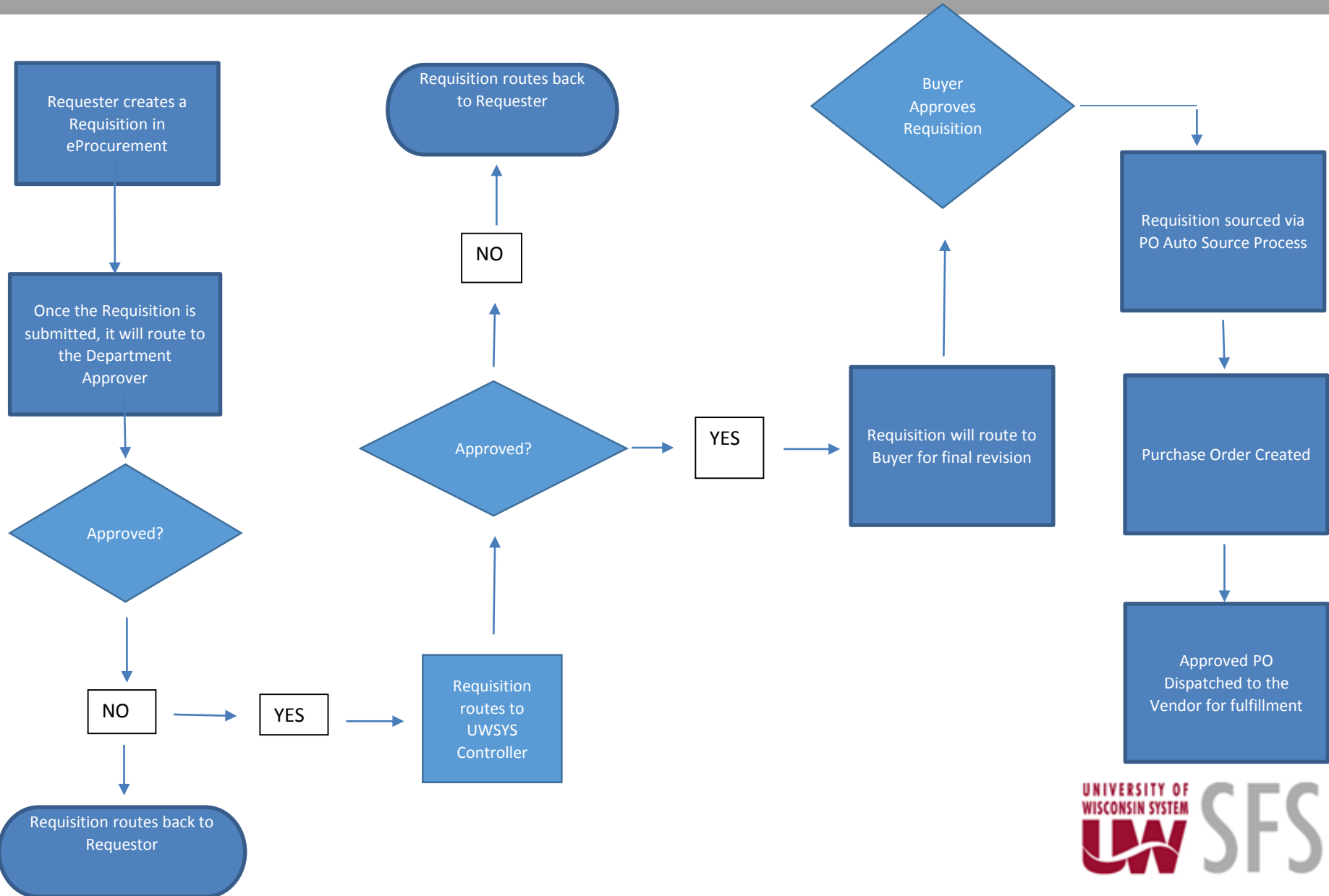
eProcurement Overview

- Eprocurement is being rolled out to create efficiencies in the purchasing process by implementing electronic workflow. This streamlines the approval process by allowing a requester to create and submit a request for purchase electronically, thus eliminating the current manual paper process.
- UWSYS and UWADM implementation date Feb 2017
- Future campus roll-out schedule to be determined post PeopleSoft 9.2 Upgrade.

eProcurement Overview

- eProcurement Roles
 - eProcurement Requester (Dynamic Role)
 - Enters requisitions in the system. Enters chart field information.
 - eProcurement Approver (Dynamic Role)
 - Approves requisitions. Individuals identified as department approvers will automatically have the security to approve requisitions.
 - eProcurement Buyer (Requires Security Form)
 - Provides final revision and approval of a requisition. Triggers automatic creation of PO and sends PO to vendor for fulfillment.
 - eProcurement Business Unit Administrator
 - The responsibilities of this role have been added to the existing BU Administrator role. Responsibilities include Approver table maintenance as well as the re-routing of requisitions should an approver be unavailable.

eProcurement Workflow



SFS

eProcurement Overview

- For more information/documentation on ePro please go to the below link.

<https://www.wisconsin.edu/sfs/documentation-training/>



University of Wisconsin System / Shared Financial System (SFS) / Documentation & Training

Documentation & Training

9.1 Business Processes

This page is the location of standard business process documentation and training materials for SFS 9.1. These materials are organized by SFS module or functional grouping. If you are unsure of the module or grouping, please use the search box at the top of the page to help find items by keyword. Security and reporting documentation can be found on their respective tabs.

SFS Module Documentation & Training

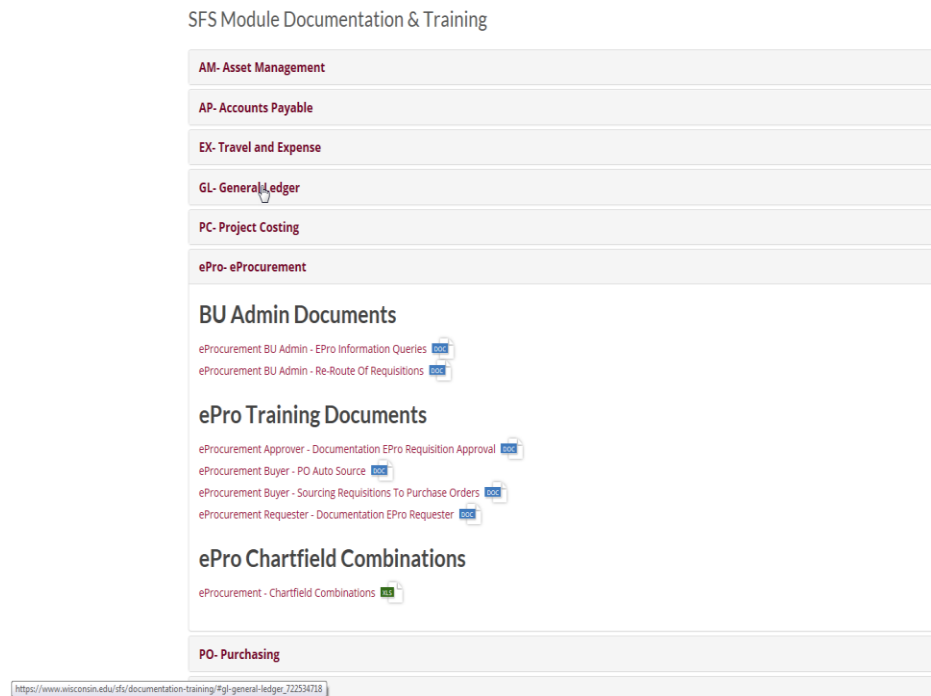
AM- Asset Management
AP- Accounts Payable
EX- Travel and Expense
GL- General Ledger
PC- Project Costing
ePro- eProcurement



SFS

eProcurement Overview

- Once you select ePro-eProcurement, the below will appear. More documents will be added as needed.



SFS

eProcurement Overview

- If you need assistance finding an accurate chart field combination, please go into WISDM using the below link.

<https://wisdm2.doit.wisc.edu/wisdm2/EditQuery/EditQuery.aspx>

- Please submit all questions to the UW Problem Solvers email box.

uwsaproblemsolvers@uwsa.edu

ePro Contact

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