

The **ePro@ccu** application is an electronic purchase requisitioning platform the university uses to initiate a purchase transaction for supplies, equipment, and miscellaneous services unless other provisions have been allowed under the Procurement Policies and Procedures manual.

Sessions begin with an overview of **ePro@ccu**.

- The Shopper and Requester session will cover the functions associated with each role's access. I will demonstrate creating a Cart, Assigning a Cart, performing Edits, creating Comments as well as placing an order into the workflow.
- The Approver session will cover the basic options available for Approvers. Topics covers will include locating the requisition, understanding the Status, viewing and adding Comments, reviewing information and creating Edits and completing an Approver step. The Approver role does not inherently possess shopping capabilities.

Users need to indicate which role they will fulfill within their department - Shopper (allowed to gather all the information for a cart creation), Requestor (can create a cart AND has access to GL codes in Colleague / Self-Service for which they can place an order against), and Approvers (typically Budget Officers who are listed on the Chart of Accounts or those at the VP Approver level).

Please note, a Requestor must have access to the GL accounts in Colleague. Users can check their current GL account access by reviewing the Finance Query in Self-Service.

- If you have completed the Shopper & Requester training, you may then register for the ePro & Pcard functionality session. This will provide a more in-depth explanation of the Pcard process within the ePro application. The ePro & Pcard training is required prior to obtaining a Pcard and may be required during the annual Pcard exam.
- Do you have questions regarding the procurement processes?
How to locate information related to making a purchase?
How to navigate the ePro@CCU application?
What an application message means and the steps to resolve it?
Have a suggestion you would like to share with the department?
Recently had changes to your department and want to discuss how you can best utilize the ePro@ccu application?
If so, then please register for the Procurement Services and ePro Systems Message – Open Forum session. This is an opportunity to delve deeper into the workings of Procurement Services and ePro@ccu. Please bring any questions or scenarios you would like to discuss.
We look forward to making the most of our time together!
- Blanket Purchase Order Renewal session will assist end users in preparing a cart for the upcoming fiscal year period. This session will cover the "Copy to New Cart" functionality, how to locate the FY24 BPO, what changes are needed to consider for the new BPO, and how copier renewals are different. As always, there will be time for questions, concerns and comments.

Remaining Winter / Spring 2024 training sessions:

ePro and Pcard functionality – training held in Microsoft Teams

Thursday 4/11 from 3 – 4:45 pm

Approver – training held in Microsoft Teams

Friday 4/19 from 10 – 11 am

Procurement Services and ePro Systems Message – Open Forum - training held in Microsoft Teams

Tuesday 4/23 from 10 – 11 am

Blanket Purchase Order Renewal - training held in Microsoft Teams

Wednesday 3/27/24/ from 10 – 11 am

Wednesday 4/10/24 from 9 – 10 am

Wednesday 4/24/24 from 3:30 – 4:30 pm

Friday 5/10/24 from 10 – 11 am

Thursday 6/06/24 from 11 am – Noon

Tuesday 4/02/24 from 3:30 – 4:30 pm

Tuesday 4/16/24 from 9 – 10 am

Tuesday 4/30/24 from 3:30 – 4:30 pm

Thursday 5/16/24 from 3:30 – 4:30 pm

Tuesday 6/11/24 from 9 – 10 am

Upcoming Summer 2024 training sessions:

Shopper & Requester – training held in Microsoft Teams

Tuesday 5/07 from 8:30 – 11:30 am

Thursday 6/06 from 2 – 5pm

Wednesday 7/03 from 9 am -12 noon

Thursday 8/08 from 9 am – 12 noon

Wednesday 5/29 from 9 am -12 noon

Tuesday 6/18 from 2 – 5 pm

Wednesday 7/17 from 2 – 5 pm

Thursday 8/15 from 9 am – 12 noon

ePro and Pcard functionality – training held in Microsoft Teams

Wednesday 5/15 from 9 – 10:45 am

Thursday 6/13 from 10 – 11:45 am

Tuesday 7/09 from 3 – 4:45 pm

Friday 8/09 from 10 – 11:45 am

Thursday 5/30 from 3 – 4:45 pm

Friday 6/21 from 10 – 11:45 am

Wednesday 7/24 from 2:30 – 4:15 pm

Fri 8/16 from 10 – 11:45 am

Approver – training held in Microsoft Teams

Thursday 5/09 from 2 – 3 pm

Thursday 5/23 from 2 – 3 pm

Friday 6/14 from 10 – 11 am

Tuesday 6/25 from 4 – 5 pm

Friday 5/17 from 11 am – 12 noon

Tuesday 6/04 from 10 – 11 am

Wednesday 6/19 from 4 – 5 pm

Wednesday 7/10 from 9 – 10 am

Thursday 7/18 from 3 – 4 pm

Tuesday 8/13 from 9 – 10 am

Thursday 8 /01 from 4 – 5 pm

Tuesday 8/20 from 4 – 5 pm

Procurement Services and ePro Systems Message – Open Forum - training held in Microsoft Teams

Tuesday 5/21 from 4 – 5 pm

Thursday 7/25 from 3 – 4 pm

Wednesday 6/26 from 10 – 11 am

Wednesday 8/14 from 9 – 10 am

To register for a training session, please contact [Casey Keck](#) directly