eProc Quick Reference Guide

Version 17.03.1.0

Important Notice

Disclaimer
This guide has been validated and reviewed for accuracy. The instructions and descriptions it contains are accurate for eProc. However, succeeding versions and guides are subject to change without notice. Zycus Inc. assumes no liability for damages incurred directly or indirectly from errors, omissions, or discrepancies between the software and the guide.

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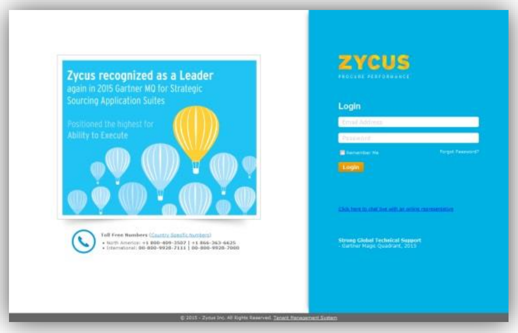
Chapter 1: Getting Started

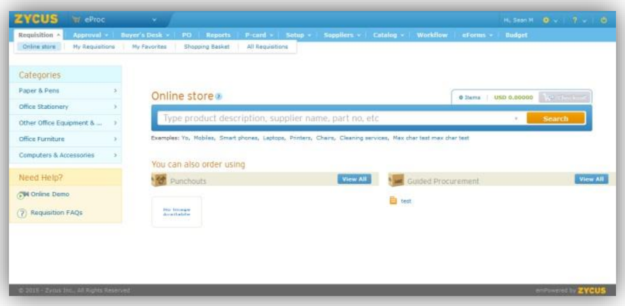
1.1 How to access eProc?

To access eProc:

1. Open the **Internet Explorer** browser (version 11 or above).
2. Type the URL in the address bar and press the **ENTER** key. The Login page is displayed.



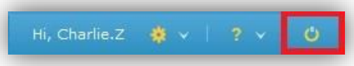
3. Type your email id and password in the **Email Address** and **Password** fields respectively.
4. Click **Login** or press the **ENTER** key. The **Product Selection** page is displayed.
5. Select **eProc**, the **following** page is displayed.



1.2 How to logout from eProc?

To logout from eProc:

1. Click on the logout button at the upper right corner of the page.

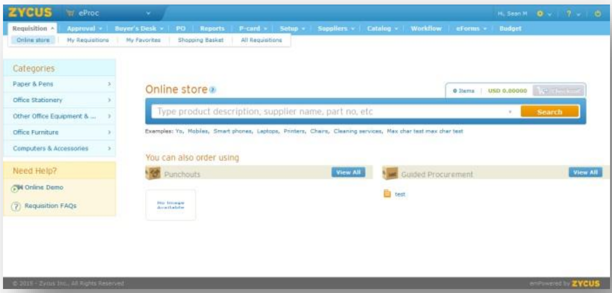


Chapter 2: Searching Items

2.1 How to search for products and services?

To search for an item by typing a description in the search box:

1. Click **Requisition** tab. Enter an item description in the text box.



2. Click **Search**. The search results page is displayed.

To search for an item by browsing categories, see [How to browse items by categories?](#)

To search for an item by visiting online stores or punchouts, see [How to add items from punchouts?](#)

> **Note:** If the item you search for is not found, you will be guided to the following page. Click **Still can't find what are you looking for? > Guide Me**. For more information, see [How to create a free-text item?](#)

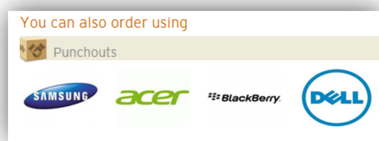
2.2 How to add items from punchouts?

To add items from Punchouts:

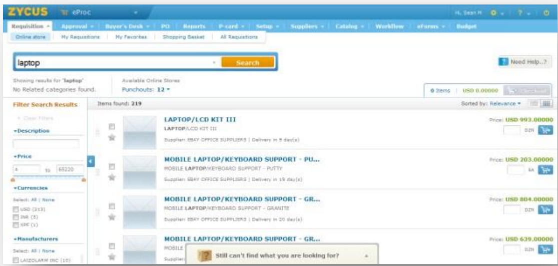
1. On the search results page, the punchouts configured for a particular category that matches your search description is displayed.

OR

2. On the **Requisition** page, the **Supplier Punchouts** are displayed.



3. Click on a supplier punchout, you will be directed to the supplier site.
4. Select and add items to the cart.



5. Click the **Checkout** button on the punchout site to return to Zycus eProc. For more information, see [Checking Out your Requisition.](#)

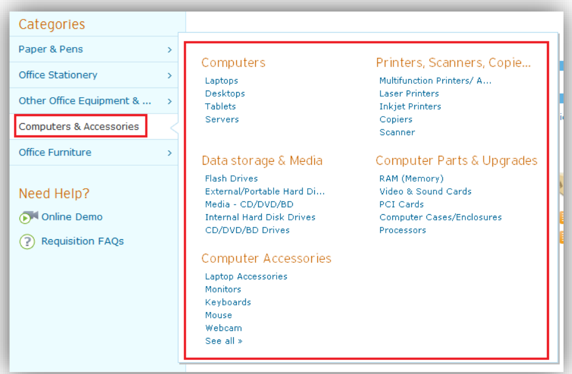
> **Note:** In the punchout cart, you will only see items added during that punchout visit. Punchout items added earlier or other items in the eProc cart will not be visible.

Provide Feedback

2.3 How to browse items by categories?

To browse items by categories:

1. On the **Requisition** tab, click a particular category under the **Categories** pane, to view catalog items under that category.



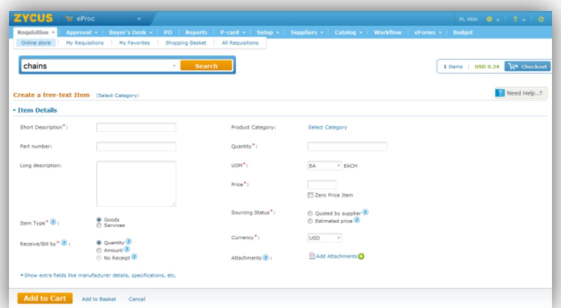
The search results page is displayed.

2.4 How to create a free-text item?

To create a free-text item:

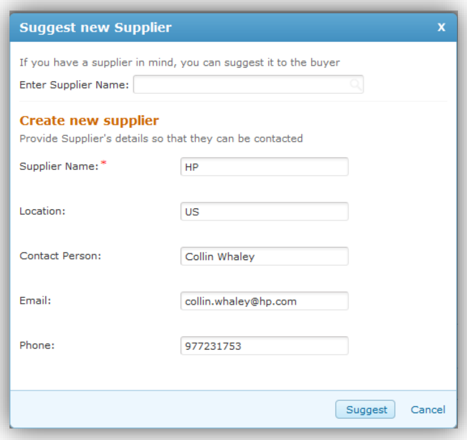
1. On the search results page, on the bottom of the page click **Still can't find what you are looking for?** Box.

2. Click **Guide Me**.

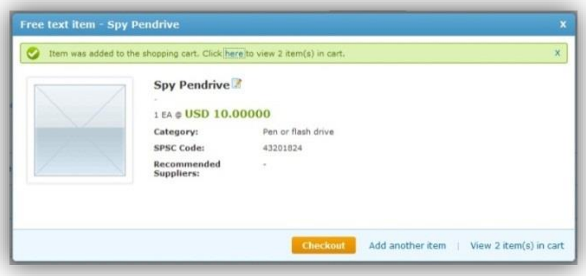


> **Note:** A category specific questionnaire is displayed. This helps the buyer find the right item and eliminates back-and-forth communication with the requester.

3. Click **Change Category** to change the category and select a new category.
4. Click **Continue Without category** if you are unsure of the category.
5. Click **See all eForms** to view all the configured eForms and select one. The questionnaire is displayed.
6. Under **Item Details** section, enter the required details.
7. Under **Suggested Suppliers** section, click **Suggest a new Supplier**, if you would like to suggest a supplier.



8. Enter the name of the supplier and other details and click **Suggest**. The item is added to the shopping cart.

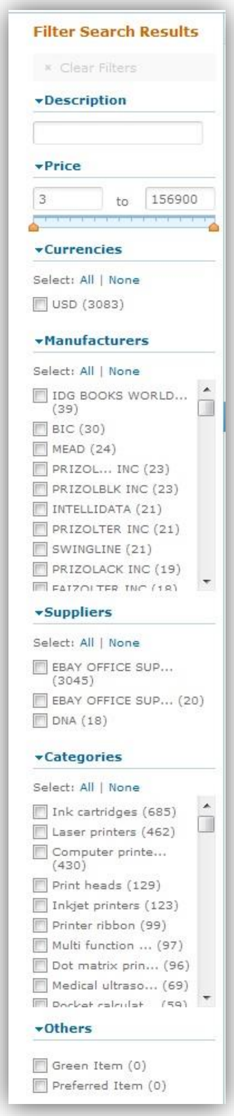


Provide Feedback

2.5 How to apply filters to the items searched?

To apply filters:

1. On the search result page, in the **Filter Search Results** pane, enter your filtering criteria.

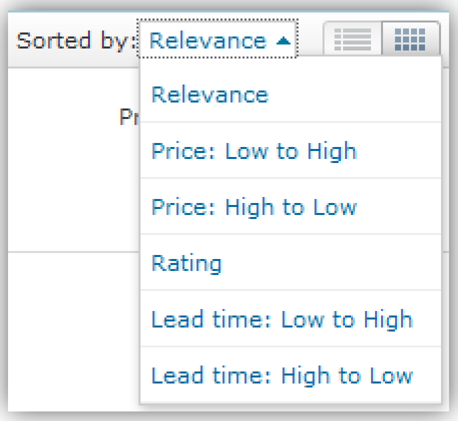


2. In the **Description** field, enter a description to filter your result.
3. In the **Price** field, you can slide through the price range along the horizontal bar.
4. In the **Suppliers** and **Manufacturers** field, select the suppliers and manufacturers to filter your result respectively.
5. In the **Categories** field, select the categories to filter your results accordingly.
6. As you select different filters, the results are filtered automatically.
7. Click **Clear Filters** to filter your result.

2.6 How to sort items in the search result page?

To sort items:

1. On the search result page, from the **Sort by** drop down list, select an option to sort your results.



2.7 How to view items in grid view?

To view items in grid view:

1. On the search result page, on the upper right corner of the page, click  to view items in grid view.

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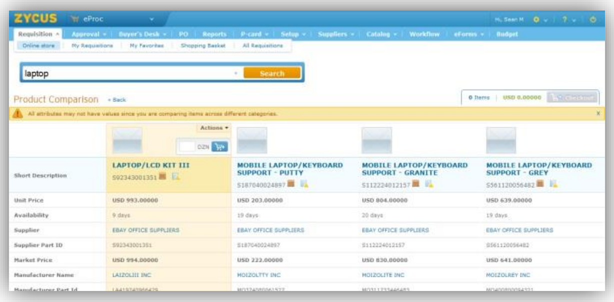
2.8 How to compare items?

To compare items:

1. Select the required items and click on the **Compare option**. The product comparison page is displayed.



2. Click **Add to Cart** to add the item to cart. For more information see, [How to add items to shopping cart?](#)

2.9 How to add items to shopping cart?

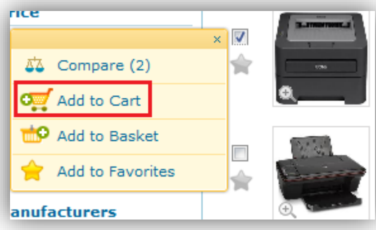
To add items to the cart:

1. Enter the quantity of items you wish to purchase in the text box provided next to the item name.

2. Click **Add to Cart**.

OR

3. Select an item and click **Add to Cart**. The item gets added to the cart.



2.10 How to view details of an item?

To view details of an item:

1. On the search results page, click on the item name to view the details of that item.

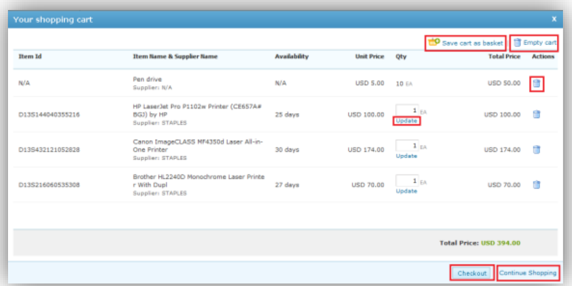
Chapter 3: Managing your Shopping Cart

3.1 How to view items in the shopping cart?

To view items in the shopping cart:

1. Click the **Items** link to the left of the total amount of the shopping cart.

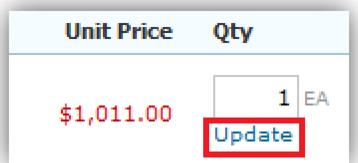
2. The **Your shopping cart** page is displayed.



3.2 How to update quantity of items in the shopping cart?

To update quantity of items:

1. On the **Your shopping cart** page, enter the quantity in the text box next to the item you wish to update.
2. Click **Update**.



3.3 How to remove items from the shopping cart?

To remove items from the shopping cart:

1. On the **Your shopping cart** page, click next to the item you wish to delete.
2. Click **Delete all items** to delete all items in the shopping cart.

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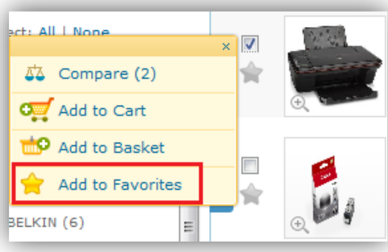
Chapter 4: Managing Item Bookmarks

4.1 How to add items to favorites?

To add items to favorites:

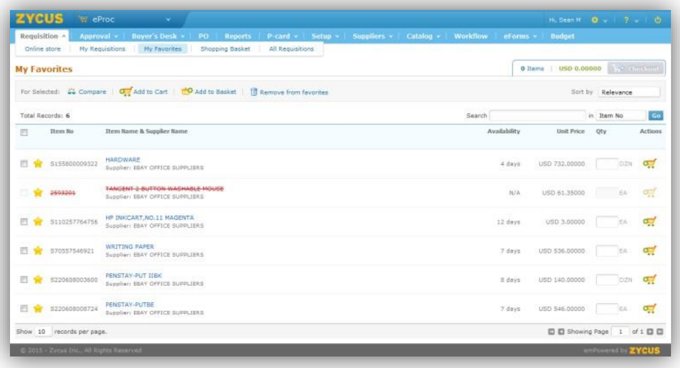
1. On the item search results page, select an item and click **Add to Favorites**. The item gets added and is displayed in the **My Favorites** page.



4.2 How to view items in favorites?

To view items in favorites:

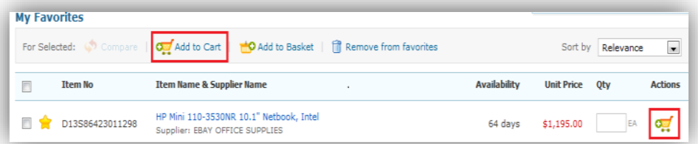
1. Click **My Favorites** sub-tab under the **Requisition** tab.



4.3 How to order items from favorites?

To order items from favorites:

1. Select the items and click or click **Add to Cart**. The items get added to the cart.

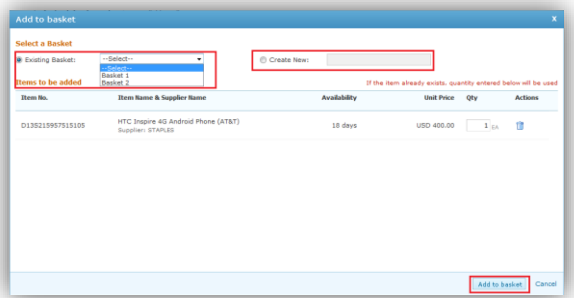


2. On the **My Favorites** page, to add multiple items to the cart, click **Add to Cart** on the top.

4.4 How to add items in a shopping basket?

To add items in a shopping basket:

1. On the **My Favorites** page, select an item and click **Add to Basket**. The **Add to Basket page** is displayed.
2. Select a basket from the **Existing Basket** drop down list.



Note: If **Existing Basket** option is selected and if the item already exists then the quantity for existing items in the selected basket will be overridden.

4.5 How to create a shopping basket?

To create a shopping basket:

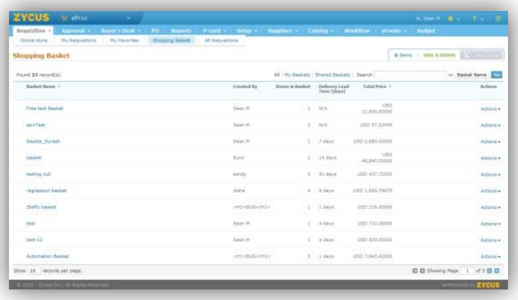
1. In the **Add to Basket** page, select **Create New** to create a new basket and specify a name for your basket in the text box field.

2. Click **Add to basket**. The basket is added and is displayed in the **My Baskets** page.

4.6 How to view shopping basket & saving it as a cart?

To view shopping basket:

1. On the **Requisition** tab, click **Shopping Baskets** sub-tab. The **Shopping Baskets** page is displayed.
2. Click on a basket name to view the basket.



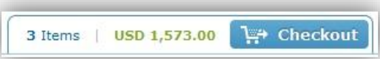
3. Click **Add to Cart** or  to save the basket as cart. For more information, see How to add items in a shopping basket?

Chapter 5: Checking Out your Requisition

5.1 How to checkout a requisition?

To checkout a requisition:

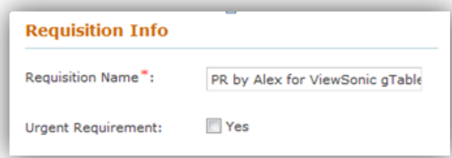
- Click **Checkout** button located on the upper right corner of the page.



5.2 How to mark a requisition as urgent?

To mark a requisition as urgent:

1. Click **Checkout** tab on the upper right corner of the page.



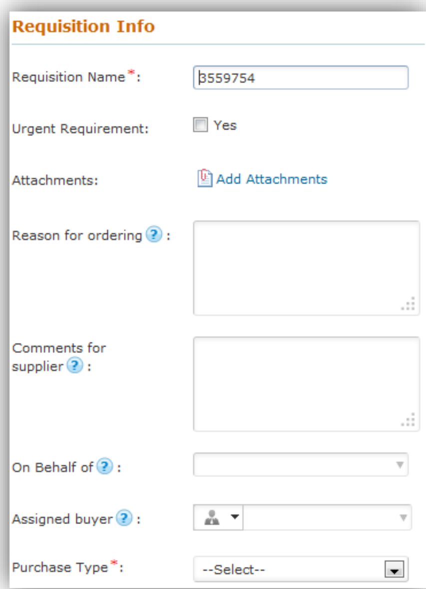
2. In the **Requisition Info** tab, in the **Urgent Requirement** field, select **Yes** based on the urgency of your requirement.

Note: ! appears next to an urgent requisition when it is being viewed or listed.

5.3 How to create a requisition on someone else's behalf?

To create a requisition on someone else's behalf:

1. Click **Checkout** tab on the upper right corner of the page.



2. In the **Requisition Info** section, in the **On Behalf of?** field, enter the name of the person on whose behalf you would like to request.

Note: Validation & workflow will be applied based on the user for whom you are creating the request.

Provide Feedback

5.4 How to assign buyer/buyer group to a requisition?

To assign a buyer/buyer group to a requisition:

1. Click **Checkout** tab on the upper right corner of the page.
2. In the **Requisition Info** tab, in the **Assigned Buyer** field, click on the icon:

   a. Select if the requisition is to be assigned to a buyer.

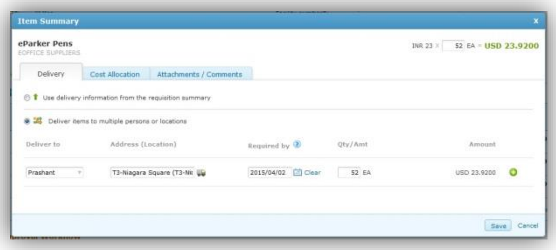
   b. Select if the requisition is to be assigned to a buyer group.

3. Enter the name/email id of the buyer/buyer group.

5.5 How to deliver items to multiple persons or locations?

To deliver items to multiple persons or locations:

1. Click **Checkout** tab on the upper right corner of the page.
2. In **Items in your Cart** section, click . The **Item Summary** box is displayed.
3. Click **Delivery** tab to enter the delivery details of items, the following page is displayed.



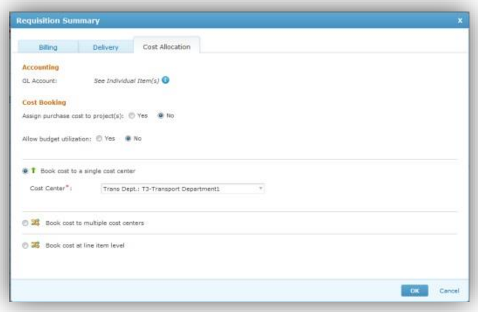
4. Select **Deliver items to multiple persons or locations** if you wish to deliver the items to different people or different locations.
5. Enter the required details. Click **Save**.

5.6 How to book cost to a cost center?

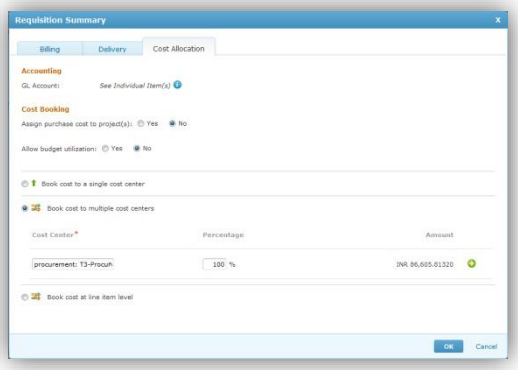
To book cost in a requisition to a cost center:

1. Click **Checkout** tab on the upper right corner of the page.
2. In **Items in your Cart** section, click . The **Item Summary** box is displayed.
3. Click **Cost Allocation** to allocate the cost under a particular business unit.
4. Select any of the following options:

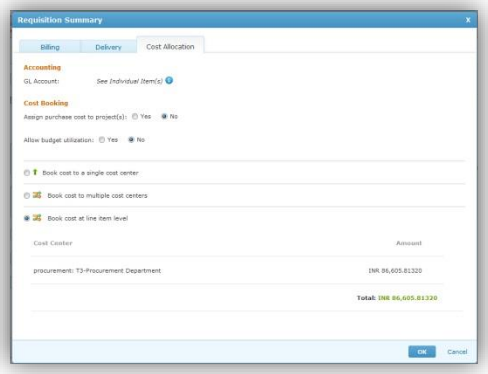
- **Book cost to a single cost center:** Select this option to book the entire cost to a single cost center. Select the cost center from the drop down list.



- **Book cost to multiple cost centers:** Select this option to book your cost partially to multiple cost centers. In **Percentage** field, enter the percentage of your cost you would like to assign to a particular cost center.



- **Book cost at line item level:** Select this option to book cost at item level.



5. Enter the required details.

5.7 How to view workflow applicable to a requisition?

To view workflow applicable to a requisition:

1. When you click **Checkout** tab, you will find **Workflow** section.
2. This section describes the approval hierarchy.

3. Click **I'm Done** to proceed with the request or click **Save as Draft** to save your request now and submit it later.

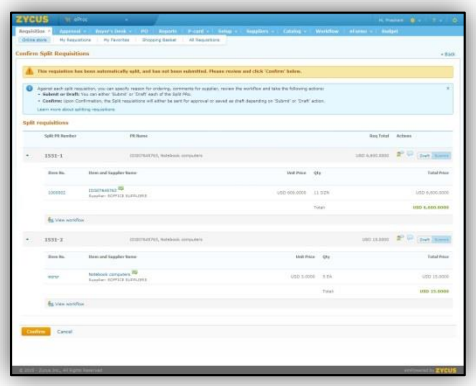
> **Note:** In case if requisition splitting is enabled (based on category and/or sourcing status), you will be redirected to the **Confirm Split Requisitions** page.

5.8 How to checkout a split requisition?

To checkout a split requisition:

1. Click on **Checkout**. Enter the required information and the following message is displayed in the **Workflow** section.

2. Click **I'm Done**. The **Confirm Split Requisitions** page is displayed.



3. Select either **Draft** or **Submit** for each split requisition as required.

4. To view the workflow of any of the split requisition, click on the **View Workflow** button under the required split requisition.

5. Select the **Mark for adding or selecting approvers** to save the requisition in the *Ready for Approval* status. This will allow you to add approvers once the requisition is available for editing under the **My Requisitions** page.

6. Click **Save** to apply the workflow settings.

7. Click **Confirm** to apply the selected actions for each individual item in the split requisitions.

> **Note:** The **Mark for adding or selecting approvers** is checked & un-editable by default if the workflow has selectable user, processor select type – Multiple or Single, or has cost center approver in the sub process node.

Provide Feedback

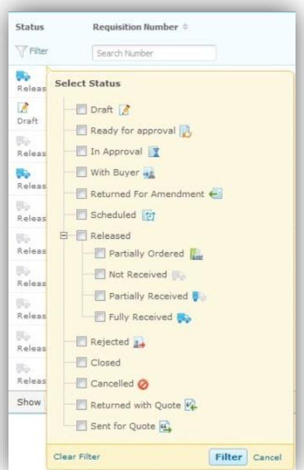
Chapter 6: Tracking Requisitions

6.1 How to apply filters to the requisitions?

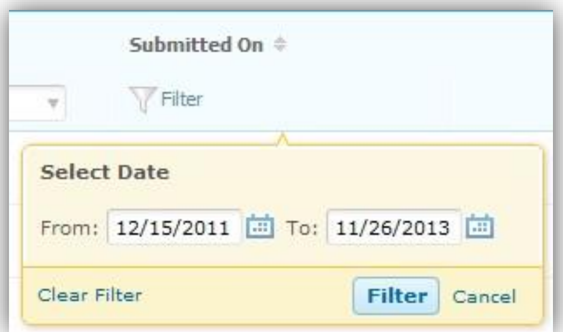
To apply filters:

1. On the search result page, click  for a particular column to filter it.
2. You can filter all the requisitions based on the following parameters:

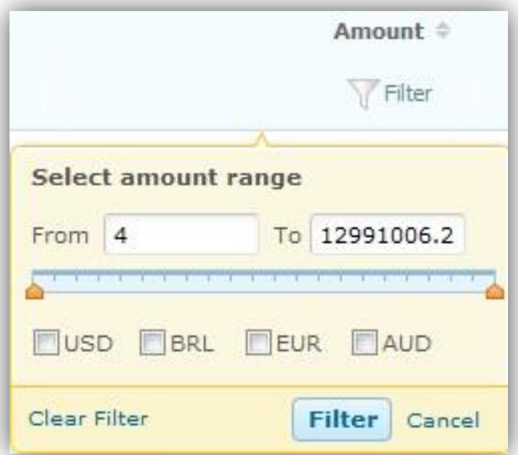
- **Requisition Status:** Select a status to view the requisitions under that particular status.



- **Submitted On:** Select the dates to view the requisitions that are found between those dates.



- **Amount:** Slide through the horizontal bar to filter your requisitions based on the total amount of your requisitions.

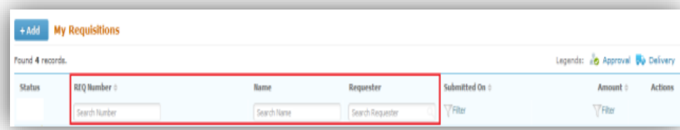


3. Select your criteria and click **Filter**.
4. Click **Clear Filters** to clear the filter result.

6.2 How to search requisitions in the search result page?

To search requisitions:

1. On the search result page, in the text box provided below a column name, enter the search text.



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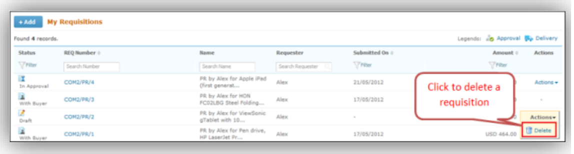
6.3 How to delete a requisition?

To delete a requisition:

1. Filter the requisitions under draft status.
2. Click **Delete** to delete the requisition.

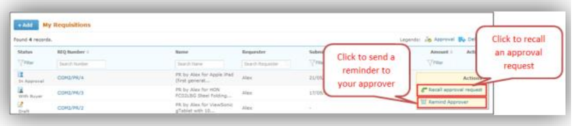


> **Note:** Only requisitons in draft stage can be deleted.

6.4 How to recall a requisition approval request?

To recall a requisition approval request:

1. Filter the requisitions under awaiting approval status.
2. Click on **Recall approval request**.



3. Click on **Remind Approver** to send a reminder to the approver about the requisition.

> **Note:** Only requisitons that are in the awaiting approval stage can be recalled.

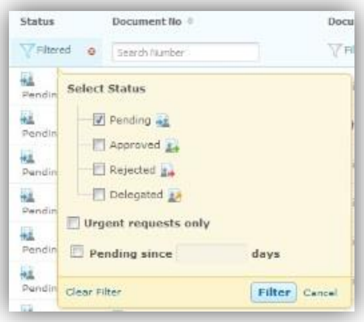
Provide Feedback

Chapter 7: Approving Requisitions

7.1 How to view requests?

To view requests:

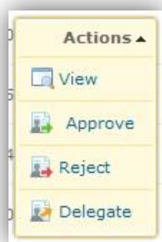
1. Click **Approval** tab.
2. By default, all the requisitions that are pending for approval are displayed.
3. Click on a status to view requisitions under that status.



7.2 How to approve/reject a request from listing screen?

To approve/reject a request from listing screen:

1. Click **Approval** tab.
2. By default, all the requisitions that are pending for approval are displayed. Click on **Action**.



3. Click **Approve** to approve a requisition.
4. A comment box is displayed. Enter your comments. Click **Approve**.

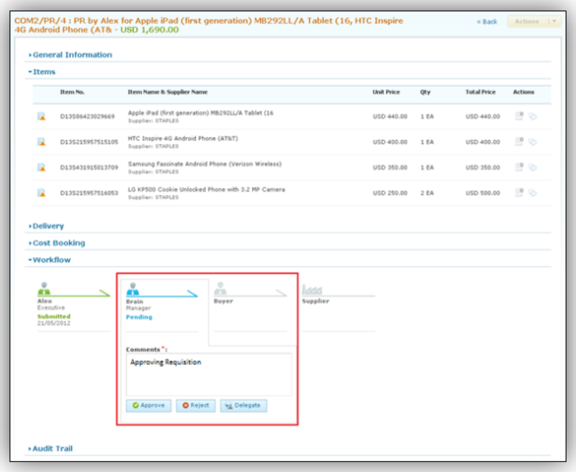
OR

5. Click **Reject** to reject a requisition.
6. A comment box is displayed. Enter your comments. Click **Reject**.

7.3 How to view request details and take action?

To view request details and take action:

1. Click **Approval** tab. By default, all the requests pending for approval are displayed.
2. Click a requisition name. The following page is displayed.



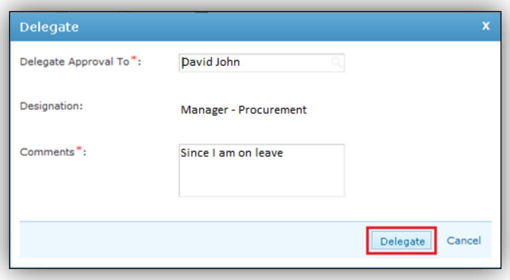
3. Enter your comments in the **Comments** area.
4. Click **Approve** to approve the requisition.
5. Click **Reject** to reject the requisition.
6. Click **Delegate** to delegate a requisition.

Note: Comments are only mandatory if the requisition is being rejected or delegated.

7.4 How to delegate a request?

To delegate a request:

1. Click **Approval** tab.
2. By default, all the requisitions that are pending for approval are displayed. Click on **Action**.

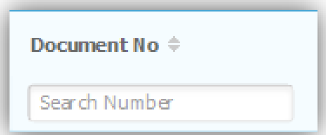


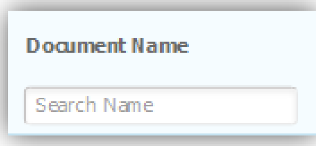
3. Click **Delegate**.
4. Enter the name of the person to whom you would like to delegate a requisition in **Delegate Approval To** field. **Designation** is auto-loaded.
5. Enter your comments in the **Comments** area and click **Delegate**.

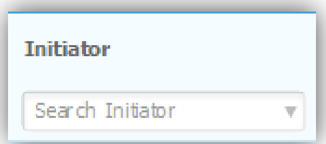
7.5 How to search approval requests?

To search approval requests:

1. Click **Approval** tab.
2. On the **Approval Requests** page, in the top pane, enter search description in the search field for either **Document No** or **Document Name** or **Initiator**.



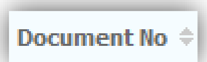




7.6 How to sort approval requests?

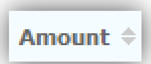
To sort approval requests:

1. Click **Approval** tab.
2. On the **Approval Requests** page:
   a. **Document No:** For sorting approval requests based on document number, click on ▲ OR ▼ to sort the approval requests.



   b. **Received On:** For sorting approval requests based on date the request is received, click on ▲ OR ▼ to sort the approval requests.

   c. **Amount:** For sorting approval requests based on amount, click on ▲ OR ▼ to sort the approval requests.

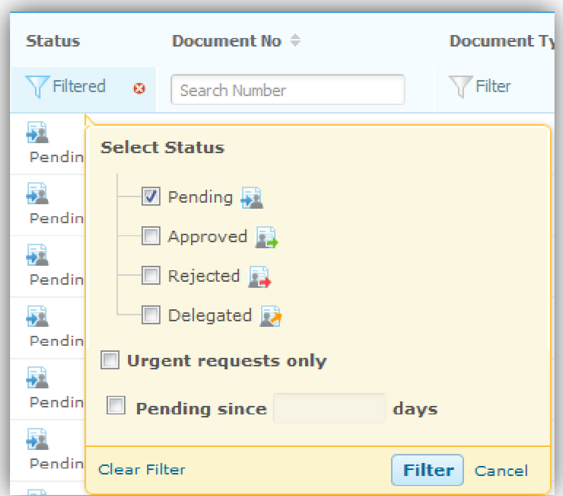


Provide Feedback

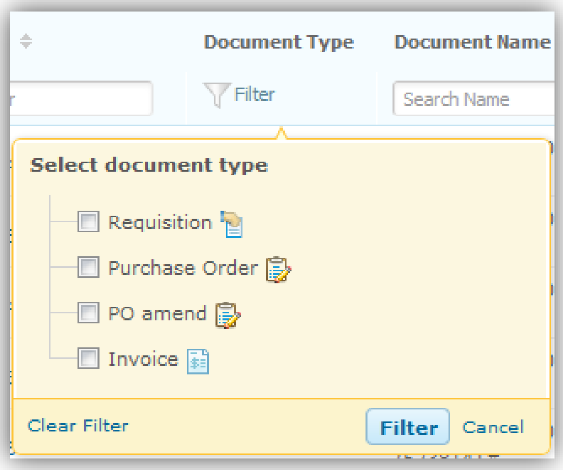
7.7 How to filter approval requests?

To filter approval requests:

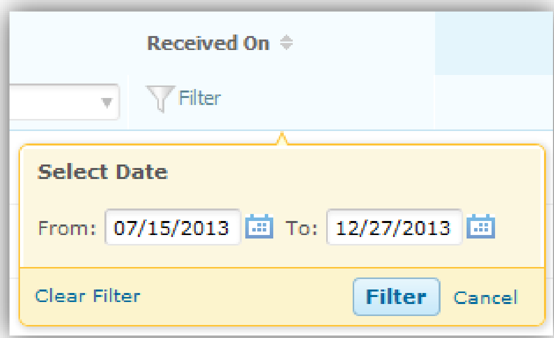
1. Click **Approval** tab.
2. You can filter the requisitions based on the following parameters:
   - **Status:** Select a status to view the requisitions under that particular status.



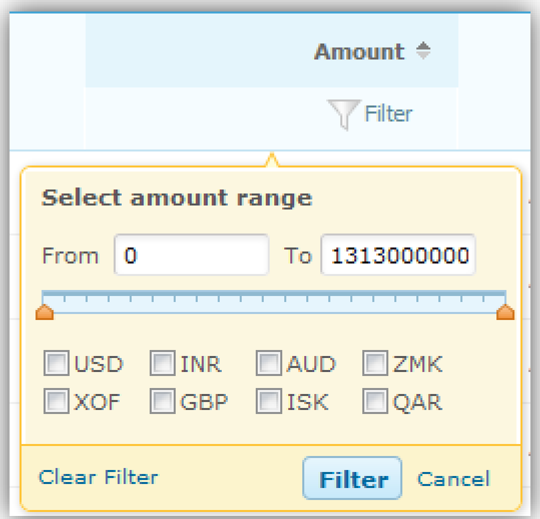
   - **Document Type:** Select a document to view the requisitions of that particular document type.



   - **Received On:** Select the dates to view the requisitions made on that date.



   - **Amount:** Slide through the horizontal bar to filter your requisitions based on the amount of your requisitions.



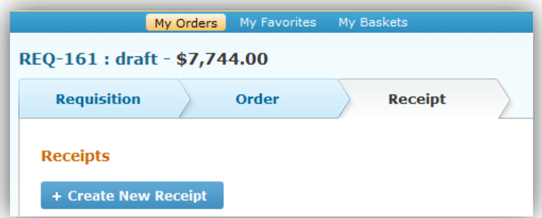
3. Click **Filter**.
4. Click the clear filters button to clear the filter results.

Chapter 8: Receiving Items

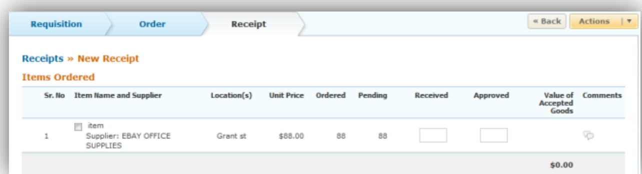
8.1 How to create a receipt for a requisition?

To create a receipt for a requisition:

1. Expand **Requisition** tab and click on **My Requisitions** sub-tab.
2. Filter the requisition status to **Released**. The requisitions in the released state are displayed.
3. Click the requisition name. Go to the **Receipt** tab.



4. Under the **Receipt** tab, click **Create New Receipt**. The **New Receipt** page is displayed.



5. Under the **Items Ordered** section, select an item using the checkbox and enter the quantity received and approved in the **Received** and **Approved** fields respectively.

> **Note:** Approved quantity cannot be greater than Received quantity.

6. Under the **Delivery Information** section, enter the required details in the respective fields.
7. Select the date on which the goods/items are received.

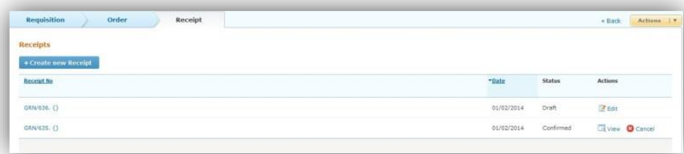
> **Note:** The date has to be between the date on which requisition was made and the date when the goods were received.

8. Click **Add Attachment** to upload an attachment.
9. Click **Save as Draft** to save the receipt.
10. Click **Submit** to submit the receipt. The requisition is then moved to the Partially Received/Fully Received status.

8.2 How to view previously created receipts?

To view previously created receipts:

1. Expand **Requisition** tab and click on **My Requisitions** sub-tab.
2. Filter the requisition status to **Released**. The requisitions in the released state are displayed.
3. Click the requisition name. Go to the **Receipt** tab. A list of receipts created previously is displayed.
4. Click on a receipt name to view the details of that receipt.
5. Click Edit to edit a receipt.



> **Note:** Only the receipts in the Draft status can be edited. The receipts in the Confirmed status cannot be edited, only viewed or cancelled.

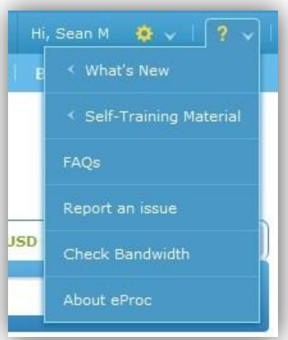
6. Click View to view the receipt.
7. Click Cancel to cancel the receipt.

Chapter 9: Need more Help?

9.1 How to refer to eProc User Manuals?

To refer eProc User Manuals:

1. On the top right corner of the page, click on the question mark.



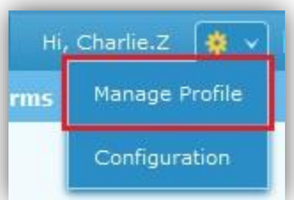
Option	Description
What's New	Gives you access to Release Notes & Release Specific Videos for the latest release.
Self-Training Material	Gives you access to Help Videos, Online Help & User Manuals for eProc.
FAQs	Gives you detailed information of all the important features
Manuals	Gives you step-by-step information to help you carry out various functions. This section provides customer specific help documents Zycus Knowledge Hub of eProc as shown in the following figure.
Online Videos	Provides a list of videos depicting the functionality of the various features
Report an issue	Gives users an option to contact Zycus Technical Support team
Check Bandwidth	Checks if the bandwidth being used is suitable to use eProc
Live Support	Provides live support via chat
About eProc	Gives all the version details of eProc

Chapter 10: Managing your Profile

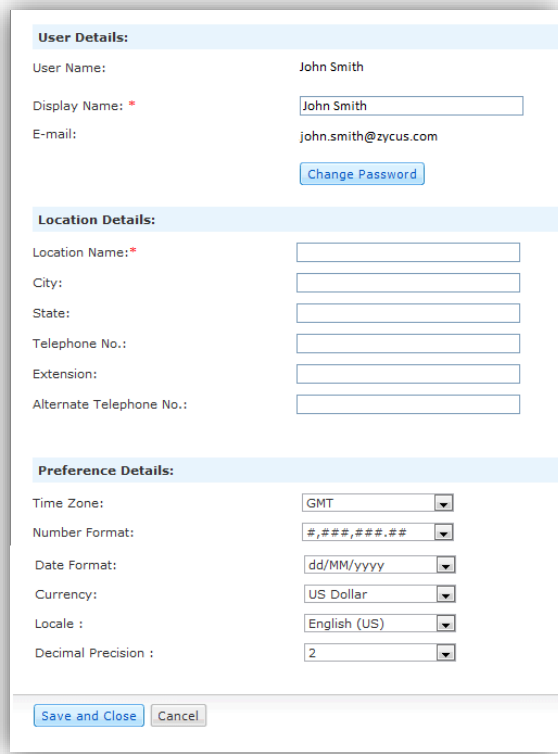
10.1 How to set profile preferences?

To set profile preferences:

1. Expand the setting icon on the upper left corner of the page. Click on **Manage Profile**.



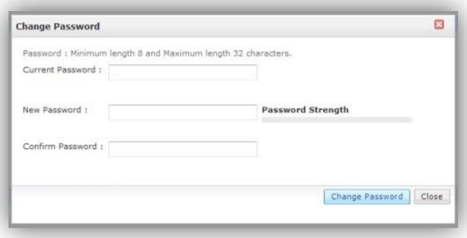
2. Modify the details and click **Save and Close** to save the settings.



10.2 How to change password?

To change password:

1. Ensure that the **User Profile** page is displayed.
2. Click **Change Password**. The Change Password dialog box is displayed.



3. Enter the current password in the **Current Password** field.
4. Enter the new password in the **New Password** field.
5. Re-enter the new password in the **Confirm Password** field.
6. Click **Change Password**.

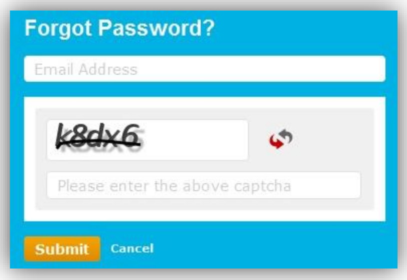
Note: Password must contain minimum six characters.

Provide Feedback

10.3 How to recover your password?

To recover your password:

1. Click **Forgot Password?** on the login page.



2. Type your official email address in the **Email Address** field.
3. Enter the code displayed in the box, in the **Enter the above code** field and click **Submit**. An email is sent to your email account with your login id and password.

Note: Click to refresh code.