

iProcurement Release Notes

Version 4.0

11/01/2007

What's Inside?

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Ordering from Office Max

Do not copy an existing Office Max requisition to your cart. You will not be able to adjust the item quantities. Each Office Max requisition needs to begin with a new, empty cart. For more information about how to empty a shopping cart, see page 18 of your iProcurement Guide.

The Check Funds Process

Chapter: Submitting Requisitions
Topic: Verifying and/or Modifying Requisition Information
Subtopic: Completing the Check Funds Process
Pages: 71-73

Account managers are expected to have sufficient funds available to cover the cost of a transaction: Whether that transaction is a purchase requisition or a journal entry. The FMS verifies availability of funds at the object summary level: contractual, supplies, other costs and equipment. For example, the FMS will aggregate all contractual accounts in an office to determine if sufficient funds exist to make a purchase form a single contractual account.

A user may not continue with a transaction when an advisory warning is received. Users should notify their superior that a transaction failed funds checking.

Changing Non-Catalog Requisitions

Chapter: Changing and Canceling Requisitions
Topic: Prior to a Purchase Order Conversion
Subtopic: Changing a Non-Catalog Request

A non-catalog request can be modified up until the point that it is assigned a purchase order number. To modify a non-catalog request during checkout:

Note: Remember, you must create a new requisition for every category. You cannot have multiple categories within the same shopping cart/requisition.

Changing and Canceling Requisitions (continued)

1. Follow the steps outlined in the documentation to **create** a non-catalog request. (pages 35-41)
2. During the first step of the checkout process, **click** the Edit Lines button.

Requisition Information Approvers Review & Submit

Checkout: Requisition Information

* Indicates required field

* Requisition Description October Office Order FY08 (Training 10/22)

Delivery Billing

* Need-By Date 11/01/2007 11:10:00
(example: 10/31/2007 19:45:00)

* Requester FMSUSER1

* Deliver-To Location Laytonville ES - Building

Project Task Award Expenditure Type Expenditure Organization Expenditure Item Date

* Taxable No

Charge Account 01_32701 0000.0000.00

GL Date 10/22/2007

Cancel Save Submit Edit Lines Step 1 of 3 Next

Shop Requisitions Receiving Shopping Cart Home Logout Preferences Privacy Statement

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3. Click the **Select** checkbox to the left of the line you want to modify. *Note: You can only modify the requisition one line at a time.*

Requisition Information: Edit Lines

* Indicates required field

Delivery Billing Accounts Attachments

Select Lines: Update Copy Delete

Select All Select None

Select Line	Description	Urgent	Need-By Date
<input type="checkbox"/>	1 Red Masking Tape- Item #2345	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/>	2 Post it Presentation Tablets- Item #3456	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/>	3 Easels- Item #5678	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/>	4 Laser Pointers Item # 4566	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/>	5 Portfolios # 3455	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/>	6 Mini Mouse Item # 7899	<input type="checkbox"/>	11/01/2007 11:10:00

Delivery Billing Accounts Attachments

4. Click the **Update** button.

Requisition Information: Edit Lines

* Indicates required field

Delivery Billing Accounts Attachments

Select Lines: Update Copy Delete

Select All Select None

Select Line Description

1 Red Masking Tape- Item #2345

Changing and Canceling Requisitions (continued)

5. The **Requisition Information: Update Selected Lines** page will display.

6. Modify the fields by clicking in the field and entering the new information.
7. Click the **Return** button. You will be taken back to the Requisition Information: Edit Lines page.

Select Line	Description	Urgent	Need-By Date
<input type="checkbox"/> 1	Red Masking Tape- Item #2345	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/> 2	Post it Presentation Tablets- Item #3456	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/> 3	Easels- Item #5678	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/> 4	Laser Pointers Item # 4566	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/> 5	Portfolios # 3455	<input type="checkbox"/>	11/01/2007 11:10:00
<input type="checkbox"/> 6	Mini Mouse Item # 7899	<input type="checkbox"/>	11/01/2007 11:10:00

8. Click the **Return** button. You will be taken back to the first step of the checkout process.

9. Continue with the checkout process.