

# iProcurement Release Notes

Version 3.0

08/15/2007

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## Creating Requisitions: The Shopping Process

The steps to find a shopping list have changed. Follow the steps below to find a shopping list:

**Chapter:** Creating Requisitions: The Shopping Process

**Topic:** Shopping for Items

**Subtopic:** Shopping Using a Shopping List

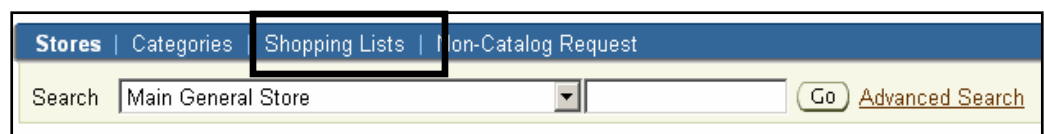
**Pages:** 41-42

1. Open the iProcurement home page.



*iProcurement home page*

2. At the top of the page in the blue menu bar, click the **Shopping Lists** link.



## Creating Requisitions: The Shopping Process (continued)

3. The **Shopping Lists** page opens.

Financial Management System iProcurement PFMS

Shopping Cart Home Logout Preferences Help

Stores | Categories | Shopping Lists | Non-Catalog Request

Shop Requisitions Receiving

Shopping List: Personal Favorites

Select List  Go Sort by  Ascending  Go

No results found.

Shopping Cart  
Your cart is empty.

*Shopping List page*

4. To search for a shopping list, type a keyword, keywords or wildcard (%) into the **Select List** field and click the **search** icon ( ).
5. The **Search and Select: Select List** page will open. Search for a shopping list.

Search and Select: Select List

Cancel Select

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By List Name  Go

**Results**

Previous 1-10 Next 10

Select	Quick Select	List Name	Description
<input type="radio"/>		EO - ES - Art	Early Order - Art Elementary
<input type="radio"/>		EO - ES - ESOL	Early Order - English as Secondary Language Elementary School
<input type="radio"/>		EO - ES - Grade 1	Early Order - Grade 1 Elementary School
<input type="radio"/>		EO - ES - Grade 2	Early Order - Grade 2 Elementary School

*Search and Select: Select List page*

6. Select the desired shopping list by clicking the Quick Select icon ( ) to the left of the list name. The Search and Select window will close and the **Select List** field on the Shopping List page will be filled in automatically.

Shopping List: Personal Favorites

Select List  Go Sort by  Ascending  Go

No results found.

*Select List field*

## Creating Requisitions: The Shopping Process (continued)

- Click the **Go** button. The selected shopping list will display.

The screenshot shows the Financial Management System iProcurement interface. The top navigation bar includes 'Shopping Cart', 'Home', 'Logout', 'Preferences', and 'Help'. Below this, there are tabs for 'Shop', 'Requisitions', and 'Receiving'. The main content area is titled 'Shopping List: EO - ES - Art'. It features a search bar with 'EO - ES - Art' entered and a 'Go' button. Below the search bar, there are options for 'Hide Images' and 'Add All Items To Cart'. The list displays two items:

- Item 1:** Applicator, Cotton Tip, 1000/ Carton, Q-Tip on Long Stick, Dynarex, 4302. Supplier: 1561002. Internal Item Number: 1561002. Price: 1. Unit of Measure: Carton. Add to Cart button.
- Item 2:** Ball Point Pens, Black, Fine Line, Papermate, 33611. Supplier: 0831286. Internal Item Number: 0831286.

Shopping List

## Setting Preferences



Remember, you can charge requisitions down to the activity level (grade levels or subject area ie, Physical Education, Grade 3, Foreign Language.) This can be used to track school expenditures.

**Chapter:** Setting Preferences

**Topic:** iProcurement Preferences

**Subtopic:** Setting and Modifying iProcurement Preferences

**Pages:** 12-13

**To create a favorite charge account:**

- Follow the steps outlined in the documentation to add a favorite charge account.
- When you are in the process of creating the new account, type the activity code into the Activity field on the **Search and Select: MCPS ACCOUNTING FLEXFIELD** window.

The screenshot shows the 'Search and Select: MCPS Accounting Flexfield' window. It contains a search form with the following fields and values:

- \* Fund: 01 (General Fund)
- \* Department: 02420 (Bannockburn Elementary School)
- \* School: 420 (Bannockburn Elementary School)
- \* Category: 04 (Instructional Supplies)
- \* Account: 503003 (Instructional Materials)
- \* Grant: 000000 (Default)
- \* Program: 0000 (Default)
- \* Activity: GR2A (2nd grade teacher A) - This field is highlighted with a red box.
- \* Interfund: 00 (Default)

Buttons for 'Search' and 'Clear' are located at the bottom of the form.

## Creating Requisitions: The Shopping Process



Remember, it is important to create separate requisitions for certain items and to create separate requisitions in certain instances.

**Chapter:** Creating Requisitions: The Shopping Process

**Topic:** Shopping for Items

**Page:** 20

Keep Office Max requisitions **separate** from other requisitions.

**DO NOT** mix regular items with non-catalog request items in the same requisition. If you do not find the item in iProcurement, create a new cart for the non-catalog request. This must be done because warehouse items are routed directly to the warehouse, while non-catalog items must be processed by the Procurement Office.

**DO NOT** mix items with different categories within the same non-catalog request. Non-catalog items are routed to buyers based on the category selected.

All other orders that are NOT non-catalog and NOT Office Max **can be mixed**.

Orders from the **TAYLOR SCIENCE CENTER** are not handled through FMS at this time. Contact the Warehouse or Taylor Science Center for ordering information.

## Submitting Requisitions: The Checkout Process



Remember, you will need to add an additional approver or approvers when an item needs to go through the Evaluation and Selection (E&S) process. For more information on what items requiring evaluation see the resources section on the FMS website

<http://www.mcps.k12.md.us/departments/fms/>

**Chapter:** Submitting Requisitions: The Checkout Process

**Topic:** Verifying and/or Modifying the Approver List

**Subtopic:** Adding an Approver

**Pages:** 75-76

Follow the steps in the documentation on pages 75-76 to add an additional approver or approvers.

[www.montgomeryschoolsmd.org/departments/fms/](http://www.montgomeryschoolsmd.org/departments/fms/)


## Canceling a Requisition

**Chapter:** Changing and Canceling Requisitions

**Page:** 93

Do not cancel a requisition after a Purchase Order has been Assigned. The user must email the buyer and request to have it cancelled. If this process is not followed, it creates an error in the system.

To find out who the buyer is:

- From the iProcurement home page, click the **requisitions tab**. A list of your requisitions will display.
- Click on the **Requisition Description** link. The requisition will display.
- Click on the **Details** icon  in the details column of the requisition. The requisition details will display.
- The buyer name is listed in the **Order Details** region.

Order	
Order	8003329-20
Buyer	Regalia, Barbara E
Supplier	Douyon
Supplier Contact	Hux, Ron

## Returning an Item

**Chapter:** Receiving Process

**Topic:** Returning Items

**Page:** 124

To return an item, contact the vendor and work through the return with their customer representative.

They will give you their Return Authorization Number or something similar. Follow their directions. Then, go into FMS and correct the receipt to this purchase. Be prepared to pay return shipping and/or a restocking fee.

## Office Max Orders

The Department of Materials Management will receive all orders from Office Max for all of MCPS. If there is a problem with an OfficeMax order including shortage, defective product, wrong item shipped, etc., it will need to be brought to the attention of Bonnie Butt in the Department of Materials Management office. She will obtain the necessary information about the return and communicate with the vendor and the school.

To contact Bonnie Butt, email her at [Bonnie\\_Butt@mcpsmd.org](mailto:Bonnie_Butt@mcpsmd.org).