iProcurement
Instructions for Submitting Storehouse Orders

Office of Business & Financial Affairs

Saint Paul Public Schools

Logging On to iProcurement

1. Open Internet Explorer, and go to the web address **http://adminapps.spps.org**. This is a web portal that allow you to access multiple systems from one location. Click the **Internet Procurement** link.

2. Enter your username and password, and click the **Log On** button.
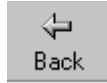
Helpful Hints on Using iProcurement

- If a field has the Flashlight icon, you must click on the flashlight to search for and select values for that field.

- If you are adding items to a shopping cart or in the middle of the checkout process and you log off the system, the record will disappear. To avoid having to recreate the record, save the shopping cart and then log off.
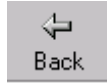
- Click the ⟵ **Back** button on the internet browser toolbar to go back to previous screens and make changes.

- Budget codes are validated by the system (the entire combination of 19 characters, not each component such as fund #, object #, etc.). If an inactive code is entered you will receive an error message.

iProcurement Home Page

1. **The iProcurement Home Page has information such as links to catalogs, favorites list, FAQ's and purchasing policies. The "Shop", "Requisition Status" and "My Profile" tabs on the upper right side allow you to access functions quickly and easily.**

2. **The bottom half of the home page displays the most recent requisitions you've entered in order of creation date. You can view more detail by clicking on the links under the Requisition and Status headings.**

Requisition	Description	Creation Date	Status
113532	Storehouse...	01/03/2003	Approved
113528	Office Cha...	12/30/2002	Pre-Approved
113522	Storehouse...	12/23/2002	Approved
113517	my stuff	12/20/2002	Cancelled

Setting Up 'My Profile'

3. **The first step in using iProcurement is setting up default information under the tab My Profile. This information will apply to all Storehouse orders and requisitions entered on the system. Click on the My Profile tab.**

1. **The delivery information already has the *Need-By Date* and *Requester Name* filled in. To fill in the *Deliver-To Location* field, click the Flashlight icon to do a search for location values.**

2. **In this example, I'm searching for Ames Elementary School, so I enter "ames" and click the *Go* button.**

3. **The locations that match the search criteria display. Click the** *Select* **button for the location you want as your default value.**

Search Results

Press the **Select** button to choose a location.

Select	Location (Organization)
Select	Ames Elem (625)

4. **The selected value fills in the Deliver-To Location field, and all delivery information is complete.**

Delivery Defaults

The delivery values you enter will default during the Checkout process.

Need-By Date   Order Date + 30 Days

* Requester Name   Shields, Colleen

* Deliver-To Location   Ames Elem

5. **Enter the most commonly used budget codes as your Favorite Charge Accounts. The Nickname field can be any text that would help you recognize that particular budget code. Leave the G/L Date field blank. Click the Default button for the charge account you use most often.**

Favorite Charge Accounts

Define a list of frequently used charge accounts by specifying a nickname and the complete account combination. Your favorites may be accessed during the checkout process. If the system is unable to generate a charge account for the item(s) in your shopping cart, the default favorite account will be used.

Line	Default	Nickname	Fund	Organization	Program	Finance	Object	Course	Delete
1	●	Consultant Fees	01	413	203	000	6305	0000	🗑
2	○	Textbooks	21	413	203	000	6460	0000	🗑
3	○	3M Grant	29	413	605	000	6401	6321	🗑

Add Another Row

6. **Under Preferences you can change the format of how dates are displayed, and the Result Set Size determines how many items display on a page as a result of a search.**

Preferences

Date Format MM/DD/RRRR

Result Set Size 10

7. **You can reset your password by typing the current password and a new password (must be at least 6 characters and can contain letters, numbers and special characters).**

Reset Password

Choose a password that is easy for you to remember, but difficult for others to guess.

Username **CSHIELDS**

Current Password

New Password   at least 6 characters

Retype Password

Apply Changes   Clear Changes

8. **When finished entering all information, click the Apply Changes button.**

9. **You'll receive a confirmation message. You can then proceed to shop or log off.**

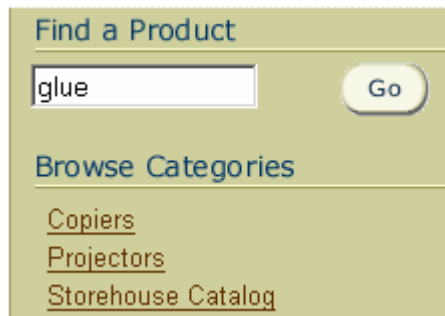## My Profile

(i) Confirmation

Profile information has been updated

Creating a Storehouse Order

NOTE: *Storehouse orders can only include items that show "Storehouse" as the Supplier. All items on a Storehouse order must be charged to the same budget code. If you are ordering items that need to be charged to different budget codes, create a separate order for each budget code.*

Searching For Products

1. **You can start shopping on the Home page by entering the item number or description in the Find a Product field, or clicking the Storehouse Catalog link to browse for the item.**

2. **You can also start shopping by clicking on the Shop tab, and entering an item number or description in the Search field and clicking the Go button.**

3. The search results are listed in Supplier Item number order (this is the Storehouse item number that you would see in the Storehouse catalog). Select the item(s) you want by clicking the checkbox in the Select column, then click the Add to Cart button.

Search Results for glue

Select item(s) and...   Add to Cart

Filter Results or Sort by -None- ▼   ○ Ascending   Go
                                      ⊙ Descending

Select All   Clear All

Select	Description	Unit	Unit Price	Supplier	Supplier Item	NIGP Code	Supplier Site	Internal Item Number	Contract Number	Contr Price
☑	Glue - White Cream 4 oz Bottle Box of 12	Box	3.72	STOREHOUSE	01-0315					
☐	Glue Stick - 3/4 oz	Each	0.53	STOREHOUSE	01-0320					
☐	Glue - White All Purpose Adhesive	Gallon	5.35	STOREHOUSE	13-0643					

4. The contents of your shopping cart will display with a default quantity of 1 and the catalog price.

🛒 Shopping Cart Contents

Line	Item	Item Description	Unit	Quantity	Price	Total (USD)
1		Glue - White Cream 4 oz Bottle Box of 12	Box	1	3.72	3.72
					update **Total (USD)**	3.72

5.   **Change the Quantity as desired. The Supplier Name defaults to "Storehouse" and the Supplier Site stays blank.**

6.   **To continue shopping, click the <u>Return to Shopping</u> link at the bottom left of the screen.**

7.   **In this example, the next item on the Storehouse order is post-it notes. You can use wildcards (%) to broaden your search if you're not sure how the item is listed in the catalog.**

8.   **Select the item you want by clicking the checkbox in the Select column, and click the Add to Cart button.**

Checkout Process

1. **When you have all the items in your shopping cart and you have entered the desired quantities, click the <u>update</u> link to see the Total (USD). Then click the "Proceed to Checkout" button at the bottom right corner of the screen.**

🛒 Shopping Cart Contents

Line	Item	Item Description	Unit	Quantity	Price	Total (USD)
1		Glue - White Cream 4 oz Bottle Box of 12	Box	15	3.72	55.80
2		Post-It-Notes - Yellow 2 in x 3 in Pkg of 12	Package	8	5.41	43.28
					<u>update</u> Total (USD)	99.08

2. **Delivery Information is the first step of the checkout process. The Storehouse handles orders on a FCFS (First Come First Serve) basis, so the Need-By Date and Urgent requisition fields are ignored. If this order is urgent, call the Storehouse once you submit the order and give them the requisition number and other necessary details.**

Enter Delivery Information

* Indicates a required field

When do you need the items on your requisition?

☐ Urgent requisition

* Need-By Date 02/19/2003

(Example: 04/30/2004)

3. **The Requester defaults to the information in "My Profile".**

4. **The Deliver-To Location defaults to the information in "My Profile". Click on the Flashlight icon to select a different location when applicable.**

NOTE: **All items on a Storehouse order must go to the same Deliver-To Location. If there are multiple locations you want items delivered to, create a separate Storehouse order for each delivery location.**

5. **The billing information will always be the default selections, so just click the Continue button.**

6. **If you don't have a default charge account set up in "My Profile", an <u>Enter account</u> link will display in the Charge Account column. If you have a default selected, that charge account will display as a link. If you need to change the charge account, click one of the links in the Charge Account column.**

NOTE: All items on a Storehouse order must be charged to the same budget code. If you are ordering items that need to be charged to different budget codes, create a separate order for each budget code.

Review Charge Accounts

Click on a Charge Account link to edit or allocate the item cost to multiple accounts.

Line	Item Description	Unit	Quantity	Price	Total (USD)	Charge Account
1	Glue - White Cream 4 oz Bottle Box of 12	Box	15	3.72	55.80	01-005-110-000-6401-0000
2	Post-It-Notes - Yellow 2 in x 3 in Pkg of 12	Package	8	5.41	43.28	01-005-110-000-6401-0000
				Total (USD)	99.08	

7. **To change the charge account, click the drop down arrow on the Nickname field and select the appropriate nickname. If the budget code you need to enter isn't one of the selections, click the Nickname "None" and enter the code.**

Edit Charge Account

Selected Line Item

Line	Item Description	Unit	Quantity	Price (USD)	Total (USD)
► 2	Post-It-Notes - Yellow 2 in x 3 in Pkg of 12	Package	8	5.41	43.28

Choose a nickname from the favorite charge accounts maintained in your personal profile to populate the charge acount information for the selected line item. Press the **OK** button when you're finished.

Charge Account	Nickname	Fund	Organization	Program	Finance	Object	Course	G/L Date
	All	01	005	110	000	6401	0000	10/21/2003

Need to allocate the cost of this item to multiple charge accounts? Click here to select multiple charge accounts.

☑ Apply this account to all requisition lines

8. **Click the checkbox next to "Apply this account to all requisition lines", then click the OK button.**

9. **The budget code you selected will display next to each line item. Click the Continue button at the bottom right corner of the screen.**

Review Charge Accounts

Click on a Charge Account link to edit or allocate the item cost to multiple accounts.

Line	Item Description	Unit	Quantity	Price	Total (USD)	Charge Account
1	Glue - White Cream 4 oz Bottle Box of 12	Box	15	3.72	55.80	01-005-110-000-6401-0000
2	Post-It-Notes - Yellow 2 in x 3 in Pkg of 12	Package	8	5.41	43.28	01-005-110-000-6401-0000
				Total (USD)	99.08	

10. **Enter a description of your Storehouse order in the Requisition Description field. This description is only for your use – it appears on the Home Page and Requisition Status screens to help you identify the order. It does not appear on the electronic order the Storehouse receives. If you prefer, you can click on the link to use a default description.**

Describe your requisition

* Requisition Description   Art Dept Order

Click here to automatically default the requisition description this default.

11. **In the Note to Buyer field, always enter a name and phone number of a contact person. Enter other pertinent information you need the Storehouse to know if there are exceptions regarding the order (such as "Susie Jones will pick up the order on Friday, Oct 24, at 3:00pm"). For your own information you can also enter specific information on where you want the items to be delivered within the building, etc. This will appear on the Storehouse invoice that is delivered with the order. The Note to Approver field is not used.**

Add notes and attachments

Note to Buyer   Contact: Colleen Shields 767-3472. Deliver to Jane Smith - Art Teacher, Room 302.

TITLE I REQUIREMENTS: If using Title I funds, also indicate in the Note to Approver field the purpose for the goods being purchased, so the Title I staff can determine if this is an appropriate Title I expenditure A Title I Order Form does not need to be submitted for storehouse orders entered in iProcurement.

12. **The Attachments feature is not used for Storehouse orders, so click the Continue button.**

Add Attachments	Attention To	Type	Description

Continue

13. **You need to add an approver so click the add approvers link.**

Review Approver List & Enter Justifications

You do not have the authority to approve this requisition. Since an Approval List was not created automatically, you must add at least one approver before you can proceed to the next checkout step.

Click here to add approvers.

14. **Click the Flashlight icon to search for the Approver Name.**

Review Approver List & Enter Justifications

Your requisition will be sent to the following list of approvers.

Approver List

Sequence	Approver Name	Required?	
1		Yes	

15. **For non-Title I orders, in the Employee Name field enter "approver" and click the Go button. *For Title I orders, enter "Mohs" and click the Go button.***

Search

Enter search criteria and press the **Go** button to find approvers

Employee Name approver   Go

16. **For non-Title I orders click the Select button next to "Approver, Storehouse".** *For Title I orders click the Select button next to "Mohs, Matthew".*

17. **The Approver List will display the name you selected. Click the Continue button.**

18. **You are now ready to submit your Storehouse order. The requisition number that displays on this screen will show on the Storehouse Invoice.   If you want a hard copy of the order, make a screen print by selecting File>Print. When ready, click the Submit button.**

19. A confirmation screen displays. If you want to create additional Storehouse orders or purchase requisitions, click on the <u>Continue Shopping</u> link or Home tab.

Submit Confirmation

Requisition 113567 has been submitted to <u>Approver, Storehouse</u> for approval.

To check on this requisition's status, click the **Requisition Status** tab or look in **Requisitions at a Glance** on the Home page.

If you have any questions about your requisition, please contact your Purchasing Department.

<u>Continue Shopping</u>

Saving a Shopping Cart

If you are creating a Storehouse order or requisition, and you want to save your work and finish it later, you can save the shopping cart.

1. **While in the shopping cart, click the Save Cart button.**

2. **Enter a cart description, and click the OK button.**

3. **You will receive a confirmation notice that the cart has been saved. At this point you can log out of the system, or proceed to other functions.**

4. **To open the saved cart, on the Home Page click the Shopping Cart icon in the top right corner of the screen.**

5. **Click on the Open Saved Cart link to display a list of all your saved carts.**

6. **A list of Saved Carts displays, where you can open or delete a cart. To open or delete a cart, click the button under the Select column, and click the Open or Delete button on the right side of the screen.**

Favorites List

You can create a Favorites List to allow quick selection of products you frequently order.

1. **To add items to your Favorites List, you can use the search or browse features of the system. When the desired items are displayed, select them and click the Add to Favorites button.**

2. **A screen will display confirming the items are now on the Favorites List. At this point you can add these items to a shopping cart, or proceed to other functions.**
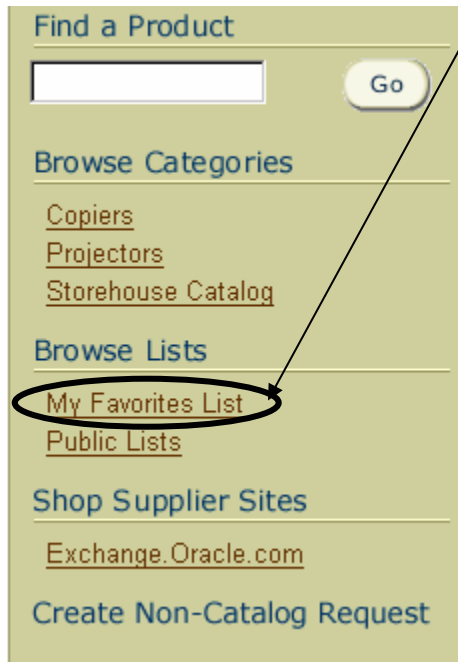
3. **You can access your Favorites List on the Home page by clicking the link on the left side of the screen.**

Copying an Existing Storehouse Order

You can copy a storehouse order that has already been submitted to save time creating a new one. Once you copy an existing storehouse order, you simply edit information as necessary and submit it. Follow the steps below to copy a storehouse order.

From the Home Tab

1. The "Requisitions at a Glance" area of the Home Page shows the last five requisitions submitted. To copy a requisition from this list, click on the requisition number.

2. The requisition details display. At the bottom of the screen (under the list of items) click the Copy to Cart button.

3. The items will be copied into a new shopping cart exactly as they appeared in the original requisition. Edit the information as necessary, and proceed to checkout as usual.

From the Requisition Status Tab

1. **The Requisition Status page shows the last ten requisitions that were submitted. To copy a requisition from this list, select it by clicking the radio button in the Select column, and then click the Copy to Cart button.**

2. **If you want to view more requisitions than just the last ten, at the top of the screen click the drop-down-arrow in the View field and select "All My Requisitions".**