IPROCUREMENT USER GUIDE
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Welcome to iProcurement

iProcurement is a web-based form that is used to create Purchase Order Requisitions in the Oracle HR & Finance Administration System. Beginning October 9, 2017, this form will replace the Java-based Purchase Order Requisition form.

Access

Access to iProcurement is achieved by following one of the responsibility paths listed below in Oracle:

UAB FN Document Entry/Approval > Purchasing: Requisitions > iProcurement

UAB Requisition Input > Requisitions > iProcurement
Exploring iProcurement: Shop Tab

The **Shop** tab is the default location when the iProcurement menu option is launched. You will visit this tab to create requisitions. On this tab, there are three sub-menu options: **Stores**, **Shopping Lists** and **Non-Catalog Request**. Use this tab to create requisitions.

**Stores**

The **Stores** option will enable users to create requisitions using items from select suppliers/vendors.

<table>
<thead>
<tr>
<th>A</th>
<th>Search: Catalog Search Engine</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Stores: Contains access to the Punchout suppliers which are our online stores. A Punchout supplier enables users to search and retrieve items from the supplier’s website.</td>
</tr>
<tr>
<td>C</td>
<td>My Requisitions: Displays the last five requisitions that the user has created.</td>
</tr>
<tr>
<td>D</td>
<td>Shopping Cart: View items for order here.</td>
</tr>
</tbody>
</table>
Shopping Lists

The Shopping Lists menu option allows you to view items that were saved as favorites. Items that are saved here can be reordered by adding them to the Shopping Cart.

A Select List: Dropdown that gives the user access to the default shopping list (Personal Favorites), as well as lists that the user created.

B Sort By: Dropdown that enables the user to sort their shopping list by items such as supplier, description, price, etc. Lists can be sorted in ascending or descending order.

C Saved Items: Displays the items that the user has saved as a favorite. Items may be reordered later by clicking the Add to Cart button. Items can also be moved to additional favorite lists by using the List dropdown and the Move button. Finally, items may be deleted from the list altogether using the Delete button.
Non-Catalog Request

The Non-Catalog Request menu option allows users to manually enter item information so that it can be added to the shopping cart. On this screen, the required fields are noted by the star or asterisk symbol (*), and the fields that contain a hidden List of Values (LOV) is noted by the magnifying glass icon 🕵️. The table below provides a description of each field.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Type</td>
<td>Field defaults to “Goods billed by quantity” and should not be changed.</td>
</tr>
<tr>
<td>Item Description</td>
<td>Contains values related to the item, such as quote #, catalog/item # and item description.</td>
</tr>
<tr>
<td>Category</td>
<td>Contains a List of Values (LOV) where the user can establish the item category, such as Office.Supplies.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The number of items ordered.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Contains a List of Values (LOV); used to establish the measurement standard of a physical item. Examples are: Each, Package, Case, etc.</td>
</tr>
<tr>
<td>Unit Price</td>
<td>The price of goods per item.</td>
</tr>
<tr>
<td>Currency</td>
<td>Field defaults to USD and should not be changed.</td>
</tr>
<tr>
<td>New Supplier</td>
<td>A checkbox that notes that a supplier is new to the system. When this box is checked, the List of Values in the supplier-related fields disappears. The user will then need to enter the supplier’s name and site.</td>
</tr>
<tr>
<td>Supplier Name</td>
<td>The name of the supplier.</td>
</tr>
<tr>
<td>Site</td>
<td>Displays the location name of the supplier. This field is auto-populated after the supplier’s name is selected.</td>
</tr>
<tr>
<td>Contact Name</td>
<td>An optional field that displays the supplier’s contact name if the information is on file.</td>
</tr>
<tr>
<td>Phone</td>
<td>An optional field that displays the phone number for the contact person if it is on file.</td>
</tr>
<tr>
<td>Supplier Item</td>
<td>An optional field that is not being used at this time. It can remain blank.</td>
</tr>
</tbody>
</table>
Exploring iProcurement: Requisitions Tab

Under the **Requisitions** tab, you can view your requisition history as well as notifications. On this tab, there are two sub-menu options: **Requisitions** and ** Notifications**.

**Requisitions**
The Requisitions menu option allows you to view your ordering history. On this screen, you can view the document number and other information such as description, total, total quantity, creation date, and status. You can also view the Purchase Order Number for your requisitions in the **Order** column.

**Notifications**
The Notifications menu option gives the user access to their Personal Worklist so that they can easily view and respond to items such as error and positive/negative notifications.
Adding Items to the Shopping Cart Using the Supplier Punchouts

Note! This method is used when ordering items from one of the following suppliers: CDW, Dell, Fisher Scientific and Staples.

1. From the Shop tab, click on one of the supplier punchouts listed under the Stores section.

2. When the supplier’s website appears, choose the desired items and add them to your online shopping cart.

3. After adding the desired items to your online shopping cart, click on the option that allows the items to be transferred to the Oracle HR & Finance system.

4. The selected items are transferred to the Oracle system.

Note! You can also save certain items to your favorites/shopping list by clicking on the green plus sign located next to the item. In the example below, the Pencil Grip Key Ring is available to be added to your favorites/shopping list. You will receive a confirmation statement at the top of your screen if you added the item to your shopping list.

5. Click the Checkout button to advance to the checkout screen.
Adding Items to the Shopping Cart Using a Non-Catalog Request

**Note!** This method is used if you are ordering items from suppliers *other than* the Punchout suppliers (CDW, Dell, Fisher Scientific, Staples) or if you have a quote that displays special pricing.

1. Under the **Shop** tab, click on **Non-Catalog Request**.

2. Enter your item information in the required fields. The required fields are noted by the asterisk (*).

3. Enter the vendor’s name in the **Supplier Name** field. The system will populate the **Site** field and any additional fields (Contact Name, Phone) if applicable.

4. Click **Add to Cart**. You can also click **Add to Favorites** if you would like to add this item to your shopping list.
5. Your screen will look similar to the one shown. If you need to order additional items from the same supplier, update the necessary fields with the new item information and then click **Add to Cart** to add the new item(s) to your cart.

![Image of UAB iProcurement](image1)

6. When you have finished adding your items, click **View Cart and Checkout**.

![Image of Shopping Cart](image2)

7. The items that you added to the cart are displayed. Click **Checkout** to advance to the checkout screen.
Checking Out Your Items

**Note!** There are a few ways to check out your items. The chosen method depends upon your location in iProcurement.

**Method 1:** Click the **Checkout** button that is located in your **Shopping Cart**.

**Method 2:** Go to Shop > Stores and click on the number of the desired requisition listed under the **My Requisitions** section. When the requisition appears, click **Complete**.
When the **Shopping Cart** appears, click on **Checkout**.

**Method 3:** Go to Requisitions > Requisitions and click on the radio button sitting next to the desired requisition. Next, click **Complete**.
When the **Shopping Cart** appears, click on the **Checkout** button.

![Shopping Cart Image]

<table>
<thead>
<tr>
<th>Line Item Description</th>
<th>Unit</th>
<th>Quantity</th>
<th>Price</th>
<th>Amount (USD)</th>
<th>Supplier</th>
<th>Supplier Site</th>
<th>Contract/Quote #</th>
<th>Air Travel Reference</th>
<th>Delete</th>
<th>Add to Favorites</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIP ART XLP S-100UL</td>
<td>Package</td>
<td>1</td>
<td>12.00</td>
<td>12.00</td>
<td>FISHER</td>
<td>SCIENTIFIC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>950/PK</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TIP ART 10F STR 10UL</td>
<td>Package</td>
<td>1</td>
<td>80.00</td>
<td>80.00</td>
<td>FISHER</td>
<td>SCIENTIFIC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>950/PK</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>92.00</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Completing the *Checking Out: Requisition Screen*

In this section of the checkout, you will enter your header, delivery and account distribution information.

1. Enter the required information under the *Requisition Information* section as shown.

![Checkout: Requisition Information]

2. Update the *Deliver-To Location* field under the *Delivery* section with your desired delivery point.

![Delivery]

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Administrative Systems Training instructeam@uab.edu
3. Enter in your account number under the **Billing** section. Detail instructions on entering account information can be found under the topics listed below in this document:

- **Charging Your Items to a General Ledger (GL) Account**
- **Charging Your Items to a Grant/Project (GA) Account**
- **Charging Your Items to Multiple Grant/Project (GA) Accounts**
- **Charging Your Items to Multiple General Ledger (GL) Accounts**

4. Click on **Next** to advance to the next screen.
5. (Optional) When the **Checkout: Approvals and Notes** screen appears, you can enter a message that can be viewed internally in the **Justification** or **Note To Buyer** fields. You have not internal message to add, skip this step.

6. Click **Next** to advance to the next screen.

7. When the **Checkout: Review and Submit Requisition** screen appears, review your order. Click on the **Show** link that is located next to the item line to view detail item information.

8. When you are finished reviewing the order, click **Submit**.
9. You will receive a Confirmation. Click Continue Shopping.

The new requisition will be listed under the My Requisitions section of the Shop tab with the updated status of In Process.
Charging Your Items to a General Ledger (GL) Account

1. Click on the Enter Charge Account link.

2. The Requisition Information: Edit Lines screen will appear. Click the Enter Charge Account link that appears next to your item description.
3. Click on the magnifying glass icon next to the UAB_AKF field.

4. When the Search and Select: UAB_AKF screen appears, enter your GL account alias (i.e., the first seven digits of your account string) in the Account field.

5. Enter the desired object code in the Object field.

6. Click on the Search button.
7. The desired account/object code combination will appear at the bottom of the form. Click on the radio button next to the **Code Combination** field and then click the **Select** button.

8. When the **Requisition Information: Split Cost Allocation** screen reappears, click on the **Apply the Cost Allocation Information to all applicable requisition lines** checkbox if you have more than one item in your cart that you would like to apply the GL account to.

9. Click on the **Apply** button.
10. When the **Requisition Information: Edit Lines** screen reappears notice all of the items will be charged to the same account number and object code. Click on the **Apply** button.

11. The **Checkout: Requisition Information** screen will reappear. The **Charge Account** field displays your desired account and object code.
Charging Your Items to a Grant/Project (GA) Account

If you are entering a Grant/Project (GA) account, populate the **Project, Task, Award, Expenditure Type, Expenditure Organization and Expenditure Item Date** fields. The account that you enter here will be applied to each item on your requisition.
Charging Your Items to Multiple Grant/Project (GA) Accounts

1. Click on the **Enter Charge Account** link.

2. The **Requisition Information: Edit Lines** screen will appear. Click on the **Billing** tab.

3. Click on the **Split** icon located at the end of the item line.
4. The **Requisition Information: Split Cost Allocation** screen will appear. The item information and cost is displayed under the **Selected Line** section. Enter in your grant/project account and then specify the desired percentage, quantity or amount. When you enter in one value, the system will automatically calculate the other two values for you. In the example below, 20 percent of the item cost will be charged to the account.

5. Click **Add Another Row**.

6. Enter the next grant/project account and then specify the desired percentage, quantity or amount. In the example below, the remaining amount of the cost (80 percent) will be charged to the account.
7. (Optional) If desired, click on the **Apply the Cost Allocation Information to all applicable requisition lines** checkbox that appears at the bottom of the screen if you have more than one item in your cart that you would like to apply the split distribution to.

8. When your split distribution allocation is complete (i.e., the total matches your item cost), click on the **Apply** button.

9. The **Requisition Information: Edit Lines** screen will reappear. The item that you applied the split distribution to will have the term *Multiple* displayed in the **Project, Task and Award** fields. Enter in your account distributions for the remaining item lines (if applicable). When you are finished, click the **Apply** button.

10. The **Checkout: Requisition Information** screen will reappear. Under the **Billing** section, the **Project, Task, Award** and **Charge Account** fields will display the term *Multiple*, to indicate the split distribution.
Charging Your Items to Multiple General Ledger (GL) Accounts

1. Click on the Enter Charge Account link.

2. The Requisition Information: Edit Lines screen will appear. Choose the item that you want to apply the split distribution to and click on the Split icon located at the end of the item line.

3. The Requisition Information: Split Cost Allocation screen will appear. Click on the magnifying glass icon next to the UAB_AKF field.
4. When the **Search and Select: UAB_AKF** screen appears, enter your GL account alias (i.e., the first seven digits of your account string) in the **Account** field.

5. Enter the desired object code in the **Object** field.

6. Click on the **Search** button.

7. The desired account/object code combination will appear at the bottom of the form. Click on the radio button next to the **Code Combination** field and then click on the **Select** button.
8. The Requisition Information: Split Cost Allocation screen will reappear. The item information and cost is displayed under the Selected Line section. Specify the desired percentage, quantity or amount. When you enter in one value, the system will automatically calculate the other two values for you. In the example below, 20 percent of the item cost will be charged to the account.

9. Click on Add Another Row.

10. Enter the next GL account by following steps 3-8. In the example below, the remaining amount of the cost (80 percent) will be charged to the account.

11. (Optional) If desired, click on the Apply the Cost Allocation Information to all applicable requisition lines checkbox if you would like to apply the split distribution to every item on your requisition.

12. When your split distribution allocation is complete (i.e., the total matches your item cost), click on Apply.
13. The **Requisition Information: Edit Lines** screen will reappear. The item(s) that you applied the split distribution to will have the term *Multiple* displayed in the **Charge Account** field. Click on **Apply**.

14. The **Checkout: Requisition Information** screen will reappear. Under the **Billing** section, the **Charge Account** field will display the term *Multiple*, to indicate the split distribution.
Copying a Purchase Order Requisition

1. Find a requisition under My Requisitions and then click on the Copy icon.

2. Click Save to save your copied requisition.

3. A Confirmation will appear. Click on New Cart to go back to your Shop tab and view the copied requisition or click on Continue with Checkout to continue the checkout process.
Creating Preferences

The Preferences option allows you to set certain pieces of item information as a default for use with future orders.

1. Click on one of the Preferences links that appears in both the top right-hand corner of the screen or at the bottom of the screen.

2. Click on the iProcurement Preferences link that appears to the left of the screen.

When the iProcurement Preferences screen appears, enter in your data that you would like to have as your default information.
3. To establish a new shopping list, go to the **Favorite Lists** section and click on **Add Another Row** to enter a name for your new list.

![Favorite Lists](image1)

4. To set a default delivery point, go to the **Delivery** section and update the **Deliver-To Location** field, which currently displays *Bham Main Campus*. In the example, the desired default currently displays *UAB Receiving Dept*.

![Delivery](image2)

5. To establish a Grant/Project (GA) account as a default, go to the **Billing** section and enter the desired account as shown.

![Billing](image3)
6. To establish a General Ledger (GL) account as a default, go to the **Favorite Charge Accounts** section and click on the **Add Another Row** button.

7. When the new row appears, enter a name for the account in the **Nickname** field.

8. Click on the magnifying glass next to the **UAB_AKF** field.

9. When the **Search and Select: UAB_AKF** form appears, enter your GL account alias (i.e., the first seven digits of your account string) in the **Account** field.

10. Enter the desired object code in the **Object** field.

11. Click on the **Search** button.
12. The desired account/object code combination will appear at the bottom of the form. Click on the radio button next to the **Code Combination** field and then click the **Select** button.

13. Repeat steps 6–12 to add additional General Ledger (GL) account combinations to your **Favorite Charge Accounts** section.

14. When you have finished listing your GL account combinations, set an account as the primary account by clicking on the radio button found under the **Select** field and then click the **Set as Primary** button. The selected account will be identified with the green icon found under the **Primary** field.
15. When you are finished entering in your information, click on **Apply**.

16. When the changes are applied, you will receive a **Confirmation** message at the top of your screen.
Adding Attachments

Attachments are used to add messages to Purchase Order Requisitions for suppliers or Buyers. They can be added at the line level or the header level. To post an attachment that pertains to an individual item, place the attachment at the line level. To post an attachment to the entire requisition, place the attachment at the header level.

**To Access the Attachments Screen:**

1. From the **Checkout: Requisition Information** screen, click **Edit Lines**.
2. On the **Requisition Information: Edit Lines** screen, click on the **Attachments** tab.

**To Add an Attachment to the Entire Requisition:**

1. On the **Requisition Attachments** tab, hover over the **Add Attachment** button. The **Add Attachment** screen will appear.

2. The **Attachment Type** field defaults to **Text**. **Do not change this value.**

3. The **Title** field is an optional field. Enter a value if desired.

4. In the **Category** dropdown, choose **To Supplier**.

5. Enter your message in the **Text** field.

6. When you are finished, click **Save**.

7. You will receive a **Confirmation** statement. Click **Close** to exit the confirmation screen.

The attachment is now listed in the **Requisition Attachments** section. When you are finished, click **Apply**.
To Add an Attachment to an Item Line:

1. Under the Requisition Line Attachments section, hover over the Attachments icon that appears at the end of the item line. The Add Attachment screen will appear.

2. The Attachment Type field defaults to Text. Do not change this value.

3. The Title field is an optional field. Enter a value if desired.

4. In the Category dropdown, choose To Supplier.

5. Enter your message in the Text field.

6. When you finished entering the message, click Save.

7. You will receive a Confirmation statement. Click Close to exit the confirmation screen.

The attachment is listed in the Requisition Line Attachments section under the Attachments column as the paperclip icon. When you are finished, click Apply.
Editing Purchase Order Requisitions & Requisition Lines

Deleting an Item from your shopping cart

To delete an item from your shopping cart, click on the trashcan icon that appears next to the item that you want to delete from your shopping cart.

Deleting a Requisition

Note! To delete a requisition, the status of the document must be *Incomplete*.

1. Go to Requisitions > Requisitions and click on either the requisition number or description.

2. When the requisition appears, click on Delete.

3. You will receive a warning. Click Yes to delete the requisition.

4. You will be directed back to the Requisitions screen. You should no longer be able to locate the requisition in your list.