iProcurement
iProcurement Login
Enter UserName/Password>Click “Login”.

![iProcurement Login Page](image-url)
Select PO Requestor Responsibility

Multiple Org Accounts will be listed Individually
Select Internet Procurement
Select iProcurement Home
Select Shop “Non-Catalog Request”.
Select applicable “Item Type” & “Line Type”.
Enter first requisition line item information:
- Item description
- (Item) Category
- (Item) Quantity
- (Item) Unit of Measure
- (Item) Unit Price

Currency defaults: DO NOT UPDATE
Entered Data will look like the example
Enter first requisition line Supplier Information if you know the (possible) Supplier. Supplier may be in the database – use the “magnifying glass” to invoke a search field.
Naming Conventions:

- See Tips for Requisition Set up Power Point at http://bfa.sdsu.edu/~leap/Purchasing.html

- Some examples of Line Item Description must include:
  - Fiscal Year: (ex: 13/14)
  - Service or Goods Description: (ex: item number, product/service description)
  - Service description requires term dates (ex: 7/1/13 – 6/30/14)
  - Electronic Waste Recycling Fee (EWRF) Screen Size (ex: 15” screen)
If Supplier is NOT in the database mark the “New Supplier” checkbox. Enter all information you have for: Supplier Name, Site (Location), Contact Name, Phone and Supplier Item Code/Number.
When you’ve entered all the information for this requisition line, click “Add to Cart”.

![iProcurement interface with filled fields]
To add next item, type the new description, price, etc., and add to Cart. When complete Click “View Cart and Checkout”.
Review lines and Click “Checkout” or Click “Save” to return to the requisition record later.
Review and update defaulted Requisition Description, Approval Path, Need-by Date, Requester, Deliver-To and/or GL Date. Click “Edit Lines”.
To update lines > select line to update > Click “Update”.

![Image of iProcurement interface]

Select Lines: Update, Copy, Delete

<table>
<thead>
<tr>
<th>Select Line</th>
<th>Description</th>
<th>Urgent</th>
<th>Need-By Date</th>
<th>Requester</th>
<th>Deliver-To Location</th>
<th>Suggested Buyer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>13/14 - ZOMQ - IMAC 21.5&quot;</td>
<td>✔️</td>
<td>23-Jul-2013</td>
<td>Hokenson, Vickie L.</td>
<td>AD116</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>13/14 - APPLE CARE PROTECTION</td>
<td>✔️</td>
<td>23-Jul-2013</td>
<td>Hokenson, Vickie L.</td>
<td>AD116</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>13/14 - ELECTRONIC WASTE RECYCLING FEE (EWRF)</td>
<td>✔️</td>
<td>23-Jul-2013</td>
<td>Hokenson, Vickie L.</td>
<td>AD116</td>
<td></td>
</tr>
</tbody>
</table>
Enter updates (e.g. - Account Number) and Click “Apply”.
Click Apply to finish Editing Lines.
After Editing Lines, you come back to Step 1 of 3. Review, & click “next” to go to Step 2.
Enter “Justification” and “Note to Buyer”, and add an attachment (Word, Excel, or PDF)
To add an electronic Attachment, title it and click browse to locate it. Click Apply.
Click Next to move to step 3 of 3
You may review requisition lines by clicking “Show”, & print a record with “Printable Page”. If everything is correct, click “Submit”.
Requisitions Submittal Confirmation

Requisition 30059249 has been submitted.

To check on this requisition's status, click on the Requisitions tab or look in My Requisitions on the Shop page.
Optional On a Per Department Procedure: How to Manage Approvals
Insert an Approver or Viewer and Location (the sequence of events)
Once submitted the Approval sequence will be shown in Step 2 of 3
The system will accommodate multiple approvers and viewers
After your Requisition is submitted you will see the Approvers name in the Confirmation Screen
At Shop “At a Glance” you can review notifications, current requisition records, current “shopping” items and can link to “Purchasing News”.
At Shop “Shopping Lists” you can select frequently used/saved items.

<table>
<thead>
<tr>
<th>Shopping List: Personal Favorites</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REPROGRAPHICS OPEN ORDER</strong></td>
<td></td>
</tr>
<tr>
<td>Shopping Category</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
</tr>
<tr>
<td>Internal Item Number</td>
<td>1065 SAN DIEGO</td>
</tr>
<tr>
<td>Price</td>
<td>N/A</td>
</tr>
<tr>
<td>Supplier Item Source</td>
<td>MAYER REPROGRAPHICS</td>
</tr>
<tr>
<td>Amount</td>
<td>100000 USD</td>
</tr>
<tr>
<td>Add to Cart</td>
<td></td>
</tr>
<tr>
<td><strong>TEST FOR A/F 1 LINE 2 ALLOCATIONS - FURNISH AND INSTALL DUCT</strong></td>
<td></td>
</tr>
<tr>
<td>Shopping Category</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
</tr>
<tr>
<td>Internal Item Number</td>
<td>4990 GREEN CRAIG</td>
</tr>
<tr>
<td>Price</td>
<td>N/A</td>
</tr>
<tr>
<td>Supplier Item Source</td>
<td>ALPHA MECHANICAL HEATING &amp; A/C INC</td>
</tr>
<tr>
<td>Amount</td>
<td>200000 USD</td>
</tr>
<tr>
<td>Add to Cart</td>
<td></td>
</tr>
<tr>
<td><strong>TEST FOR A/F 1 LINE MULTIPLE DISTRIBUTIONS WITH DIFFERENT FUNDS FURNISH AND INSTALL PUMP</strong></td>
<td></td>
</tr>
<tr>
<td>Shopping Category</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
</tr>
<tr>
<td>Internal Item Number</td>
<td>3235 SAN DIEGO</td>
</tr>
<tr>
<td>Price</td>
<td>N/A</td>
</tr>
<tr>
<td>Supplier Item Source</td>
<td>WESTERN PUMP INC</td>
</tr>
<tr>
<td>Amount</td>
<td>37500 USD</td>
</tr>
<tr>
<td>Add to Cart</td>
<td></td>
</tr>
<tr>
<td><strong>TEST BUILD AND DESIGN</strong></td>
<td></td>
</tr>
<tr>
<td>Shopping Category</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
</tr>
<tr>
<td>Internal Item Number</td>
<td>285 CHULA VISTA</td>
</tr>
<tr>
<td>Price</td>
<td>N/A</td>
</tr>
<tr>
<td>Supplier Item Source</td>
<td>HIGHLAND PARTNERSHIP INC</td>
</tr>
<tr>
<td>Amount</td>
<td>501000 USD</td>
</tr>
<tr>
<td>Add to Cart</td>
<td></td>
</tr>
</tbody>
</table>

*test no tax req (leave blank) no tax no DESIGN BUILD*
At “Requisitions” you can review reqs, check PO numbers, and change or cancel reqs.
At “Receiving” you view requisition receipt records and view requisitions for which receiving records have not been posted.
To view a copy of your purchase order, click “Purchase Order Inquiry”, which will take you to the “Forms” environment.
Type in your purchase order number & click “Find”. When Oracle pulls your PO record, click “Inquire” in the Toolbar & select “View Document”.

[Diagram of Oracle application interface]
A .pdf file of your PO can be opened, saved to your files, emailed as an attachment, etc.
How to look up which buyer has your req: Choose “Requisition Inquiry”
Enter your req number, select “Lines” and hit Find.
In the Folder menu, click Show Field, and select “Buyer”.
Select “Preferences” hyperlink > “iProcurement Preferences” to set iProcurement default preferences.
iProcurement Preferences (cont.)

Shopping
- My Favorite Store
- Search Results Per Page
- Shopping Search Results Per Page
- Sort Shopping Search Results By

Favorite Lists
Use the Select column to set your primary favorite list.
Select Favorite List: Set as Primary

Select *Favorite List Name
- Personal Favorites

Add Another Row

Delivery
- Need By Date Offset
- Need By Time
- Requester
- Deliver-To Location

Favorite Charge Accounts
Use the Select column to set your primary favorite charge account.
TIP During checkout the system automatically generates charge accounts. In some circumstances, the system may select your primary favorite charge account.
Select Account: Set as Primary

Select *Nickname
- Purchasing Supplies
- Purchasing Services
- Payable Services

Accounting Fidext
- 63051.000.66030.0000.1005.3605.1
- 63051.000.66032.0000.1005.3605.1
- 60053.000.66032.0000.1005.3605.1

Primary
- Delete
Contract & Procurement Management
Who and Where are We?

Administration Building, Room 116   Office Hours: Monday-Friday 8:00am – 4:30pm
Main Line Phone: 619-594-5243   Fax: 619-594-5919 Website: http://bfa.sdsu.edu/prosrvcs/

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Are there any Questions?