



## **Procure to Pay (P2P)**

Set Requisition Preferences

R12 Work Instructions



## DOCUMENT CONTROL

### Change Record

Date	Author	Version	Change Reference
03-Jul-14	Janet Woolever	1.0	Initial for R12
08-Mar-16	Eck Abazi	2.0	12C Upgrade Changes
06-Jan-17	Kristin Wade	3.0	DoDEA Updates

### Reviewers

Date	Name	Position
17-Jul-14	Bill Mohamed	Workforce Preparation Training Lead
08-Mar-16	Janet Woolever	Workforce Preparation Team

### Distribution

Copy No.	Name	Location
1	Set Requisition Preferences	DEPS
2		

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If you receive a hard copy of this document, please write your name on the front cover, for document control purpose.



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## Business Process Description

A user may set up requisition preferences and defaults as needed in DAI. Once the defaults are established, certain fields throughout DAI will populate automatically with values based on the user's preferences.

-  Throughout this document, there are data fields which can be populated via a List of Values (LOV); either by clicking on the magnifying glass icon, a drop-down arrow, or a calendar icon. Whenever a required (or optional) data field has an LOV associated with it, you should use it, rather than attempting to manually type in the information – regardless of how short the input or response.

### Prerequisites

- There are no prerequisites.

### Responsibility

- iProcurement Requisitions DoDEA

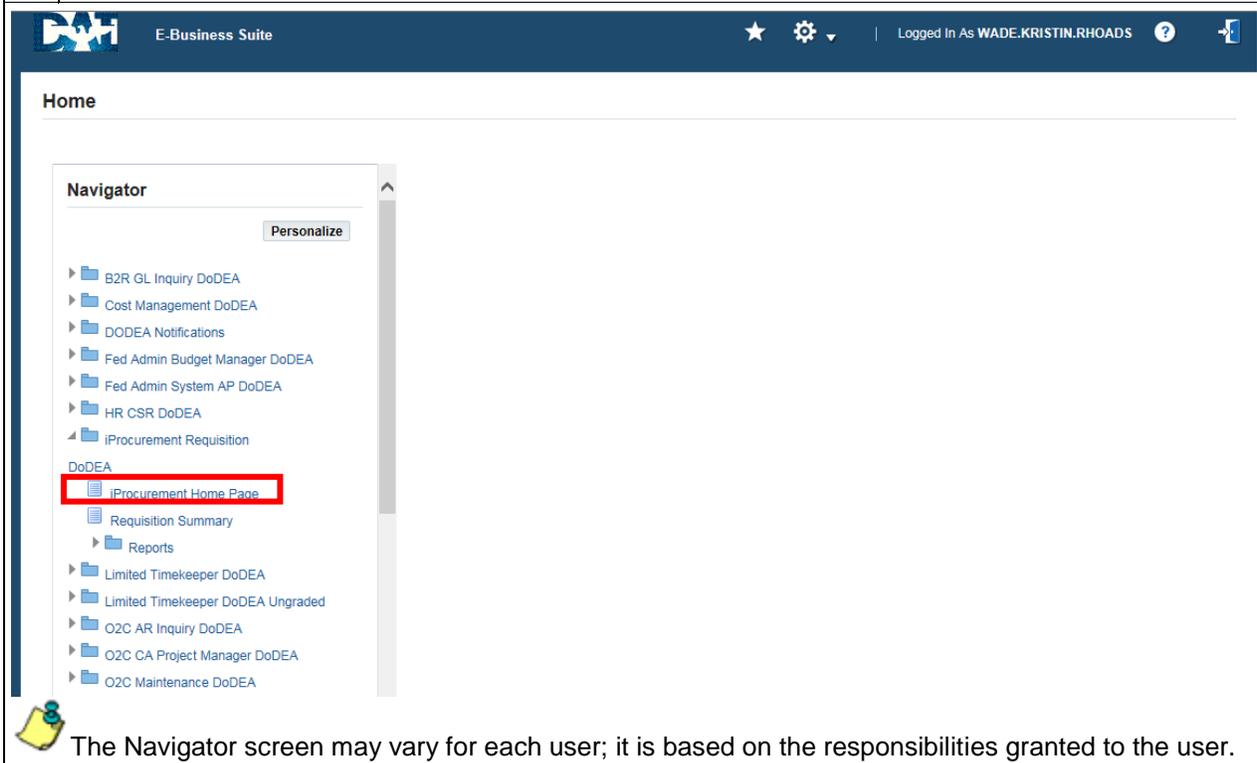
### Menu Path

Use the following menu path(s) to begin this task.

- iProcurement Home Page

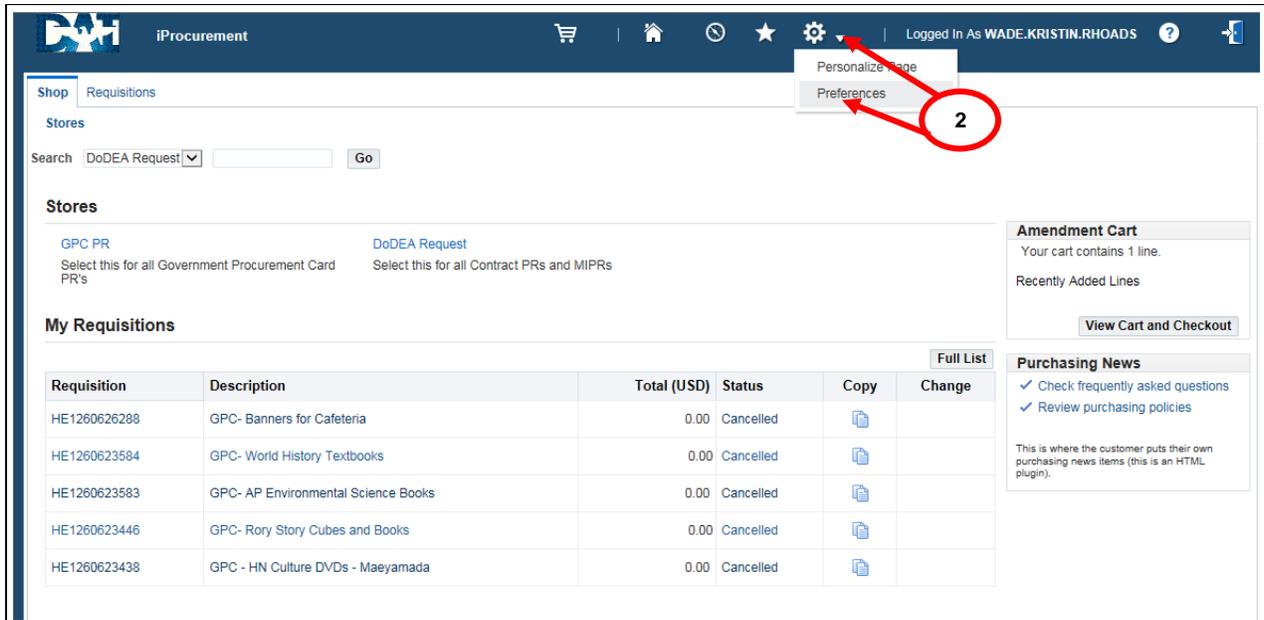
## Setting up Requisition Preferences

1. Start the task using the following Responsibility and menu path to open the **iProcurement** window:
  - **Responsibility:** iProcurement Requisitions DoDEA
  - **Menu:** iProcurement Home Page



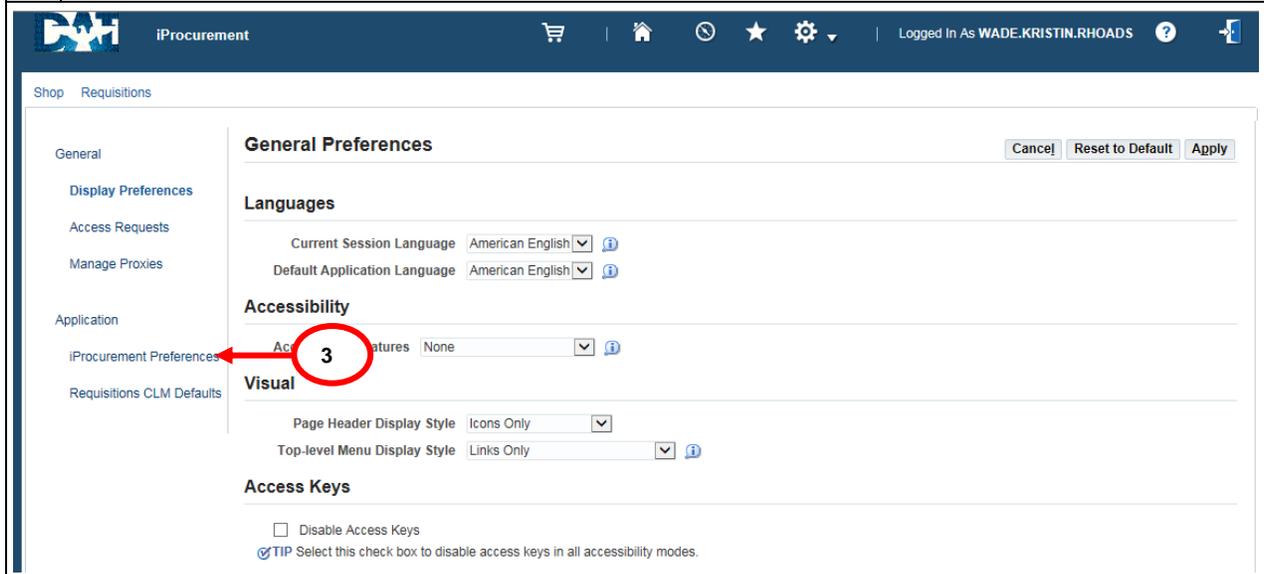
The screenshot shows the E-Business Suite interface. At the top, the header includes the DAI logo, 'E-Business Suite', a star icon, a gear icon, and the text 'Logged In As WADE.KRISTIN.RHOADS'. Below the header is a 'Home' section. The main content area is a 'Navigator' menu with a 'Personalize' button. The menu items are: B2R GL Inquiry DoDEA, Cost Management DoDEA, DODEA Notifications, Fed Admin Budget Manager DoDEA, Fed Admin System AP DoDEA, HR CSR DoDEA, iProcurement Requisition, DoDEA (with a sub-item 'iProcurement Home Page' highlighted by a red box), Requisition Summary, Reports, Limited Timekeeper DoDEA, Limited Timekeeper DoDEA Ungraded, O2C AR Inquiry DoDEA, O2C CA Project Manager DoDEA, and O2C Maintenance DoDEA. A yellow sticky note icon is visible in the bottom left corner of the screenshot area.

The Navigator screen may vary for each user; it is based on the responsibilities granted to the user.

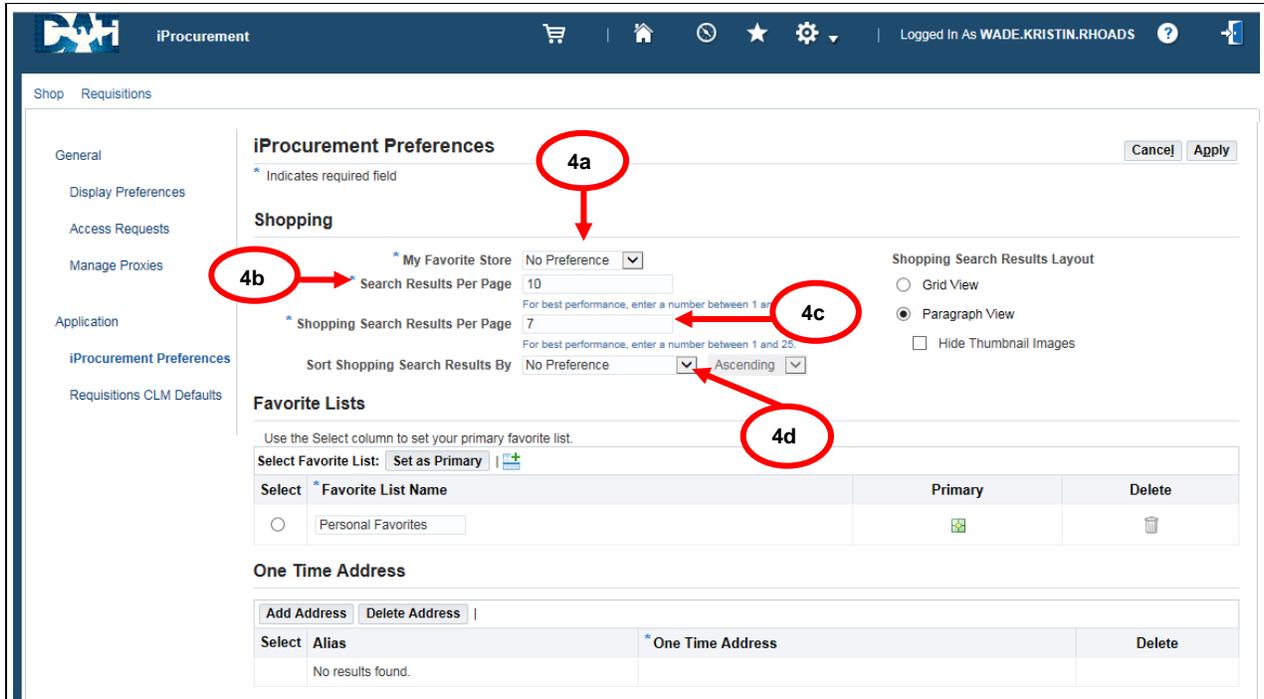


The **iProcurement** Home Page displays.

2. Click the drop-down list on the **Settings** icon and select the **Preferences** link. The **General Preferences** screen displays.



3. Under the **Application** section, click the **iProcurement Preferences** link. The **iProcurement Preferences** page displays.



4. Complete the following in the **Shopping** region:
- Select a preference for the **My Favorite Store** from the drop-down menu.
  - Enter the preference for the **Search Results Per Page** field.
  - Enter the preference for the **Shopping Search Results Per Page** field.
  - Optionally, select a preference for the **Sort Shopping Search Results By** field.

Optionally, add or delete entries in the **Favorite Lists** region.

When you are viewing your favorites, you can move items from one favorite list to another by selecting the item in your search results and clicking **Move**.



Personal Favorites

**One Time Address**

Add Address Delete Address |

Select	Alias	* One Time Address	Delete
No results found.			

**Delivery**

\* Need By Date Offset  ← **5a**

\* Need By Time  ← **5b**

(Example: 17:30)

\* Requester  ← **5c**

\* Deliver-To Location  ← **5d**

Deliver to subinventory

Subinventory

**Billing**

Project

Task

Expenditure Type

Expenditure Org

Expenditure Item Date Offset

**Favorite Charge Accounts**

Use the Select column to set your primary favorite charge account.

Override Employee Charge Account

**TIP** iProcurement uses a series of rules to generate charge accounts during checkout. Under certain circumstances, iProcurement gets the charge account from your Employee record in HR. If you select this checkbox and specify a primary favorite charge account, iProcurement will use your Primary Favorite Charge Account instead of the Employee Charge Account.

Select	* Nickname	DODEA Accounting Flexfield	Primary	Delete
No results found.				

5. Complete the following in the **Delivery** region:
- a. **Need By Date Offset** – sets the number of days after the current date which is used for the **Need By Date**.
  - b. **Need By Time** – Sets the time by which the goods or service should be delivered or performed on the **Need By Date**.
  - c. **Requester** – Defaults to the user’s DAI user name.
  - d. **Deliver-To Location** – Enter the code for the delivery location.
- Values entered in these fields will automatically default when completing a purchase request.



○ Personal Favorites
🗑️

### One Time Address

Add Address
Delete Address

Select	Alias	* One Time Address	Delete
No results found.			

### Delivery

\* Need By Date Offset:

\* Need By Time:   
(Example: 17:30)

\* Requester:

\* Deliver-To Location:

Deliver to subinventory

Subinventory:

Billing

Project:

Task:

Expenditure Type:

Expenditure Org:

Expenditure Item Date Offset:

6a

6b

6c

6d

### Favorite Charge Accounts

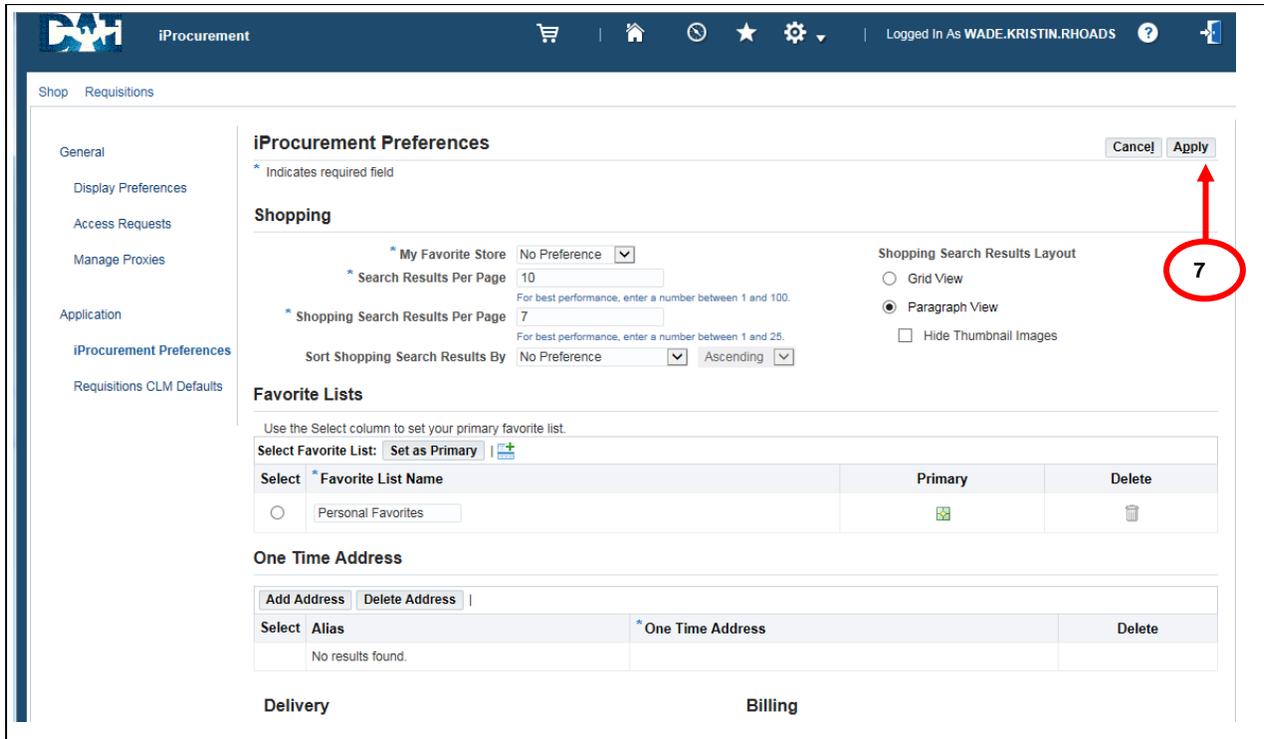
Use the Select column to set your primary favorite charge account.

Override Employee Charge Account

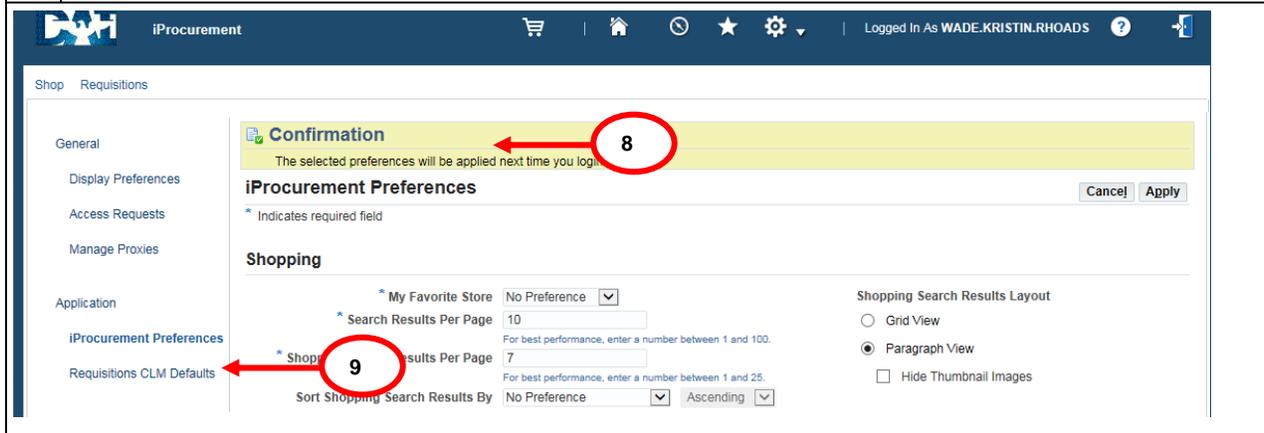
**TIP** iProcurement uses a series of rules to generate charge accounts during checkout. Under certain circumstances, iProcurement gets the charge account from your Employee record in HR. If you select this checkbox and specify a primary favorite charge account, iProcurement will use your Primary Favorite Charge Account instead of the Employee Charge Account.

Select	* Nickname	DODEA Accounting Flexfield	Primary	Delete
No results found.				

- 6.** Optionally, complete the following in the **Billing** region:
- a. Enter the POET **Project** code.
  - b. Enter the POET **Task** code.
  - c. Enter the POET **Expenditure Type** code.
  - d. Enter the POET **Expenditure Org** code.
- Values entered in these fields will automatically default when completing a purchase request.



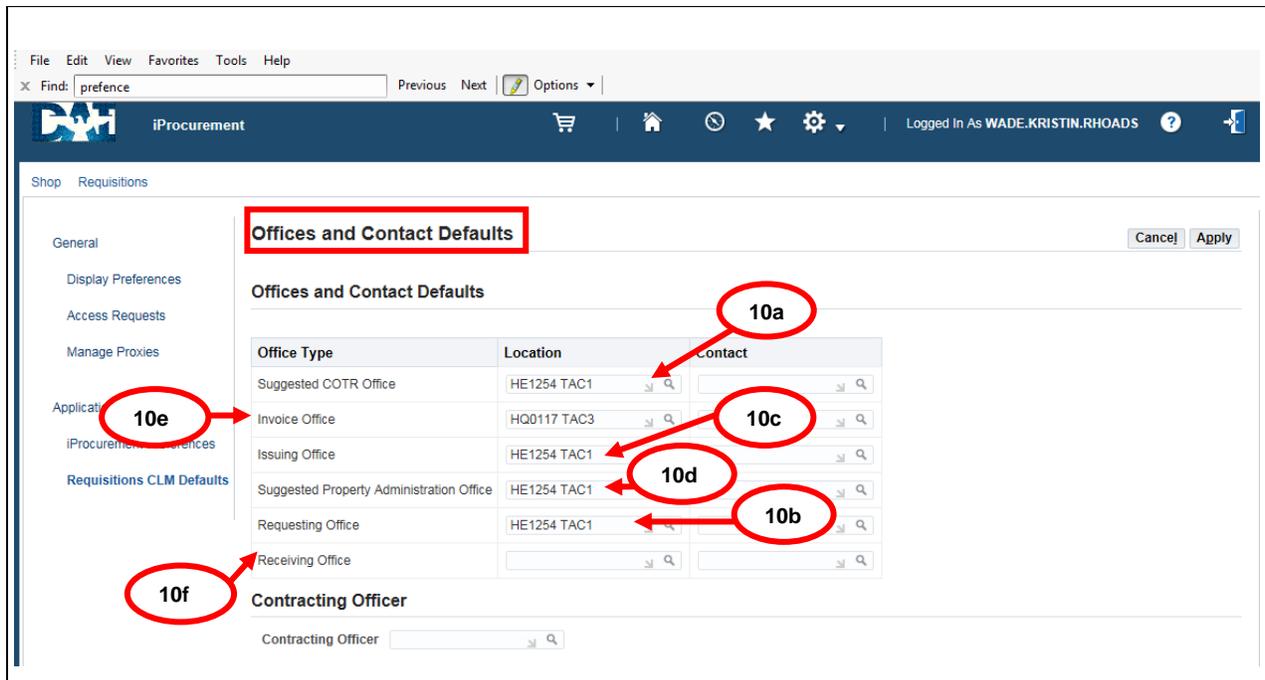
7. Click the **Apply** button to save the selected preferences.



8. The system displays a **Confirmation** message.

The preferences will be applied the next time the user logs in to DAI.

9. Click the **Requisitions CLM Defaults** link. The **Offices and Contact Defaults** screen displays.



10. Optionally, enter the following in the **Offices and Contact Defaults** region:
- a. **Suggested COTR Office** – Enter the appropriate DoDAAC and contact for the Contracting Officer Technical Representative.
  - b. **Requesting Office** – Enter the appropriate DoDAAC and contact for the office which is procuring the goods or service.
  - c. **Issuing Office** – Enter the appropriate DoDAAC and contact for the Issuing Office.
  - d. **Suggested Property Admin Office** – Enter the appropriate DoDAAC and contact for the Property Administration Office.
  - e. **Invoice Office** – Enter the appropriate DoDAAC and contact for the office which will process the invoices for the goods or service.
  - f. **Receiving Agency** – Enter the appropriate DoDAAC and contact for the Receiving Office. The Receiving Agency is the MIPR receiving agency and as such will change as you create MIPRs to different agencies. It is best to either leave this field blank and update it manually on the requisition or default the agency that is most used for MIPRs and make it a practice to double check it on the requisition and update as necessary.
- Values entered in these fields will automatically default when completing a purchase request.

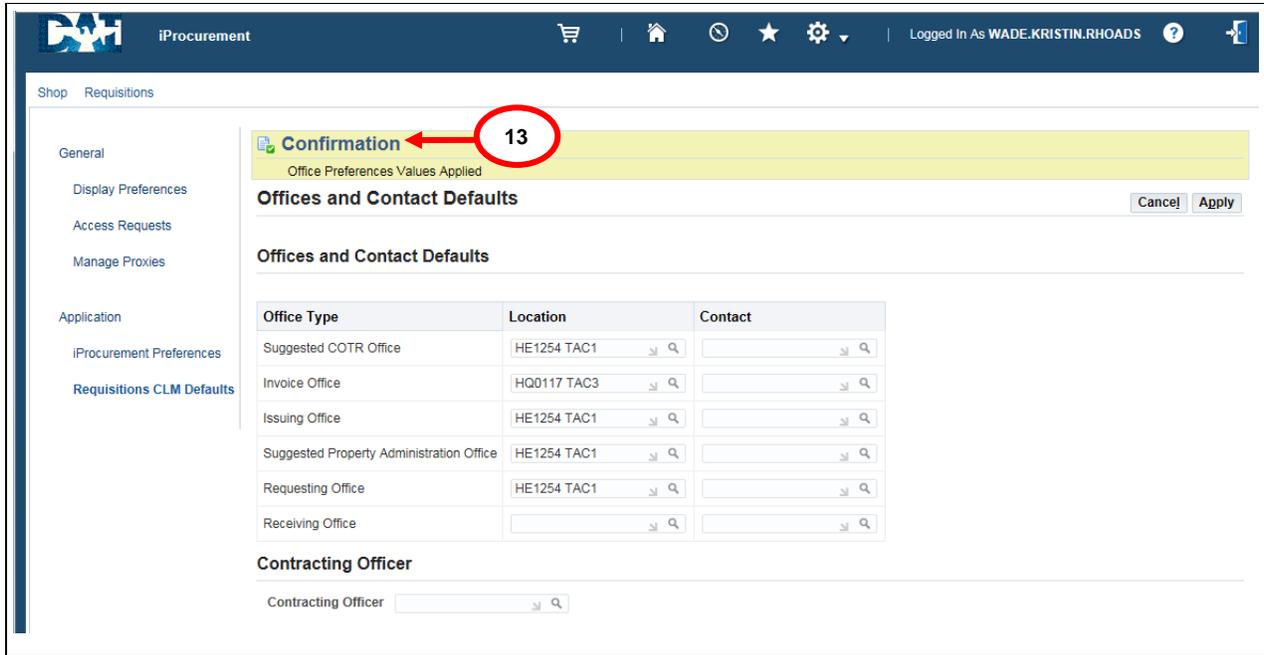
The screenshot shows the 'Offices and Contact Defaults' configuration page in the iProcurement system. The page includes a table for office types and locations, and a field for the Contracting Officer. Red circles and arrows highlight the 'Apply' button (labeled 12) and the 'Contracting Officer' field (labeled 11).

Office Type	Location	Contact
Suggested COTR Office	HE1254 TAC1	
Invoice Office	HQ0117 TAC3	
Issuing Office	HE1254 TAC1	
Suggested Property Administration Office	HE1254 TAC1	
Requesting Office	HE1254 TAC1	
Receiving Office		

**Contracting Officer**  
Contracting Officer

11. Optionally, enter the **Contracting Officer** or click the magnifying glass icon and select a name from the list of values.

12. Click the **Apply** button.



The screenshot shows the iProcurement interface. At the top, there is a navigation bar with the iProcurement logo, a shopping cart icon, a home icon, a clock icon, a star icon, a gear icon, and a user profile icon. The user is logged in as WADE.KRISTIN.RHOADS. Below the navigation bar, there is a sidebar with a menu containing 'General', 'Application', and 'Requisitions CLM Defaults'. The main content area displays a yellow 'Confirmation' message with the text 'Office Preferences Values Applied'. A red circle with the number '13' and an arrow points to the 'Confirmation' message. Below the message, there is a section titled 'Offices and Contact Defaults' with 'Cancel' and 'Apply' buttons. This section contains a table with columns for 'Office Type', 'Location', and 'Contact'. Below the table, there is a 'Contracting Officer' field.

Office Type	Location	Contact
Suggested COTR Office	HE1254 TAC1	
Invoice Office	HQ0117 TAC3	
Issuing Office	HE1254 TAC1	
Suggested Property Administration Office	HE1254 TAC1	
Requesting Office	HE1254 TAC1	
Receiving Office		

Contracting Officer

13. Once again, the system displays a **Confirmation** message.

## Result

Congratulations, you have successfully created **iProcurement preferences** and **CLM requisition defaults**. You can close all forms and return to the Navigator.