



# Logging in to IAS

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## Scope

This instruction covers logging in to IAS.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

## Ownership

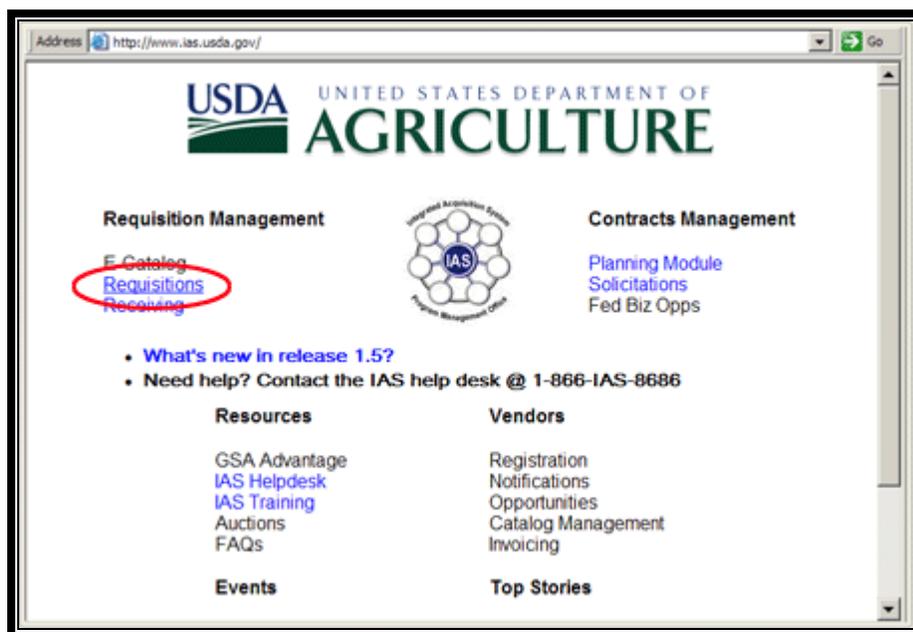
The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

These tasks are performed whenever access to the Integrated Acquisition System (IAS) is required.

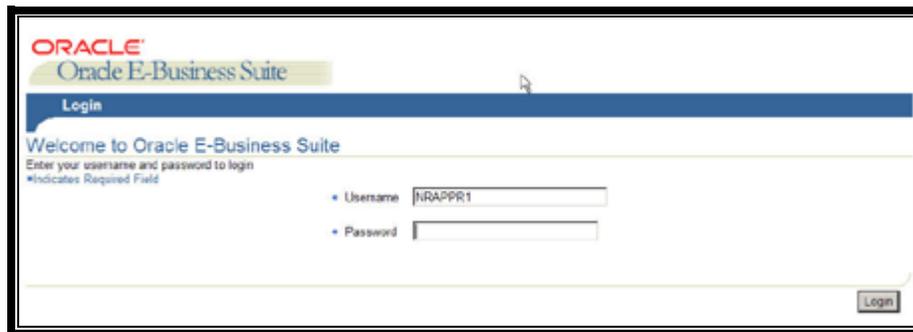
## IAS Requisitioner

1. Open an Internet browser. (i.e. Internet Explorer)
2. Type [www.ias.usda.gov](http://www.ias.usda.gov) in the browser address window and hit Enter.
3. Click on the Requisitions link.



4. Read the information on the next page and click on the Accept button to proceed to the Oracle Applications log in screen.

5. Enter a username and password.



IAS uses FFIS usernames and passwords. This allows Requisitions to pass from IAS directly to FFIS, for commitment of funds. Enter your username and password in the spaces provided.

6. Click on the Login button.

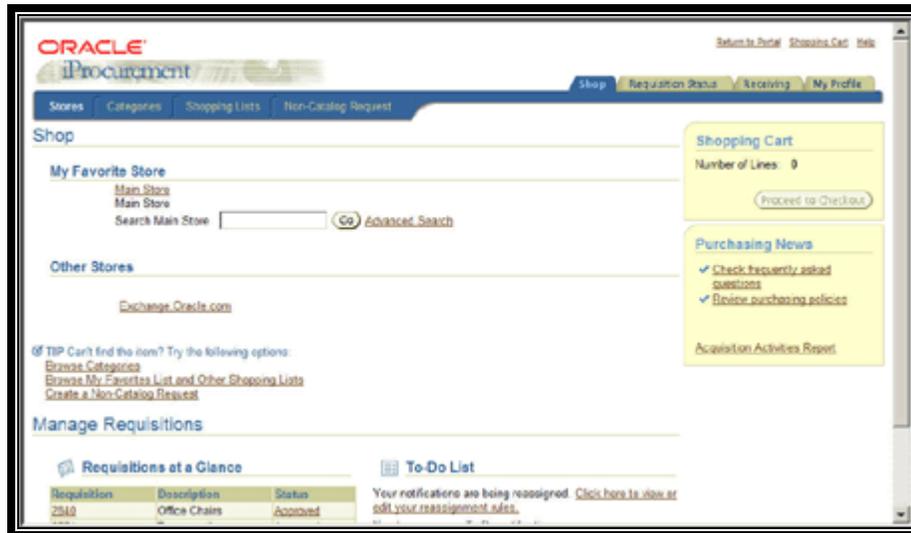
After logging in for the first time, you will be prompted to change your password. The following rules apply when creating a password:

- Passwords will contain a minimum of 8 characters.
- One character must be a number.
- The leading character cannot be a number.
- Successive, repeat characters are not permitted. E.g. “mississippi1”
- IAS will prompt users to change passwords every 30 days.
- Passwords cannot be re-used for a period of 1 year.
- After 3-failed login attempts a user’s account will be locked out. Please contact your System Administrator for assistance.
- Once logged in, if an account is left idle, IAS will time out after 30 minutes. The user will have to login again.

User names and passwords are NOT case sensitive.

7. View the IAS Shop page.

The first page you will see after logging in is the Shop home page.

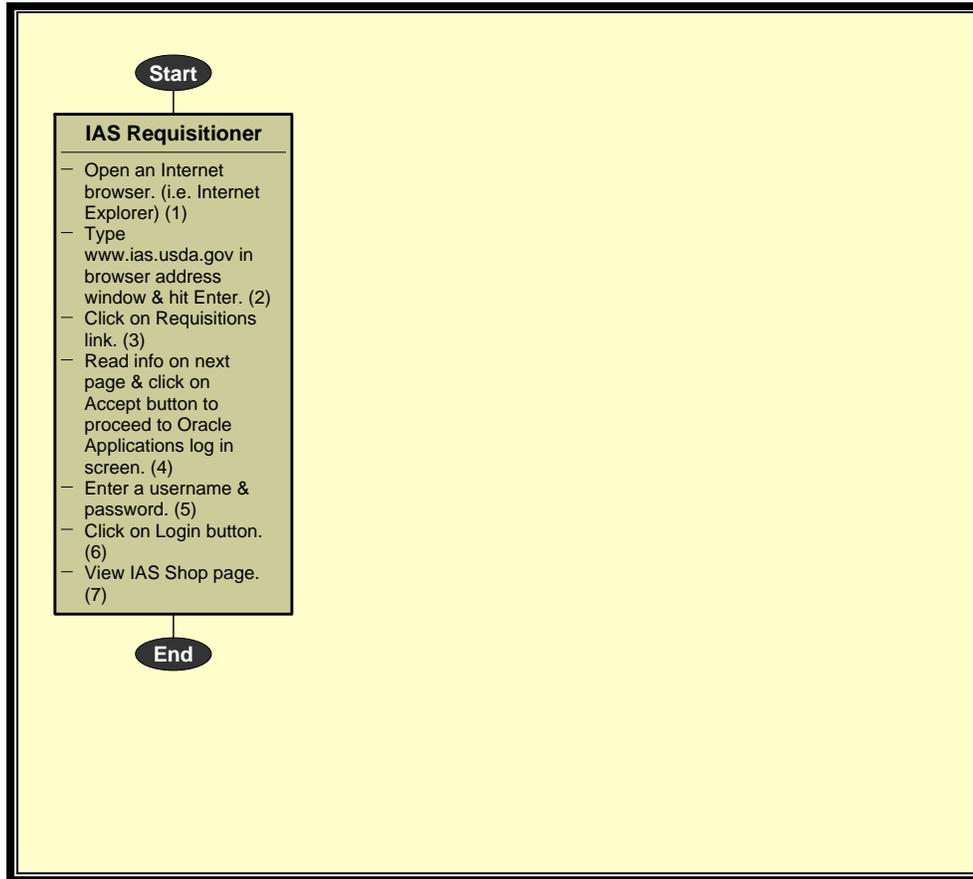


From this page you will be able to:

- Use your personal Favorites List to keep items you order frequently.
- Reassign notifications while you are out on vacation (if you are an authorized approver).
- Review your To-Do List (of approvals that have been sent to you) if you are an authorized approver.
- View status of Requisitions you submitted in a previous session.
- Start creating a Requisition.

**End of activity.**

# Process Workflow





# Managing Profiles in IAS

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## Scope

This instruction covers managing profiles in IAS.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

## Ownership

The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

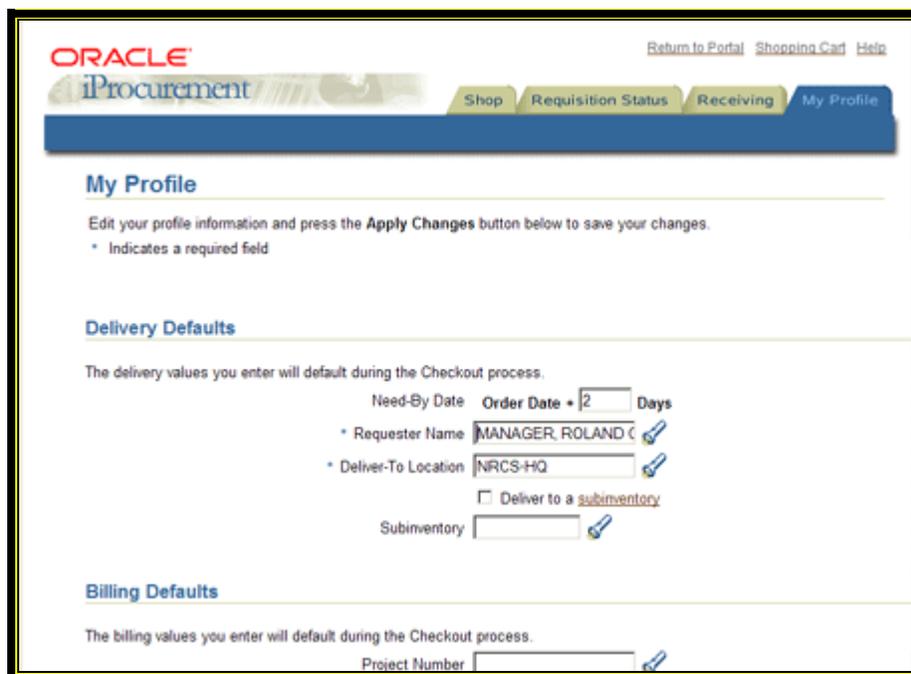
These tasks are performed whenever updates are required to the IAS profile.

### IAS Requisitioner

1. Log in to IAS.

Refer to *Logging into IAS*

2. Click on the My Profile tab, located in the top right hand corner of the Shop home page.
3. Review the information on the My Profile tab.



The screenshot shows the Oracle iProcurement 'My Profile' page. At the top, there is a navigation bar with tabs for 'Shop', 'Requisition Status', 'Receiving', and 'My Profile'. The 'My Profile' tab is selected. Below the navigation bar, the page title is 'My Profile'. A message states: 'Edit your profile information and press the **Apply Changes** button below to save your changes.' A note indicates that an asterisk (\*) denotes a required field. The 'Delivery Defaults' section includes a note: 'The delivery values you enter will default during the Checkout process.' It contains the following fields: 'Need-By Date' (set to 'Order Date + 2 Days'), 'Requester Name' (MANAGER, ROLAND C), 'Deliver-To Location' (NRCS-HQ), and 'Subinventory' (empty). There is a checkbox for 'Deliver to a subinventory'. The 'Billing Defaults' section includes a note: 'The billing values you enter will default during the Checkout process.' and a 'Project Number' field.

**If changes to the profile are required, go to task #4. Otherwise, go to task #6.**

4. Make changes as needed.

Most of the fields, under the following sub-sections of the My Profile tab, will be pre-populated with default values:

- Delivery Defaults;
- Billing Defaults;
- Favorite Charge Account;
- Preferences;

These values can be changed by the user. Although any change to the default Date Format (DD-MON-RRRR), under the Preferences sub-section, will cause Requisitions to fail.

You can change your password on the My Profile page.

**Reset Password**

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

Username **NRAPPR1**

Current Password

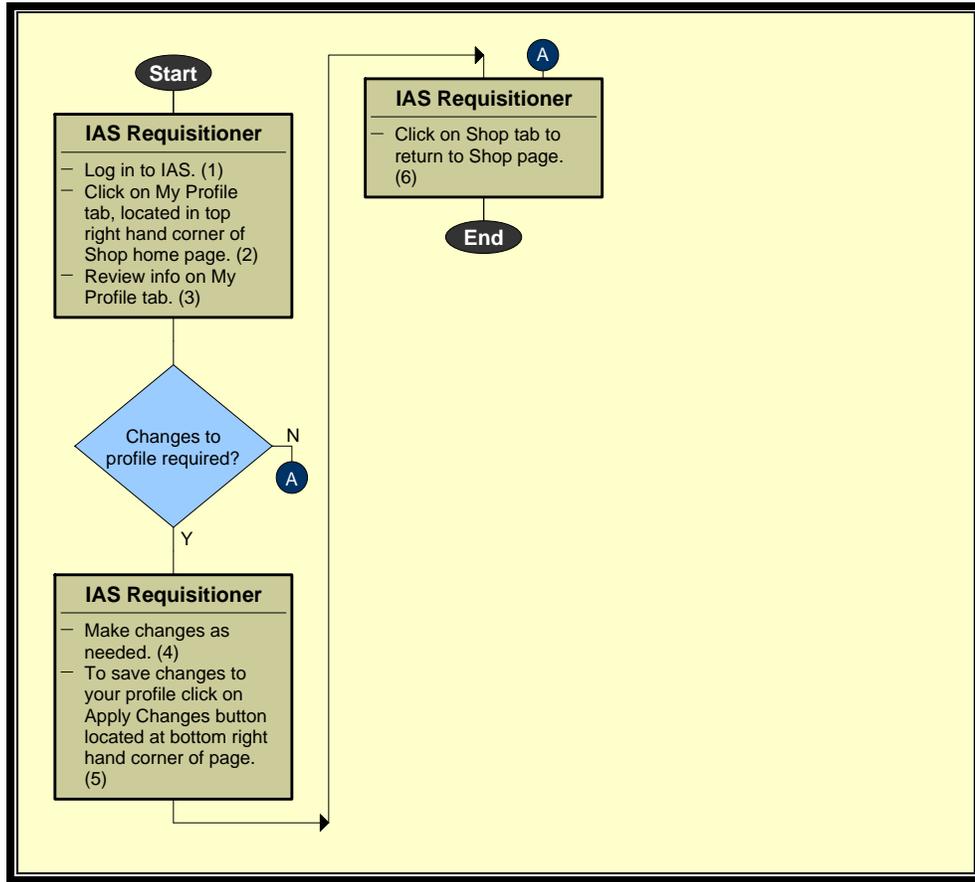
New Password  At least 8 characters.

Retype Password

- Enter your current password in the box;
  - Enter your new password;
  - Retype your new password one more time for confirmation;
  - Apply the changes to complete the password reset process;
5. To save the changes to your profile click on the Apply Changes button located at the bottom right hand corner of the page.
  6. Click on the Shop tab to return to the Shop page.

**End of activity.**

# Process Workflow





# Creating a Requisition in IAS

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## Scope

This instruction covers creating a Requisition in IAS.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

## Ownership

The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

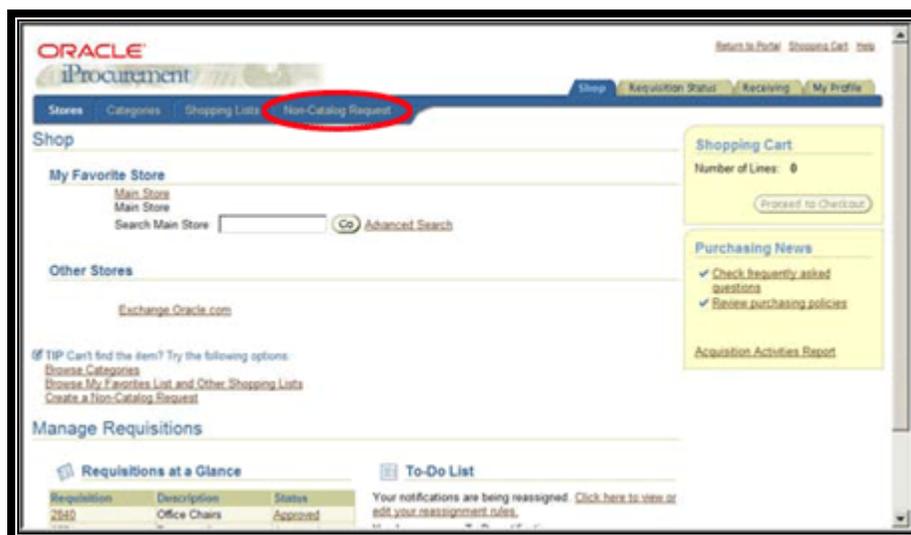
This activity is performed whenever the purchase of an item needs to be requested.

## IAS Requisitioner

1. Log in to the IAS system.
  - Type [www.ias.usda.gov](http://www.ias.usda.gov) in the browser address window and hit enter.
  - Click the Requisitions link, and click on the Accept button on the following screen.
  - Enter your Username and Password and click the Login button.

The Shop page will be displayed.

2. Click on the Non-Catalog Request tab to begin creating the Requisition.



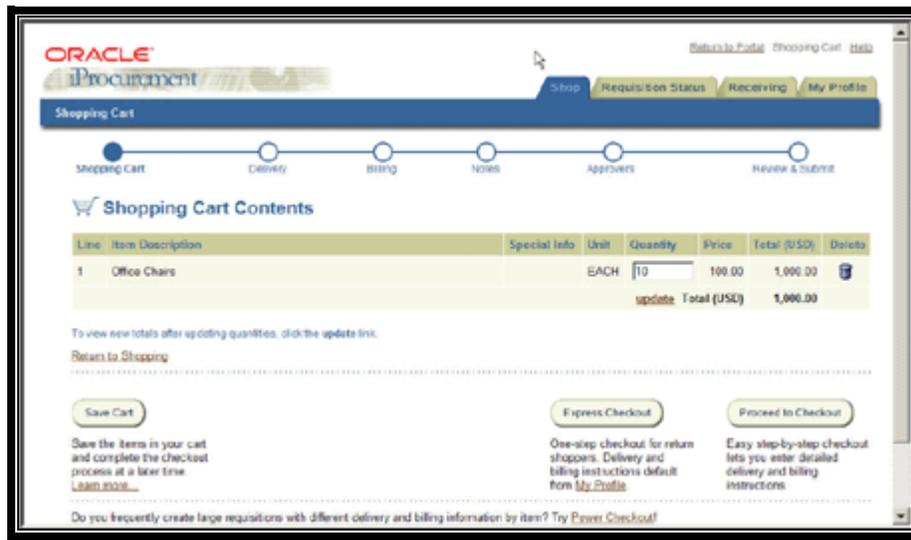
3. Enter the details of the Requisition.

The screenshot shows a web form titled "Describe your item". The form contains the following fields and options:

- Item Type:** Goods billed by quantity. Example: 10 books @ (USD) 25/each.
- Click below to select different item type
  - > **Select** Service billed by quantity. Example: 10 hours of consulting @ (USD) 100/hour.
  - > **Select** Goods or services billed as an amount. Example: (USD) 10,000 worth of consulting.
- Category:** A text input field with a flashlight icon for search.
- Item Description:** A large text area with scrollbars.
- Unit of Measure:** A dropdown menu currently set to "EACH" with a flashlight icon.
- Quantity:** A text input field.
- Currency:** A dropdown menu currently set to "USD".
- Unit Price:** A text input field.
- Exchange Rate Type:** A dropdown menu currently set to "Corporate".
- Exchange Rate Date:** A text field containing "18-MAR-2004".

- Describe the requested item. Use the Flashlight icon to search.
- Add items to the cart by clicking on the Add to Cart button.

4. Review the contents of Shopping Cart.



This page contains the Description, Unit, Quantity, Price and Total price of items ordered.

- If you change your mind about the item, click on the Trash Can icon in the Delete column and row of the item you would like to remove.
- If you want to change the order, click on the Return to Shopping link on the left side of the page.
- To change the quantity, update the number in the box under the Quantity column for the line item you would like to change. Then click on the Update link at the bottom of the Quantity column.

5. Click the Save Cart button.

This action will protect work to date on the Requisition in the event of a power loss or network failure.

6. Click Proceed to Checkout.

The Continue Button will be used to proceed through the following pages.

7. Add and/or confirm delivery information.

The information from your Profile settings has pre-populated the Delivery Information fields. The information can be changed as required.

8. Review or enter billing information.

On the Billing Information page, the only input necessary is the Transaction Code. You can use the Search and Select tool by clicking on the Flashlight icon to help you with the Transaction Code. For Requisitions, IQ-COMMIT must be selected as the Transaction Code in order for funds to be committed within FFIS. Leave the default answer "No" in the Taxable field.

On the Charge Accounts page, your default Charge Account will be inserted for the item(s) you selected. To change the default Charge Account, click on the link. The "Z's" in the charge code are neutral placeholders for accounting segments not currently used by an Agency. Click OK to save any changes.

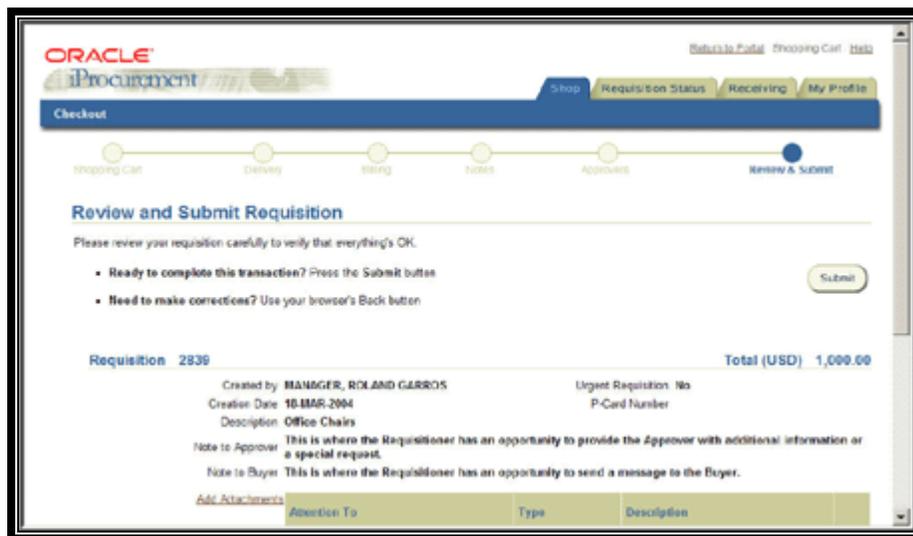
9. Enter notes or attachments to support the requisition, if needed.

A Requisition Description must be entered on this page. Enter the Requisition Description (100 characters) or click on the link below the box to automatically default the Requisition Description to the first line item's description. You can edit this as needed.

10. Review approver information and add approvers, if needed.

If you need to add more individuals to your approval chain, click on the Add Another Approver button. When adding approvers make sure that the final approver has rights to obligate funds in FFIS for the account specified in the Requisition.

11. Review the Requisition details.

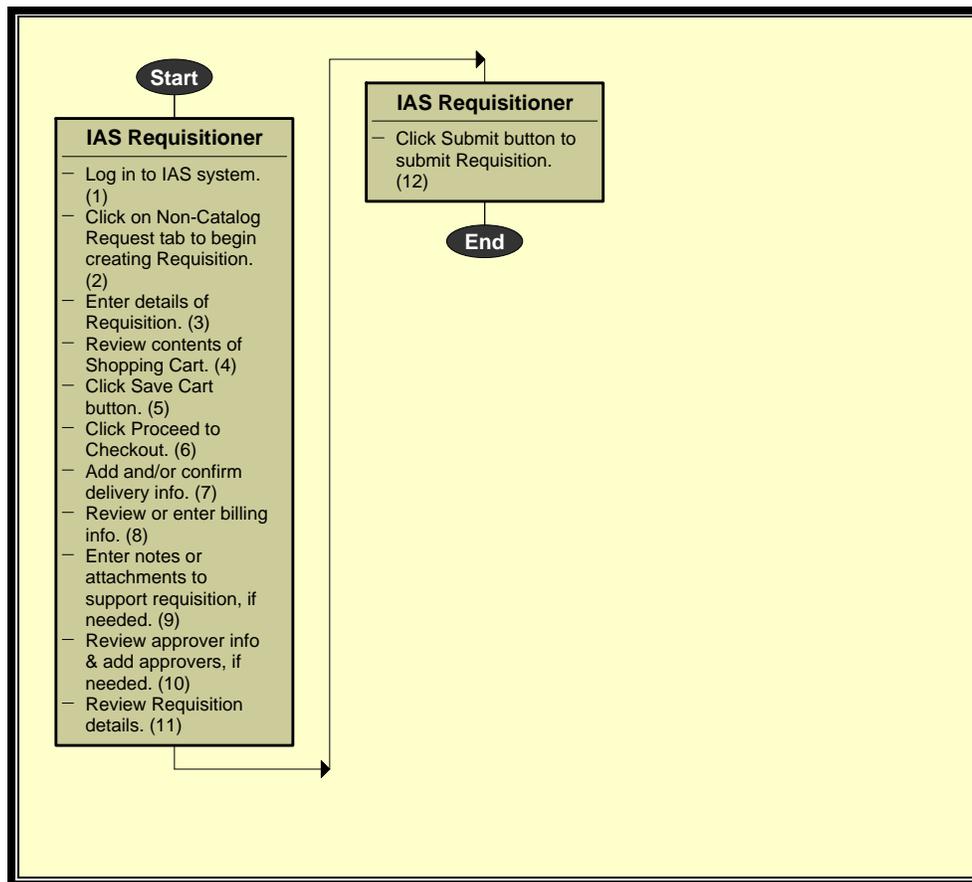


12. Click the Submit button to submit the Requisition.

Note that you will receive a blue confirmation message that indicates a Requisition has been successfully created. Below it will be a Requisition number.

**End of activity.**

## Process Workflow





# Changing or Canceling a Requisition with Order Number

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## Scope

This instruction covers changing or canceling a Requisition with an Order Number Assigned to it.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

## Ownership

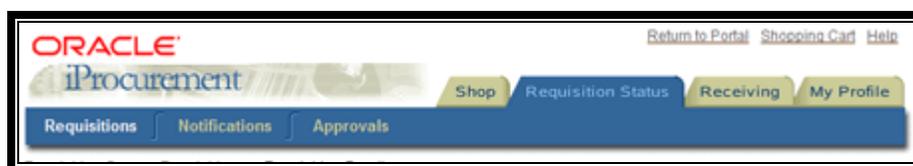
The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

These tasks are performed whenever a Requisition needs to be changed or cancelled. Different processes are used to change or cancel a Requisition. The process used is dependent on the assignment of an Order Number to the Requisition. Order Numbers are assigned to a Requisition within IAS when an obligation document (e.g. PO or Contract) is created. The primary difference between these methods is the number of fields available for modification.

## IAS Requisitioner

1. Navigate to the Requisition Status page.
  - Step 1 - Log in to IAS;
  - Step 2 - Click on the Requisitions Status tab;



2. Click to select the Requisition that has an Order Number assigned.
3. Review the Requisition details.

**If the Requisition needs to be changed, go to task #4. Otherwise, go to task #9.**

### Change the Requisition

4. Click on the Change button.

5. Edit the Need-By and Quantity Details as appropriate.

Change Requisition: Enter Changes

The lines eligible for change below have been placed on a purchase order. Your change requests are made directly to the purchase order. If you make a change, you must enter a reason. When you are finished, press the **Next** button. Note that not all lines may be eligible for changes. [Learn More...](#)

**Requisition 2899 (Total Amount 390000.00 USD)**

Created By: REQUISITIONER, NATE RAYMOND  
 Creation Date: 23-MAR-2004  
 Description: Annual Facility Guard Services

Urgent Requisition: No  
 P-Card Number:

**Requisition Details**

For lines with multiple distributions, click on the Quantity link to change quantities.  
 - Indicates previously cancelled line  
 o Indicates a line where requisition information differs from order information. Click the icon to view the differences

Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price (USD)	Amount (USD)	Cancel	Reason
1	Annual Facility Guard Services	Purchase	AG 304 P-03-0099	31-Mar-2004	HOUR	12000	9.00	390000.00	<input type="checkbox"/>	Added 1 more Guard Post

Shop | Requisition Status | Receiving | My Profile | Return to Portal | Shopping Cart | Help

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Note that there is a requirement to enter a reason for making changes to the Requisition.

6. Click on the Next button to proceed through the following pages.
7. Add an Approver, and a justification regarding the Requisition change, appropriate or required.
8. Review the details of the Requisition change, and click the Submit button.

A confirmation message will indicate a successful change to the Requisition.

**End of activity.**

### Cancel the Requisition

9. Click on the Cancel button.

- Click on the check box in the Cancel Line column of the Requisition you wish to cancel.

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Shop | Requisition Status | Receiving | My Profile

Requisitions | Notifications | Approvals

### Cancel Requisition: Select Lines

Cancel | Continue

Select the requisition line(s) you want to cancel and press the Continue button when you are done.

**Requisition 2681 (Total Amount 12950.00 USD)**

Created By: REQUISITIONER, NATE RAYMOND      Urgent Requisition: Yes  
Creation Date: 09-MAR-2004      P-Card Number:  
Description: HINGES FOR STOCK

#### Requisition Details

Indicates previously cancelled line

Details	Line	Description	Order Type	Order	Need-By	Unit	Quantity	Price (USD)	Amount (USD)	Cancel Line	Reason
Show	1	HINGES FOR BREAKROOM DOOR	Purchase	AG-0281-P-03-0066	11-Mar-2004	EACH	1000	12.95	12950.00	<input type="checkbox"/>	

Cancel | Continue

Shop | Requisition Status | Receiving | My Profile | Return to Portal | Shopping Cart | Help

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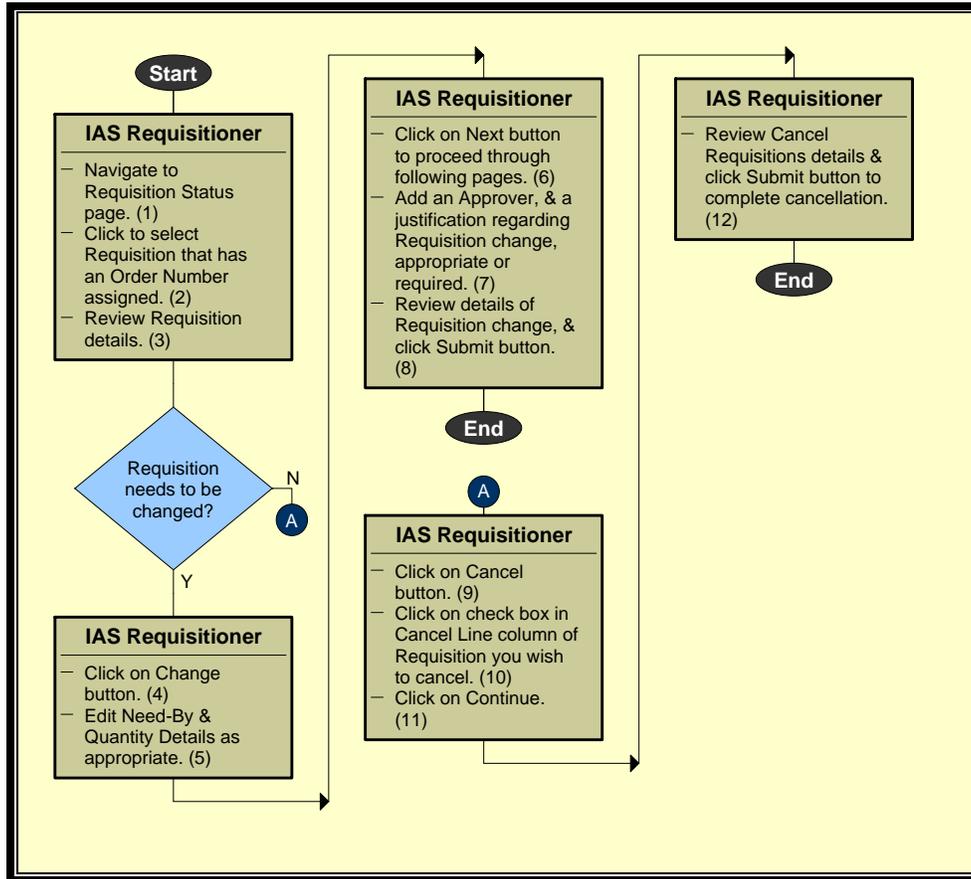
Note that it is a reason for the cancellation is required.

- Click on Continue.
- Review the Cancel Requisitions details and click the Submit button to complete the cancellation.

A confirmation message indicates that the Requisition has been successfully cancelled.

**End of activity.**

# Process Workflow





# Changing or Canceling a Requisition

---

## Scope

This instruction covers changing or canceling a Requisition without an Order Number assigned to it.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner<sup>\*</sup>

## Ownership

The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

These tasks are performed whenever a Requisition without an Order Number needs to be changed or cancelled. Different processes are used to change or cancel a Requisition. The process used is dependent on the assignment of an Order Number to the Requisition. Order Numbers are assigned to a Requisition within IAS when an obligation document, e.g. PO, Contract, is created. The primary difference between these methods is the number of fields available for modification.

## IAS Requisitioner

1. Navigate to the Requisition Status page.
  - Step 1 - Log in to IAS;
  - Step 2 - Click on the Requisitions Status tab;



2. Click to select the Requisition.

**If the Requisition needs to be changed, go to task #3. Otherwise, go to task #8.**

## Change the Requisition

3. Click on the Change button and click Continue.

ORACLE iProcurement

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Shop Requisition Status Receiving My Profile

Requisitions Notifications Approvals

### Change Requisition (Requisition 2921)

Indicate how you want to proceed with changing your requisition. Make the appropriate selection below and press the Continue button when you're done.

**Change and Resubmit Requisition**  
Withdraw your requisition from the approval process and add it to the shopping cart so you can make changes and checkout.

**Cancel Requisition**  
Don't need the items you ordered? Cancel the entire requisition or some of the items on it.

Cancel Continue

4. Edit the information on the Shopping Cart page.
5. Click the Update link to recalculate totals.
6. Proceed through the Checkout process making changes as needed.
7. Review the details of the Requisition, and click the Submit button.

The Requisition has been changed and re-submitted for approval.

**End of activity.**

## Cancel the Requisition

8. Click on the Cancel button.
9. Review the details and click on the Cancel Entire Requisition button, to confirm the cancellation.

**ORACLE** [Return to Portal](#) [Shopping Cart](#) [Help](#)  
**iProcurement** [Shop](#) [Requisition Status](#) [Receiving](#) [My Profile](#)  
[Requisitions](#) [Notifications](#) [Approvals](#)

### Cancel Requisition: Select Lines

[Cancel](#) [Cancel Entire Requisition](#) [Continue](#)

Select the requisition line(s) you want to cancel and press the **Continue** button when you are done. To cancel all requisition lines, press the **Cancel Entire Requisition** button.

**Requisition 2916 (Total Amount 750.00 USD)**

Created By: REQUISITIONER, NATE RAYMOND      Urgent Requisition: No  
Creation Date: 24-MAR-2004      P-Card Number:  
Description: Office Chairs

#### Requisition Details

⊖ Indicates previously cancelled line

Details	Line	Description	Order Type	Order Need-By	Unit	Quantity	Price (USD)	Amount (USD)	Cancel Line
▶ Show	1	Office Chairs Purchase		26-Mar-2004	EACH	5	150.00	750.00	<input type="checkbox"/>

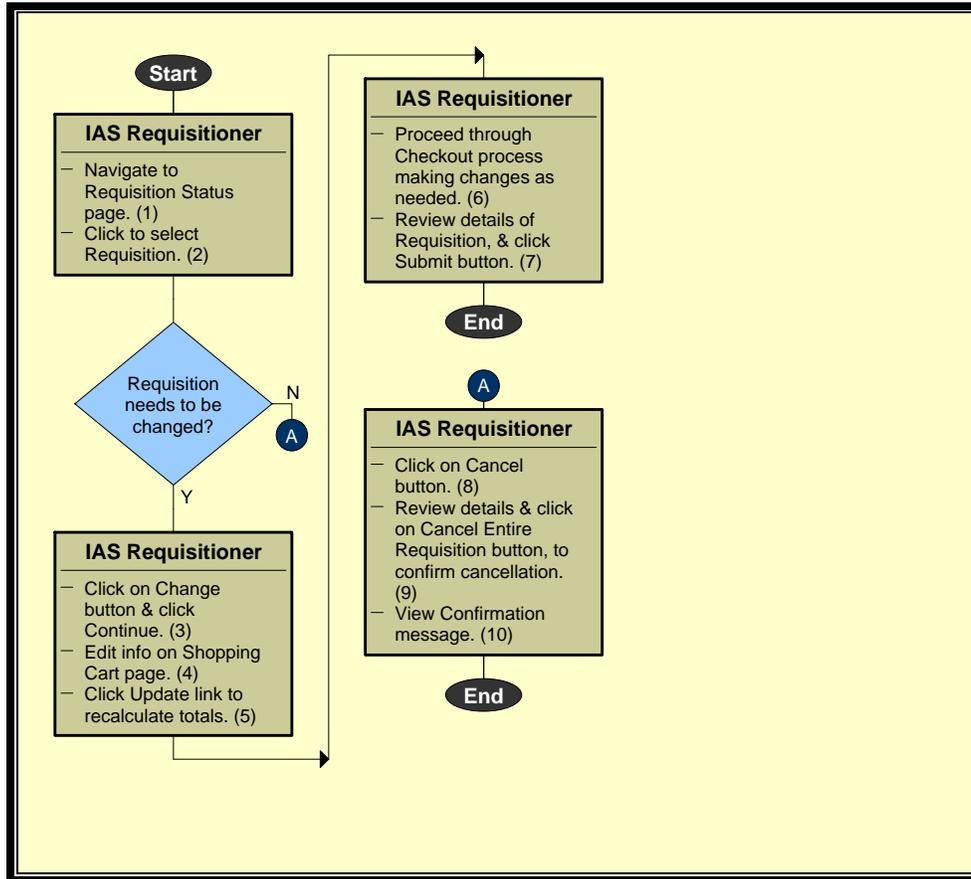
[Cancel](#) [Cancel Entire Requisition](#) [Continue](#)

[Shop](#) | [Requisition Status](#) | [Receiving](#) | [My Profile](#) | [Return to Portal](#) | [Shopping Cart](#) | [Help](#)  
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10. View the Confirmation message.

**End of activity.**

# Process Workflow





# Approving or Rejecting Requisitions

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## Scope

This instruction covers approving or rejecting Requisitions.

## Distribution

IAS Approving Manager\*

IAS Requisition Management Desk Manual

## Ownership

The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

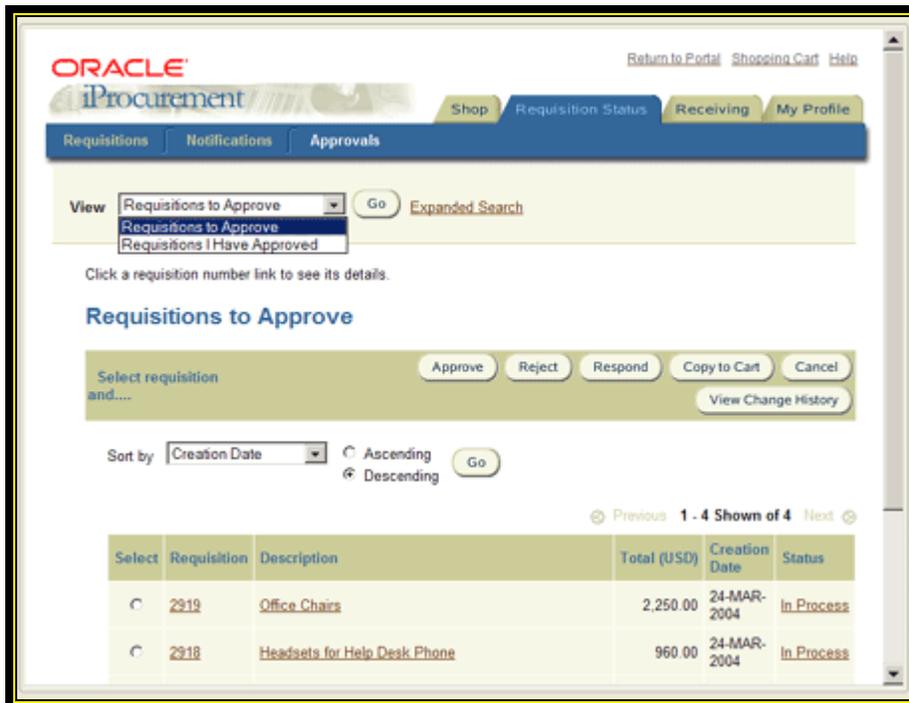
These tasks are performed whenever a Requisition requires an approval or a rejection.

## IAS Approving Manager

1. Navigate to the Requisition Status page.
2. Click on the Approvals tab.



3. Sort the list of Notifications to retrieve the Requisitions that require action.



Notifications can also be accessed via the To-Do list on the Shop home page, and the Notifications tab on the Requisition Status page.

- Click on the Requisition Description link to view details of a specific Requisition.
- To select a Requisition for Approver action, click on the radio button in the Select column.

Select	Requisition	Description	Total (USD)	Creation Date	Status
<input checked="" type="radio"/>	2919	<a href="#">Office Chairs</a>	2,250.00	24-MAR-2004	In Process
<input type="radio"/>	2918	<a href="#">Headsets for Help Desk Phone</a>	960.00	24-MAR-2004	In Process

**If the Requisition needs approval, go to task #6. Otherwise, go to task #8.**

- Click on the Approve button.

### Requisitions to Approve

Select requisition and.... Approve Reject Respond Copy to Cart Cancel

[View Change History](#)

Sort by: Creation Date  Ascending  Descending Go

Previous 1 - 4 Shown of 4 Next

Select	Requisition	Description	Total (USD)	Creation Date	Status
<input type="radio"/>	2919	<a href="#">Office Chairs</a>	2,250.00	24-MAR-2004	In Process
<input type="radio"/>	2918	<a href="#">Headsets for Help Desk Phone</a>	960.00	24-MAR-2004	In Process

- View the Confirmation message.

[Return to Portal](#) [Shopping Cart](#) [Help](#)

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iProcurement

Shop Requisition Status Receiving My Profile

Requisitions Notifications Approvals

**Confirmation**

Requisition 2918 has been approved.

[Return to Approvals](#)

[Shop](#) | [Requisition Status](#) | [Receiving](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

**End of activity.**

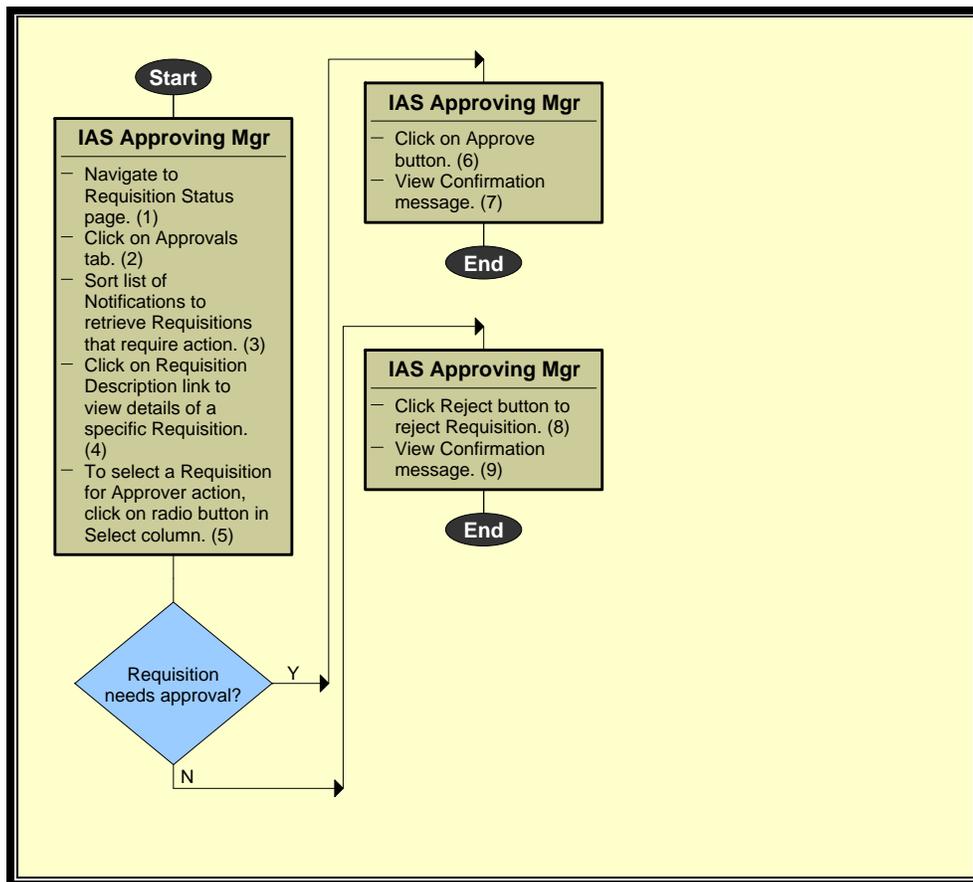
8. Click the Reject button to reject the Requisition.

Add notes as needed.

9. View the Confirmation message.

**End of activity.**

## Process Workflow





# Reassigning Notifications

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## Scope

This instruction covers reassigning Notifications in IAS.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

IAS Requisition Approver\*

## Ownership

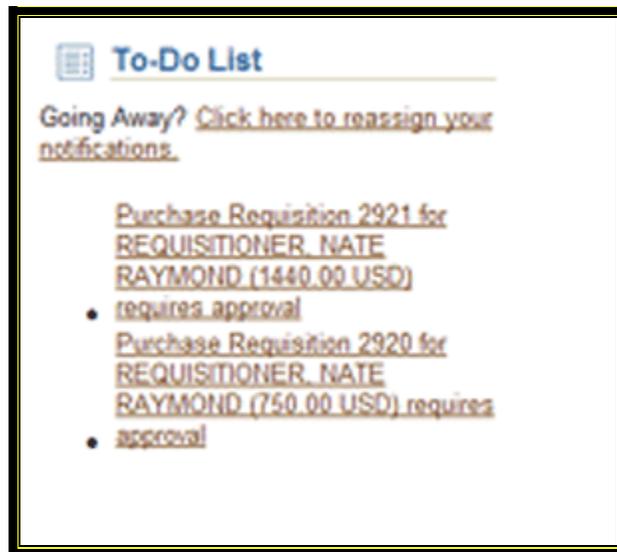
The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

These tasks are performed whenever it is necessary to delegate authority of Notifications or transfer ownership of Requisitions in the IAS application.

### IAS Requisitioner or IAS Requisition Approver

1. On the Shop home page click on the Click Here to Reassign Your Notifications link under the To-Do List.



2. Click on the Create Rule Button.



3. Select the Type of Notification and click Next.

The options displayed will differ based on the rights and privileges assigned to your UserID.

4. Select the Notification Format and click Next.

Select the criteria the Notification must meet to activate the Rule.

5. Define the Notification Rule on the Rule Response screen.

ORACLE  
Workflow

Return to Portal Shopping Cart Help

Shop Requisition Status Receiving My Profile

Requisitions Notifications Approvals

Item Type Notification Rule Response

### Rule Response

Complete the form below to set up the proper response for the rule.

Item Type PO Requisition Approval

Notification ... .. for ... (... ..) requires approval

Start Date 24-Mar-2004

End Date

Message

Comments will display with each routed notification

Reassign

Delegate authority for responding to this notification

Transfer ownership of this notification

Respond

Forward To

Note

Action Approve

Deliver notifications to me regardless of any general rules

6. Enter a Start Date.

Start Date is the only required field. However, it is recommended that you specify an End Date to ensure the Rule is controlled and managed.

7. Enter a message that explains the notification action.

8. Select a Delegate.

Use the Search and Select tool to identify your Delegate.

9. Click on the appropriate button to specify whether you are delegating authority or transferring ownership.

ORACLE  
Workflow

Return to Portal Shopping Cart Help

Requisitions Notifications Approvals

Item Type Notification Rule Response

### Rule Response

Complete the form below to set up the proper response for the rule.

Item Type PO Requisition Approval

Notification ... for ... ( ... ) requires approval

Start Date 24-Mar-2004  
(example: dd-MMM-yyyy)

End Date  
(example: dd-MMM-yyyy)

Message

Comments will display with each routed notification

Reassign

Delegate authority for responding to this notification

Transfer ownership of this notification

Response

Forward To

Note

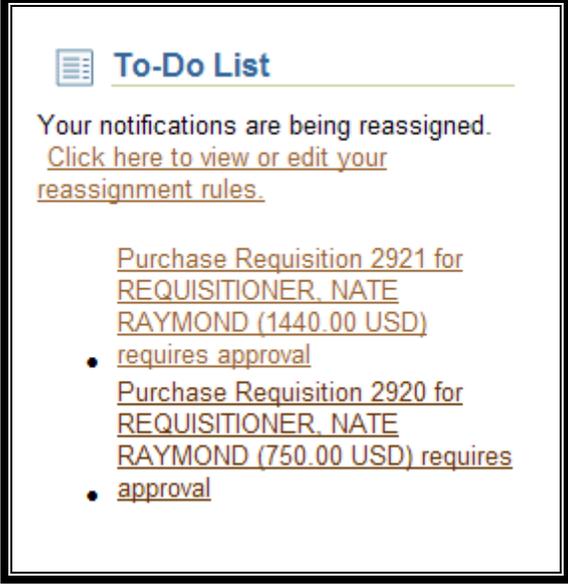
Action Approve

Deliver notifications to me regardless of any general rules

Delegation of authority enables another Requisitioner to act on your behalf in your absence. Transferring ownership grants another Requisitioner complete rights to the Requisitions meeting the Rule.

10. Click on the Submit button to complete the Rule.

On the Shop page under the To-Do List, note that the message has changed indicating that the Rule is now in effect.

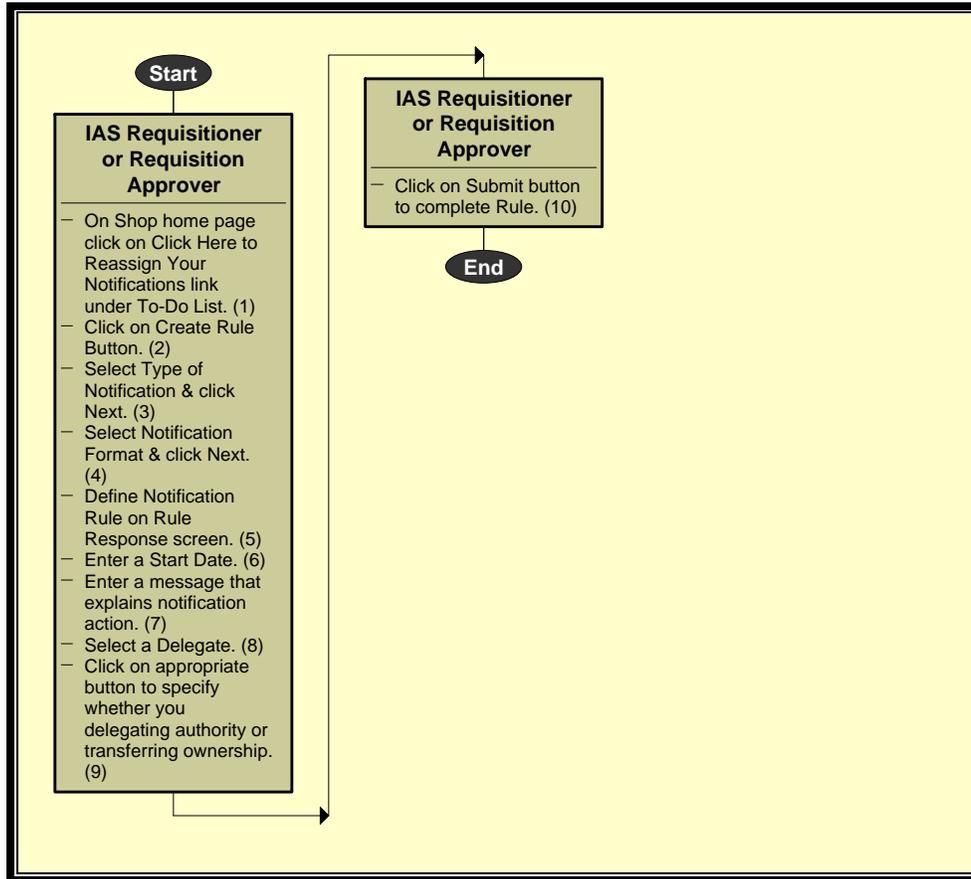


The screenshot shows a notification box titled "To-Do List" with a list icon. The text inside reads: "Your notifications are being reassigned. Click here to view or edit your reassignment rules." Below this, there are two items in a list, each with a bullet point. The first item is "Purchase Requisition 2921 for REQUISITIONER, NATE RAYMOND (1440.00 USD) requires approval". The second item is "Purchase Requisition 2920 for REQUISITIONER, NATE RAYMOND (750.00 USD) requires approval".

Click on the link to edit the Rule. From the Notification Routing Rules page, you can update the rule or delete it.

**End of activity.**

# Process Workflow





# Receiving Goods and Services in IAS

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## Scope

This instruction covers receiving goods and services in the IAS application.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

## Ownership

The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

These tasks are performed whenever an item requires Receipt. Receiving is the system-based (IAS) process for acceptance of goods or services from a vendor.

## IAS Requisitioner

1. Navigate to the Receiving page.
  - From the Shop Home page, click on the Receiving tab.

**Receiving**

Select the receiving action you want to perform.

- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

**Requisitions to Receive**

Click **Express Receive** to directly create receipt(s) with the receipt values automatically defaulted. [Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
<a href="#">2899</a>	Annual Facility Guard Services	RENT-A-SPACE-411374445	AG-3D47-P-03-0099	<a href="#">Express Receive</a>
<a href="#">2898</a>	Intercom System	RENT-A-SPACE-411374445	AG-3D47-P-03-0098	<a href="#">Express Receive</a>
<a href="#">2897</a>	Power Strips	RENT-A-SPACE-411374445	AG-3D47-P-03-0097	<a href="#">Express Receive</a>
<a href="#">2718</a>	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	AG-3D47-P-03-0086	<a href="#">Express Receive</a>
<a href="#">2694</a>	HINGES FOR STOCK	RENT-A-SPACE-411374445	AG-3D47-P-03-0084	<a href="#">Express Receive</a>

**Receiving Process**

- Receive**  
Record receipt of the items you ordered, or receive on behalf of others.  
[Receive Items](#)
- Return**  
Need to send items back to the supplier?  
[Return Items](#)
- Correct**  
Did you record the wrong receipt quantity?  
[Correct Receipts](#)
- View**  
View receipts with all

The Receiving page provides a sample list of Requisitions awaiting action as well as Receipts that have already been created.

2. Click on the Full List button to view all Requisitions pending receipt.

If the Full List is too large to manage, use the Search and Select tool to refine your results.

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Return to Portal Shopping Cart Help

Shop Requisition Status Receiving My Profile

### Receive Requisitions

Cancel Express Receive

#### Search

Enter search criteria and press the Go button to find the requisitions you want to receive.

Requester

Created By

Requisition Number

Supplier

Order Number

Go

#### Results

Select the requisition you want to receive and press the Express Receive button to directly create receipt(s) for all eligible item(s) on the requisition with the receipt values automatically defaulted.

Select	Requisition	Requisition Description	Supplier	Creation Date	Total (USD)	Order Number
<input type="radio"/>	2899	Annual Facility Guard Services	RENT-A-SPACE-411374445	23-Mar-2004	390000.00	AG-3D47-P-03-0099
<input type="radio"/>	2898	Intercom System	RENT-A-SPACE-411374445	23-Mar-2004	1946.89	AG-3D47-P-03-0098
<input type="radio"/>	2897	Power Strips	RENT-A-SPACE-411374445	23-Mar-2004	322.80	AG-3D47-P-03-0097

Receiving within IAS is a simple, three-step process: (1) Selecting Items, (2) Entering Receipt Information, and (3) Submitting the Receipt. When the details of a receipt do not require change, there is an abbreviated process called Express Receive available, which enables the user to submit a receipt in a single-step process.

**If the Requisition can be received using the Express Receive process, go to task #3. Otherwise, go to task #6.**

### Perform an Express Receive

3. Select the Requisition to be received by clicking on the radio button in the select column of the Results set.

4. Click on the Express Receive button.

**Results**  
Select the requisition you want to receive and press the Express Receive button to directly create receipt(s) for all eligible item(s) on the requisition with the receipt values automatically defaulted.

Select	Requisition	Requisition Description	Supplier	Creation Date	Total (USD)	Order Number
<input checked="" type="radio"/>	2899	Annual Facility Guard Services	RENT-A-SPACE-411374445	23-Mar-2004	390000.00	AG-3D47-P-03-0099
<input type="radio"/>	2898	Intercom System	RENT-A-SPACE-411374445	23-Mar-2004	1946.89	AG-3D47-P-03-0098
<input type="radio"/>	2897	Power Strips	RENT-A-SPACE-411374445	23-Mar-2004	322.80	AG-3D47-P-03-0097
<input type="radio"/>	2718	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	10-Mar-2004	13000.00	AG-3D47-P-03-0086
<input type="radio"/>	2694	HINGES FOR STOCK	RENT-A-SPACE-411374445	10-Mar-2004	19425.00	AG-3D47-P-03-0084
<input type="radio"/>	2691	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	10-Mar-2004	12000.00	AG-3D47-P-03-0082
<input type="radio"/>	2681	HINGES FOR STOCK	RENT-A-SPACE-411374445	09-Mar-2004	12950.00	AG-0281-P-03-0066
<input type="radio"/>	2677	Sandra NRCS 3line req6	RENT-A-SPACE-411374445	09-Mar-2004	12000.00	AG-3D47-P-03-0078
<input type="radio"/>	2614	Sandra's NRCS REQ3	R L LEASING-920156127	09-Mar-2004	1500.00	AG-3D47-P-03-0072
<input type="radio"/>	2593	Sandra's NRCS req1	RENT-A-SPACE-411374445	09-Mar-2004	700.00	AG-3D47-P-03-0071

Cancel **Express Receive**

Shop | Requisition Status | **Receiving** | My Profile | Return to Portal | Shopping Cart | Help

The Express Receive option will take you directly to the Review and Submit step, bypassing any screens for the entry or editing of data.

- Review the data and click Submit.

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Shop | Requisition Status | **Receiving** | My Profile

Select Items | Receipt Information | **Review & Submit**

---

**Receive Items: Review and Submit** Cancel | Back | Step 3 of 3 | Submit

Review your receipt details and press the **Submit** button when you are done.

**Receipt Information**  
 Receipt Date 25-Mar-2004  
 Receipt Comments

**Received Item Details**

Requisition	Item Description	Unit	Receipt Quantity	Packing Waybill Slip	Transaction Code	Item Comments	Supplier
2899	Annual Facility Guard Services	HOUR	9960				RENT-A-SPACE-411374445

Cancel | Back | Step 3 of 3 | Submit

Shop | Requisition Status | **Receiving** | My Profile | Return to Portal | Shopping Cart | Help

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The Confirmation page will indicate the Receipt has been successfully created and a Receipt number will appear below the Confirmation heading.

**End of activity.**

**Perform a Standard Receipt**

- Click the Requisition link to view Requisition Details.

**Requisitions to Receive** Full List

Click **Express Receive** to directly create receipt(s) with the receipt values automatically defaulted.

Requisition	Requisition Description	Supplier	Order Number	Express Receive
<b>2898</b>	Intercom System	RENT-A-SPACE-411374445	AG-3D47-P-03-0098	
2897	Power Strips	RENT-A-SPACE-411374445	AG-3D47-P-03-0097	
2718	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	AG-3D47-P-03-0086	
2694	HINGES FOR STOCK	RENT-A-SPACE-411374445	AG-3D47-P-03-0084	
2691	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	AG-3D47-P-03-0082	

7. Click the Receive button.

**Items**

To view additional details for a line item, click its **View** link.

	Line	Order Type	Order Number	Item Description	Need-By	Unit	Quantity	Price	Total (USD)
<a href="#">View</a>	1	Purchase	AG-3D47-P-03-0098	Intercom System	31-MAR-2004	EACH	1	1946.89	1946.89
<b>Total (USD)</b>									<b>1,946.89</b>

[Respond](#) [Copy to Cart](#) [View Change History](#) [Receive](#)

[Shop](#) | [Requisition Status](#) | [Receiving](#) | [My Profile](#) | [Shopping Cart](#) | [Help](#)

8. Enter Receipt information, if required, on the Receipt Information page.

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[Shop](#) [Requisition Status](#) [Receiving](#) [My Profile](#)

Select Items    Receipt Information    Review & Submit

**Receive Items: Enter Receipt Information**

[Cancel](#) [Back](#) [Step 2 of 3](#) [Next](#)

▪ Indicates required field

**Receipt Information**

▪ Receipt Date  (example: 31-Dec-2000)

Waybill

Packing Slip

Transaction Code

Receipt Comments

[Cancel](#) [Back](#) [Step 2 of 3](#) [Next](#)

[Shop](#) | [Requisition Status](#) | [Receiving](#) | [My Profile](#) | [Return to Portal](#) | [Shopping Cart](#) | [Help](#)

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The Receipt Date is the only required field. However, this page provides an opportunity to document Receipt information not already captured.

If the Receipt is a partial shipment, goto task #9. Otherwise, goto task #10.

9. Edit the quantity received in the "Receipt Quantity" box.

Select Requisition	Item Description	Need-By	Unit	Receipt Quantity Ordered	Already Received	Supp
<input type="checkbox"/> 2098	Intercom System	31-Mar-2004	EACH	1	1	RENT SPAC 41137

TIP Use the Previous/Next navigation tool to make selections across multiple pages

Note that the Requisition will still appear in the Requisitions to Receive list as outstanding items are yet to be received. You can find the Receipt for partial shipment received under your Receipts at a Glance. To create a Receipt for the remaining items, open the Requisition again and enter the remaining quantity amount in the Receipt Quantity box. This will create an additional Receipt against the same Requisition number.

10. Click the Next button to proceed.

11. Review the Receipt details.

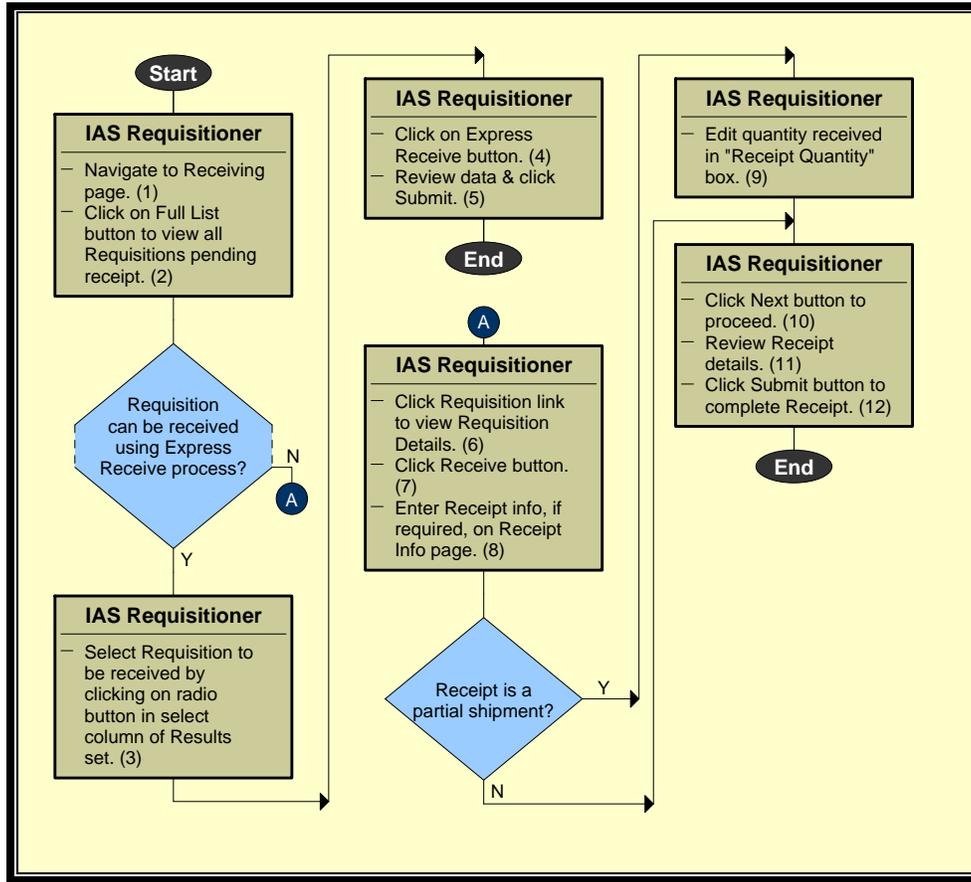
Use the browser's Back button to edit any information on previous pages.

12. Click the Submit button to complete the Receipt.

The Confirmation page will indicate the Receipt has been successfully created and a Receipt number will appear below the Confirmation heading.

**End of activity.**

# Process Workflow





# Modifying a Receipt

---

## Scope

This instruction references modifying a Receipt in the IAS application.

## Distribution

IAS Requisition Management Desk Manual

IAS Requisitioner\*

## Ownership

The Procurement Systems Division is responsible for ensuring that this document is necessary and that it reflects actual practice.

## Activity Preface

These tasks are performed whenever a Receipt needs to be modified. Receiving is the system-based (IAS) process for acceptance of goods or services from a vendor.

## IAS Requisitioner

1. Navigate to the Receiving page.
  - From the Shop Home page, click on the Receiving tab.

**Receiving**  
Select the receiving action you want to perform.

- [Receive Items](#)
- [Return Items](#)
- [Correct Receipts](#)
- [View Receipts](#)

**Requisitions to Receive**  
Click **Express Receive** to directly create receipt(s) with the receipt values automatically defaulted. [Full List](#)

Requisition	Requisition Description	Supplier	Order Number	Express Receive
<a href="#">2897</a>	Power Strips	RENT-A-SPACE-411374445	AG-3D47-P-03-0097	
<a href="#">2718</a>	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	AG-3D47-P-03-0086	
<a href="#">2694</a>	HINGES FOR STOCK	RENT-A-SPACE-411374445	AG-3D47-P-03-0084	
<a href="#">2691</a>	Sandra NRCS 3line req7	RENT-A-SPACE-411374445	AG-3D47-P-03-0082	
<a href="#">2681</a>	HINGES FOR STOCK	RENT-A-SPACE-411374445	AG-0281-P-03-0066	

**My Receipts at a Glance**  
Click **View Details** to view receipt details. [Full List](#)

Receipt	Item Description	Receipt Date	Transaction Date	Supplier	View Details
<a href="#">111</a>	Intercom System	25-Mar-2004	22-Mar-2004	RENT-A-SPACE-411374445	

**Receiving Process**

- Receive**  
Record receipt of the items you ordered, or receive on behalf of others.  
[Receive Items](#)
- Return**  
Need to send items back to the supplier?  
[Return Items](#)
- Correct**  
Did you record the wrong receipt quantity?  
[Correct Receipts](#)
- View**  
View receipts with all associated returns and corrections.  
[View Receipts](#)

The Receiving page provides a sample list of Receipts that have already been created. You can view the Receipts in a variety of ways:

- Click on the links in the Receipts column.
- Click on the links at the top of the page under Receiving.
- Click on the links in the Receiving Process box on the right hand side of the page.
- Click on the Glasses icon in the View Details column.
- Select the Full List button and select a Receipt from the View Receipts page.

2. Select a Receipt to be modified.

3. View the Receipt Details page.

**iProcurement** [Return to Portal](#) [Shopping Card](#) [Help](#)  
[Shop](#) [Requisition Status](#) [Receiving](#) [My Profile](#)

[Receiving](#) > [View Receipts](#) > Receipt Details

### Receipt Details

[Return Items](#) [Correct Receipt](#) [Ok](#)

Press the **Return Items** button to return items on this receipt or press the **Correct Receipt** button to make corrections to the receipt quantity.  
Press the **OK** button to search and view other receipts.

#### Receipt 110

Requisition 2899  
Item Description Annual Facility Guard Services  
Receipt Date 25-Mar-2004  
Supplier RENT-A-SPACE-411374445  
Order Type Purchase  
Order Number AG-3D47-P-03-0099  
Waybill  
Packing Slip  
Comments

#### Transaction History

Net Quantity Received 9960  
Original Receipt Quantity 9960

Transaction	Unit of Measure	Quantity	Transaction Date	Transacted By
Receive Items	HOUR	9960	25-Mar-2004	REQUISITIONER, NATE RAYMOND

TIP There are no returns and corrections associated with this receipt.

[Return to Receiving](#) [Return Items](#) [Correct Receipt](#) [Ok](#)

4. Click on the Correct Receipt button.

Note that the Return Items functionality is not currently utilized by the USDA. If an item needs to be returned, use the Correct Receipt button.

5. Edit the Receipt information on the Correct Items page.
6. Click Submit.

7. View the Confirmation message.

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Confirmation

Your correction(s) have been submitted.

### Correct Receipts: Confirmation Details

#### Corrections

Receipt	Item Description	Unit	Correct Quantity	Change	Quantity Received	Supplier
110	Annual Facility Guard Services	HOUR	9570	-390	9960	9960 RENT-A-SPACE-411374445

[Return to Receiving](#)

[Shop](#) | [Requisition Status](#) | [Receiving](#) | [My Profile](#) | [Return to Portal](#) | [Shopping Cart](#) | [Help](#)

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8. Click on the Receiving link to return the Receiving home page.

**End of activity.**

## Process Workflow

