

# 9.1 Edison FSCM Upgrade

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Agency User's Guide

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## Objectives

- Identify the changes in functionality from Edison 8.9 to Edison 9.1.
- Understand the functionality that has been added to Edison 9.1.
- Identify limitations and functionality that should not be used in Edison 9.1.

## Introduction

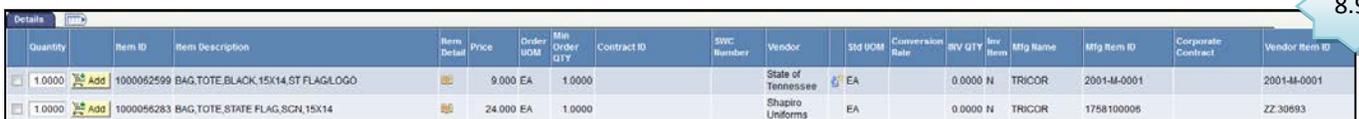
The purpose of this manual is to outline the changes that will occur when Edison upgrades from version 8.9 to 9.1. The overall look of the system will change, but much of the functionality will remain the same. Outlined below are the changes in current functionality, additional functionality, and general pieces of information to aid in the use of Edison 9.1.

**NOTE:** This manual does not include complete navigation or functionality. It is only intended to explain changes that will take place with the Edison 9.1 upgrade.

## Requisitions

### Item Detail

Previously when searching the catalog for items, all item information defaulted under the Details tab.



Quantity	Item ID	Item Description	Item Detail	Price	Order UOM	Mfg Order QTY	Contract ID	SWC Number	Vendor	Std UOM	Conversion Rate	RV QTY	Inv Item	Mfg Name	Mfg Item ID	Corporate Contract	Vendor Item ID
1.0000	1000062599	BAG,TOTE,BLACK,15X14,ST FLAG,LOGO		9.000	EA	1.0000			State of Tennessee	EA		0.0000	N	TRICOR	2001-44-0001		2001-44-0001
1.0000	1000056283	BAG,TOTE,STATE FLAG,8CN,15X14		24.000	EA	1.0000			Shapiro Uniforms	EA		0.0000	N	TRICOR	1758100005		ZZ.30593

8.9

The contents of the Details tab have now been split into two tabs. The Details tab now contains the following: Item Description, Vendor, Manufacturer, Price, UOM, and Quantity.



Item Description	Vendor	Manufacturer	Price	UOM	Quantity
<a href="#">FLAG, 3 X 5 US OUTDOOR</a>	Howard Sales	Howard sales	15.00000	USD Each	1.0000
<a href="#">FLAG, 4 X 6 US OUTDOOR</a>	JC Schultz Enterprises Inc	FLAGSOURCE	22.00000	USD Each	1.0000

9.1

The Item ID's tab contains the following: Item Description, Item ID, Vendor Item ID, Manufacturer ID, Mfg Item ID, Catalog ID, Conversion Rate, Contract ID, SWC Number, More Information, and Corporate Contract. The new fields on this tab include Manufacturer ID and More Information.

9.1

Item Description	Item ID	Vendor Item ID	Manufacturer ID	Mfg Item ID	Catalog ID	Conversion_Rate	Contract ID
<a href="#">All Beef Meatballs Precooked</a>	1000040022	64011T-MJK			PROCUREMENT ITEMS		000000000000

### Item Detail/Descriptions

The Item Details for a line were previously accessed by clicking on the Item Detail icon.

8.9

Quantity	Item ID	Item Description	Item Detail	Price	Order UOM	Min Order QTY	Contract ID	SWC Number	Vendor
1.0000	1000014034	APPLE BUTTER FANCY, Size * 10, 6-packs per ca		37.590	CA	1.0000			M J Kellner Co Inc

The Item Detail icon no longer exists. The user will click the Item Description link to navigate to the item details.

9.1

Item Description	Vendor	Manufacturer	Price	UOM	Quantity
<a href="#">BOXES, CORRUGATED, COMPLETE W/</a>	Boxes Etc II LLC		1.18000	USD Carton	1.0000
<a href="#">BOXES, CORRUGATED, COMPLETE W/</a>	Dominion Box Co Inc		1.17000	USD Each	1.0000
<a href="#">BOXES, CORRUGATED, COMPLETE W/</a>	Boxes Etc II LLC		1.14000	USD Carton	1.0000

**HINT**

Click on the look-up icon next to the UOM to reveal more information about quantity, including alternate UOM's.

Unit of Measure	# of Units	Unit Price	Price
Case	6.00000000	6.82833	40.9700 USD
Each	1.00000000	6.83000	6.8300 USD

## Requisition Summary Box

Previously the Requisition Summary box was located on the left side of the screen, under the navigation.

8.9

The screenshot shows the 'Create Requisition' page. On the left, a navigation pane lists various procurement options. A 'Requisition Summary' box is highlighted with a red border, containing the following data:

Description	Qty	UOM
Flag set, TN, 3'x5', 8' ...	10	EA

Below the table, it shows: Total Lines: 1, Total Amount (USD): 879.00.

The Requisition Summary box is now located on the right side of the screen. The function and the purpose of this box has remained the same.

9.1

The screenshot shows the 'Results' page with a list of items. On the right, a 'Requisition Summary' box is highlighted with a red border, containing the following data:

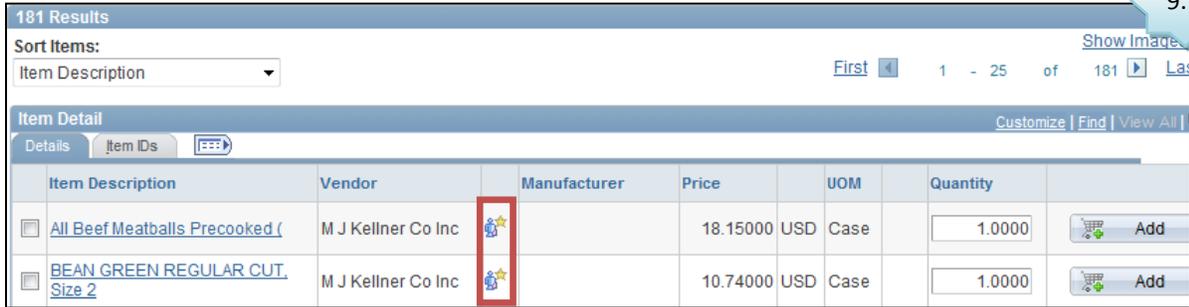
Description	Qty	UOM
BOXES, CORRUGATED, COMPLETE...	12	CT
BOXES, CORRUGATED, COMPLETE...	10	CT

Below the table, it shows: Total Lines: 2, Total Amount (USD): 25.48.

## Preferred Vendors

Functionality exists in the Catalog tab in the Requisition that allows the requester to easily identify the items that are available on contract. If an item is a contracted item it will have a preferred vendor icon  next to the name of the vendor. This should assist agency users when they are identifying contract versus non-contract items.

9.1



181 Results

Sort Items: Item Description

First 1 - 25 of 181 Last

Item Detail

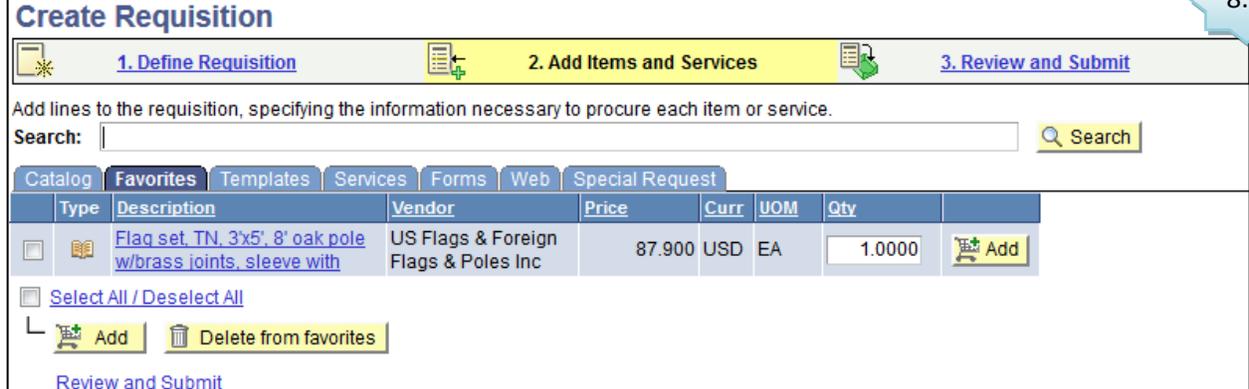
Details Item IDs

Item Description	Vendor	Manufacturer	Price	UOM	Quantity	
<input type="checkbox"/> <a href="#">All Beef Meatballs Precooked (</a>	M J Kellner Co Inc		18.15000	USD Case	1.0000	
<input type="checkbox"/> <a href="#">BEAN GREEN REGULAR CUT, Size 2</a>	M J Kellner Co Inc		10.74000	USD Case	1.0000	

## Status Column

The lines that are saved on the Favorites tab previously consisted of the following: Type, Description, Vendor, Price, Curr, UOM, Quantity, and the Add button. Buttons along the bottom allow the user to add the item to the Requisition or delete it from the favorites.

8.9



Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:  Search

Catalog Favorites Templates Services Forms Web Special Request

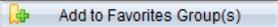
Type	Description	Vendor	Price	Curr	UOM	Qty	
<input type="checkbox"/>	 <a href="#">Flag set, TN, 3'x5', 8' oak pole w/brass joints, sleeve with</a>	US Flags & Foreign Flags & Poles Inc	87.900	USD	EA	1.0000	

Select All / Deselect All

[Review and Submit](#)

The lines that are saved on the Favorites tab now include a status. This information tells the requester if the line they are adding from their favorites is “Active” or “Item Inactive.” Two new buttons have been added along the bottom allowing the user to Add to Favorites Group

 or Add to Template(s) .

9.1

**Create Requisition**

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | Web | Special Request

Favorites ?

Group Name		Description							
Ungrouped Items									
Favorite Items									
Type	Description	Vendor Name	Status	Price	UOM	Quantity			
<input type="checkbox"/>	BLUEBERRIES, FROZEN, CULTURED WH...	M J Kellner Co Inc	Active	71.86000	USD CA	1.0000	<input type="button" value="Add"/>		
<input type="checkbox"/>	BREAKFAST BURRITO, FROZEN	M J Kellner Co Inc	Active	27.10860	USD CA	1.0000	<input type="button" value="Add"/>		

Select All / Deselect All

Review and Submit

## Creating a Favorites Group

Follow the steps below to create a Favorites Group.

Type	Description	Vendor Name	Status	Price	UOM	Quantity			
<input checked="" type="checkbox"/>	BLUEBERRIES, FROZEN, CULTURED WH...	M J Kellner Co Inc	Active	71.86000	USD CA	1.0000	<input type="button" value="Add"/>		
<input checked="" type="checkbox"/>	BREAKFAST BURRITO, FROZEN	M J Kellner Co Inc	Active	27.10860	USD CA	1.0000	<input type="button" value="Add"/>		
<input type="checkbox"/>	Placement and removal of flags (...)		Active	150.00000	USD EA	1.0000	<input type="button" value="Add"/>		

Select All / Deselect All

1. Select the lines that you want added to your group. These lines should already be added to your favorite items.
2. Click the **Add to Favorites Group(s)** button. This will populate the Add Selected Items to Favorites Group(s) screen.

**Add Selected Items to Favorites Group(s)**

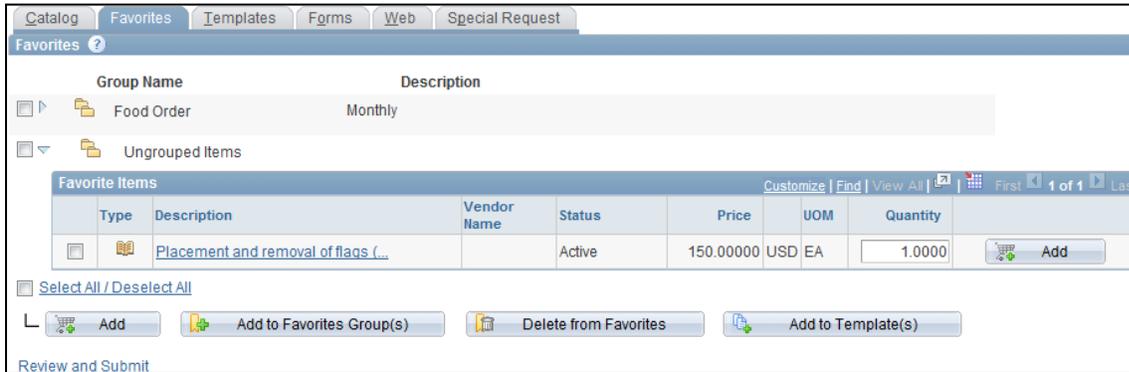
You have no Favorites Group(s).

Add to a new favorites group

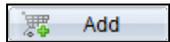
Group Name:

Description:

3. Enter a Group Name and Description.
4. Click **OK**. This will return you to the Favorites tab with the Group Name populated under the Favorites tab.



To order the group, click on the check box next to the Group Name and then click

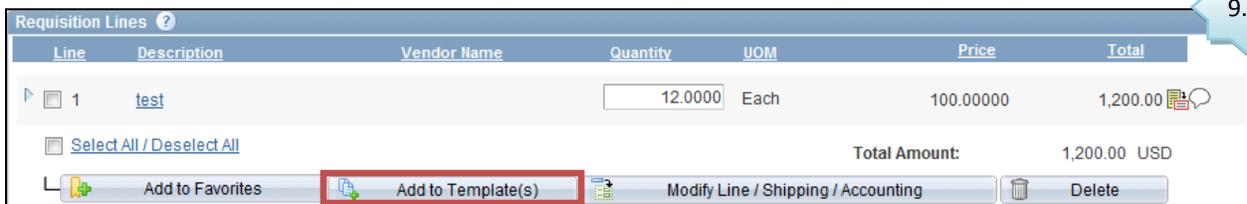


## Add to Template(s)

Previously the field that allowed the user to save the Requisition as a template was located under the Check Budget button.



This functionality has now been moved and is now the **Add to Template(s)** button located below the Requisition lines.



Once all necessary information has been entered in to the Requisition the steps below can be followed to create a template.

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	test		12.0000	Each	100.00000	1,200.00
						Total Amount: 1,200.00 USD

Select All / Deselect All

1. Select the lines to be added to the template.
2. Click the **Add to Template(s)** button. This will bring you to the Add Selected Items to Template(s) screen.

**Add Selected Items to Template(s)**

Template Name	Description
<input type="checkbox"/> dcr	dcr
<input type="checkbox"/> special request	special request
<input type="checkbox"/> test	test
<input type="checkbox"/> testing	testing
<input type="checkbox"/> testing123	1

Add a new template

Template Name:   
 Description:

This screen gives the requester the option to add the items to an existing template or add a new template. To add the lines to an existing template click the checkbox beside the template name. To add a new template, enter a template name and description. Click **OK**, this will add your items to or create a new template.

## Special Request Tab

Previously the only vendor information that could be input on the Special Request tab was the Vendor ID and the Vendor Item ID.

The screenshot shows the 'Special Request' tab in a software application. The interface includes a navigation bar with tabs for 'Catalog', 'Favorites', 'Templates', 'Services', 'Forms', 'Web', and 'Special Request'. The main area is titled 'Special Item' and contains several input fields: '\*Item Description:', '\*Price:', '\*Quantity:', '\*Category:', 'Vendor ID:', 'Vendor Item ID:', 'Mfg ID:', 'Mfg Item ID:', '\*Currency:' (set to USD), '\*Unit of Measure:', and 'Due Date:'. There are also search icons next to the Category, Vendor ID, Vendor Item ID, Mfg ID, and Mfg Item ID fields. A 'Suggest New Vendor' link is visible. Below the input fields is an 'Additional Information' section with a large text area and three checkboxes: 'Send to Vendor', 'Show at Receipt', and 'Show at Voucher'. At the bottom, there are three buttons: 'Add Item', 'Cancel', and 'Add or Start New Type'. A blue callout bubble with the number '8.9' is positioned over the Vendor ID field.

The Special Request tab now has the option to enter a Vendor Name.

This screenshot shows the updated 'Special Request' tab. The 'Vendor Name:' field has been added below the 'Vendor ID:' field and is highlighted with a red rectangular box. A blue callout bubble with the number '9.1' points to this new field. The rest of the interface, including the navigation bar, input fields, and buttons, remains the same as in the previous screenshot. The 'Additional Information' section now includes a 'Request New Item' button next to the text area.

## Changes to Review & Submit Page

The field for the Doc Type was previously located beside the Requisition Name field, and there was no option to show the Justification/Comments during the approval.

8.9

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 32101 General Services  
\*Requester: alys0728001 Alyssa Cave \*Currency: USD  
Requisition Name: test Doc Type: DCR Priority: Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Flag set, TN, 3x5, 8' oak	US Flags & Foreign Flags & Poles Inc	1.0000	Each	87.90	87.90
Total Amount:						87.90 USD

Justification/Comments

Send to Vendor Show at Receipt Show at Voucher

Check Budget Save as Template Save & submit Save & preview approvals Cancel requisition Find more items

The field for the Doc Type is now located under the Requisition Name field. There is also now the **Approval Justification** checkbox that allows the requester to have the comments entered on the Requisition shown during approvals. The Justification/Comments box has been renamed the Comments box. A Pre-Encumbrance Balance field has been added below Total Amount, this will populate once the budget has been checked.

9.1

### Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: 32101 General Services \*Currency: USD  
Requester: alys0728001 Alyssa Cave Priority: Medium  
Requisition Name: test Doc Type: DCR

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	test		10.0000	Each	100.00000	1,000.00
Total Amount:						1,000.00 USD
Pre-Encumbrance Balance:						1000.00 USD

Comments

approval comments

Send to Vendor Show at Receipt Shown at Voucher  Approval Justification

Check Budget Budget Checking Status: Valid

Save & submit Save & preview approvals Cancel Changes Find more items

## Modify Shipping Address

The link to modify shipping addresses on a Requisition was previously called the **Modify Shipping Address** link.

8.9

Line	Description	Vendor Name	Quantity	UOM	Price
1	<a href="#">Flag set, TN, 3x5', 8' oak</a>	US Flags & Foreign Flags & Poles Inc	1.0000	Each	87.900

Consolidate with other Reqs     Override Suggested Vendor

Shipping Line: 1      Due Date:       Quantity: 1.0000 + -  
 Status: Active      \*Ship To:       Modify Shipping Address  
 Attention:

The link to modify shipping addresses on a Requisition is now called the **Modify Onetime Address**.

9.1

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	<a href="#">Page Flags, Blue, 1 In. Wide.</a>	Staples Contract & Commercial Inc	1.0000	Box	13.99000	13.99

Consolidate with other Reqs     Override Suggested Vendor

Shipping Line: 1      Due Date:       Quantity: 1.0000      Price: 13.99000 + -  
 Status: Active      \*Ship To:       Modify Onetime Address  
 Attention To:

**HINT** This field will allow the requester to enter 20 characters, when all Ship To codes should be limited to 10 characters. Confirm before submitting that the correct Ship To is being used. This issue will also exist when using the **Modify Line/Shipping/Accounting** button Modify Line / Shipping / Accounting.

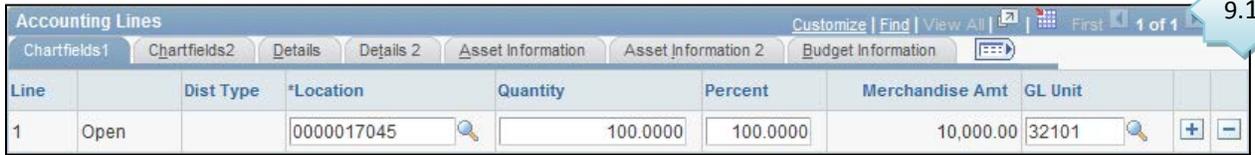
## Chartfields

The Chartfields 1 tab previously contained a field for the Account code.

8.9

Accounting Lines									
Customize   Find   View All         First 1 of 1									
Line	Status	Dist Type	*Location	Quantity	Percent	Amount	GL Unit	Account	
1	Open		000001E	2.0000	100.0000	135.98	31701	722010C	+ -

The Chartfields 1 tab no longer has the Account field.



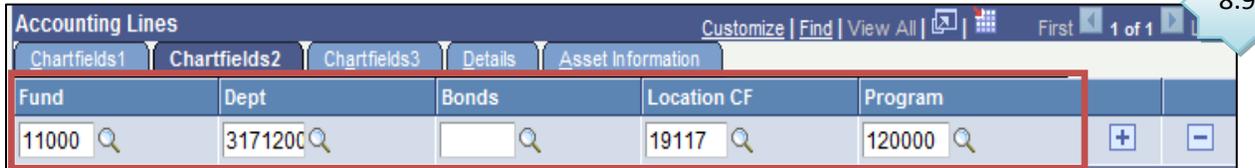
Accounting Lines

Customize | Find | View All | First 1 of 1

9.1

Line	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open	0000017045	100.0000	100.0000	10,000.00	32101

The Chartfields 2 tab previously contained only the following fields: Fund, Dept, Bonds, Location CF, and Program.



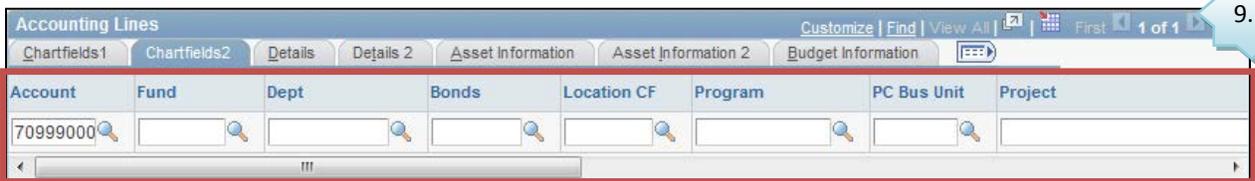
Accounting Lines

Customize | Find | View All | First 1 of 1

8.9

Fund	Dept	Bonds	Location CF	Program
11000	3171200		19117	120000

The Account code, PC Bus Unit, Project, Activity, Source Type, Category, Subcategory, Affiliate, Fund Affiliate, and User Code fields are now located in the Chartfields 2 tab.



Accounting Lines

Customize | Find | View All | First 1 of 1

9.1

Account	Fund	Dept	Bonds	Location CF	Program	PC Bus Unit	Project
70999000							

There is no longer a Chartfields 3 tab.



Accounting Lines

Customize | Find | View All | First 1 of 1

8.9

PC Bus Unit	Project	Activity	Source Type	Category	Subcategory	User Code

The Details tab previously contained the following fields: Affiliate, Fund Affiliate, Budget Date, and Currency.



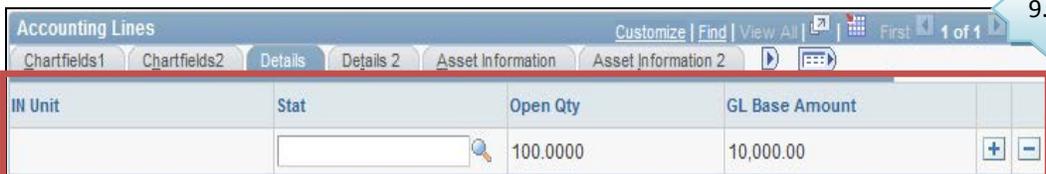
Accounting Lines

Customize | Find | View All | First 1 of 1

8.9

Affiliate	Fund Affil	IN Unit	Budget Date	Stat	Open Qty	GL Base Amount	Currency	Exch Rt
			04/03/2014		100.0000	10,000.00	Dollar	1.00000000

The Details tab still contains the IN Unit, Stat, Open Qty, and GL Base Amount fields.



Accounting Lines

Customize | Find | View All | First 1 of 1

9.1

IN Unit	Stat	Open Qty	GL Base Amount
		100.0000	10,000.00

The Currency field is now located under the Details 2 tab. There is a new Exchange Rate Detail icon.

The screenshot shows the 'Accounting Lines' window with the 'Details 2' tab selected. A red box highlights the 'Currency' field, which contains the value 'Dollar'. To the right of the field is an 'Exchange Rate Detail' icon (a globe with a dollar sign) and '+' and '-' buttons. A callout bubble with the number '9.1' is in the top right corner.

The Asset Information tab previously contained the following fields: AM Business Unit, Profile ID, Tag Number, CAP #, Sequence, Empl ID, Capitalize, and Cost Type.

The screenshot shows the 'Accounting Lines' window with the 'Asset Information' tab selected. A red box highlights the fields: AM Business Unit (32101), Profile ID (XBOAT), Tag Number, CAP #, Sequence, Empl ID, Capitalize (checkbox), and Cost Type. A callout bubble with the number '8.9' is in the top right corner.

The Capitalize and Cost Type fields are no longer located under the Asset Information tab.

The screenshot shows the 'Accounting Lines' window with the 'Asset Information' tab selected. The fields AM Business Unit, Profile ID, Tag Number, CAP #, Sequence, and Empl ID are visible. The Capitalize and Cost Type fields are no longer present in this tab. A callout bubble with the number '9.1' is in the top right corner.

The Capitalize and the Cost Type fields have been moved to the Asset Information 2 tab.

The screenshot shows the 'Accounting Lines' window with the 'Asset Information 2' tab selected. A red box highlights the 'Capitalize' field (checkbox) and the 'Cost Type' field (text input). A callout bubble with the number '9.1' is in the top right corner.

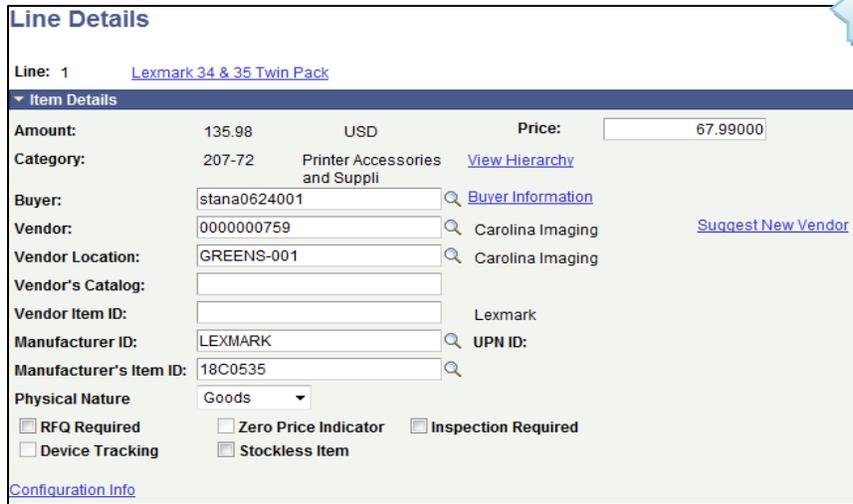
The Budget Information tab contains the Budget Status, Budget Date, Pre-Encumbrance Balance, and Pre-Encumbered Balance fields.

The screenshot shows the 'Accounting Lines' window with the 'Budget Information' tab selected. A red box highlights the fields: Budget Status (Not Chk'd), Budget Date (04/03/2014), Pre-Encumbrance Balance (0.00 USD), and Pre-Encumbered Base Balance (0.000 USD). A callout bubble with the number '9.1' is in the top right corner.

**HINT** Contact your agency's Fiscal Office for more information on how these fields are to be used since the information input here will vary from agency to agency.

## Line Details

Previously on the Line Details screen there were fewer fields, and the link to Suggest New Vendors existed.



**Line Details**

Line: 1 [Lexmark 34 & 35 Twin Pack](#)

**Item Details**

Amount: 135.98 USD Price: 67.99000

Category: 207-72 Printer Accessories and Suppli [View Hierarchy](#)

Buyer: stana0624001 [Buyer Information](#)

Vendor: 0000000759 [Carolina Imaging](#) [Suggest New Vendor](#)

Vendor Location: GREENS-001 [Carolina Imaging](#)

Vendor's Catalog:

Vendor Item ID:  Lexmark

Manufacturer ID: LEXMARK [UPN ID:](#)

Manufacturer's Item ID: 18C0535 [UPN ID:](#)

Physical Nature: Goods

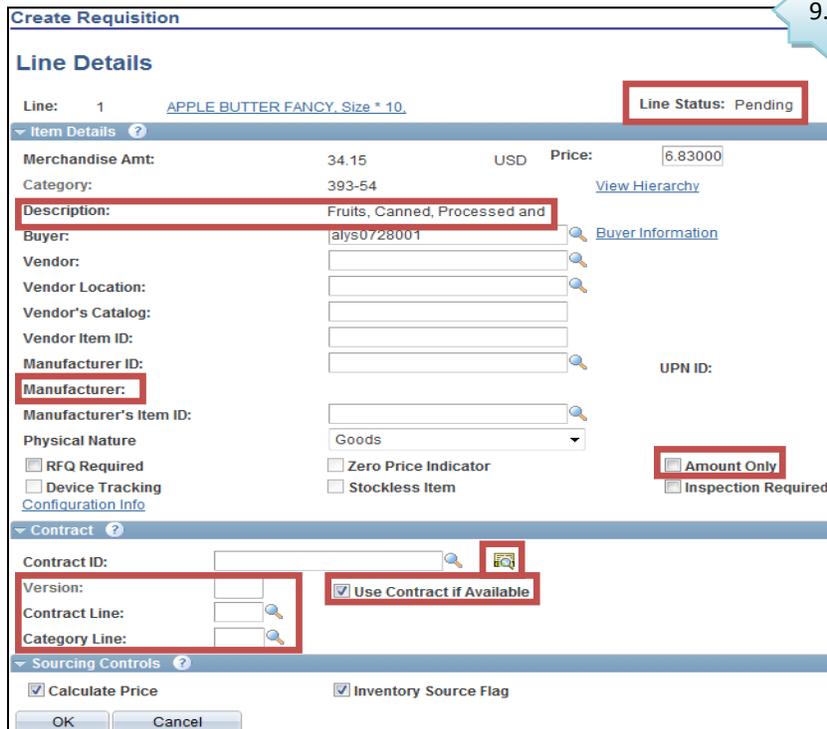
RFQ Required  Zero Price Indicator  Inspection Required

Device Tracking  Stockless Item

[Configuration Info](#)

8.9

The Suggest New Vendor link has been removed, and the following fields have been added to the Line Details page: Line Status, Description, Manufacturer, Amount Only, Contract Search icon, Version, Use Contract if Available, Contract Line, Category Line. While it is not necessary for the Requester to utilize any of the functionality on the screen, this screen is a resource that should be used to gather information on the item being purchased.



**Create Requisition**

**Line Details**

Line: 1 [APPLE BUTTER FANCY, Size \\* 10.](#) **Line Status: Pending**

**Item Details**

Merchandise Amt: 34.15 USD Price: 6.83000

Category: 393-54 [View Hierarchy](#)

**Description:** Fruits, Canned, Processed and

Buyer: alys0728001 [Buyer Information](#)

Vendor:

Vendor Location:

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID:  **UPN ID:**

**Manufacturer:**

Manufacturer's Item ID:

Physical Nature: Goods

RFQ Required  Zero Price Indicator  Amount Only

Device Tracking  Stockless Item  Inspection Required

[Configuration Info](#)

**Contract**

Contract ID:  [Contract Search](#)

Version:   Use Contract if Available

Contract Line:

Category Line:

**Sourcing Controls**

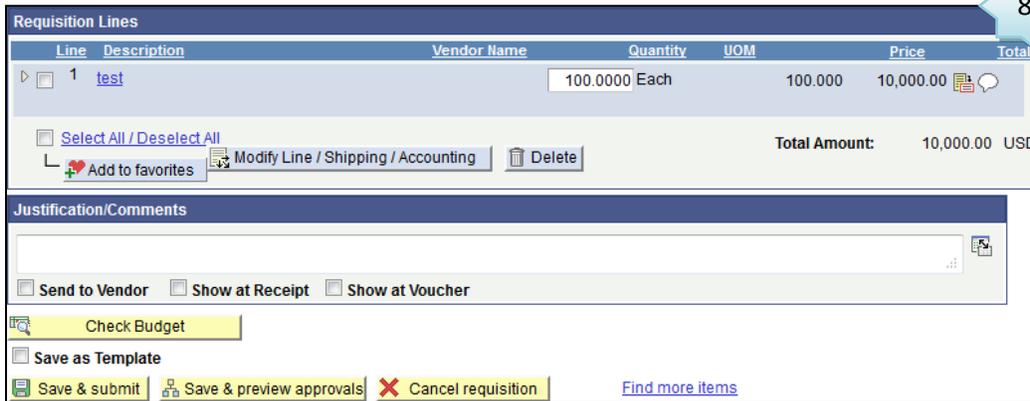
Calculate Price  Inventory Source Flag

OK Cancel

9.1

## Budget Check

Previously if changes were made to the quantity on a Requisition line after the budget check had occurred, then it would be necessary and click **Save and Preview Approvals** before the budget can be checked again.



8.9

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	test		100.0000	Each	100.000	10,000.00

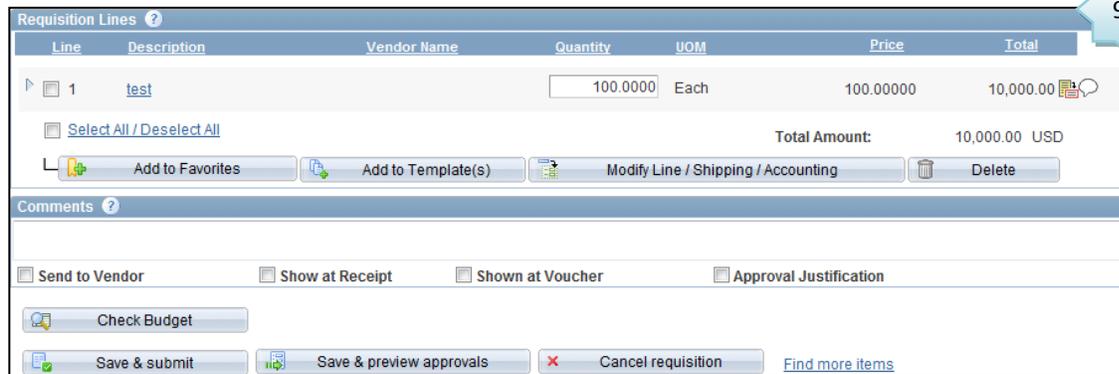
[Select All / Deselect All](#) [Add to favorites](#) [Modify Line / Shipping / Accounting](#) [Delete](#) **Total Amount:** 10,000.00 USD

[Send to Vendor](#)  [Show at Receipt](#)  [Show at Voucher](#)

[Check Budget](#) [Save as Template](#)

[Save & submit](#) [Save & preview approvals](#) [Cancel requisition](#) [Find more items](#)

Now if changes are made to quantities on an existing line item, and the Requisition is already budget checked, either click **Save and Preview Approvals** OR **Save and Submit**. There is no need to budget check again, Edison will auto budget check. However, if another line item is added, the budget check will have to be done again.



9.1

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	test		100.0000	Each	100.00000	10,000.00

[Select All / Deselect All](#) **Total Amount:** 10,000.00 USD

[Add to Favorites](#) [Add to Template\(s\)](#) [Modify Line / Shipping / Accounting](#) [Delete](#)

[Send to Vendor](#)  [Show at Receipt](#)  [Shown at Voucher](#)  [Approval Justification](#)

[Check Budget](#)

[Save & submit](#) [Save & preview approvals](#) [Cancel requisition](#) [Find more items](#)

## Requisition Confirmation

Previously the Confirmation screen did not allow you to check the Status of a Requisition, and while the Requisition has always pre-encumbered it did not confirm the balance that was pre-encumbered.

**8.9**

### Confirmation

<b>Requested For:</b>	Kimberly G Wright	<b>Number of Lines:</b>	2
<b>Requisition Name:</b>	OIR13-14-0203 - Faxback Mntc	<b>Total Amount:</b>	3,981.48 USD
<b>Requisition ID:</b>	0000011912	<b>Justification:</b>	10182013 added contract id 18738 to both lines. RLC Purchase of Faxback NET SatisFAXtion Enterprise IP Edition annual maintenance/support for End Point Management. ***** OIR13-14-0203 / QUO 664574514 31701, FA00002469, Fax, 3170300016, 030817, 12001, 19000 Liz Driscoll-Jones / Kim Wright
<b>Business Unit:</b>	31701		
<b>Priority:</b>	High		
<b>Budget Status:</b>	<a href="#">Valid</a>		

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

The Confirmation screen now includes the status of the Requisition and the total amount that the Requisition has pre-encumbered.

**9.1**

### Confirmation

<b>Requested For:</b>	Donald N Pierce	<b>Number of Lines:</b>	1
<b>Requisition Name:</b>	0000012122	<b>Total Amount:</b>	909.98 USD
<b>Requisition ID:</b>	0000012122	<b>Pre-Encumbrance Balance:</b>	<a href="#">909.98</a> USD
<b>Business Unit:</b>	31701		
<b>Status:</b>	<a href="#">Approved</a>		
<b>Priority:</b>	Medium		
<b>Budget Status:</b>	<a href="#">Valid</a>		

[Submit](#) [Edit Requisition](#) [Apply Approval Changes](#) [Check Budget](#)

[View printable version](#) [Manage Requisitions](#) [Create New Requisition](#)

## Manage Requisitions Searching

Previously when searching for Requisitions the following Request Statuses existed: All but Complete, Complete, Approved, Canceled, Complete, Denied, Open, PO(s) Created, PO(s) Dispatched, Pending, Received, Service Complete, Service Filled, and Service Sourced.

8.9

### Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:

Requisition ID:  Request Status:  Budget Status:

Date From:  Date To:

Requester:  Entered By:

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Actions column and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	Actions
0000027898	Asset,TABC,Silverado,Cr...	32101	04/03/2014	Open	27,840.30USD		<Select Action...> Go
0000027897	Revenue-VantageWay,als302	32101	04/03/2014	Pending	147.60USD		<Select Action...> Go

There is now the option to filter by the following additional Request Statuses when searching for a Requisition: PO Partially Canceled, PO Partially Completed, PO Partially Created, PO(s) Canceled, PO(s) Completed, Partially Dispatched, Partially Received, or See Lines.

9.1

### Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:

Requisition ID:  Request Status:  Budget Status:

Date From:  Date To:

Requester:  Entered By:

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Actions column and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	Actions
0000027645	test	32101	04/03/2014	Open	40.97 USD		<Select Action> Go

[Create New Requisition](#) [Review Change Request](#) [Page Receipts](#) [Requisition Report](#)

Previously there were three Budget Status options to use when searching on the Manage Requisition screen. These statuses were Error, Not Chk'd, and Valid.

**8.9**

### Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 32101 Requisition Name:

Requisition ID:  Request Status: All but Complete Budget Status:

Date From: 03/27/2014 Date To: 04/03/2014

Requester:  Entered By:  PO ID:

Search Clear

**Budget Status dropdown menu:**  
 Error  
 Not Chk'd  
 Valid

The options for the Budget Status have been updated. The name for an error has now changed to Error in Budget Check, and the name for a budget not being checked is Not Budget Checked. **The Provisionally Valid Budget Status will NOT be used.**

**9.1**

### Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 32101 Requisition Name:

Requisition ID:  Request Status: All but Complete Budget Status:

Date From: 03/27/2014 Date To: 04/03/2014

Requester: alys0728001 Entered By:  PO ID:

Search Clear

**Budget Status dropdown menu:**  
 Error in Budget Check  
 Not Budget Checked  
 Provisionally Valid  
 Valid

## Select Option Drop-Down Menu

The previous options from the Select Action drop-down menu are still available. These options vary depending on the Status of the Requisition and include: Cancel Requisition, Edit Requisition, Change Request, Receive Order, Return to Vendor, and View Approvals.

**8.9**

### Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 32101 Requisition Name:

Requisition ID:  Request Status: All but Complete Budget Status:

Date From: 04/04/2014 Date To: 04/11/2014

Requester:  Entered By:  PO ID:

Search Clear

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon: ▾

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
0000027970	Shrink wrap-Mark Andy	32101	04/11/2014	Approved	Valid	146.19USD	<Select Action...> Go
0000027969	Right window envelope-C...	32101	04/11/2014	Approved	Valid	335.00USD	<Select Action...> Go
0000027968	Comm Support Supplies	32101	04/11/2014	PO(s) Dispatched	Valid	142.86USD	Cancel Requisition Edit Requisition View Approvals Go

The new options that are available from the Select Action drop-down menu are Copy Requisition and View Printable Version.

9.1

**Manage Requisitions**

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: 32101 Requisition Name: Request Status: Budget Status: Date From: 03/27/2014 Date To: 04/03/2014 Requester: Entered By: PO ID:

Search Clear

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total		
0000027645	test	32101	04/03/2014	Open	Not Ch'k'd	40.97 USD	<Select Action>	Go
0000027644	Test req for sourcing	32101	03/27/2014	Pending	Valid	100.00 USD	<ul style="list-style-type: none"> <li>&lt;Select Action&gt;</li> <li>Cancel Requisition</li> <li>Check Budget</li> <li>Copy Requisition</li> <li>Edit Requisition</li> <li>View Printable Version</li> </ul>	Go

## Review Change Tracking

At the bottom of the Manage Requisition there were previously links for the following: Create New Requisition, Inquire Change Request, Inquire Receipts, and Requisition Reports.

8.9

0000011960	AMMUNITION	31701	11/01/2013	PO(s) Dispatched	Valid	1,193.64 USD	<Select Action..	
0000011959	Psychological Evaluation	31701	11/01/2013	Partially Received	Valid	1,645.00 USD	<Select Action..	Go

[Create New Requisition](#)
[Inquire Change Request](#)
[Inquire Receipts](#)
[Requisition Report](#)

The Create New Requisition and Requisition Report links have remained the same. The link name of Inquire Change Request has been changed to Review Change Request and the link name of Inquire Receipts has changed to Manage Receipts. The Review Change Tracking link is a new piece of functionality.

9.1

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total		
0000027648	test	32101	04/14/2014	Approved	Valid	63.76 USD	<Select Action>	Go
0000027647	test	32101	04/11/2014	Pending	Valid	10,000.00 USD	<Select Action>	Go

[Create New Requisition](#)
[Review Change Request](#)
[Review Change Tracking](#)
[Manage Receipts](#)
[Requisition Report](#)

The Change Tracking History feature allows the user to track all changes and actions made in regards to a specific Requisition. Follow the steps below to use the Review Change Tracking feature.

1. Click the **Review Change Tracking** link.
2. Enter the search information.
3. Click **Search**.
4. Click the Expand Section arrow next to the Req ID to view the history of the Requisition.

## Manage Requisition Approvals

The previous name for the screen that is used to approve Requisitions was called Approve Requisitions.

The name of the screen that is used to approve Requisitions is now called Manage Requisition Approvals.

## HINT

The navigation to the screen will be reflective of the screens name change.

Main Menu > FSCM > eProcurement > Manage Requisition Approvals

## Saving an Event

It is no longer necessary to have a line item in order to save an Event. The only item that is needed in order to save is the Event Name.

Event Type: RFx [Change to Auction](#)

Event Status: Open

\*Event Name: test

Description:

Time Zone: CDT

Preview Date: 04/04/2014 12:34PM

Start Date: 04/04/2014 12:34PM

End Date: 04/04/2014 12:34PM

Copy From:

Go

## Event Settings and Options

The options on the Event Settings and Options are reflective of the functionality they control. The 8.9 version included setting and options that matched the system functionality.

Create an Event

### Event Settings and Options

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Allow Bidder XML Downloads

Bid Required On All Lines

Multiple Bids Allowed

Allow Edit of Posted Bids

Round\Version Display: Display Round and Version

Sealed Event

Display Bid Factor Weightings

Factor Event Score Into: Total Score

Start Price: Do Not Display

Header Weighting:

Create an Event

### Event Settings and Options

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Create PDF on Event Post

Allow Bidder XML Downloads

Bid Required On All Lines

Multiple Bids Allowed

Allow Edit of Posted Bids

Do Not Use Best Bids on New Rounds

Display Bid Factor Ideal Value

Display Bid Factor Best/Worst

Round\Version Display: Display Round and Version

Sealed Event

Display Bid Factor Weightings

Factor Event Score Into: Total Score

Start Price: Do Not Display

Header Weighting:

Line Factor Weighting:

Bidders May Create Line Groups

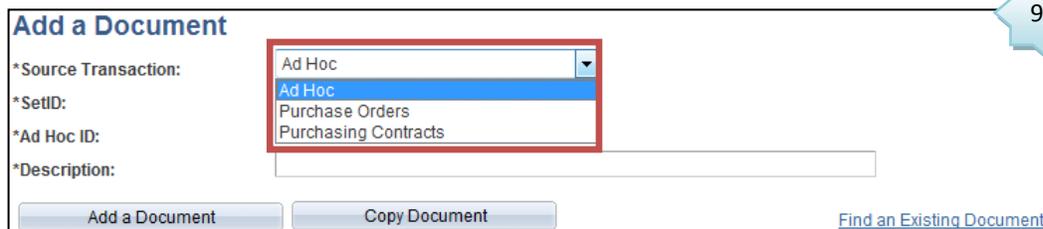
Allow Price Breaks with Groups

The Event Settings and Options page now includes options for the new functionality. Below are the new settings available in Event Settings and Options:

- Create PDF on Event Post – this creates a PDF copy of the Event Details (leave this selected)
- Do Not Use Best Bids on New Rounds – this functionality is not currently being utilized (leave this deselected)
- Display Bid Factor Ideal Value – this will display an ideal response (leave this selected ONLY if this functionality is being used)
- Display Bid Factor Best/Worst – this functionality is not currently being utilized (deselect this option)
- Bidders May Create Line Groups – this functionality is not currently being utilized (leave this deselected)
- Allow Price Breaks with Groups – this functionality is not currently being utilized (leave this deselected)

## Terms and Conditions

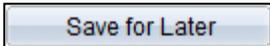
There is a new Source Transaction option on the Add a Document screen, titled Purchase Orders. This option should **NOT** be used. The Source Transaction **Ad Hoc** should still be selected when creating Terms and Conditions. Also, the **Description** must now be included on the Add a Document screen instead of the Document Management screen.

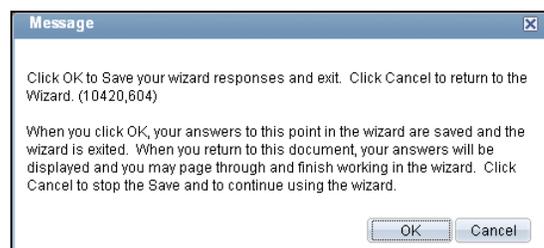


The screenshot shows the 'Add a Document' form. The 'Source Transaction' dropdown menu is highlighted with a red box and a callout box labeled '9.1'. The dropdown menu is open, showing the following options: Ad Hoc (selected), Purchase Orders, and Purchasing Contracts. Below the dropdown menu are fields for '\*SetID:', '\*Ad Hoc ID:', and '\*Description:'. At the bottom of the form are three buttons: 'Add a Document', 'Copy Document', and 'Find an Existing Document'.

## Saving Terms and Conditions

Terms and Conditions now has a feature that allows you to save your progress and continue later. Follow the steps below to save Terms and Conditions.

1. Click on .
2. Click **OK** on the pop-up message. This will return you to the Create Document screen. You are now able to navigate away without it being necessary to save anything.





## Document Creation

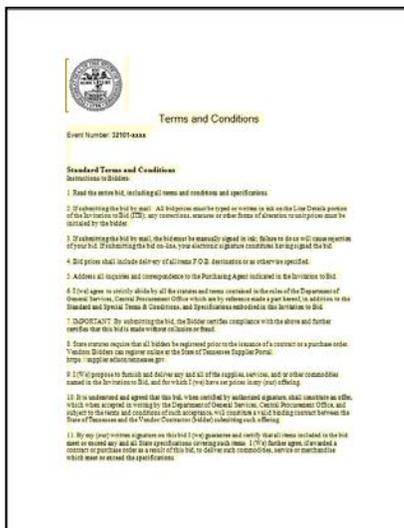
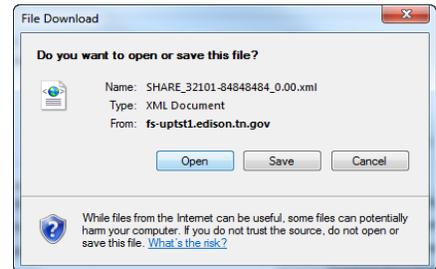
11. From the Document Management screen, click on **View Document**.

**HINT**

*If using Internet Explorer hold down the CTRL key before clicking View Document and Open to avoid receiving pop-up blockers.*

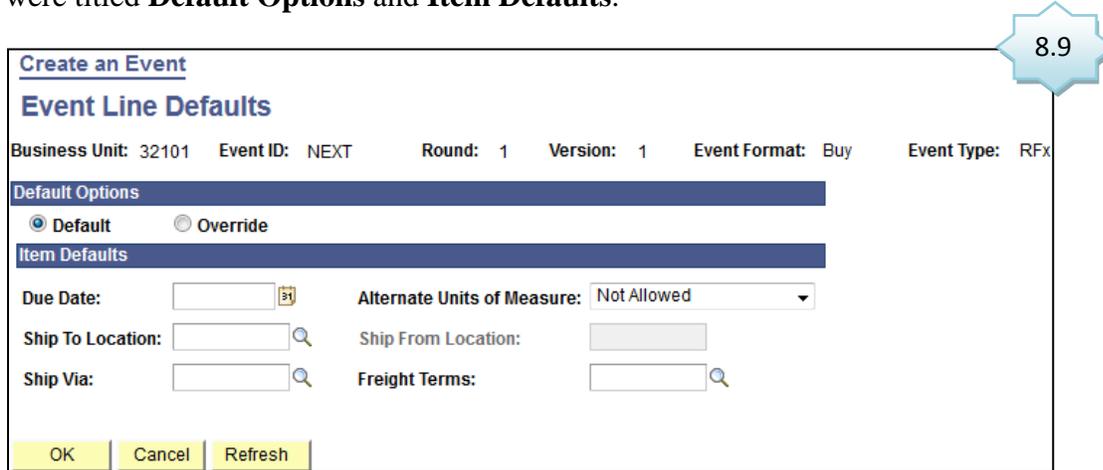
The screenshot shows the 'Document Management' interface for document ID 32101. It displays metadata such as 'Description: 32101', 'Administrator: Alyssa Cave', 'Begin Date: 03/19/2014', and 'Status: Draft'. Below the metadata are three columns of buttons: 'View and Edit Options' (View Document, Edit Document, Add Attachments/Related Documents, Document Modification Summary, Document Version History), 'Review and Approval' (Route Internally, Preview Approval, Submit for Approval, Approval Details, Internal Contacts/Signers, External Contacts/Signers, Document View Access), and 'Other Document Actions' (Send to Contacts, Refresh Document, Recreate Document, Compare Documents, Deactivate Document, Generation Log).

12. Click **Open** to populate the Terms and Conditions. It will no longer be necessary to convert Terms and Conditions to a Word Document. They will now automatically convert. The file will no longer need to be converted to be read; it will automatically save as the file type Word 2003 XML Document. The creator of the Terms and Conditions must manually change the file type if another file type is needed.



## Event Line Defaults

The Event Line Defaults screen was previously limited in functionality. The headers previously were titled **Default Options** and **Item Defaults**.



8.9

Create an Event

### Event Line Defaults

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

**Default Options**

Default  Override

**Item Defaults**

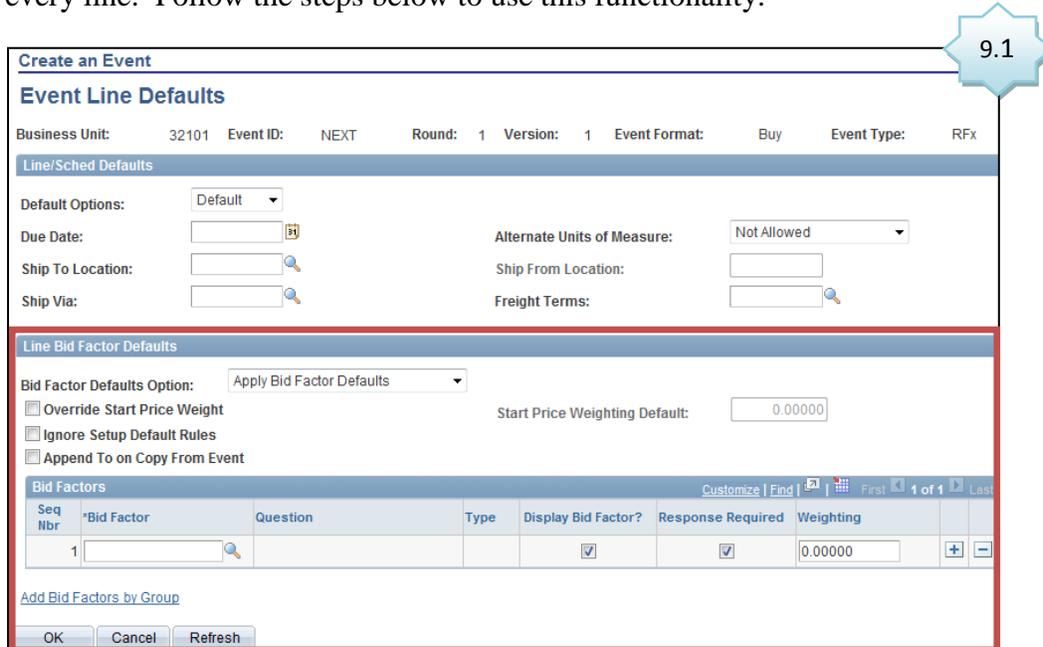
Due Date:   Alternate Units of Measure: Not Allowed

Ship To Location:   Ship From Location:

Ship Via:   Freight Terms:

OK Cancel Refresh

By using the Line Bid Factor Defaults, the solicitation coordinator can now apply a Bid Factor to every line. Follow the steps below to use this functionality.



9.1

Create an Event

### Event Line Defaults

Business Unit: 32101 Event ID: NEXT Round: 1 Version: 1 Event Format: Buy Event Type: RFX

**Line/Sched Defaults**

Default Options: Default

Due Date:   Alternate Units of Measure: Not Allowed

Ship To Location:   Ship From Location:

Ship Via:   Freight Terms:

**Line Bid Factor Defaults**

Bid Factor Defaults Option: Apply Bid Factor Defaults

Override Start Price Weight Start Price Weighting Default: 0.00000

Ignore Setup Default Rules

Append To on Copy From Event

**Bid Factors**

Seq Nbr	*Bid Factor	Question	Type	Display Bid Factor?	Response Required	Weighting		
1	<input type="text"/> <input type="button" value="Q"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00000	<input type="button" value="+"/>	<input type="button" value="-"/>

Add Bid Factors by Group

OK Cancel Refresh

1. Click on the [Item Line Defaults](#) link to access the Event Line Defaults screen.
2. Click on the Bid Factor Defaults Option drop-down menu and select **Apply Bid Factor Defaults**.

Seq Nbr	*Bid Factor	Question	Type	Display Bid Factor?	Response Required	Weighting
1				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.00000

- To add a Bid Factor click on the Lookup icon  next to the empty Bid Factor field.
- Select the **Bid Factor Code** that is needed for each line. The settings for the bid factor can be controlled from the line. Click the plus icon  to add more rows.
- Click  to return to the Event Summary screen.

**Look Up Bid Factor**

SetID:

Bid Factor Code: begins with

Bid Factor Type: =

Description: begins with

**Search Results**

Bid Factor Code	Bid Factor Type	Description
AP-CAT_PERCENT_BID	Text	Percent Bid from Catalog
BID_OFFER_EXPIRE	Numeric	Bid Offer Expiration

**HINT** To confirm the Line Bid Factors click on the **Bid Factor** link on the line under the **Advanced Definition** tab.

Line	Item ID	Description	Item SetID	Belongs to or Contains	Details	Bid Factors	Constraints
1	1000112857	Laboratory Equipment, Scientific/Medical GENERIC ASSET	SHARE	-	<a href="#">Details</a>	<a href="#">Bid Factors</a>	No

## Bid Factors

The following Bid Factors will now automatically populate: VNDR RSPNS 01, VNDR RSPNS 02, VNDR RSPNS 03, VNDR RSPNS 04, BID OFFER EXPIRE, REVENUE REQUIRE, and DIVERSITY FORM. Confirm that these bid factors have defaulted for every solicitation.

**Modify an Event**

**Event Bid Factors**

Event ID: 000007784 Bid Factor Weighting Total: 0.00000

Event Name: test Remaining Bid Factor Weight: 100.00000

Seq Nbr	*Bid Factor	Type	Yes/No	Weighting
1	DGS_SIGNATURE_REQ	Yes/No		0.00000

Question: I (we) agree to strictly abide by all the statutes and terms contained in the rules of the Department of General Services, Central Procurement Office, which are by reference

Display Bid Factor?

Bid Factor Response Required

Ideal Response Required

Include on Contract

Yes/No:  Yes  No

Select for deletion

[Add Clauses To Bid Factor](#)

[Add Bid Factors by Group](#) [Select Bid Factors](#)

Bid Factor Weighting Total: 0.00000 Remaining Bid Factor Weight: 100.00000

9.1

## Line Grouping

As users become more familiar with the Edison 9.1 upgrade, they will see multiple opportunities for the solicitation coordinator to configure an Event with groups. **THIS FUNCTIONALITY SHOULD NOT BE USED.**

### Requisition Lines to Copy

**Requisition Lines to Copy**

[Select All](#)     [Deselect All](#)

Select Lines				
Sel	Item SetID	Item	Description	Quantity
<input type="checkbox"/>	SHARE		DPA repair parts, labor and modifications to E.R.F. equipment	393460.0000

**Create Line Group**

### Event Settings and Options

**Modify an Event**

**Event Settings and Options**

Business Unit: 32101    Event ID: 000007801    Round: 1    Version: 1    Event Format: Buy    Event Type: RFx

Create PDF on Event Post    Round/Version Display: Display Round and Version  
 Allow Bidder XML Downloads     Sealed Event  
 Bid Required On All Lines     Display Bid Factor Weightings  
 Multiple Bids Allowed  
 Allow Edit of Posted Bids  
 Do Not Use Best Bids on New Rounds  
 Display Bid Factor Ideal Value  
 Display Bid Factor Best/Worst

Factor Event Score Into: Total Score    Start Price: Do Not Display

Header Weighting:

Line Factor Weighting:

Bidders May Create Line Groups  
 Allow Price Breaks with Groups

[Associated Categories](#)

### Line Items

Copy From: Requisition        Filtered View: All Lines and Groups

**Line Items**    [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Basic Definition    Advanced Definition

Line	Item ID	Description	Category	*UOM	*Qty	Start Price	Ext. Amount	Weighting
<input type="checkbox"/> 1		test	120-63	EA	100.0000	100.0000	\$10,000.00	0.00000
<input type="checkbox"/> 2		test2	120-63	EA	50.0000	50.0000	\$2,500.00	0.00000

Event Total: 12500.0000 USD    Line Weighting Total: 0 %    Remaining Weight: 100 %

Add Selected Lines to Group:

## Invite Bidders

When clicking on the [Search for Bidders](#) link on the Invite Bidders screen the user will now get the following message before entering the Bidder Search screen. Click **OK** or **Cancel** to continue.

Bidder Type defaults to Vendor, please remember to select the correct option if Vendor is not your Bidder Type

Outlined below is additional functionality that has been added to the Invite Bidders screen.

### Bidder Search

Search Criteria

Bidder Type: 
 State: 
 Type:

Name: 
 City: 
 SIC Type:

ID: 
 Country: 
 SIC Code:

Contact: 
 Postal: 
 Item ID:

Group ID:

Group Name:

Optional Organization Criteria

Results Option: 
 Type:

Search Results

Bidder ID	Location	Bidder Company	Invite
1 0000000496	MAIN	Brunswick Corp	<input type="checkbox"/>
2 0000000521	MAIN	Safety Systems Corp	<input type="checkbox"/>

When searching for bidders/vendors, the option now exists to display various results options. The options from the **Results Option** drop-down menu must be selected before clicking

. Below is a description of each option.

- Display All Contacts – this will display the Bidder ID, Location, Name, and Bidder Company
- Display Bidder/Company Id Only – this will display the Bidder ID, Location, and Bidder Company
- Display Contacts of Type – this option will display the Bidder ID, Location, Name, and Bidder Company by contract type.

**HINT** *The Display Contacts of Type search option can be used to filter by the type of contact.*

Type:

Maximum Rows:

- Accounts Payable
- Billing Contact
- Broker
- Commercial Paper Contact
- Contract Collaborator
- Executive Management
- External Contact
- General**
- Internal Corporate Contact
- Investment Pool Contact
- Line of Credit Contact
- Sales Contact
- Service Contact
- Warehousing/Shipping Contact

## Deleting Ineligible Bidders

When clicking , if one of the Bidders or Vendors on the Bidder Invitation List is no longer active in the system, you will receive the message to the right.

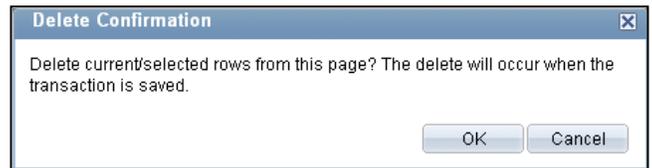


Follow the steps below to remove the Bidder or Vendor from the Invitation List.

1. Click  to return to the Invite Bidders screen.
2. Click the  link to view a complete list of Bidders and Vendors on the Bidder Invitation List. Identify the Bidder that was identified as no longer eligible in the message.

1		0000000496	Vendor	MAIN	Brunswick Corp	Email		
---	---	------------	--------	------	----------------	-------	---	---

3. Click on the minus icon  to remove the Bidder or Vendor that is no longer eligible.
4. Click **OK** to delete the selected row. To



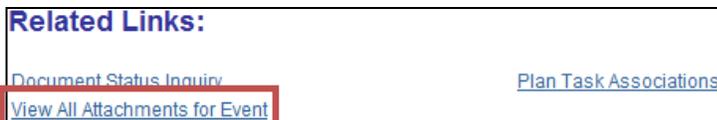
confirm the deletion click .

### **HINT**

*This message will not be received for undeliverable email, this is only for vendors that have been deemed ineligible.*

## View All Attachments for an Event

Additional functionality has been added to the Related Links section of the Event Summary screen. This additional functionality allows the solicitation coordinator to view all attachments for the event. Follow the steps below to utilize this functionality.



1. Click on the **View All Attachments for Event** link to access the Event Files screen.

**Modify an Event**

**Event Files**

You can view the attachment by selecting the magnifying glass icon. No additions or changes can be made from this page.

View	Description	Filename
	Terms and Conditions	SHARE_TC_0.00.docx

**No other file attachments exist for this event.**

2. From the Event Files screen, confirm that all necessary attachments have been included.
3. To view the attached documentation, click on the view icon



*It may be necessary to hold down the CTRL key while clicking on the view icon. Once the File Download box has populated, choose to either Open or Save the File.*

4. Click on the icon to return to the Event Summary screen.

## Award an Event

Previously the screen that was used to analyze bids and award an event was the Analyze Events screen.

**Analyze Events**

Analyze Total [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 32943 Event ID: 0000001573 Round: 1 Version: 1 Event Name: GALVANIZED SHEET METAL

Event Format: Buy Event Type: RFX Currency: USD End Date: 07/21/2010 11:59AM CDT Status: Pend Award Go To: ...

**Bid Analysis and Display Options**

Header Weighting: [ ] Sort Bids By: Total Event Score Sort Order: Descending [Analyze](#)

Display Options: View Factor Responses  Display Delta Responses  Display Disqualified Bids  Display Withdrawn Bidders

View Bid Actions:  All Bid Actions  Award  Counter  Disallow  Reject  <No Action>

**Analysis**

	<a href="#">J M Tull Metals Co</a>	<a href="#">East Tn Steel Sup Co, Inc</a>
Bidder Name	J M Tull Metals Co	East Tn Steel Sup Co, Inc
Event Version:	1	1
Bid Number:	1	1
Total Bid Amount:	210.5200	332.8900
Total Bid Cost:	210.52	332.89
Total Event Score:	56.8000	50.0000
Total Header Cost:	0.00	0.00
Total Header Score:	0.0000	0.0000

Bid Action: Award NA

Reject Reason Code: [ ]

Award by Percent: 100.000 [ ]

**Factors**

Weighting	UOM	Ideal

8.9

There have been alterations in functionality and changes in the location of screens. Follow the instructions below to award an Event.



The instructions below do not include analyzing responses, creating a bid analysis export, or adding award comments and justification. These instructions only outline changes in functionality.



### Analyze Total

Analyze Total Analyze Line

Business Unit: 32101	Event ID: 000007784	Round: 1	Version: 1	Event Name: test	Go To: <input type="text"/>
Event Format: Buy	Event Type: RFX	Currency: USD	End Date: 03/19/2014 3:34PM CDT	Status: Pending Award	<input type="text"/>

**Bid Analysis and Display Options**

**Analysis**

Bidder Name	Triton Boat Company
Event Version Responded To:	1
Bid Number:	1
Total Bid Amount:	36,000.0000
Total Bid Cost:	36,000.00
Total Event Score:	100.0000
Total Header Cost:	0.00
Total Header Score:	0.0000

Bid Action:

Reject Reason:

Award by Percent:

Hide Bid:

**Factors**

Weighting	UOM	Ideal
<small>I (we) agree to strictly abide by all the statutes and terms contained in the rules of the Department of General Services, Central Procurement Office, which are by reference made a part hereof, in addition to the special terms, conditions and specifications embodied in the invitation to bid. IMPORTANT: By Selecting YES, the bidder certifies compliance with the above and further certifies that this bid is made without collusion or fraud.</small>		
0.00000	Y	Y <input type="text"/>



On the new Analyze Total screen the Bid Factors will not automatically populate. Click the expand section arrow to the left of the Factors header section to reveal the responders answers to the Bid Factor questions.

Once the lowest responsive and responsible responder has been identified the award can be made.

1. From the Analysis header section, identify the correct bidder/vendor information and click on the **Bid Action** drop-down menu.
2. Select **Award**.
3. Enter 100 in the **Award by Percent** field.
4. Click Save.
5. Click on the **Go To** drop-down menu and select **Award Events**. A new window containing the **Award Details** screen will populate. This screen is used to post the award and it contains the following tabs: Award Details, Award Summary, and Review Constraints.

**Analysis**

Bidder Name	Triton Boat Company
Event Version Responded To:	1
Bid Number:	1
Total Bid Amount:	36,000.0000
Total Bid Cost:	36,000.00
Total Event Score:	100.0000
Total Header Cost:	0.00
Total Header Score:	0.0000

Bid Action:

Reject Reason:

Award by Percent:

Go To:

...

...

...Analyze Export

Associate Planning Task

**Award Events**

Create New Round

Document Status Inquiry

Event Attachments/Comments

Invite Collaborators

Review Optimization

**Award Details** First 1 of 1 Last

Bidder Name: Triton Boat Company Bidder Type: Vendor Buyer: alys0728001

Award Type: PO Contract Award Currency: Event USD Terms:

Award Number: Purchase Order PO Business Unit:  Total Award: 36,000.0000

Line	Item ID	Vndr/Item Rel	Item Description	Group ID	UOM	Award Quantity	Awarded Price	Extended Price
1		<input checked="" type="checkbox"/>	test		EA	12.0000	3,000.0000	36,000.0000

[Post Award](#)

6. Select the **Award Type**. The award choices are now limited to Purchase Orders and PO Contracts.
7. Enter the **PO Business Unit** and click [Save](#).
8. Click **Post Award**. This will populate the Contract Entry Screen or Purchase Order screen.

## Analyze Line

Previously each line was accessed by selecting the line from the Select Line drop-down menu. It was not necessary to navigate through multiple pages

**Analyze Events** 8.9

[Analyze Total](#) [Analyze Line](#) [Review Constraints](#) [Review Award Recommendation](#) [Award Summary](#) [Award Details](#)

Business Unit: 34301 Event ID: 0000007661 Round: 1 Version: 1 Event Name: Mobile Alternate Care Unit Beds

Event Format: Buy Event Type: Rfx Currency: USD End Date: 03/10/2014 2:00PM CDT Status: Pend Award Go To: ...

Select Line: 1 - 1000162850 - MOBILE ALTERNATE CARE UNIT, 20 B

Line Number: 1 - 1000162850 - MOBILE ALTERNATE CARE UNIT, 20 B UOM: EA Start Price: 100000.00000

Item ID: 1000162850 Item Description: MOBILE ALTERNATE CARE UNIT, 20 BED, DEPT. OF HEALTH, Weighting: 100.00000

While all lines will now be accessible at once from the Analyze Line screen, the upgrade will require the user to click into the Analyze link to perform an analysis of each line.

**Analyze Line** 9.1

[Analyze Total](#) [Analyze Line](#)

Business Unit: 32101 Event ID: 0000007832 Round: 1 Version: 1 Event Name: test

Event Format: Buy Event Type: Rfx Currency: USD End Date: 03/27/2014 2:17PM CDT Status: Pending Award Go To: ...

Line	Item ID	Description	Category	UOM	Start Price	Requested Qty	Qty Awarded	Weighting	Line Status	Analyze
1		outboard motor	120-63	EA	3,000.00000	12.0000	0.0000	100.00000	Open	<a href="#">Analyze</a>



8.9

**Purchase Order**

Enter any information you have and click Search. Leave fields blank for a list of all values

[Find an Existing Value](#) [Add a New Value](#)

Limit the number of results to (up to 300):

**Business Unit:** =

**PO ID:** begins with

**Purchase Order Date:** =

**PO Status:** =

**Short Vendor Name:** begins with

**Vendor ID:** begins with

**Vendor Name:** begins with

**Buyer:** begins with

**Buyer Name:** begins with

**PO Type:** =

**Purchase Order Reference:** begins with

**Hold From Further Processing**

Case Sensitive

[Basic Search](#)

- Approved
- Canceled
- Complete
- Dispatched
- Initial
- Open
- Pending Approval/Approved
- Pending Cancel

The new options for the PO Status search include Denied and Line Denied.

9.1

**Purchase Order**

Enter any information you have and click Search. Leave fields blank for a list of all values

[Find an Existing Value](#) [Add a New Value](#)

Limit the number of results to (up to 300):

**Business Unit:** =

**PO ID:** begins with

**Purchase Order Date:** =

**PO Status:** =

**Short Vendor Name:** begins with

**Vendor ID:** begins with

**Vendor Name:** begins with

**Buyer:** begins with

**Buyer Name:** begins with

**PO Type:** =

**Purchase Order Reference:** begins with

**Hold From Further Processing**

Case Sensitive

[Basic Search](#)

- Approved
- Canceled
- Complete
- Denied
- Dispatched
- Initial
- Line Denied
- Open
- Pending Approval/Approved
- Pending Cancel

## Maintain Purchase Order

Previously there were no fields on the Maintain Purchase Order screen for Activity Summary or Encumbrance Balance.

8.9

**Maintain Purchase Order**

**Purchase Order**

Unit: 31701 PO Status: Dispatched ▲ ✖  
 PO ID: 0000132929 Budget Status: Valid 📄 📄  
 Copy From:   Hold From Further Processing

**Header**

\*PO Date: 05/17/2012 B Vendor Search [Sub Contractor](#) Doc Tol Status: Valid  
 \*Vendor: PRESIDIO N-001 [Vendor Details](#) [Insur/Bond/Cert](#) Backorder Status: None [Create BackOrder](#)  
 \*Vendor ID: 0000132929 Presidio Networked Solutions Inc Receipt Status: Partial  
 \*Buyer: michd0809001 Michael D Robinson \*Dispatch Method: Print   
 PO Reference: OIR11-12-0217

**Amount Summary**

Merchandise: 515029.75  
 Freight/Tax/Misc.: 0.00   
 Total Amount: 515029.75 USD

**Add Items From**   **Select Lines To Display** Line:  To:

Line	Item	Description	PO Qty	*UOM	Category	Price	Amount	Status
1	8000090145	ON-SITE ENGINEERING SUPPORT	1002.0000	UN	920-47	100.00000	100,200.00	Active

There have been two new fields added to the Maintain Purchase Order screen. These fields are Encumbrance Balance and Activity Summary. The Encumbrance Balance field provides the amount that has been already encumbered by the Purchase Order.

9.1

**Maintain Purchase Order**

**Purchase Order**

Business Unit: 31701 PO Status: Dispatched ▲ 📄 ✖  
 PO ID: 0000023652 Budget Status: Valid 📄  
 Copy From:   Hold From Further Processing

**Header**

\*PO Date: 02/14/2014 B Vendor Search [Sub Contractor](#) Doc Tol Status: Valid  
 \*Vendor: WATSONS MA-001 [Vendor Details](#) [Insur/Bond/Cert](#) Backorder Status: Not Backordered [Create BackOrder](#)  
 \*Vendor ID: 0000093603 Watsons Marine Receipt Status: Received  
 \*Buyer: donan0506001 Donald N Pierce \*Dispatch Method: Print   
 PO Reference:

**Amount Summary**

Merchandise: 45,280.00  
 Freight/Tax/Misc.: 0.00   
 Total Amount: 45,280.00 USD  
**Encumbrance Balance: 32,640.00 USD**

**Add Items From**    **Select Lines To Display** Line:  To:

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status
1	1000157633	Boat Motor, 225 Horsepower, with Prop	2.0000	EA	120-63	12,640.00000	25,280.00	Approved

The Activity Summary provides a summary of the activity on the Purchase Order.

**Activity Summary**

Business Unit: 32101 PO Status: Approved  
 Purchase Order: 0000035612 Vendor: M J Kellner Co Inc  
 Merchandise Amount: 186.70 USD  
 Merchandise Receipt: 0.00 USD  
 Merchandise Returned: 0.00 USD  
 Merchandise Invoice: 0.00 USD  
 Merchandise Matched: 0.00 USD

Lines Customize | Find | View All | First 1 of 1 Last

Details Receipt Invoice Matched RTV

Line	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency	Amount Only
1	1000040022	All Beef Meatballs Precooked (	CA	10.0000	186.700	USD	<input type="checkbox"/>

## Contract Tab

Previously the Contract tab on the line contained the following fields: Line, Line Details Icon, Item, Description, SetID, ContractID, Contract Line, Release, Milestone Line, GPO ID, GPO Contract, and Rebate ID.

Lines Customize | Find | View All | First 8.9

Details Ship To/Due Date Statuses Item Information Attributes BFG Contract Receiving Spending Authority

Line	Item	Description	SetID	Contract ID	Contract Line	Release	Milestone Line	GPO ID	GPO Contract	Rebate ID
1			SHARE			NEXT				

The Contract tab now contains the following additional fields: Contract Search icon, Contract Version (this will be used in the future), and Category Line (this functionality should not be used).

Lines Customize | Find | View All | First 9.1

Details Ship To/Due Date Statuses Item Information Attributes BFG Contract Receiving Spending Authority

Line	Item	Description	SetID	Contract ID	Contract Search	Contract Version	Contract Line	Category Line
1	1000040022	All Beef Meatballs	SHARE					

The Contract Search icon can be used to perform an advanced search for the Contract ID.

**Contract Search**

Search Criteria

SetID: SHARE Vendor SetID: SHARE  
 Contract ID: 0000000000000000000000000000 Vendor ID: 0000000540 M J Kellner Co Inc  
 Contract Process Option: Contract Process Option: Item SetID: SHARE  
 Description: Description: Item ID: 1000040022  
 Master Contract ID: Master Contract ID: Item Description: All Beef Meatballs Precooked (No Pork No Poultry No Soy Or Organ Meat Acceptable), Packed 160/ 1 Oz Portions 390-49  
 Contract Reference Type: Contract Reference Type: Category: Category:  
 PO Date: 04/08/2014 Corporate Contract: Corporate Contract:

Search Clear

## Receiving Tab

Previously the receiving tab on the line contained the following fields: Line, Line Details icon, Item, Description, Receiving Required, Inspection Required, and Inspect ID.

Line	Item	Description	*Receiving Required	Inspection Required	Inspect ID
1		S1B716 replace wipers	Required	<input type="checkbox"/>	

8.9

This tab now has a Close Short checkbox. ***This functionality is not currently being used.***

Line	Item	Description	*Receiving Required	Inspection Required	Inspect ID	Close Short
1	1000040022	All Beef Meatballs	Required	<input type="checkbox"/>		<input type="checkbox"/>

9.1

## Saving a Contract

In order to save a Contract all the information that is needed is a line and a Vendor ID. It will be necessary to save a contract before the Contract Type drop-down menu will populate.

## Contract Search Options

Additional search options have been added to the Contract Entry screen under the Find an Existing Value tab. The user is now able to search Contract Version, Version Status and Vendor Name.

8.9

- Contract Version – This is the Version of the contract that is being searched for (This will be applicable with future functionality).
- Version Status – The status will either be Current, Draft or History (This will be applicable with future functionality).
- Vendor Name – This feature allows the user to search by the entire name of the Vendor.

**Contract Entry** 9.1

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value   Add a New Value

Limit the number of results to (up to 300):

SetID: =

Contract ID: begins with

**Contract Version:** =

**Version Status:** =

Contract Process Option: =

Short Vendor Name: begins with

**Vendor Name:** begins with

Master Contract ID: begins with

Case Sensitive

Search   Clear   Basic Search   Save Search Criteria

**HINT**

In order to make the search case sensitive check the  **Case Sensitive** checkbox before clicking **Search**.

## Order Contract Options

The previous functionality did not allow the user to indicate in the contract if the Vendor or the pricing was not already determined (this functionality is only applicable for Delegated Purchase Authority Contracts).

**Order Contract Options** 8.9

Allow Multicurrency PO    Allow Open Item Reference    Must Use Contract Rate Date

Corporate Contract    Adjust Vendor Pricing First   Rate Date: 04/07/2014

Lock Chartfields    Price Can Be Changed on Order

[PO Defaults](#)   [PO Open Item Pricing](#)

The upgraded Order Contract Options now has an Auto Default checkbox. This checkbox should always remain checked unless a Delegated Purchase Authority contract is being created.

**Order Contract Options** 9.1

Allow Multicurrency PO    Allow Open Item Reference    Must Use Contract Rate Date   Rate Date: 04/07/2014

Corporate Contract    Adjust Vendor Pricing First    **Auto Default**

Lock Chartfields    Price Can Be Changed on Order

[PO Defaults](#)   [Add Open Item Price Adjustments](#)   [Price Adjustment Template](#)

## Contract Categories

**This functionality is not currently being used. To hide this functionality click on the collapse section arrow.**

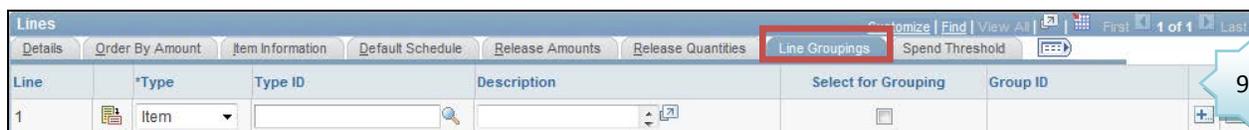


## Contract Line Tabs

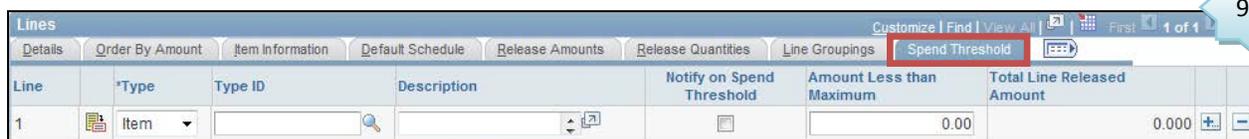
The contract line tabs allow the contract creator to control the usage of the contract line by line. The previous functionality included: details, order by amount, item information, default schedule, release amounts and release quantities.



**The Line Groupings tab should NOT be used.**



The spend threshold feature allows users to be notified when a specific line has reached the amount less than the maximum that was indicated by the contract administrator on each line.

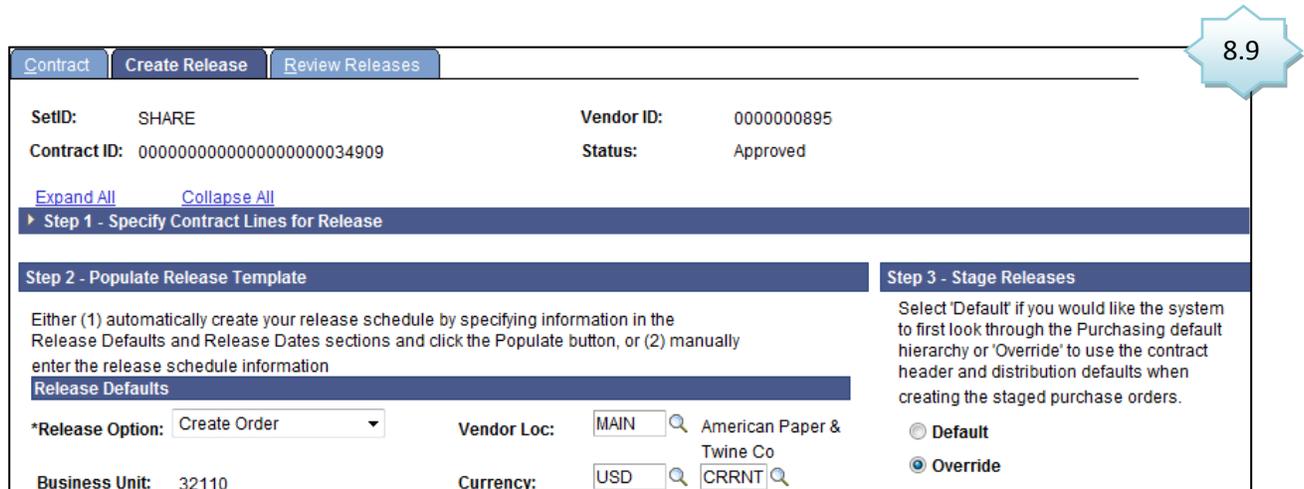


### HINT

*This feature may be applicable when monitoring fiscal year spend.*

## Contract Release

The navigation for the Contract Release function has changed. Contract Releases were previously located under a tab at the top of the Contract Entry screen.



8.9

Contract | **Create Release** | Review Releases

SetID: SHARE Vendor ID: 0000000895  
Contract ID: 0000000000000000000000000000000034909 Status: Approved

[Expand All](#) [Collapse All](#)

▶ Step 1 - Specify Contract Lines for Release

**Step 2 - Populate Release Template**

Either (1) automatically create your release schedule by specifying information in the Release Defaults and Release Dates sections and click the Populate button, or (2) manually enter the release schedule information

**Release Defaults**

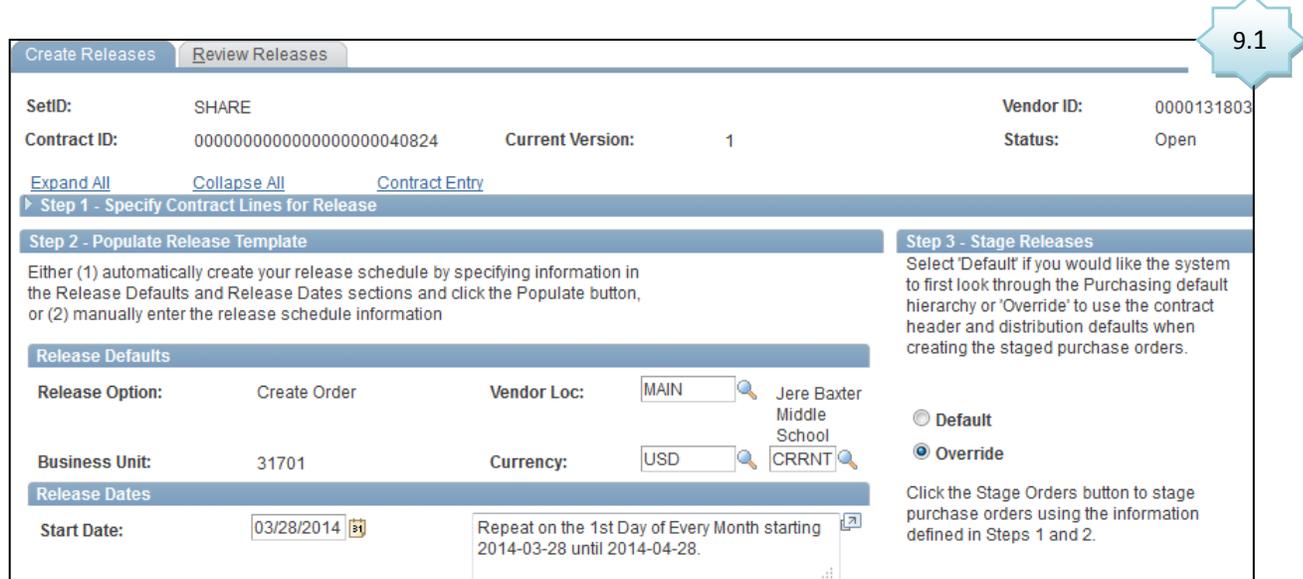
\*Release Option: Create Order Vendor Loc: MAIN American Paper & Twine Co  
Business Unit: 32110 Currency: USD CRRNT

**Step 3 - Stage Releases**

Select 'Default' if you would like the system to first look through the Purchasing default hierarchy or 'Override' to use the contract header and distribution defaults when creating the staged purchase orders.

Default  
 Override

Contract releases can now be accessed by clicking on the [Contract Releases](#) link in the Header section of the contract.



9.1

Create Releases | **Review Releases**

SetID: SHARE Vendor ID: 0000131803  
Contract ID: 0000000000000000000000000000000040824 Current Version: 1 Status: Open

[Expand All](#) [Collapse All](#) [Contract Entry](#)

▶ Step 1 - Specify Contract Lines for Release

**Step 2 - Populate Release Template**

Either (1) automatically create your release schedule by specifying information in the Release Defaults and Release Dates sections and click the Populate button, or (2) manually enter the release schedule information

**Release Defaults**

Release Option: Create Order Vendor Loc: MAIN Jere Baxter Middle School  
Business Unit: 31701 Currency: USD CRRNT

**Release Dates**

Start Date: 03/28/2014 Repeat on the 1st Day of Every Month starting 2014-03-28 until 2014-04-28.

**Step 3 - Stage Releases**

Select 'Default' if you would like the system to first look through the Purchasing default hierarchy or 'Override' to use the contract header and distribution defaults when creating the staged purchase orders.

Default  
 Override

Click the Stage Orders button to stage purchase orders using the information defined in Steps 1 and 2.

## Additional Contract Info

Previously the Additional Contract Info link was visible on the Contract Entry screen without having to select a Contract Type. The link also did not populate a new window.

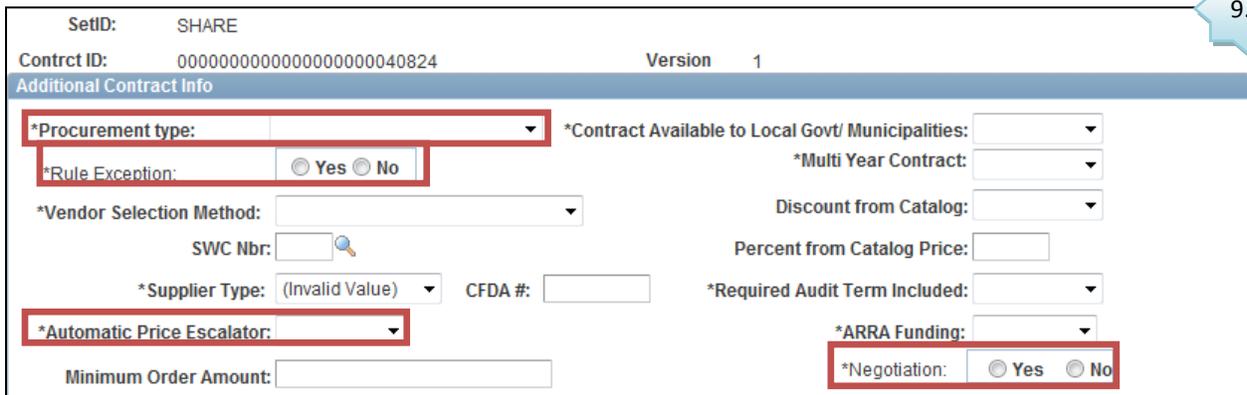


8.9

**Additional Contract Info**

\*Sole Source Procurement: (Invalid Val) ▾ \*Contract Available to Local Govt/ Municipalities: (Invalid Valt ▾  
\*Proprietary Procurement: (Invalid Valt ▾ \*Multi Year Contract: (Invalid Valt ▾  
\*Vendor Selection Method: (Invalid Value) ▾ Discount from Catalog: ▾  
SWC Nbr:   Percent from Catalog Price:   
\*Supplier Type: (Invalid Value) ▾ \*Required Audit Term Included: (Invalid Valt ▾  
CFDA #:  \*ARRA Funding: (Invalid Val ▾  
Minimum Order Amount:  Additional Reference #:

The Contract Type must now be chosen before the Additional Contract Info link will appear. Once the Contract Type has been selected a window will populate with the Additional Contract Info screen. The Additional Contract Info screen can be accessed again at any time by clicking on the [Additional Contract Info](#) link.



9.1

SetID: SHARE  
Contract ID: 0000000000000000000040824 Version 1

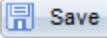
**Additional Contract Info**

\*Procurement type: ▾ \*Contract Available to Local Govt/ Municipalities: ▾  
\*Rule Exception:  Yes  No \*Multi Year Contract: ▾  
\*Vendor Selection Method: ▾ Discount from Catalog: ▾  
SWC Nbr:   Percent from Catalog Price:   
\*Supplier Type: (Invalid Value) ▾ CFDA #:  \*Required Audit Term Included: ▾  
\*Automatic Price Escalator: ▾ \*ARRA Funding: ▾  
Minimum Order Amount:  \*Negotiation:  Yes  No

Outlined below is an explanation of the fields contained in Additional Contract Info.

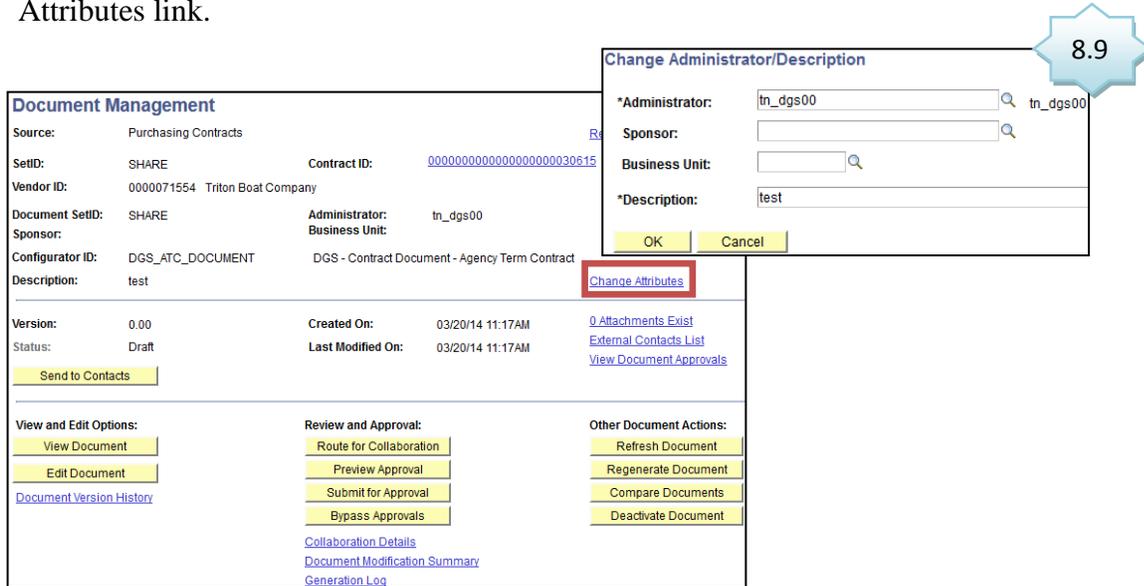
- Procurement Type – Indicate the competitive nature of the solicitation by selecting Sole Source, Proprietary, or Neither.
- Rule Exception – Indicate whether a Rule Exception Request was filed and approved to revise contract language explicitly required by service contracting rules.
- Automatic Price Escalator – This option allows for price escalation in the contract.
- Negotiation – This indicates whether the pricing or Terms and Conditions of the contract was reached through negotiation. (**Negotiation should only be done by the CPO.**)



Click the Save icon  and click the  close icon to exit the screen and return to the Contract Entry screen.

## Document Details

Previously the link to change the administrator of the contract document was called the Change Attributes link.



**Document Management**

Source: Purchasing Contracts

SetID: SHARE Contract ID: 0000000000000000000030615

Vendor ID: 0000071554 Triton Boat Company

Document SetID: SHARE Administrator: tn\_dgs00

Sponsor: Business Unit:

Configurator ID: DGS\_ATC\_DOCUMENT DGS - Contract Document - Agency Term Contract

Description: test

Version: 0.00 Created On: 03/20/14 11:17AM

Status: Draft Last Modified On: 03/20/14 11:17AM

[0 Attachments Exist](#)

[External Contacts List](#)

[View Document Approvals](#)

[Change Attributes](#)

**View and Edit Options:**

[View Document](#)

[Edit Document](#)

[Document Version History](#)

**Review and Approval:**

[Route for Collaboration](#)

[Preview Approval](#)

[Submit for Approval](#)

[Bypass Approvals](#)

[Collaboration Details](#)

[Document Modification Summary](#)

[Generation Log](#)

**Other Document Actions:**

[Refresh Document](#)

[Regenerate Document](#)

[Compare Documents](#)

[Deactivate Document](#)

**Change Administrator/Description**

\*Administrator: tn\_dgs00

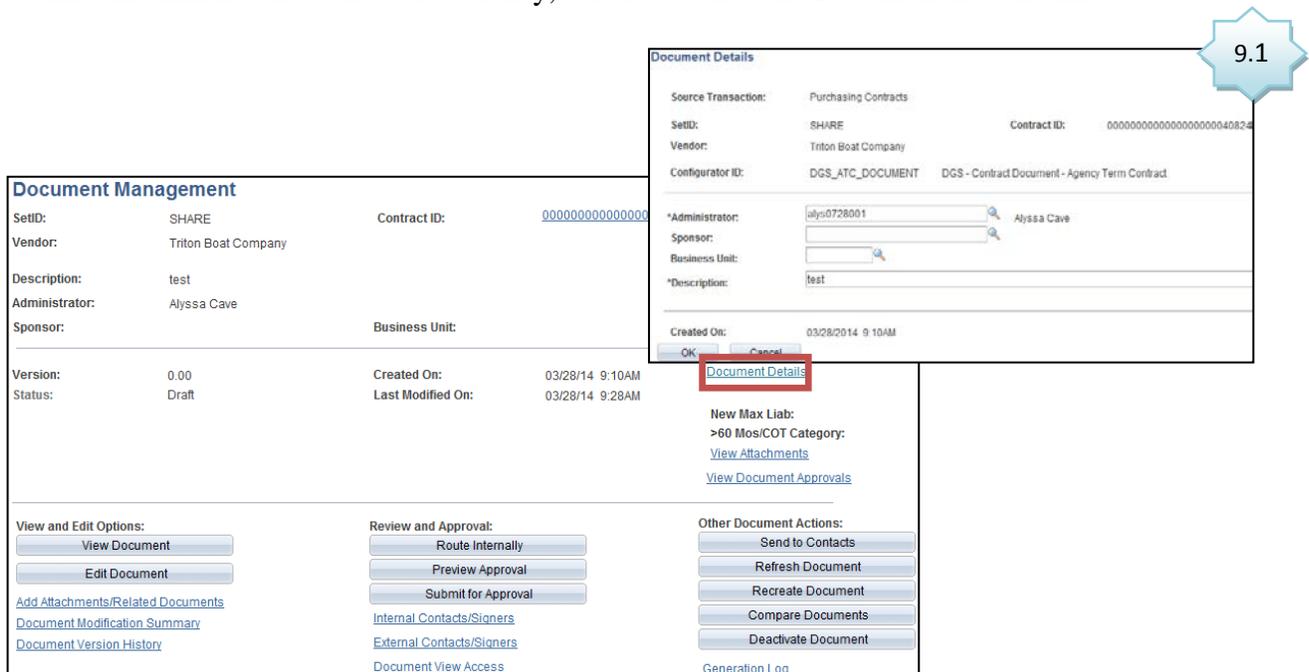
Sponsor:

Business Unit:

\*Description: test

OK Cancel

While this link has the same functionality, it is now called the Document Details link.



**Document Management**

SetID: SHARE Contract ID: 000000000000000000000000

Vendor: Triton Boat Company

Description: test

Administrator: Alyssa Cave

Sponsor: Business Unit:

Version: 0.00 Created On: 03/28/14 9:10AM

Status: Draft Last Modified On: 03/28/14 9:28AM

[Add Attachments/Related Documents](#)

[Document Modification Summary](#)

[Document Version History](#)

**View and Edit Options:**

[View Document](#)

[Edit Document](#)

[Document Modification Summary](#)

[Document Version History](#)

**Review and Approval:**

[Route Internally](#)

[Preview Approval](#)

[Submit for Approval](#)

[Internal Contacts/Signers](#)

[External Contacts/Signers](#)

[Document View Access](#)

**Other Document Actions:**

[Send to Contacts](#)

[Refresh Document](#)

[Recreate Document](#)

[Compare Documents](#)

[Deactivate Document](#)

[Generation Log](#)

**Document Details**

Source Transaction: Purchasing Contracts

SetID: SHARE Contract ID: 000000000000000000000040824

Vendor: Triton Boat Company

Configurator ID: DGS\_ATC\_DOCUMENT DGS - Contract Document - Agency Term Contract

\*Administrator: alysa0728001 Alyssa Cave

Sponsor:

Business Unit:

\*Description: test

Created On: 03/28/2014 9:10AM

OK Cancel

[Document Details](#)

**New Max Liab:**

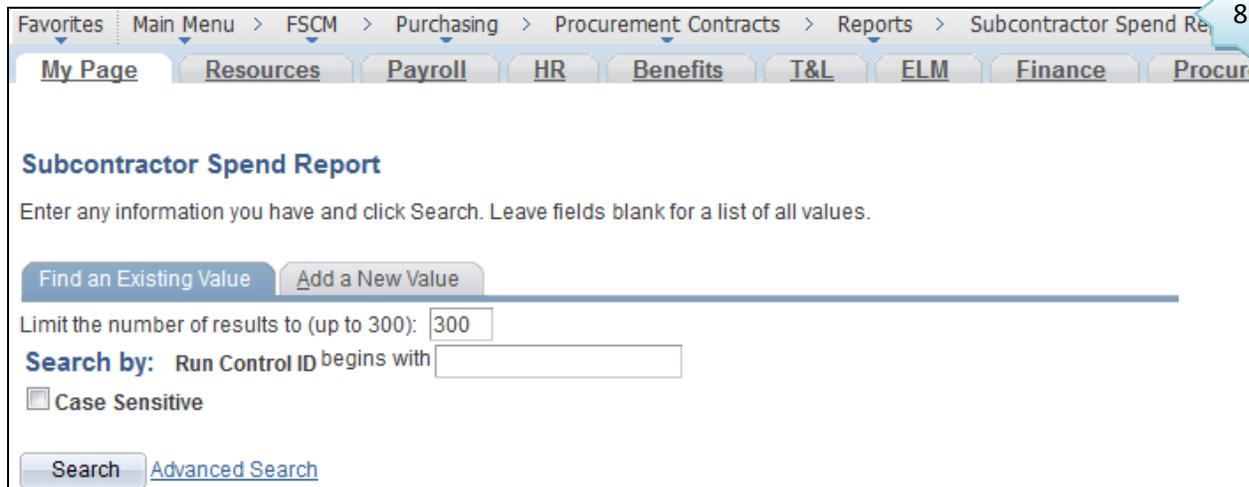
**>60 Mos/COT Category:**

[View Attachments](#)

[View Document Approvals](#)

## Contract Reports

Previously Contract Reports were only located in the Procurement Contracts section.



8.9

Favorites Main Menu > FSCM > Purchasing > Procurement Contracts > Reports > Subcontractor Spend Report

My Page Resources Payroll HR Benefits T&L ELM Finance Procurement

### Subcontractor Spend Report

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

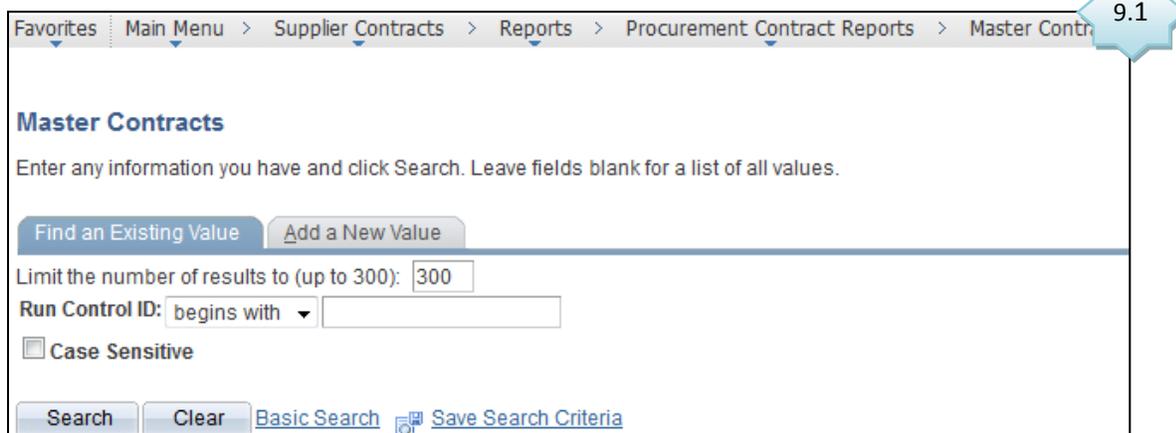
Limit the number of results to (up to 300): 300

**Search by:** Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

Contract Reports are now also located in the Supplier Contracts section.



9.1

Favorites Main Menu > Supplier Contracts > Reports > Procurement Contract Reports > Master Contracts

### Master Contracts

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Limit the number of results to (up to 300): 300

**Run Control ID:** begins with

Case Sensitive

Search Clear [Basic Search](#) [Save Search Criteria](#)

## FSCM User Monitor

The functionality of FSCM User Monitor is similar to that of FSCM Worklist, but the User Monitor feature may allow the user to search and approve more quickly. Follow the navigation below to access FSCM User Monitor.

1. Click **Main Menu**.
2. Click **Worklist**.
3. Click **FSCM User Monitor**.

**Monitor Approvals**

Search Criteria

Approval Process:  Definition ID:

Header Status:  Last Modified:

Current Role:  Approver Status:

Originator:  Requester:

Search

User Actions

No results found.

**Look Up**

**Look Up Approval Process**

Search by: Process ID begins with

Look Up Cancel Advanced Lookup

Search Results

View 100 First 1-7 of 7 Last

Process ID
Document
Event Approval
GL Journal Approval
Purchase Order
Requisition
TNGL Journal Approval
Voucher Approval



*The Process ID Document will search for any necessary contract approvals.*

4. To select an action click the look up icon  next to the **Approval Process** field.
5. Select the **Process ID** that you are approving.
6. Select a **Header Status** from the drop-down menu. Most often the status that users are seeking is **Pending**.
7. Click **Search**.
8. Select the items needing approval by clicking the check box next to each item.

Header Status:

Current Role:

Approver Status:

Originator:

Requester:

Search

- Approved
- Complete
- Denied
- Hard Deny
- Initial
- Not Active
- Pending**
- Pending Denial
- Suspended/Pending Der
- Terminated

User Actions

Approver's Oper ID:

Comment:

Approve Selected Deny Selected

Search Results

Select All Deselect All

Approval Process: ePro Requisition

Business Unit:  Requisition ID:

Requisition Date:  Requester:

Filter Toggle Header and Line

	Modified	Status	Business Unit	Requisition ID	Requisition Date	Requester
1	2014-01-07	Pending	31865	0000005672	2014-01-07	patrk0502001
2	2014-03-20	Pending	31865	0000005953	2014-03-20	trand0821001
3	2014-02-27	Pending	34301	0000087387	2014-02-27	ednat1013001
4	2014-02-24	Pending	33701	0000015759	2014-02-24	desiw1129001



*Use the Approval Process header section to filter the search results.*

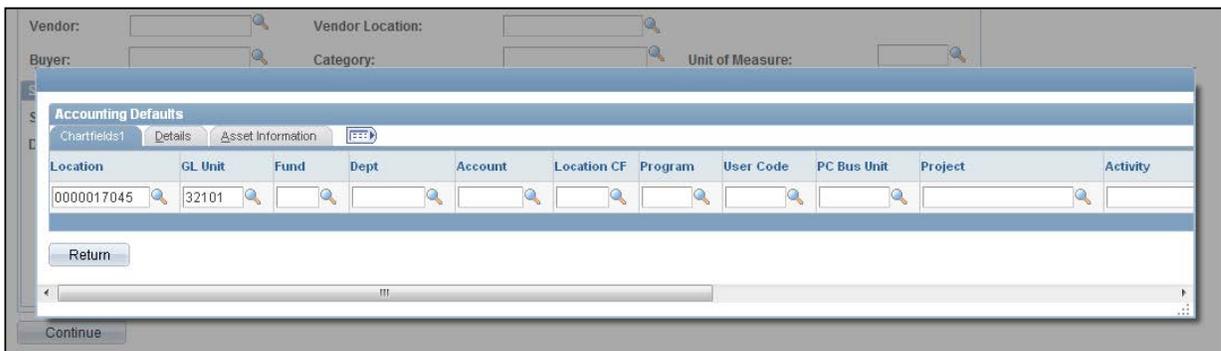
9. Click the on the **Approve Selected** button to approve all previously chosen documents.
10. A confirmation message will generate saying that the approval was successful. Click **OK**.



## Additional Functionality

Outlined below are additional pieces of functionality that will impact the user throughout all modules in Edison.

- Edison 9.1 will support up to Internet Explorer 8.
- Password changes will need to meet new criteria: Your new password must be at least eight characters in length and contain at least one number, one capital letter, one special character, such as ! @ # \$ % ^ & \* ( ) +, and at least one capital letter.
- Home Page Favorites and My Links will not be transferred into Edison 9.1. Users will have to re-create both of these once the upgrade takes place.
- Two new help icons are located throughout the 9.1 modules. The help icon , when clicked will provide information about the functionality on the page. Clicking on the zoom icon  will populate a pop-up with an expanded view of the field that is being worked in. Click the **Return** button to return to the previous screen.



## Upcoming Functionality

Additional functionality is forthcoming that will allow contract administrators to create and maintain multiple versions of a contract. This allows for contracts to be approved and active, while still having the ability modify draft versions.