



## Essential set up: iProcurement Preferences

Preferences enable you to set up and save specific purchasing defaults. This is a one off task, though you can change it later. Any field marked with a \* is a mandatory field. The information that you set up in Preferences will default in against the requisition when you are checking out.

1. Click on **Preferences** from the Shop page and the General Preferences screens displays.
2. Click **iProcurement Preferences** to display the screen below.

The screenshot shows the 'iProcurement Preferences' interface. At the top, there's a navigation bar with 'Shop', 'Requisitions', and 'Receiving'. A sidebar on the left lists 'General', 'Application', and 'iProcurement Preferences'. The main area is titled 'iProcurement Preferences' and contains several sections:

- Shopping:** Fields for 'My Favorite Store' (No Preference), 'Search Results Per Page' (10), 'Shopping Search Results Per Page' (7), and 'Sort Shopping Search Results By' (No Preference, Ascending). There are also radio buttons for 'Grid View' and 'Paragraph View', and a checkbox for 'Hide Thumbnail Images'.
- Favorite Lists:** A table with columns 'Favorite List Name', 'Primary', and 'Delete'. One row is visible with 'Personal Favorites' as the name and a green checkmark in the Primary column.
- Delivery:** Fields for 'Need By Days' (7), 'Need By Time' (00:00), 'Requester' (DARLOW, Mrs. Rebecca), 'Deliver-To Location' (LB), and 'Subinventory'. There's a checkbox for 'Deliver to subinventory'.
- Favourite Project:** Fields for 'Project', 'Task', 'Award', 'Expenditure Type', and 'Expenditure Org', each with a magnifying glass icon for search.

3. From this screen you can complete a couple of set ups in the **Delivery** section:

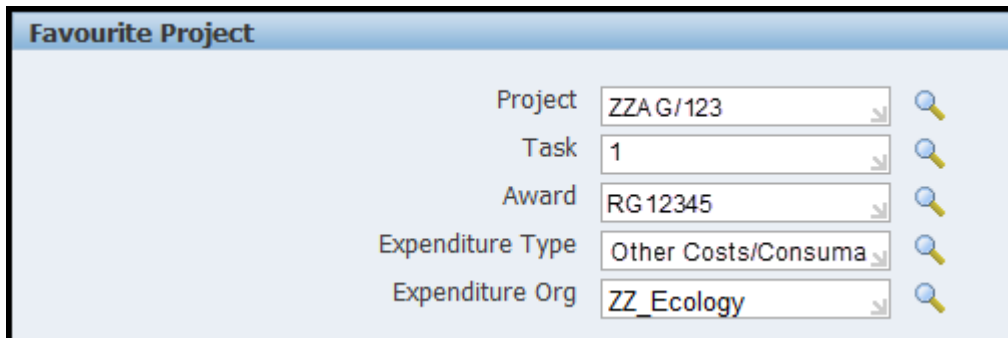
- **Need By Days:** Amend to what you would like to default in e.g. 1. If you don't then 7 days will be the system default.
- **Deliver-To Location:** Amend if applicable by either manually typing in the code or clicking on the Magnifying Glass to search for your departments location codes.

4. To set up a favourite project code:

- a) **Project** Type in your department or project code and **Tab** to list

all your department's project codes. Click on **Quick Select** for the relevant code.

- b) **Task** Click on the **Magnifying Glass** for the Task field, click **Go** and **Quick Select** the relevant task number.
- c) **Award** Click on the **Magnifying Glass** for the Award field, click **Go** and **Quick Select** the relevant award number.
- d) **Expenditure Type** Click on the **Magnifying Glass** for the Expenditure Type field and click **Go** to view all types or enter in a key word followed by the wildcard % to help search. Click **Go** and **Quick Select** the relevant expenditure type.
- e) **Expenditure Org** Type in your department code and **Tab** and **Quick Select** the relevant Organization.
- f) Click **Apply Changes** and all the fields should be completed as per example below. This code will take preference when checking out and you can amend this project code when checking out.



The screenshot shows a window titled "Favourite Project" with the following fields and values:

Field	Value	Action
Project	ZZAG/123	Magnifying Glass
Task	1	Magnifying Glass
Award	RG12345	Magnifying Glass
Expenditure Type	Other Costs/Consuma	Magnifying Glass
Expenditure Org	ZZ_Ecology	Magnifying Glass