How do I get to Workflow to take care of accepting Invoices?

Log on to the portal:

http://www.fbms.doi.net

logon: Active Directory username and password (i.e. jdoe@blm.gov hint: the way you logon in the morning).

Click on Home

Click on My Tasks

Click on Inbox

Click on Workflow

Double click the notification message.

If your message is: **Invoice XXXXXXXX is waiting for your approval.**

a. Approve
b. Reject
c. Cancel and Keep

OR if your message is **a SES is needed for PO LXXXXXX.**

You need to ensure that you first enter the SES and then indicate

a. Completed
b. Cancelled
c. Cancel and Keep

To set a substitute:

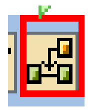
Click on Home

Click on My Tasks

Click on the Yellow Menu Button

Navigate to Settings, Workflow Settings, Maintain Substitute

Click on and Highlight your name

Click the  (Create Substitute Button)

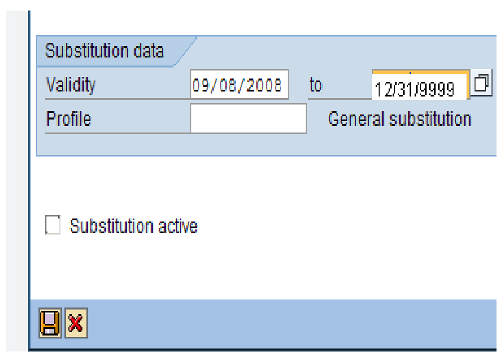
Search for Users Name that will be your proxy using the Wildcard (*) search.

Highlight the name of the Substitute and then Click ✓

In the New Dialog Box enter the dates you want the substitute active from

Check Substitution Active (See illustration in the next column)

Click the Save (Disc Icon) (See illustration in the next column)



To end your substitute early:

Click on the Yellow Menu Button

Navigate to Settings, Workflow Settings, End Substitute

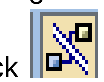
OR

If the Substitute is no longer appropriate:

Click on the Yellow Menu Button

Navigate to Settings, Workflow Settings, Maintain Substitute

Highlight the name of the Substitute and

Click  (Delete Substitute)

Remember: Each role is defined by your role mapping and a proxy receiving official/ COR *MUST* have the same role as you.

HELP

Contact your FBMS Acquisitions Super User OR

Put in a Help Desk Ticket through the portal by clicking Home and then Help Desk and then Submit a Request for Help Desk Support or through Lotus Notes at

FBMS_HelpDesk@nbc.gov

SERVICE ENTRY SHEETS (SES)

Quick Reference Guide For Receiving Officials/COR's

NOTE: Use this guide for receiving/accepting services/construction.

March 2009

As a Receiving Official/COR you play an important part in this process.

Some things to keep in mind . . .

- Without you, we cannot pay the vendors
- We can no longer accept over deliveries. Purchase orders and purchase requests must be modified **before** the receiving process can be finalized if there are over deliveries or the items come in lower than expected.

So, you may be asking yourself, how will I know what I need to do…

You will be utilizing a Service Entry Sheet and this quick reference guide to help you create one in a few easy steps.

This electronic process takes the place of previous processes such as: filling out 1510-10s or responding to the Contracting Officer verbally or in an email that you received the service/construction.

Creating a Service Entry Sheet Made Easy!

You as a Receiving Official/COR designated and role mapped in FBMS will receive a couple of kinds of notices requesting you to do something by your Lotus Notes Email.

The receiving process in FBMS is really a 2-step process:

Preparing the Service Entry Sheet

and

Approving the Invoice

The **first** type of notice you may receive indicates the following:

Invoice XXXXXXXX is waiting for your approval.

This type of a message indicates you have already completed the Goods Receipt and must now approve the invoice.

The **second** type of notice you may receive indicates the following:

A SES is needed for PO LXXXXXX.

This type of a message indicates that an invoice is waiting in Denver and you prepare a Service Entry Sheet (SES) and then you will be asked to approve the invoice as well.

How do I Create the Service Entry Sheet?

Log on to the portal:

http://www.fbms.doi.net

logon: Active Directory username and password (ie. jdoe@blm.gov hint: the way you logon in the morning).

Click on:

Acquisition (Top blue menu)

Receiving

Click on Create Service Entry Sheet

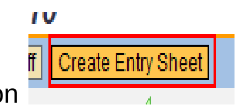
Click on the 

button

In the new dialog box enter the 

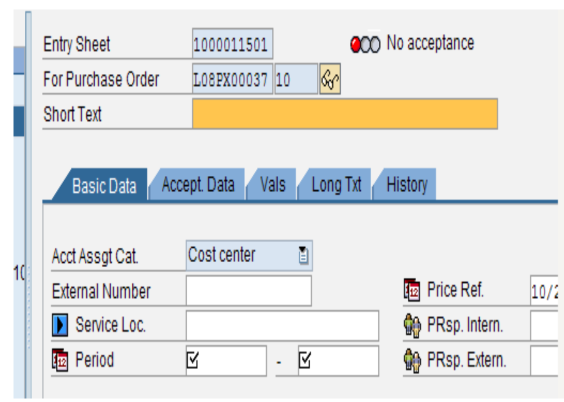
Purchase Order Number (First Box) and if applicable the Line Item (Second Box) for which the Service Entry Sheet is being created and click the ✓

NOTE: Be sure to check the Purchase Order for the correct line item number and verify which line you are receiving against.

Then click on 

Then you will enter:

Short Text, Service Location, and Period of Performance.



Next enter the following on line 10:

Short Text about the Service – Please be sure to enter the Invoice Number on this line.

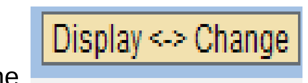
Quantity (1)

Unit of Measure (AU)

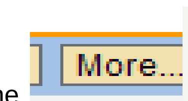
Gross Price of the Invoice

Click the Accept Data Tab and Enter the Invoice Number in the Reference Block

Click the Yellow Save Button (Black text at the top has changed from CREATE to DISPLAY). Click Yes when asked

Click the 

(Black text at the top has changed from DISPLAY to CHANGE).

Click the 

Click on Accept

Click the Yellow Save Button and answer Yes.

You now have a Green Light with Accepted next to it.