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 GR/SES is needed for PO LXXXXXX.**

You need to ensure that you <u>first</u> enter the GR and then indicate

a. Completed
b. Cancelled
c. Cancel and Keep

To set a substitute:

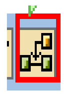
Click on Home

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)

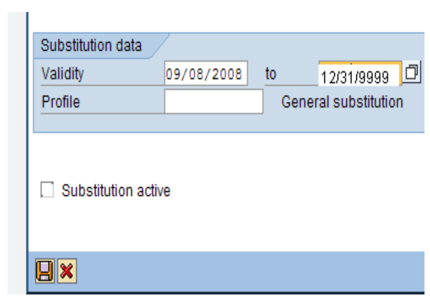
Search for Users Name that will be your proxy using the Wildcard (*) search.

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

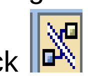
OR

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)

<u>Remember</u>: Each role is defined by your role mapping and a proxy receiving official/ COR *<u>MUST</u>* 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

GOODS RECEIPT (GR)

Quick Reference Guide for Receiving Officials/COR's

NOTE: Use this guide for receiving/accepting <u>goods, supplies, and equipment</u>.

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 Goods Receipt 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 receiving reports; filling out 1510-10s, or responding to the Contracting Officer verbally or in an email that you received the goods.

Creating a Goods Receipt Made Easy!

You as a Receiving Official/COR are designated and role mapped in FBMS to receive/accept goods, supplies or equipment. As a receiving official/COR you will receive a couple of kinds of notices requesting you to do something via your Lotus Notes Email.

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

Preparing the Goods Receipt

and

Approving the Invoice

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

A GR/SES is needed for PO LXXXXXX.

This type of a message indicates that an invoice is waiting in Denver and you need to prepare a Goods Receipt (GR). Once you have created a GR you will be asked to approve the invoice as well.

How do I Create the Goods Receipt?

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).

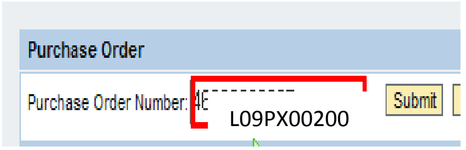
Click on:

Acquisition (Top blue menu)

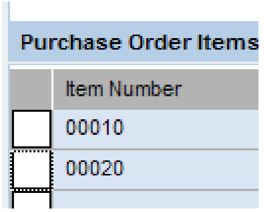
Receiving

Create Goods Receipt

On the new screen enter the Purchase Order Number in the box and then click the Yellow Submit button



After you have done this the details will populate and you will choose which line item you are accepting. This is done by clicking on the white box.



NOTE: The white box is next to the line item you are creating the goods receipt for.

After the details populate in the fields below you will then indicate the quantity which you are accepting in the quantity box, entering the document date (the date the goods were received and accepted).

Then click the Yellow Submit button.