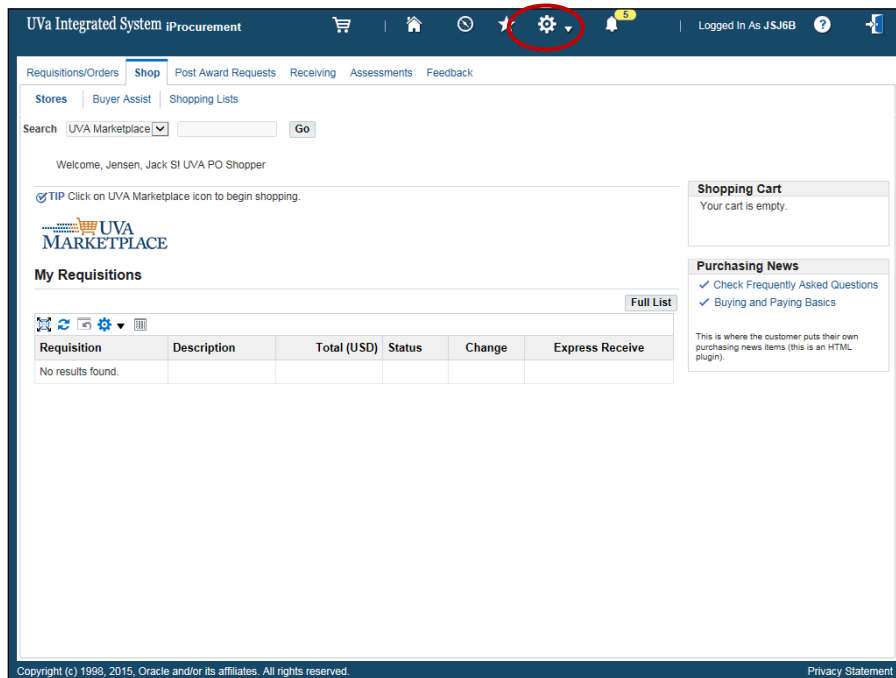


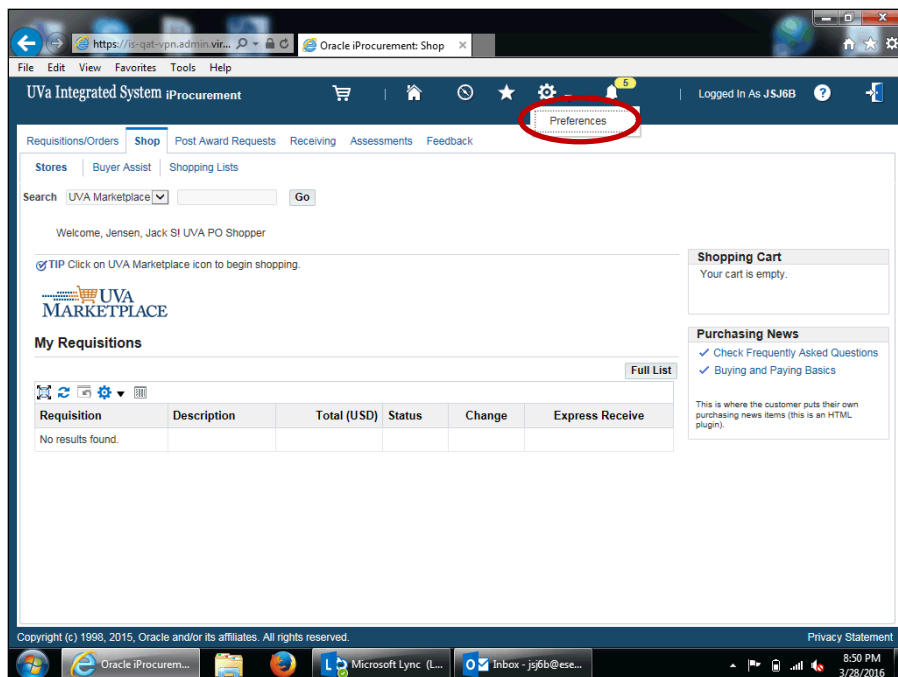
## How can I have my PTAE0 information default on all lines of my purchase requisition?

Step	Action
1.	Access iProcurement by selecting UVA Marketplace using your Purchasing responsibility

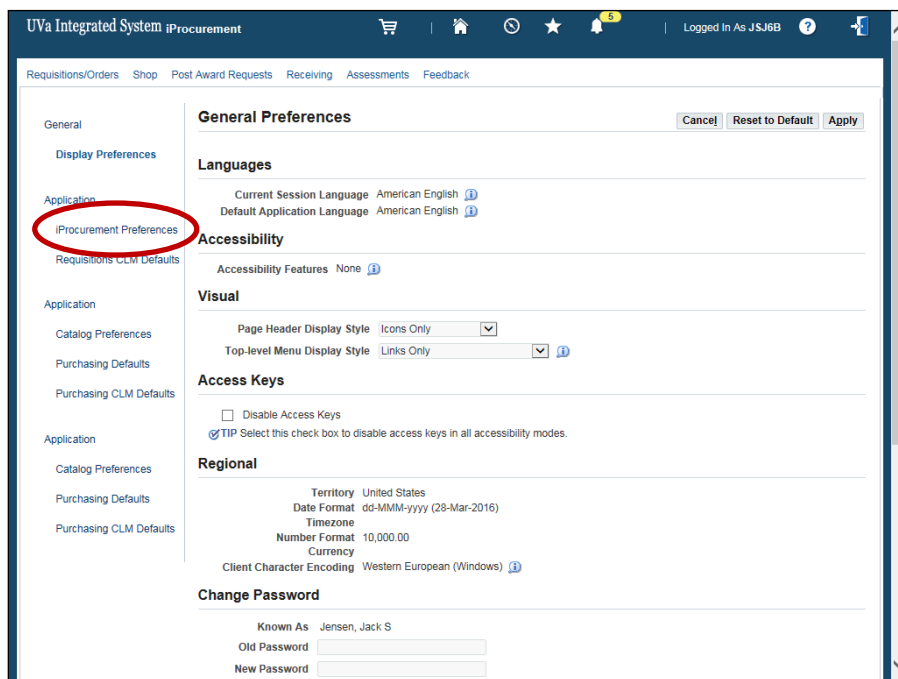
Step	Action
2.	Click on the <b>Settings</b> icon.



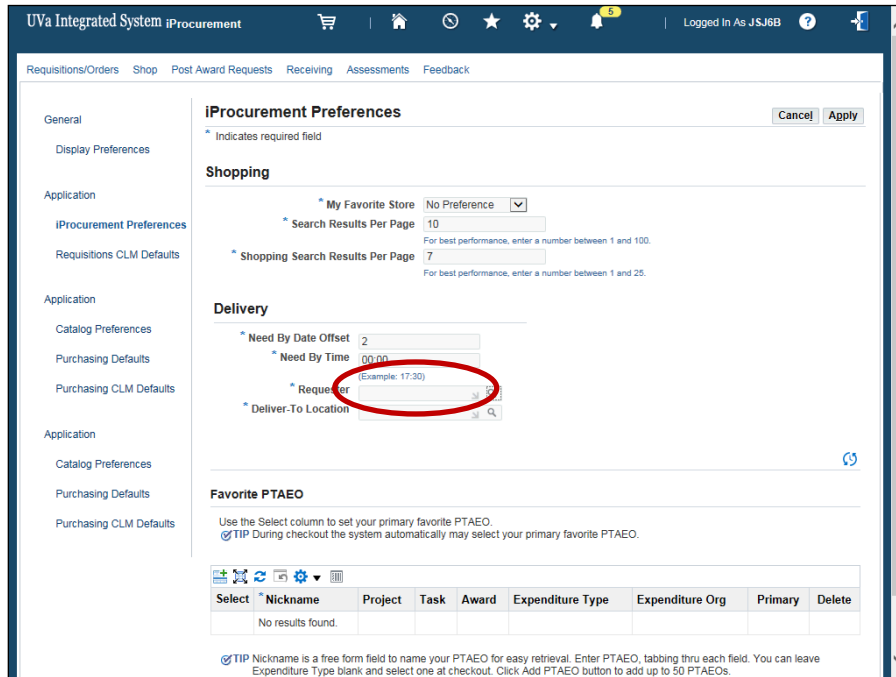
Step	Action
3.	Click on the <b>Preferences</b> link.



Step	Action
4.	Click on the <b>iProcurement Preferences</b> link.



Step	Action
5.	The first time you enter preferences you will have to enter the requester name (your name or whoever you want to default as the requester.)



UVA Integrated System iProcurement

Requisitions/Orders Shop Post Award Requests Receiving Assessments Feedback

General **IProcurement Preferences** Cancel Apply

\* Indicates required field

**Shopping**

\* My Favorite Store No Preference

\* Search Results Per Page 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset 2

\* Need By Time 00:00  
(Example: 17:30)

\* Requester **HR-University of VA**

\* Deliver-To Location

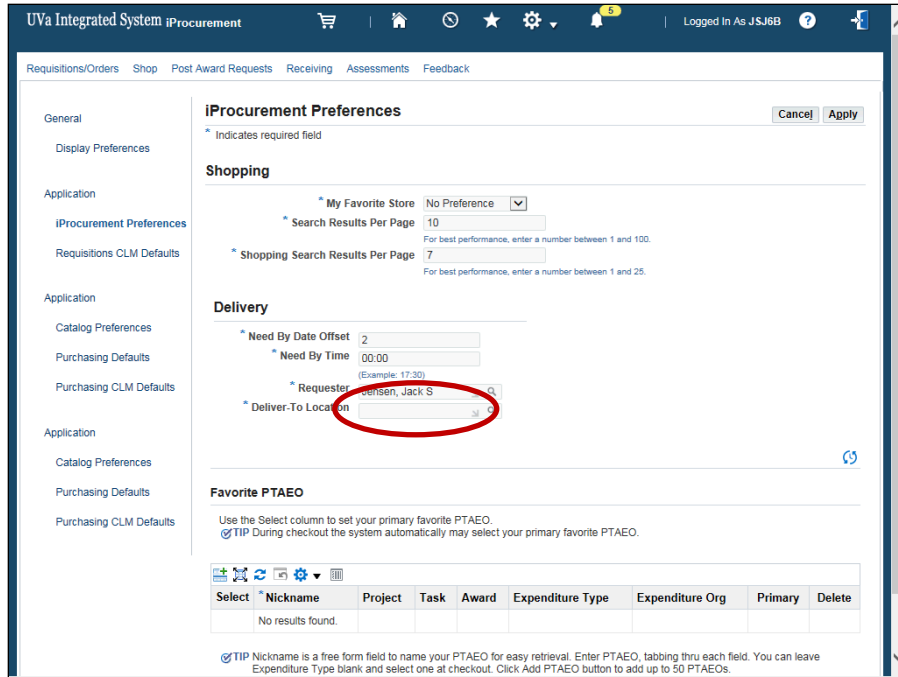
**Favorite PTAEO**

Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

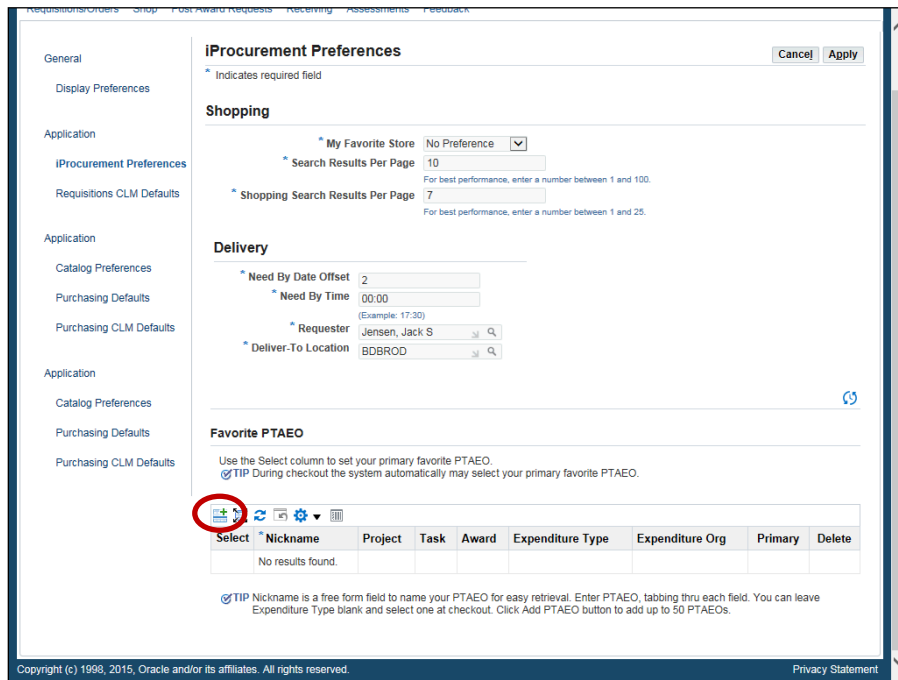
Select	*Nickname	Project	Task	Award	Expenditure Type	Expenditure Org	Primary	Delete
No results found.								

TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

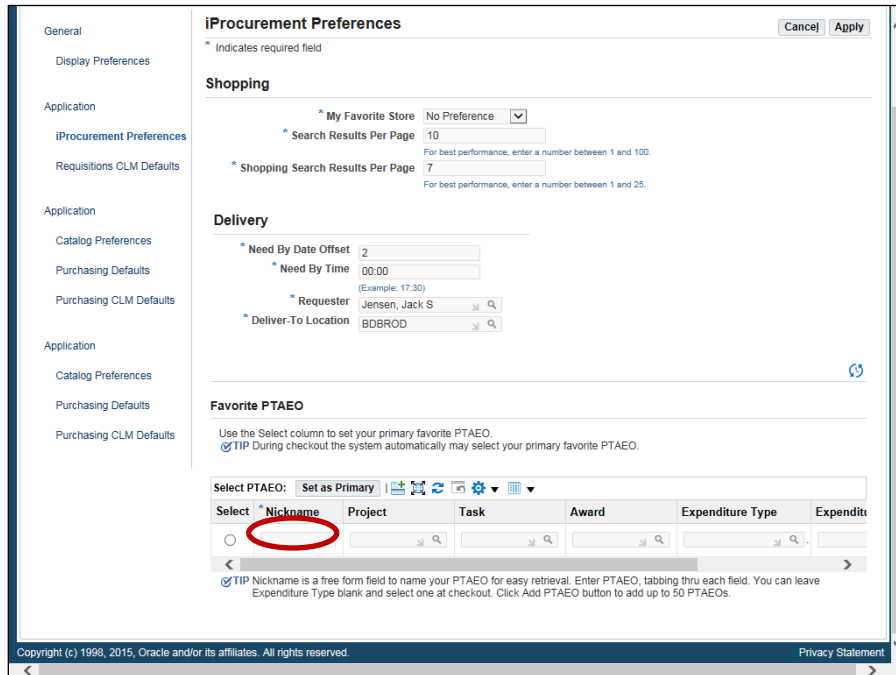
Step	Action
6.	<p>The <b>Deliver-To Location (DLC)</b> defaults every time you create a requisition. <b>DO NOT</b> leave <b>HR-University of VA</b> as the <b>DLC</b>. Click on the <b>Look Up</b> icon to search the list of values for your <b>DLC</b>.</p> <p>If your <b>DLC</b> does not exist, or if you need to update or delete an existing <b>DLC</b>, then submit a <b>Delivery Location Request</b> form (found on the Procurement Services web site).</p>



Step	Action
7.	Click on the <b>Add PTAEO</b> icon.

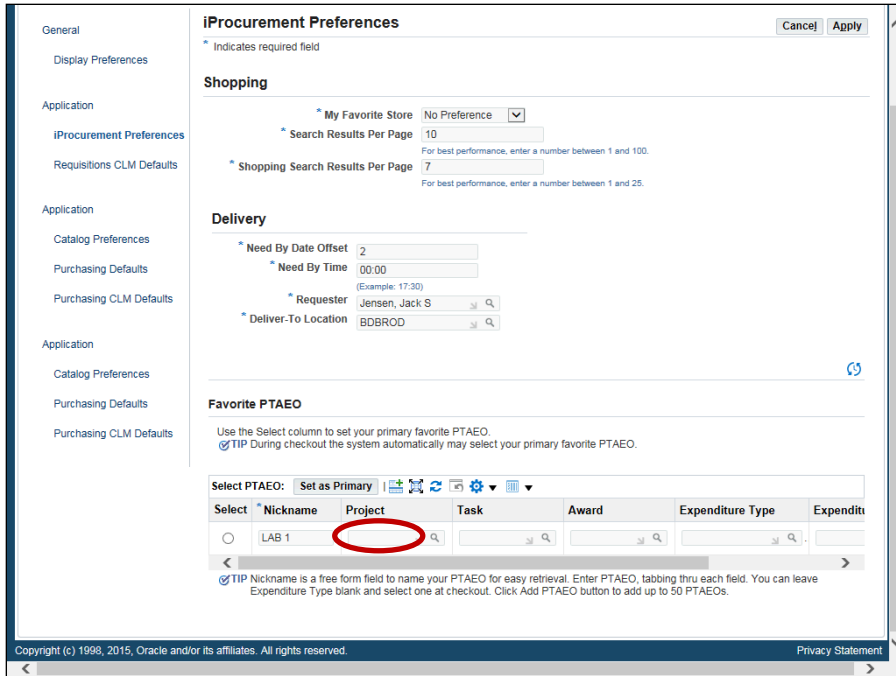


Step	Action
8.	The nickname field is a free form field which you can use to help identify specific PTAEOs.



The screenshot shows the 'iProcurement Preferences' window. On the left is a navigation pane with categories like 'General', 'Application', and 'Purchasing Defaults'. The main area is titled 'iProcurement Preferences' and contains sections for 'Shopping' and 'Delivery'. The 'Shopping' section includes fields for 'My Favorite Store', 'Search Results Per Page', and 'Shopping Search Results Per Page'. The 'Delivery' section includes fields for 'Need By Date Offset', 'Need By Time', 'Requester', and 'Deliver-To Location'. Below these is a 'Favorite PTAEO' section with a table. The table has columns for 'Select', 'Nickname', 'Project', 'Task', 'Award', 'Expenditure Type', and 'Expenditure'. The 'Nickname' column is circled in red. Below the table is a tip: 'TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.'

Step	Action
9.	Enter the desired information into the <b>Project</b> field.  You can also choose the Project from the list of values by clicking on the magnifying glass icon.



**iProcurement Preferences** [Cancel] [Apply]

\* Indicates required field

**Shopping**

\* My Favorite Store: No Preference

\* Search Results Per Page: 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page: 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset: 2

\* Need By Time: 00:00  
(Example: 17:30)

\* Requester: Jensen, Jack S

\* Deliver-To Location: BDBROD

**Favorite PTAEO**

Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

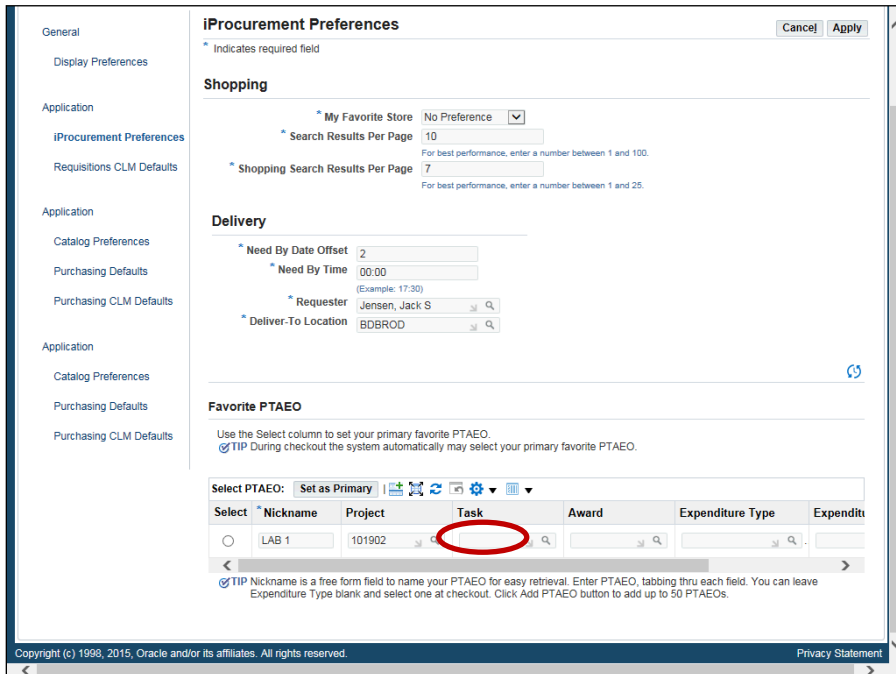
Select PTAEO: [Set as Primary] [Add] [Refresh] [Settings] [Filter]

Select	* Nickname	Project	Task	Award	Expenditure Type	Expendit
<input type="radio"/>	LAB 1					

TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

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Step	Action
10.	Enter the desired information into the <b>Task</b> field.  You can also choose the Task from the list of values by clicking on the magnifying glass icon.



**iProcurement Preferences** [Cancel] [Apply]

\* Indicates required field

**Shopping**

\* My Favorite Store: No Preference

\* Search Results Per Page: 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page: 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset: 2

\* Need By Time: 00:00  
(Example: 17:30)

\* Requester: Jensen, Jack S

\* Deliver-To Location: BDBROD

**Favorite PTAEO**

Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

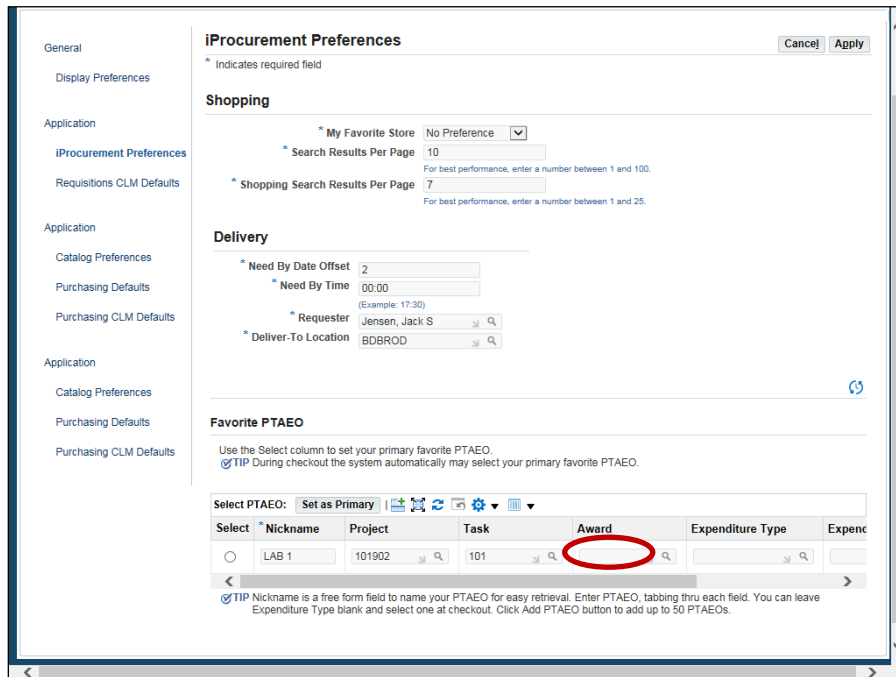
Select PTAEO: [Set as Primary] [Add] [Refresh] [Settings] [Filter]

Select	* Nickname	Project	Task	Award	Expenditure Type	Expendit
<input type="radio"/>	LAB 1	101902				

TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

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Step	Action
11.	<p>Enter the desired information into the <b>Award</b> field.</p> <p>You can also choose the Award from the list of values by clicking on the magnifying glass icon.</p>



**iProcurement Preferences** Cancel Apply

\* Indicates required field

**Shopping**

\* My Favorite Store: No Preference

\* Search Results Per Page: 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page: 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset: 2

\* Need By Time: 00:00  
(Example: 17:30)

\* Requester: Jensen, Jack S

\* Deliver-To Location: BDBROD

**Favorite PTAEO**

Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

Select PTAEO: Set as Primary + - ↺ ↻ ⚙ ⌵

Select	* Nickname	Project	Task	Award	Expenditure Type	Expend
<input type="radio"/>	LAB 1	101902	101	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>

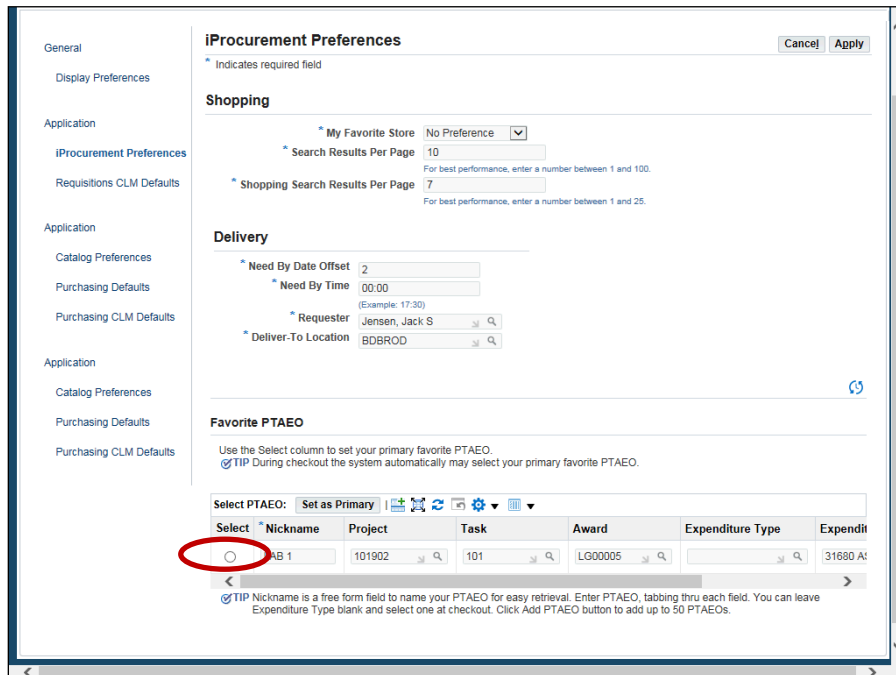
TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

Step	Action
12.	<p>You can also choose the <b>Expenditure Type</b> from the list of values by clicking on the magnifying glass icon.</p> <p>Although you can set the Expenditure Type in your preferences, you should always ensure that your purchases and requisitions have the correct expenditure type during checkout</p>





Step	Action
14.	<p>You can add as many as 50 PTAEOs to your preferences, but one must be set as the primary PTAEO.</p> <p>To do so, click on the <b>Select</b> radio button (to the left of the Nickname field.)</p>



**iProcurement Preferences** Cancel Apply

\* Indicates required field

**Shopping**

\* My Favorite Store: No Preference

\* Search Results Per Page: 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page: 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset: 2

\* Need By Time: 00:00  
(Example: 17:30)

\* Requester: Jensen, Jack S

\* Deliver-To Location: BDBROD

**Favorite PTAEO**

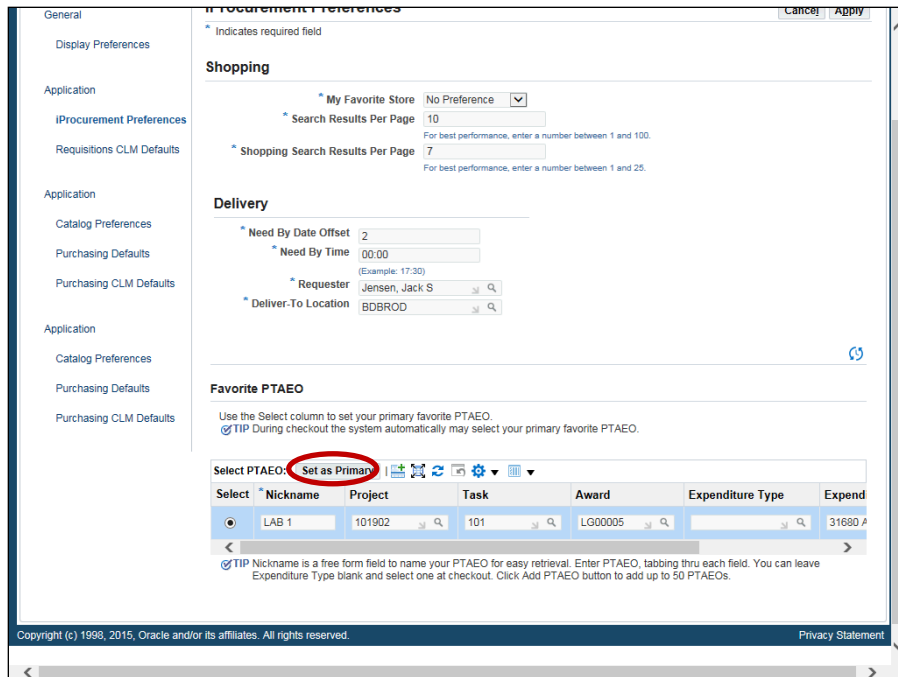
Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

Select PTAEO: Set as Primary + - ↺ ↻ ⚙ ⌵

Select	*Nickname	Project	Task	Award	Expenditure Type	Expendit
<input checked="" type="radio"/>	AB 1	101902	101	LG00005		31680 At

TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

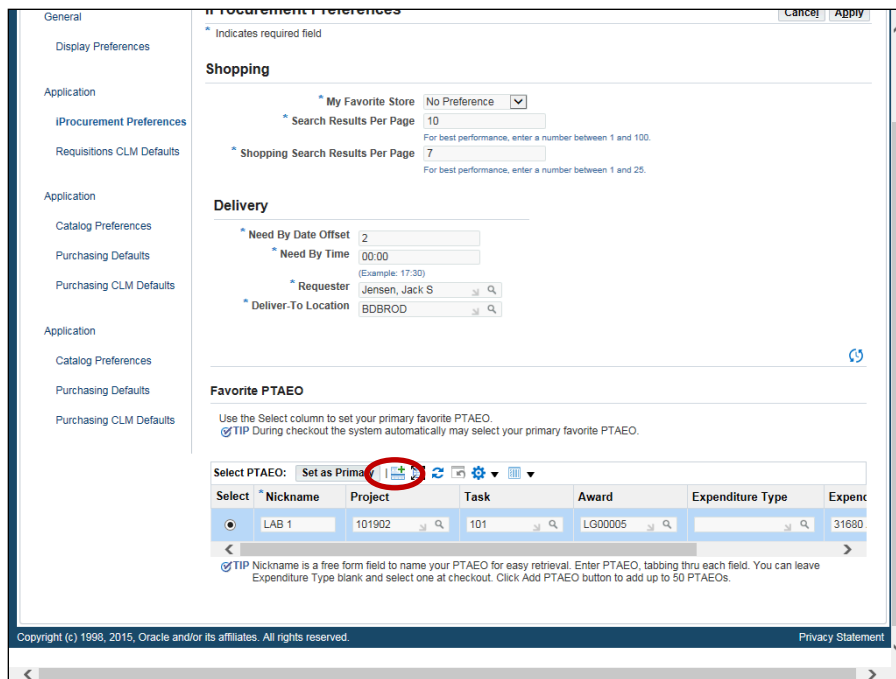
Step	Action
15.	Click on the <b>Set as Primary</b> button.



The screenshot shows the 'Procurement Preferences' form. The 'Shopping' section includes 'My Favorite Store' (No Preference), 'Search Results Per Page' (10), and 'Shopping Search Results Per Page' (7). The 'Delivery' section includes 'Need By Date Offset' (2), 'Need By Time' (00:00), 'Requester' (Jensen, Jack S), and 'Deliver-To Location' (BDBROD). The 'Favorite PTAEO' section features a table with columns: Select, Nickname, Project, Task, Award, Expenditure Type, and Expend. A 'Set as Primary' button is circled in red above the table. Below the table, a tip explains that the nickname is a free form field and the expenditure type is blank.

Select	* Nickname	Project	Task	Award	Expenditure Type	Expend
<input checked="" type="radio"/>	LAB 1	101902	101	LG00005		31680 A

Step	Action
16.	<p>If you would like to add more favorite PTAEOs, click on the <b>Add PTAEO</b> icon.</p> <p>The primary PTAEO will default when you submit your purchases. You can change which PTAEO defaults as the primary by selecting the PTAEO and clicking on the <b>Set as Primary</b> button.</p>



**iProcurement Preferences** Cancel **Apply**

\* Indicates required field

**Shopping**

\* My Favorite Store: No Preference

\* Search Results Per Page: 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page: 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset: 2




\* Need By Time: 00:00  
(Example: 17:30)

\* Requester: Jensen, Jack S

\* Deliver-To Location: BDBROD

**Favorite PTAEO**

Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

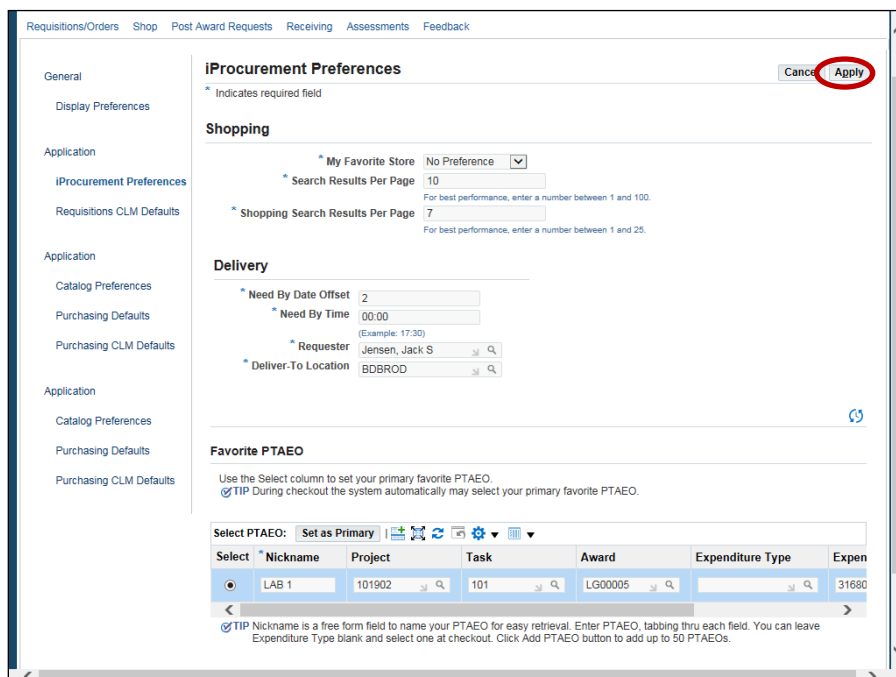
Select PTAEO: Set as Primary **+**   

Select	* Nickname	Project	Task	Award	Expenditure Type	Expen
<input checked="" type="radio"/>	LAB 1	101902	101	LG00005		31680

TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

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Step	Action
17.	Click on the <b>Apply</b> button.



Requisitions/Orders Shop Post Award Requests Receiving Assessments Feedback

**iProcurement Preferences** Cancel **Apply**

\* Indicates required field

**Shopping**

\* My Favorite Store: No Preference

\* Search Results Per Page: 10  
For best performance, enter a number between 1 and 100.

\* Shopping Search Results Per Page: 7  
For best performance, enter a number between 1 and 25.

**Delivery**

\* Need By Date Offset: 2




\* Need By Time: 00:00  
(Example: 17:30)

\* Requester: Jensen, Jack S

\* Deliver-To Location: BDBROD

**Favorite PTAEO**

Use the Select column to set your primary favorite PTAEO.  
 TIP During checkout the system automatically may select your primary favorite PTAEO.

Select PTAEO: Set as Primary **+**   

Select	* Nickname	Project	Task	Award	Expenditure Type	Expen
<input checked="" type="radio"/>	LAB 1	101902	101	LG00005		31680

TIP Nickname is a free form field to name your PTAEO for easy retrieval. Enter PTAEO, tabbing thru each field. You can leave Expenditure Type blank and select one at checkout. Click Add PTAEO button to add up to 50 PTAEOs.

