



Managing Requisitions Fluid

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Training Guide

Managing Requisitions Fluid

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Managing Requisitions - Fluid

Managing Requisitions 9.2 for LSUNO

Welcome to the **PeopleSoft 9.2 Managing Requisitions for LSUNO** module! This module contains the tools needed to learn many of the concepts and procedures associated with Requisitioning items.

GOAL

Our goal is for users to have the skills and knowledge necessary to enter and inquire on a requisition.

Participants will learn:

1. The three required and five optional steps of Add/Update a Requisition, and
2. How to Review Requisition Documents and Process Status.

NOTE: The functions in this manual must be performed in the PeopleSoft Production Database. Any data entered into a non-production database (i.e., Reports (PS9FSRPT) or Sandbox (PS9FSSND)) will be lost.

Contact for Assistance

The following will be your contacts for Managing Requisitions:

1. For technical assistance with PeopleSoft (i.e., problems accessing PeopleSoft, assistance with changing passwords, etc.), contact the Help Desk as follows:

Long Distance: 1-800-303-3290;

Local Calls: 1-504-568-HELP (4357); or

Email: helpdesk@lsuhsc.edu (<mailto:helpdesk@lsuhsc.edu>)

2. For functional assistance with PeopleSoft (e.g., questions about entering requisitions, items being ordered, the bid process, or other purchasing procedures), contact your **Buyer** or **Purchasing Supervisor** if you Buyer is not available.

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Add/Update Requisitions

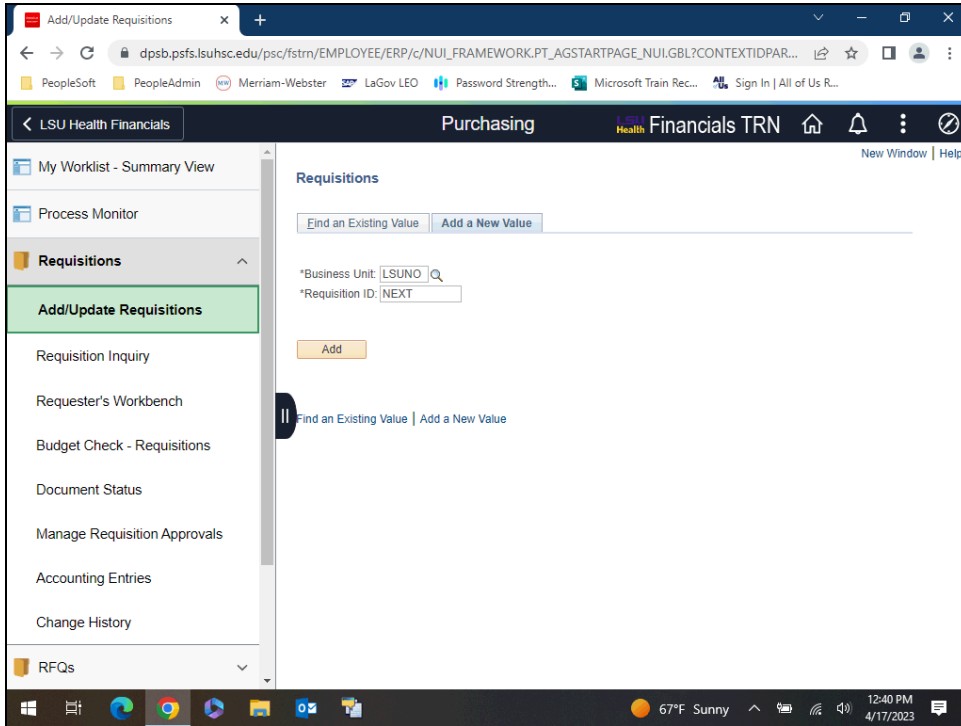
Requisition Essentials

Topic Contents:

1. What is a requisition?
2. What is required to generate a PO?
 - a. Approval
 - b. Budget Check
3. Four (4) basic elements of a requisition
 - a. Header
 - b. Lines
 - c. Schedule
 - d. Distribution
4. Identify required fields
5. **Add a New Value** Defaults
 - a. Business Unit
 - b. Requisition ID
6. How to **Find an Existing Value**
7. Default fields on **Maintain Requisitions** page
 - a. Business Unit
 - b. Requisition ID
 - c. Status
 - d. Budget Status
8. **Steps for entering a requisition**
 - a. **Three (3) required steps**
 - b. **Five (5) optional steps**
9. Entering Supplier Information
10. Navigating on PeopleSoft Pages
11. Request for Quote

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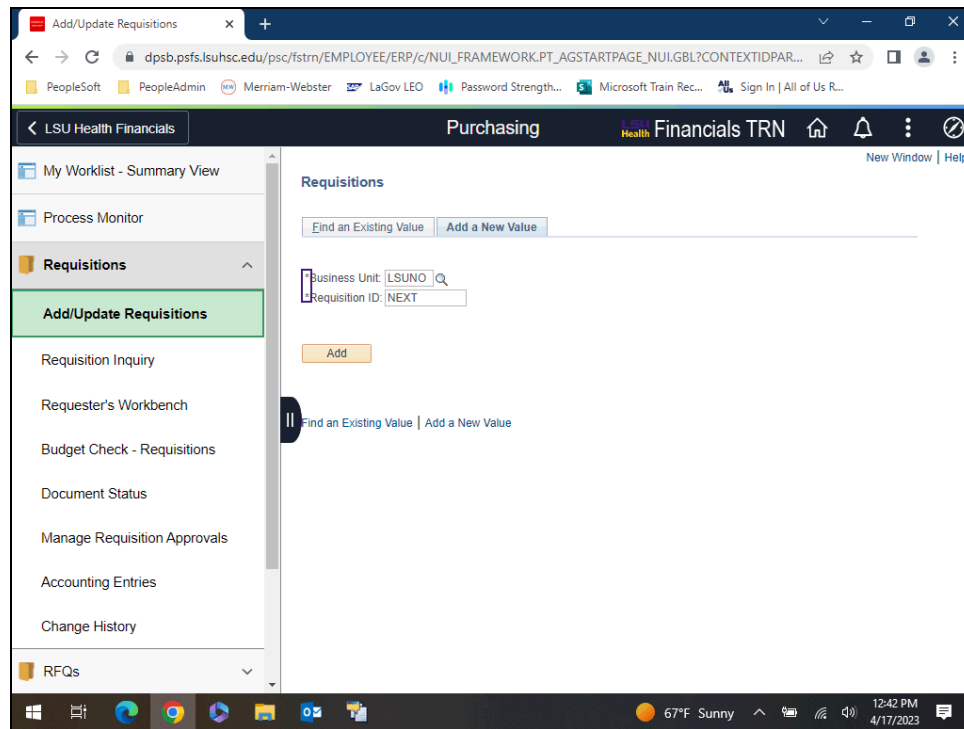


Step	Action
1.	<p>What is a Requisition?</p> <p>A requisition is a request for items to be ordered from a supplier. This creates a pre-encumbrance in the PeopleSoft system which is an intent to buy a product or service. It is a commitment to a department's budget, but it is <u>not</u> final and binding with the supplier. Requisitions allows users to create, review, edit, approve or cancel a requisition.</p>
2.	<p>Once the requisition is entered into the PeopleSoft system, two things must occur for Purchasing to be able to generate a Purchase Order to the supplier in the PeopleSoft system:</p> <ol style="list-style-type: none"> 1. The requisition <u>must</u> be approved. 2. The requisition <u>must</u> pass the budget check process. <p>Budget checking ensures that financial obligations and expenditures do not exceed budget limits. Controls are created to permit only those transactions that are applied to correct calendar periods, as well as to the correct account types and ChartString combinations. Budget Checking a requisition also verifies that the allocated funds are still available before a liability is created. In short, the Budget Check process verifies the ChartString entered into the requisition is valid and that the funds are available for the ChartString.</p>

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Step	Action
3.	<p>There are four (4) basic elements that comprise a requisition:</p> <ol style="list-style-type: none"> 1. Headers 2. Lines 3. Schedules 4. Distributions <p>Each requisition has one header, which can have multiple lines. Each line can have multiple schedules, and each schedule can have multiple distributions.</p>
4.	<p>The schedule defines when and where you want the item(s) delivered. The distribution defines how accounts and departments are charged for the item(s), as well as how much of the total price the department should pay.</p>



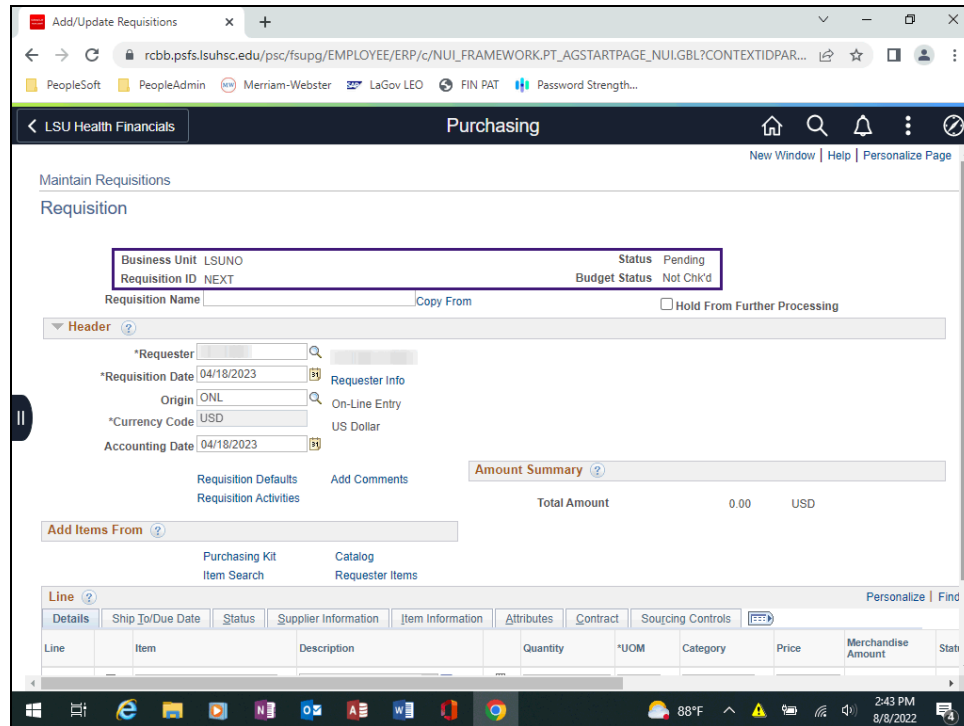
Step	Action
5.	<p>Anytime you see a star (*) to the left of a field name, this indicates the field is a required field. Information must be entered into required fields in order to save the requisition and ultimately generate a Purchase Order. There are some fields not required by PeopleSoft, but are required by LSUNO. These fields will be identified and discussed in the topics in this manual.</p>

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Step	Action
6.	<p>Add a New Value</p> <p>The system defaults you into the "Add a New Value" tab.</p> <p>The appropriate Business Unit will display in the Business Unit field, when working in Production. If the Business Unit does <u>not</u> default correctly, enter it or select it by clicking the magnifying glass (Look up Business Unit) to the right of the Business Unit field. It is recommended that you do <u>not</u> attempt to continue with the requisition, as save errors are likely to occur. Contact the Purchasing so that the defaults can be set appropriately.</p>
7.	<p>Requisition ID</p> <p>The Requisition ID will default as NEXT. This allows the system to auto-assign the next available requisition number for the business unit the first time the requisition is saved. <i>The Requisition ID is not the Purchase Order (PO) number.</i> A separate PO number will be assigned by Purchasing once the PO is generated.</p> <p><i>NOTE: Blanket or Standing Orders will be entered in PeopleSoft one time to cover the entire fiscal year, thereafter, the Purchase Order number will be used to place additional orders during the year. See your Buyer or Purchasing for more information about blanket or standing orders.</i></p>
8.	<p>Users can access an existing requisition by clicking the "Find an Existing Value" tab.</p> <p><i>See the Review a Requisition topic for instructions on how to find an existing requisition in PeopleSoft.</i></p>

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Step	Action
9.	<p>When entering a new requisition, the following four (4) fields must default as follows on the Maintain Requisitions page to enter a new requisition:</p> <ol style="list-style-type: none"> 1. Business Unit = LSUNO 2. Requisition ID = NEXT 3. Status = Pending 4. Budget Status = Not Chk'd
10.	<p>The Business Unit and Requisition ID default from the Add a New Value page.</p> <p>The Status will default as Pending. If the Status does <u>not</u> default as Pending, contact Purchasing so that default information can be set up appropriately.</p> <p>The Budget Status indicates whether the budget check process has been run, so will default to Not Chk'd. The budget check can only be performed <u>after</u> a requisition is approved, but <u>prior</u> to Purchasing generating a Purchase Order or RFQ (Request for Quote).</p> <p>It is recommended you do <u>not</u> attempt to continue with the requisition, as save errors are likely to occur, if any of these fields default incorrectly.</p>
11.	<p>Steps for Entering a Requisition</p> <p>There are three (3) required steps and five (5) optional steps for entering a requisitions. <i>It is important to enter the requisition in step order. Changing the order of the steps may cause save errors and result in the user having to re-enter the requisition.</i></p>

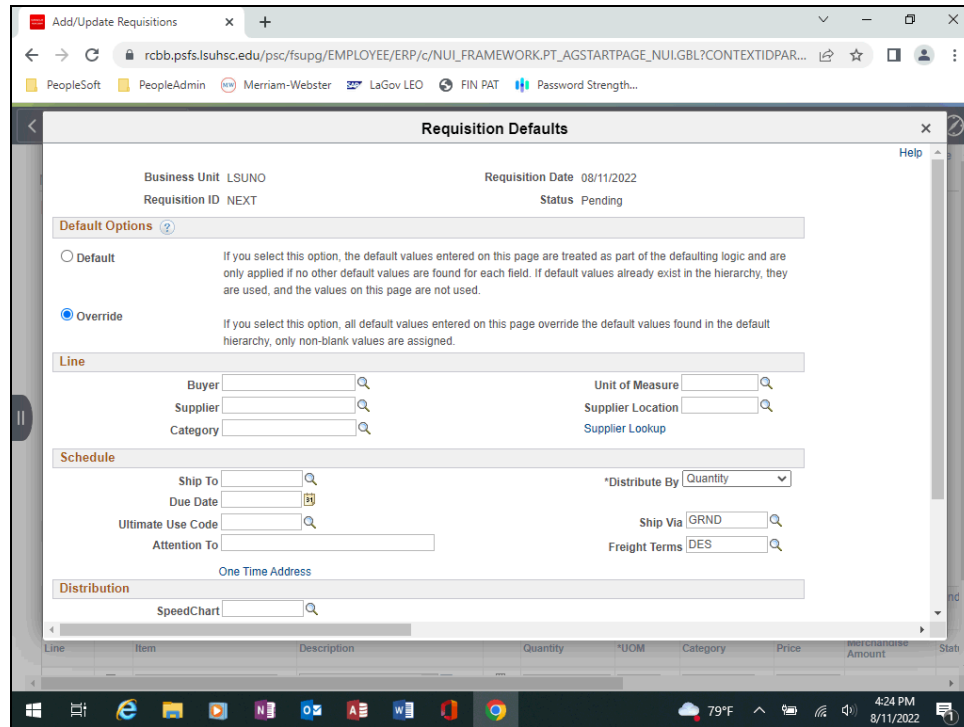
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Step	Action
12.	<p data-bbox="342 264 889 296">Steps for Entering a Requisition (continued)</p> <ol data-bbox="342 331 987 600" style="list-style-type: none"><li data-bbox="342 331 927 363">1. Check Hold from Further Processing (optional)<li data-bbox="342 367 781 399">2. Enter Requisition Name (optional)<li data-bbox="342 403 841 434">3. Enter Requisition Defaults (required)<li data-bbox="342 438 987 470">4. Enter Item(s) and Save the requisition (required)<li data-bbox="342 474 911 506">5. Adjust Chartstring Information (required)<li data-bbox="342 510 971 541">6. Enter Comments and Attach Documents (optional)<li data-bbox="342 546 987 577">7. View Approvals, and Print the requisition (optional)<li data-bbox="342 581 948 613">8. View and Copy an existing requisition (optional) <p data-bbox="342 636 1273 697">Each step, whether required or optional, will be discussed in detail in the topics included in this manual.</p>

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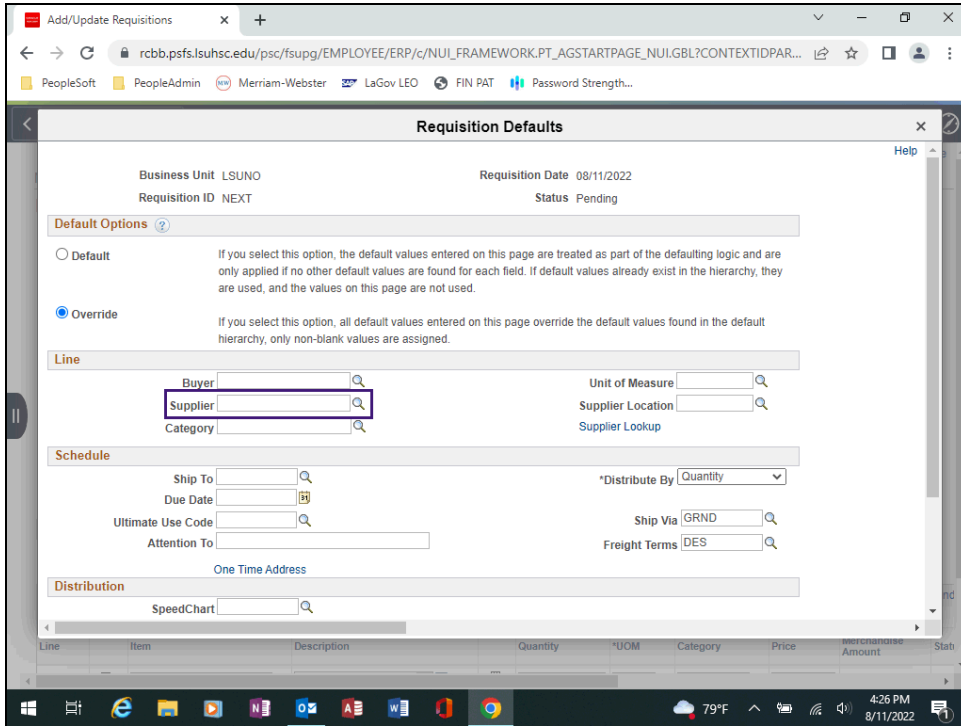
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Step	Action
13.	<p data-bbox="440 1087 1003 1121">Step 3: Enter Requisition Defaults (required)</p> <p data-bbox="440 1155 1317 1188">You must first enter data on the Requisition Defaults page for two reasons:</p> <ol data-bbox="440 1222 1382 1486" style="list-style-type: none"> <li data-bbox="440 1222 1382 1323">1. In order to properly Save the requisition. If defaults are not entered before entering item(s) information, the requisition will not save and will have to be re-entered by the requester. <li data-bbox="440 1356 1382 1486">2. In order for the chartstring(s) to default to all line items. The chartstring values can be changed on any line item on the Distribution page. However, by entering the information on the Requisitions Defaults page, the system will automatically default the chartstring information to each line item on the requisition.

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Step	Action
14.	<p>Entering Supplier Information</p> <p>A requisition can have only one supplier. Although the Supplier field is not a required field, the requester must provide information about the supplier to Purchasing. The Supplier ID is used to designate the Supplier for the requisition. The Supplier ID is always a <i>10-digit</i> number in PeopleSoft. Users can enter the Supplier ID directly into the Supplier field or can utilize the Look up Supplier to search for it.</p>
15.	<p>Entering Supplier Information (continued)</p> <p>If the <i>Supplier ID</i> is unknown, the requester should attempt to locate it in the PS database. If the supplier does not appear in the list of suppliers in the PS system, the Supplier may be left <i>blank</i>. However, supplier information must then be entered in the <i>Header Comments</i> page and include as much of the following information as is known: the supplier's name, contact person, street address, city, state, zip code, telephone number, fax number and Tax ID number.</p>
16.	<p>Navigating on PeopleSoft Pages</p> <p>The Tab key on your keyboard is used to move from field to field within PeopleSoft. The Enter key acts as a Save button, so it cannot be used to move from field to field on a page.</p> <p>Use only the <i>buttons and links</i> provided on the PeopleSoft pages. Do not use the <i>Back</i> and <i>Forward</i> arrows on your browser.</p>

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Step	Action
17.	<p data-bbox="435 264 672 296">Request for Quote</p> <p data-bbox="435 331 1419 430">Louisiana State Law requires that every purchase above \$10,000 - including freight and handling - must go out for bid. Purchases made under the Governor's Executive Order for Small Purchases is the exception to this rule.</p> <p data-bbox="435 468 1430 632"><i>NOTE: See your Buyer for detailed information about the bid process (i.e., the price thresholds, required quotes from Suppliers and items that require and do not require bids, etc.) Users may also review the Executive Order for Small Purchases on the Louisiana Office of State Purchasing web site for information about the bid process.</i></p>
18.	<p data-bbox="435 646 857 678">This completes <i>Requisition Basics</i>.</p> <p data-bbox="435 678 672 709">End of Procedure.</p>

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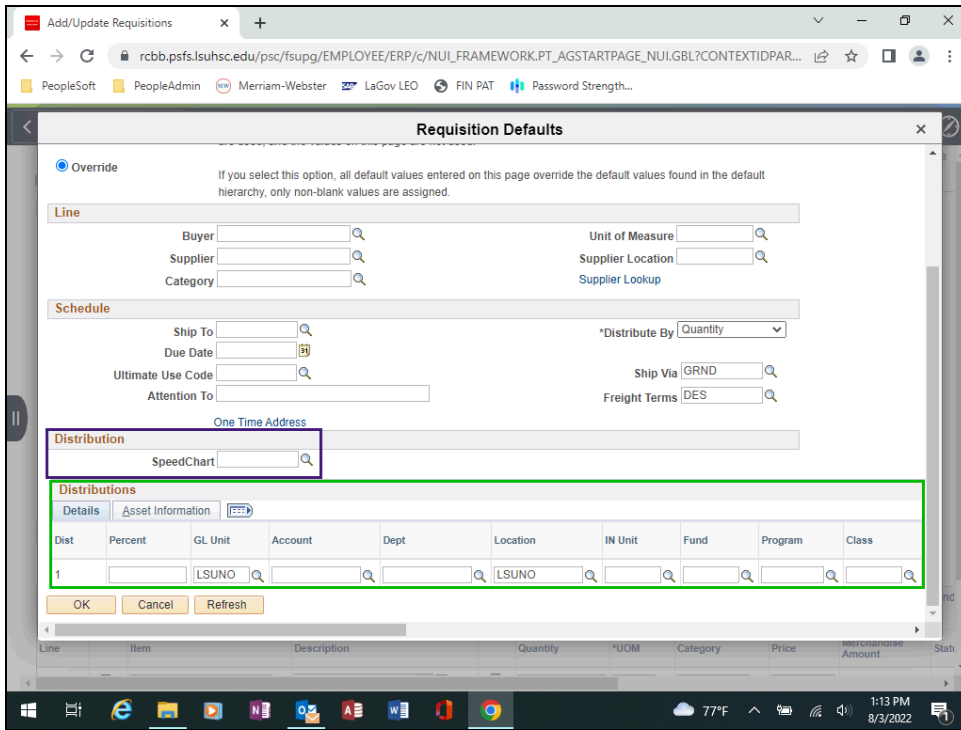
Lookup SpeedChart

Topic Contents:

1. Introduce SpeedCharts
 - a. Define what a SpeedChart is
 - b. Define values used for a SpeedChart
 - 1) ChartField
 - 2) ChartString Values
 - a) Account Code
 - b) Department
 - c) Location
 - d) Fund
 - e) Program
 - f) Class
 - g) Project
 - h) PC Bus Unit
2. Search for and select a SpeedChart
3. Using multiple SpeedCharts

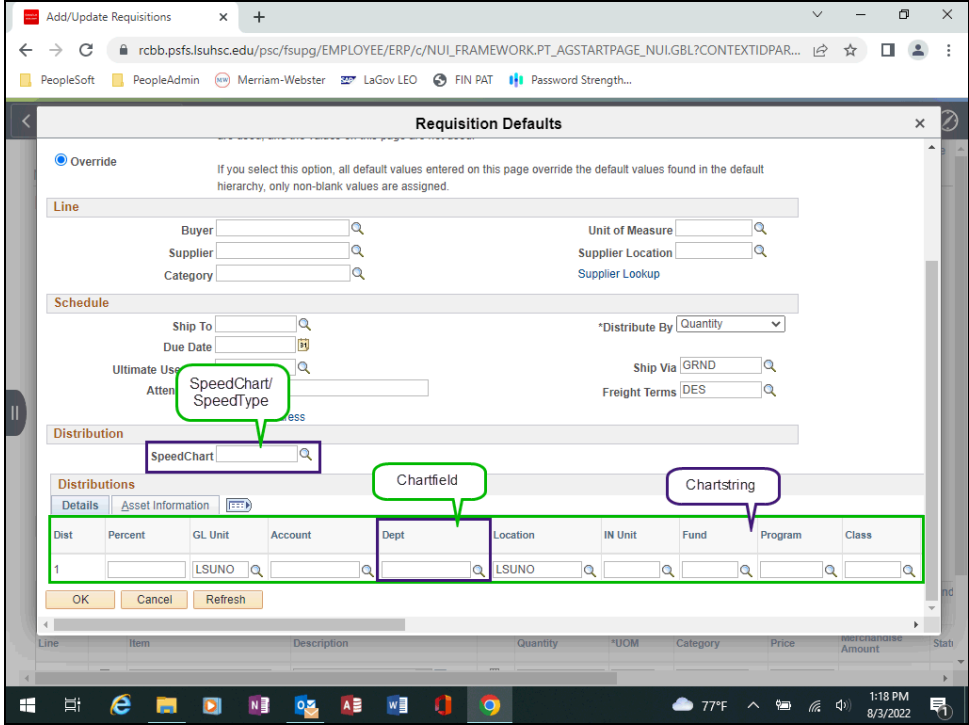
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Step	Action
1.	A SpeedChart is a shortcut users' can enter to automatically populate individual chartfield values on the distribution line located on the Requisitions Defaults page. The use of SpeedCharts can greatly increase data entry efficiency by reducing the number of keystrokes required to enter frequently used combinations of chartfield values and by reducing keystroke errors.

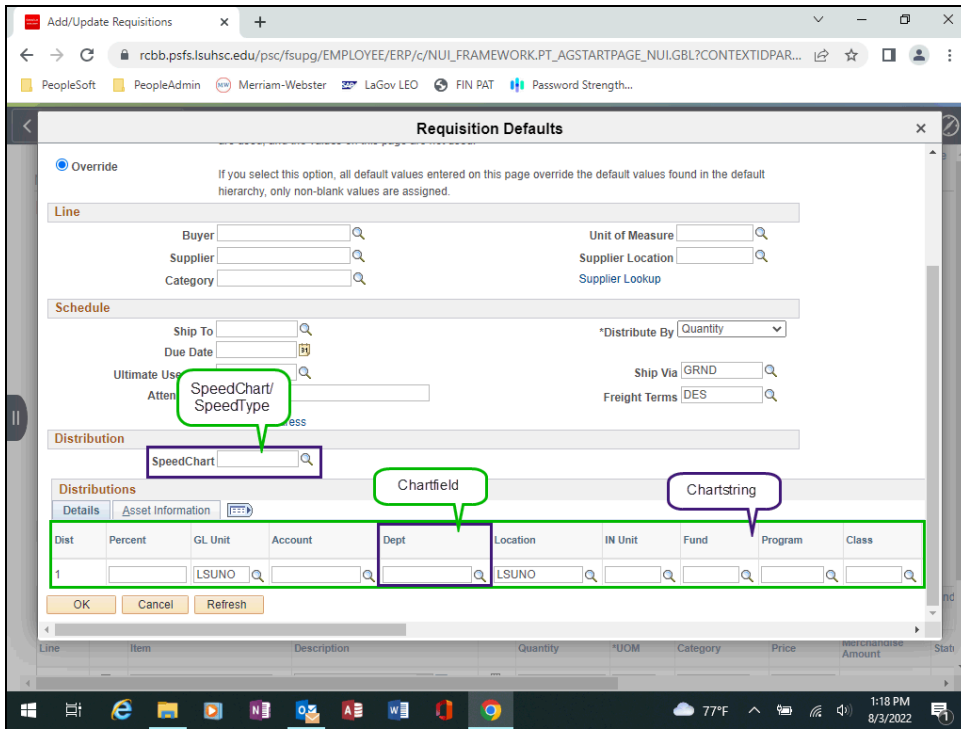
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Step	Action
2.	<i>NOTE: SpeedType and SpeedChart are used interchangeably for LSU Health.</i>

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Step	Action
3.	<p>Please review the following definitions on SpeedChart, Chartfield and ChartString.</p> <ul style="list-style-type: none"> • SpeedChart/SpeedType – A SpeedChart is a combination of chartfields values, <u>excluding</u> the <u>Account Code</u>, that define how transactional information and budget data is categorized. The Account Code is <u>not</u> part of the SpeedChart values and <u>must</u> be entered on the distribution line to complete the chartstring. SpeedChart is also referred to as SpeedType. • ChartField – In PeopleSoft, the Chart of Accounts is comprised of information fields that provide the basic structure to segregate and categorize transactional information and budget data. Each information field is called a chartfield. • Chartstring – The chartstring combines a series of chartfield values into one string. The chartfields <u>included</u> in a chartstring are: <i>Fund, Program, Class,</i> and <i>Project</i> (if needed). The <i>Account Code</i> is <u>excluded</u>.

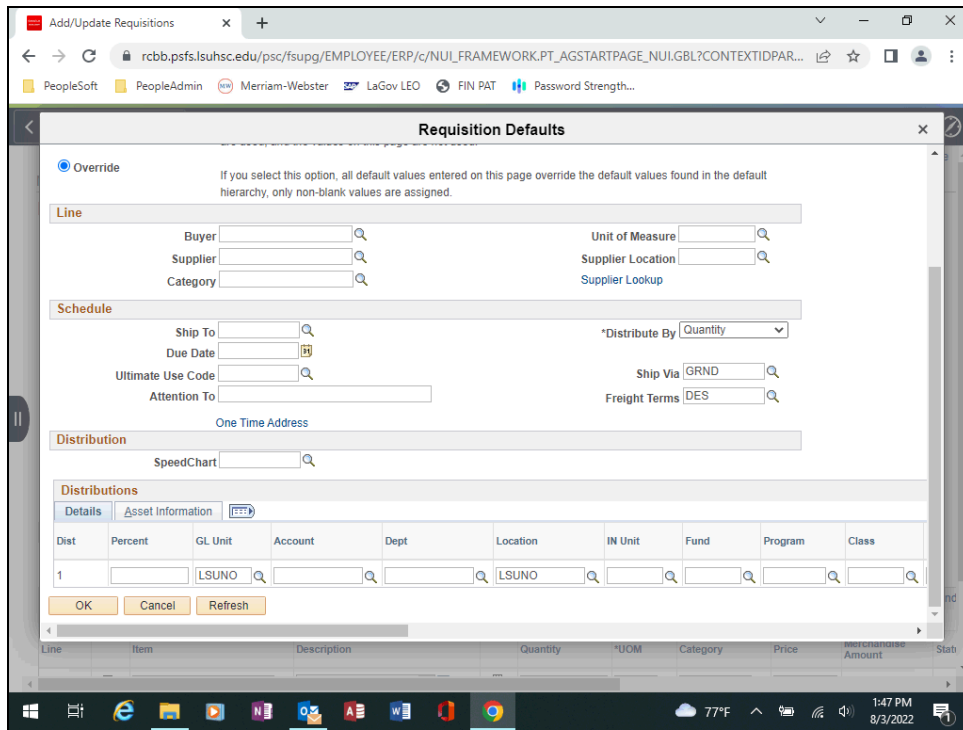
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Step	Action
4.	<p>ChartString Values</p> <p>The ChartString is comprised of the following values:</p> <ol style="list-style-type: none"> 1. Account Code 2. Dept 3. Location 4. Fund 5. Program 6. Class 7. Project 8. PC Bus Unit
5.	<p>Account Code</p> <p>The Account Code is a transaction code for the item(s) being ordered (e.g., office supplies, medical supplies, dental supplies, etc.). The <u>correct</u> Account Code <u>must</u> be entered for each line item. The Account Code can be entered on the Requisition Defaults page when <i>entering a single line requisition</i>, or <i>when entering multiple lines items using the same Account Code</i> (e.g., office supplies, dental supplies, etc.).</p> <p>If, however, a user is ordering multiple line items, and each line has a <i>different</i> Account Code, the Account Code will be left blank on the <i>Requisitions Defaults</i> page. The user <u>must</u> then enter the appropriate Account Code on the <i>Distribution</i> page for each line item.</p> <p>Contact your Finance/Accounting group for a list of Account Codes.</p>
6.	<p>Dept and Location</p> <p>The Dept is the cost center paying for the item(s). The Dept is always a <i>7-digit</i> department number.</p> <p>The Location is a business unit designation. It is recommended that LSUNO be used as the <i>Location</i> code for <u>all requisitions</u>.</p>
7.	<p>Fund, Program and Class</p> <p>The Fund Code identifies the <i>funding source</i> for the item(s) being ordered. If the item(s) involve a <i>Project/Grant</i>, enter the <i>Fund Code associated</i> with the specified Project/Grant (e.g., 113,115,116, etc.).</p> <p>The Program Code classifies the and reports expenses according to the type of activity for which the expenses were incurred.</p> <p>The Class Code indicates the accounting class for a sub ledger journal line (e.g., Receivables, Revenue, Expenditure, etc.)</p>

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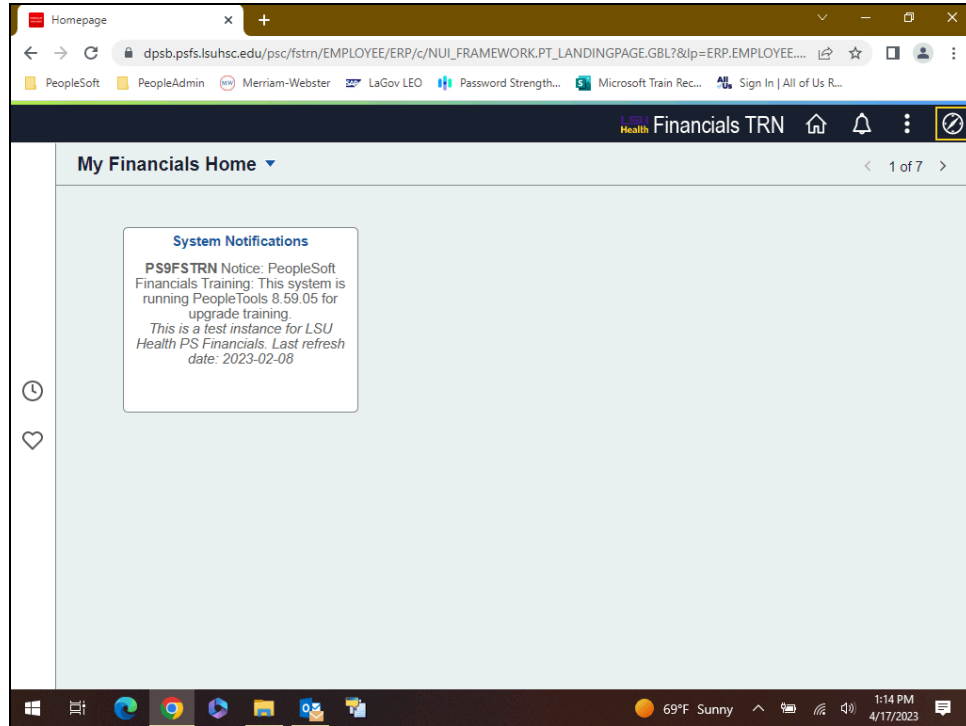
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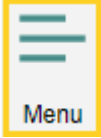

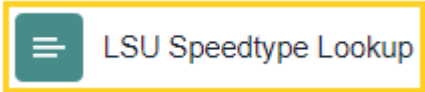
Step	Action
8.	<p>Project and PC Bus Unit</p> <p>The Project/Grant number <u>must</u> be entered if the item(s) being ordered are associated with a specific Project or Grant. The Project/Grant will only be entered on the <i>Requisitions Default</i> page if all items on the requisition will be charged to the project/grant. Otherwise, the Project/Grant number will be entered on the <i>Distribution</i> page for the <i>specific line item</i>.</p> <p>The PC Bus Unit <u>must</u> contain a value. The user's <i>business unit</i> designation will default into the field. If it does <u>not</u> default, the user <u>must</u> <i>enter it</i> or select it using the <i>Look up</i> feature.</p>



Step	Action
9.	<ul style="list-style-type: none"> • Single SpeedCharts can be utilized on the <i>Requisition Defaults</i> page and the line item <i>Distribution</i> page. • Multiple SpeedCharts are utilized on the line item <i>Distribution</i> page only.

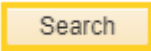

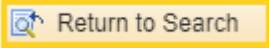


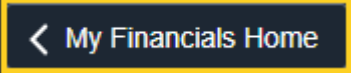
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Step	Action
10.	<p>SpeedChart information can be found in the Navigator menu under LSU Processes > LSU SpeedType Lookup.</p> <p>Click the NavBar button.</p> 
11.	<p>Click the Navigator Menu button.</p> 
12.	<p>Click the Down scrollbar.</p>
13.	<p>Click the LSU Processes button.</p> 
14.	<p>Click the LSU Speedtype Lookup button.</p> 

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Step	Action
15.	<p>Scenario</p> <p>In this exercise, you will search for two SpeedCharts using the following Search criteria:</p> <p>SetID: LSUNO Department: 1497100 SpeedType Key: 0497100013 SpeedType Key: 0497100012</p>
16.	Enter the desired information into the SetID: field. Enter " LSUNO ".
17.	Enter the desired information into the Department: field. Enter " 1497100 ".
18.	<p>Click the Search button.</p> 
19.	<p>Click the SpeedType Key - 0497100013 link.</p> 
20.	<p>The SpeedChart information displays. Verify that the chartfield information (e.g., Fund Code, Program Code, Class Field, etc.) can be used for your requisition. You will need to make a <i>note</i> of the SpeedType Key so that you can later enter it on your requisition.</p> <p><i>NOTE: Only SpeedCharts with a numeric value can be used when creating a requisition. SpeedCharts that begin with a "G" or a "R" cannot be used.</i></p> <p>Click the Return to Search button.</p> 
21.	<p>Click the Down scrollbar.</p> 
22.	<p>Click the SpeedType Key - 0497100012 link.</p> 
23.	<p>The SpeedChart information displays. Verify that the chartfield information (e.g., Fund Code, Program Code, Class Field, etc.) can be used for your requisition. You will need to make a <i>note</i> of the SpeedType Key so that you can later enter it on your requisition.</p> <p><i>NOTE: Only SpeedCharts with a numeric value can be used when creating a requisition. SpeedCharts that begin with a "G" or a "R" cannot be used.</i></p> <p>Click in the My Financials Home field.</p> 

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Step	Action
24.	This completes <i>Lookup SpeedChart</i> . End of Procedure.

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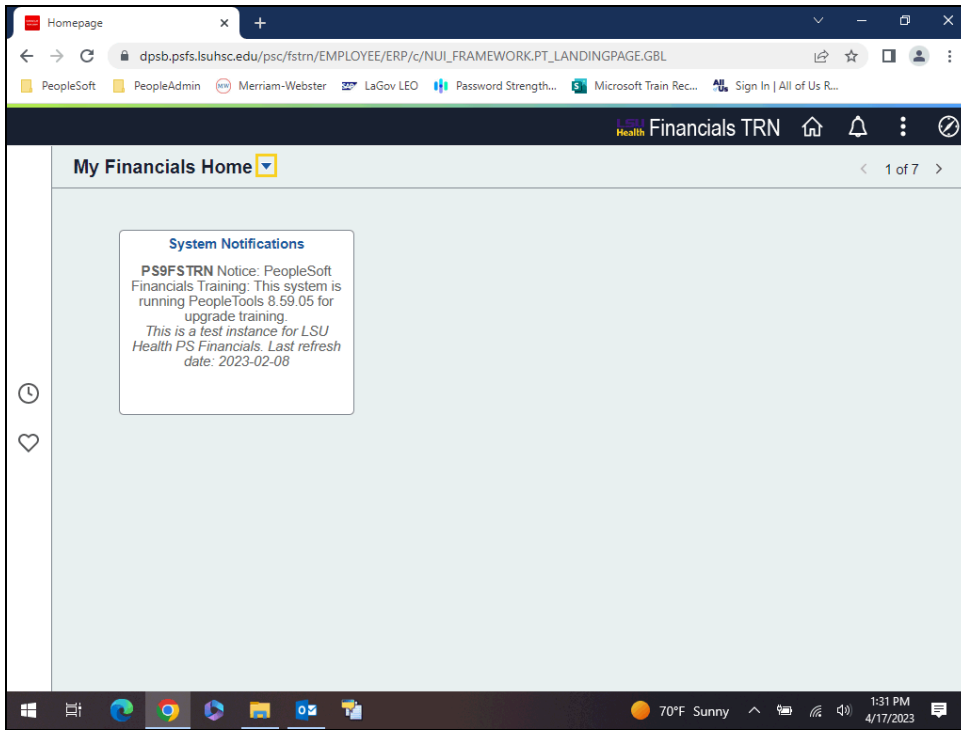
Maintain Requisitions Navigation and Overview






Topic Contents:

1. Navigate to Maintain Requisitions page via Purchasing tile.
 - a. Access LSU Health Financials Homepage
2. Add a New Value
3. Overview of Maintain Requisitions page
 - a. Hold From Further Processing
 - b. Header Section
 - 1) Requestor default
 - 2) Requisition Date vs. Accounting Date
4. Introduction to Requisition Defaults
 - a. Examples of fields entered on Requisition Defaults: Buyer, Supplier, Shipping Location, etc.
5. Introduction to Add Comments
6. Add Items From Section - Links **not** used by LSUNO
7. Introduction to Line
 - a. Fields used
 - b. Line Comments
 - c. Schedule
 - d. Distribution

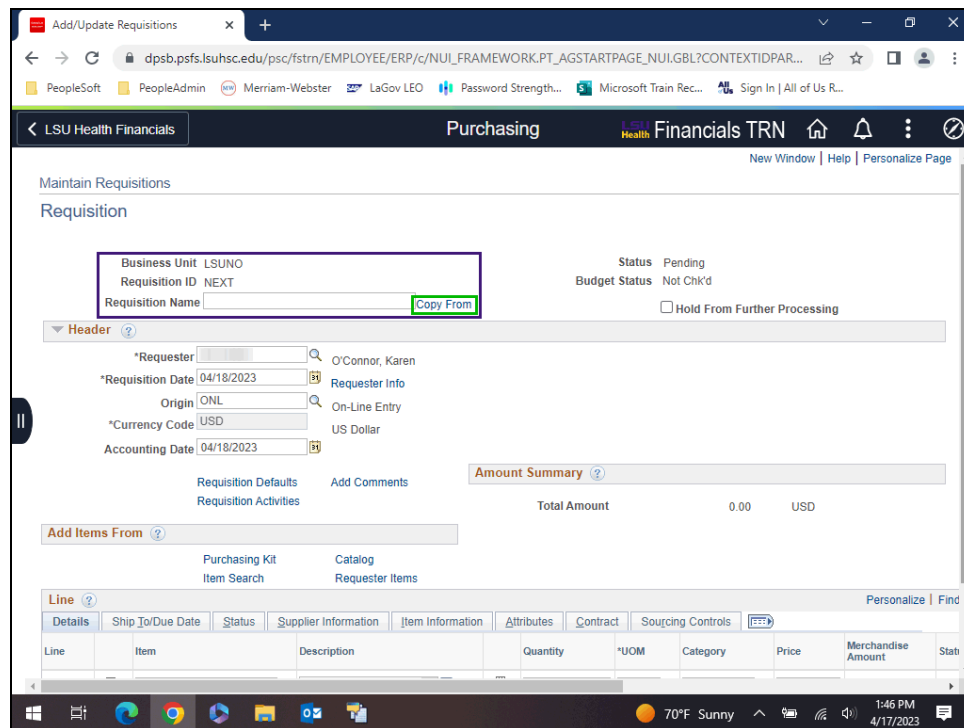
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Step	Action
1.	Navigate to Maintain Requisitions page. Click the button to the right of the My Financials Home field. 
2.	Click the LSU Health Financials list item. 
3.	Click the Purchasing button.
4.	Click the button to the right of the Requisitions field. 
5.	Click the Add/Update Requisitions button. 
6.	Click the Hide Navigation Area button. 

Step	Action
7.	<p>Add a New Value</p> <p>A new requisition is being entered. Verify the Business Unit and Requisition ID default correctly.</p> <p>Click the Add button to begin the Enter a Requisition process.</p> <div style="text-align: center; border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> Add </div>

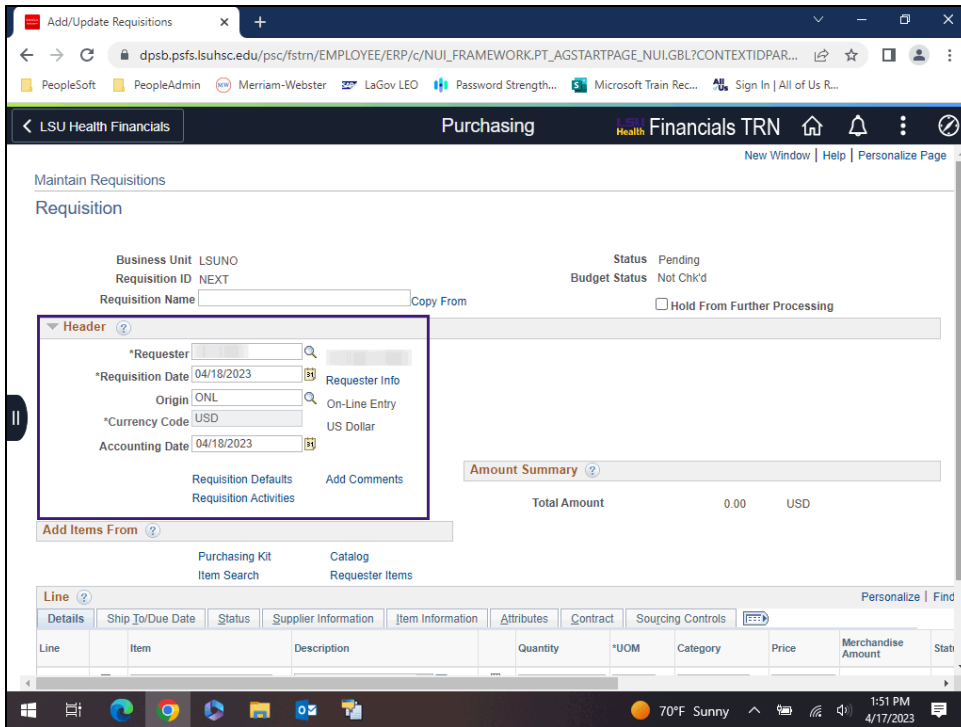


Step	Action
8.	<p>The Maintain Requisitions page displays.</p> <p>The Business Unit and Requisition ID that have defaulted from the Add a New Value page display on the top left of the page.</p> <p>The "Requisition Name" field can display a <i>note or description of the item(s)</i> being ordered if desired. PeopleSoft does not like blank fields, so if <u>no</u> note or description is written, the requisition id will be defaulted into the field when the requisition is first saved.</p> <p>The "Copy From" link allows the user to copy a previously entered requisition. Users can copy their own requisitions, or another user's requisition depending on his/her security access.</p>

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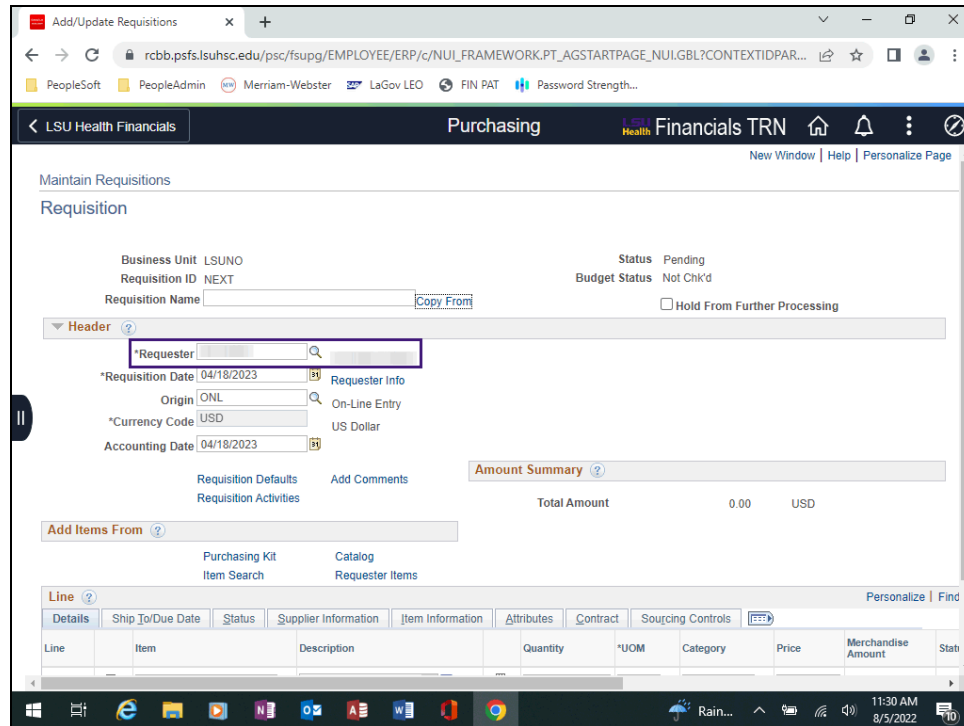
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Step	Action
9.	<p>The Status will default as "Pending" and the Budget Status as "Not Chk'd."</p> <p>The "Hold From Further Processing" allows the user to <i>control</i> the requisition. By selecting the "Hold From Further Processing" option, the user determines when the requisition will <i>move forward</i> in the Purchasing process. If "Hold From Further Processing" is <u>not</u> selected, the requisition will move to the <u>Approver's</u> <u>worklist</u> the first time the requisition is <u>saved</u>.</p>



Step	Action
10.	<p>The Header section of the <i>Maintain Requisitions</i> page contains information that will be found on the Header (top) section of the <i>requisition</i> when printed. Not all fields/links are used by LSUNO. For example, the <i>Requisition Activities</i> link is <u>not</u> used when entering a requisition.</p>


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Step	Action
11.	<p>The Requester field is a required field and should default with your User ID. Your name will display to the right of the field as well. If your User ID does <u>not</u> default into the Requester field, contact Purchasing so that default parameters can be set for entering future requisitions.</p> <p><i>NOTE: You will not be able to save the requisition if your User ID does not default.</i></p>
12.	<p>Requisition Date vs. Accounting Date</p> <p>The Requisition Date defaults to the current date and may <i>remain</i> as defaulted.</p> <p>The Accounting Date also defaults to the <i>current date</i>. However, it may need to be <i>adjusted</i> depending on the time of year you are creating the requisition. For example, if you are entering a blanket requisition for the next Fiscal Year, the Accounting Date would need to be adjusted to 07/01/XX or after to ensure the requisition is charged to the correct budget period.</p>
13.	<p>The Requisition Defaults page is an optional feature that <i>automatically populates</i> each line item with the <i>information entered</i> on the Requisition Defaults page. The information you enter on the Requisitions Defaults screen will be used by all lines, schedules and distributions on the requisition. This minimizes data entry when creating a new requisition.</p> <p>Click the Requisition Defaults link.</p> <p>Requisition Defaults</p>

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Step	Action
14.	<p>The Requisitions Defaults page allows users to enter buyer, supplier, shipping, distribution, chartstring, etc., information on one page rather than for each line item. <i>Only information that will apply to all lines of the requisition should be entered on the Requisition Defaults page.</i></p> <p>Click the Close button.</p> 
15.	<p>Add Comments</p> <p>Comments can be added at the Header level or the line level. <i>Only comments that will apply to all lines of the requisition should be entered at the Header level.</i> Comments pertaining to a specific line item will be entered at the line level.</p> <p>Comments added to the Header can be <i>specific shipping instructions, supplier information</i> if the supplier is not listed in look up supplier on the requisition defaults page, etc. Files can be attached</p>
16.	<p>Add Items From</p> <p>None of the links associated with Add Items From are used by LSUNO for creating a requisition.</p>
17.	<p>Line</p> <p>The Line section contains <u>all</u> the line items on a requisition and shows the goods or services being requested. Information such as item description, quantity, price, etc., is entered for each line item. Comments pertaining to a specific line item can be added as needed. Files can be attached providing additional specifications or approvals for a line item.</p> <p>Each line item has its own schedule and distribution row. The Schedule defines when and where you want the items delivered. A line item can have one or multiple Schedule rows. The Distribution defines how accounts and departments are charged for the purchase and how much of the total price a department should pay. Each line item can have one or multiple distribution rows.</p>
18.	<p>This completes <i>Maintain Requisitions Navigation and Overview</i>. End of Procedure.</p>

Enter Requisition Header and Default Information

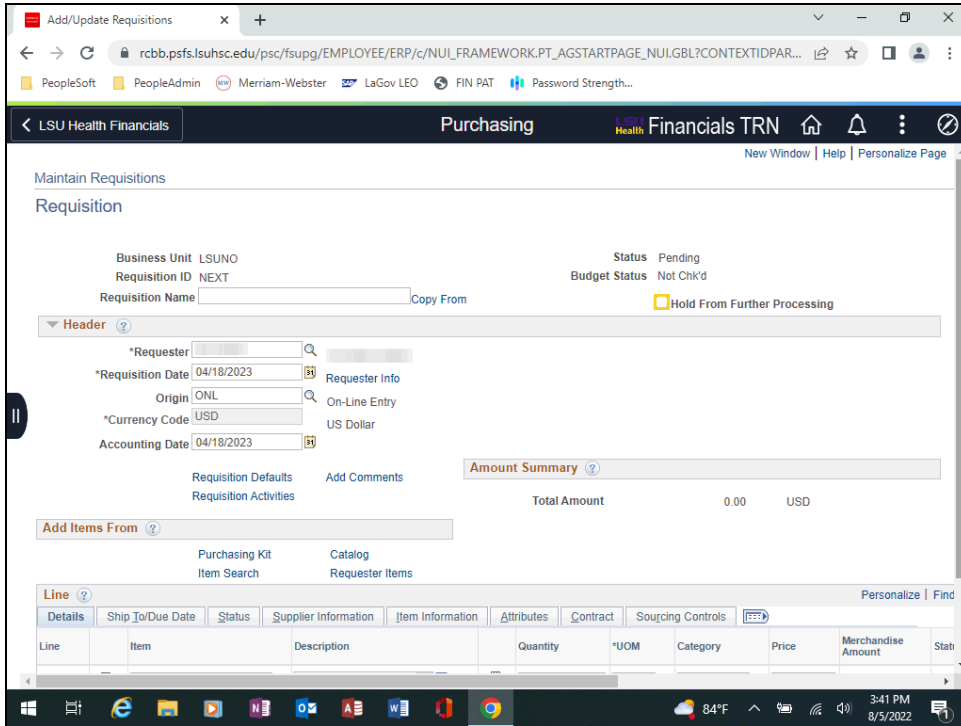
Topic Contents:

1. **Step 1: Hold From Further Processing (optional)**
2. **Step 2: Enter Requisition Name (optional)**
3. Header Information
 - a. Requester
 - b. Requisition Date vs Accounting Date
4. **Step 3: Enter Requisition Defaults (required)**
 - a. Buyer
 - b. Supplier
 - c. Supplier Location
 - d. Ship To
 - e. Due Date
 - f. Distribute By
 - g. Attention To
 - h. Ship Via and Freight Terms
 - i. SpeedChart
 - j. Account Code
 - k. PC Bus Unit
 - l. Enter multiple chartstrings
 - 1) Add a new row to row 1
 - 2) Change Percent and Dept
 - 3) Delete row 2
 - 4) Change Percent
 - m. Return to Maintain Requisitions page

Step	Action
1.	<i>NOTE: The Buyers names, chartstrings, and other values being shown in this exercise are for <u>demonstration purposes only</u>. When working in Production, users must enter their requisition information.</i>

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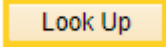



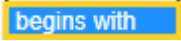
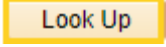



Step	Action
2.	<p>Step 1: Check Hold From Further Processing (optional)</p> <p>Although this is an optional step, it is <u>highly recommended</u> that you check the Hold From Further Processing box before proceeding further with entering your requisition. Having this box checked prevents the requisition from moving forward in the Purchasing process, thus allowing the user to save the requisition as often as desired, exit PeopleSoft and come back to the requisition later to complete it, etc.</p> <p>Click the Hold From Further Processing option.</p> <p><input type="checkbox"/></p>
3.	<p>Step 2: Enter Requisition Name (optional)</p> <p>"Requisition Name" can have a note or description of item(s) requested entered into the field. Again, this is an optional field, so entering a note or description is <u>not</u> required. If the field is left <u>blank</u>, the system will automatically populate it with the <i>Requisition ID</i> number the first time you save the requisition.</p> <p>Enter the desired information into the Requisition Name field. Enter "Karen's Binders".</p>
4.	<p>Verify that the Requester ID has defaulted into the Requester field. The user's name should also default to the right of the Requester field. If the Requester ID does not default, contact Purchasing so that default parameters can be set up. It is recommended you do <u>not</u> attempt to continue with the requisition, as save errors are likely to occur.</p>







Step	Action
5.	<p>Requisition Date vs. Accounting Date</p> <p>The Requisition Date defaults to the current date and may <i>remain</i> as defaulted.</p> <p>The Accounting Date also defaults to the <i>current date</i>. In this example, the Accounting Date does not need to be adjusted since you want the item(s) to be charged to the current fiscal year budget.</p> <p><i>NOTE: Requisition Date is a required field, but Accounting Date is not, for PeopleSoft. However, for LSUNO, Accounting Date <u>is</u> a required field.</i></p>
6.	<p>Step 3: Enter Requisition Defaults (required)</p> <p>The "Requisition Defaults" link is used to enter information that will apply to all lines on the requisition. Information entered on the Requisition Defaults page will be copied to each line item on the requisition.</p> <p>Click the Requisition Defaults link.</p> <p style="border: 1px solid black; padding: 2px; display: inline-block;">Requisition Defaults</p>
7.	<p>Default Options</p> <p>The Override option is selected and will remain as defaulted.</p>
8.	<p>Scenario</p> <p>In this exercise, users will enter the following requisition default information:</p> <ol style="list-style-type: none"> 1. Buyer - Deborah Holmes 2. Supplier - Office Depot 3. Ship To - 1497100 (Radiology) 4. Due Date - August 26, 2022 5. Distribute By - Quantity 6. Ship Via - As Defaulted 7. Freight Terms - As Defaulted 8. SpeedChart - 0497100013 9. Account Code - 546700
9.	<p>Buyer</p> <p>The Buyer is a required field for LSUNO. If you do <u>not</u> know who your buyer is, you can search for the Buyers By Department page using the Search option on the LSU Health New Orleans web page. The URL is also provided below.</p> <p>https://www.lsuhsoc.edu/administration/SupplyChain/buyers_by_department.aspx</p>

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Step	Action
10.	<p>If you know your Buyer, you can search for his/her user id using the Look up Buyer option.</p> <p>Click the Look up Buyer button.</p> 
11.	<p>In this example, the Buyer is Deborah Holmes.</p> <p>Enter the desired information into the Name: field. Enter "HO".</p>
12.	<p>Click the Look Up button.</p> 
13.	<p>Click in the DHOLME2 field.</p> 
14.	<p>In this example, the Supplier will be Office Depot. Use the Look up Supplier feature to search for the 10-digit Supplier ID number.</p> <p>Click the Look up Supplier button.</p> 
15.	<p>Click the button to the right of the Short Supplier Name begins with field.</p> 
16.	<p>A list of available operands displays. Often users will select another operand, such as "contains" to use when searching for field information. In this example, the default "begins with" will be used.</p> <p>Click the begins with list item.</p> 
17.	<p>Enter the desired information into the Short Supplier Name: field. Enter "OFFICE".</p>
18.	<p>Click the Look Up button.</p> 
19.	<p>Sixteen (16) results are returned using the Short Supplier Name "Office."</p> <p>Click the 0000002440 - OFFICE DEPOT link.</p> 
20.	<p>When the Supplier field contains a value, the <i>Supplier Name</i> will display to the right of the Supplier field. The <i>Supplier Location</i> will also default into the page. The <i>Supplier Location will remain as defaulted</i>.</p>



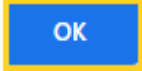
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Step	Action
21.	<p>Category and Unit of Measure</p> <p><i>NOTE: The Category and Unit of Measure can only be entered on the requisitions defaults page if the user is doing a single line requisition. If the user is ordering multiple items on the requisition, the Category and Unit of Measure will be entered on the Maintain Requisitions page for each line item.</i></p>
22.	<p>The Ship To is the Department designation where the item(s) will be delivered.</p> <p>Click the Look up Ship To button.</p> 
23.	<p>For this example, the Radiology department will be used.</p> <p>Enter the desired information into the Ship To Location: field. Enter "Radiology".</p>
24.	<p>Click the Look Up button.</p> 
25.	<p>Click the 1497100 link.</p> 
26.	<p>The Due Date is the date you expect the item(s) to be delivered. In this example, the due date will be 4/28/23.</p> <p>Click the Calendar Due Date button.</p> 
27.	<p>Click the 28 date.</p> 
28.	<p>Click the Down scrollbar.</p> 
29.	<p>The Ultimate Use Code field is not used by LSUNO.</p> <p>The Attention To can be used if desired for designate a contact person or room for item delivery</p> <p>The One Time Address link is not used by LSUNO..</p>
30.	<p>Distribute By</p> <p>Funds are distributed either by Quantity or Amount. The distribution method is important when:</p> <ol style="list-style-type: none"> 1. An item(s) is being charged to more than one account or department; or 2. An item(s) is a product or a service. Most <i>blanket</i> Purchase Orders are distributed by <i>Amount</i>.

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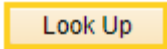



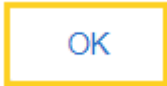

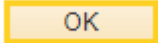
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Step	Action
31.	<p>Distribute By (continued)</p> <p>The Distribute By is <i>designated</i> on the <i>Requisition Defaults</i> page. However, the distribution method can be <i>changed</i> on the <i>Distribution</i> page for a specific line item.</p>
32.	<p>In this example, the Distribute By will be "Quantity", so it will remain as defaulted.</p> <p><i>See the Adjust ChartString Information topic for distributing funds by Amount.</i></p>
33.	<p>The Ship Via and Freight Terms will remain as defaulted unless instructed otherwise by Purchasing.</p>
34.	<p>As previously stated, a SpeedChart is a shortcut users' can enter to automatically populate individual chartfield values on the Distributions line. In this example, users will enter the first SpeedChart from the "Lookup SpeedChart" exercise: 0497100013</p> <p>Enter the desired information into the SpeedChart field. Enter "0497100013".</p>
35.	<p>Press [Tab] on your keyboard to populate chartfield values.</p> <p><i>NOTE: The Account Code will not populate. Users must manually enter the Account Code on the Distributions line.</i></p>
36.	<p>The chartstring displays.</p> <p>Click the Look up Account button.</p> 
37.	<p>In this example, users will search for the Account Code for "Office Supplies."</p> <p>Enter the desired information into the Description: field. Enter "OFFICE".</p>
38.	<p>Click the Look Up button.</p> 
39.	<p>Click in the 546700 field.</p> 
40.	<p>Click the Right scrollbar.</p> 
41.	<p>Project</p> <p>The Project/Grant number <u>must</u> be entered on the Requisitions Defaults page only if all requisition items are being charged to the Project/Grant. No Project/Grant is associated with this requisition, so <u>no</u> Project number will be entered.</p>

Step	Action
42.	<p>Your business unit designation will be your PC Bus Unit. It is recommended that LSUNO be used for all requisitions.</p> <p>Enter the desired information into the PC Bus Unit field. Enter "LSUNO".</p>
43.	<p>Click the Right scrollbar.</p> 
44.	<p>PeopleSoft does not allow the use of two SpeedCharts on the Requisitions Defaults page. However, if the user needs to split the cost of all items on the requisitions, an additional row may be added on the Requisitions Defaults page. The new row will be a duplicate of the current chartstring. The user must change at least chartfield (e.g., Account, Dept, Fund, Program, Class, and/or Project) on the second row to create a valid chartstring for splitting item costs.</p> <p><i>NOTE: If the user only wants to split the cost of one item, the second row would not be added on the Requisition Defaults page. Instead, it would be added to the Distribution page for the specific line item.</i></p> <p>Click the Add multiple new rows at row 1 button.</p> 
45.	<p>The number of rows to add defaults to one (1). Users can add as many rows as desired, however, PeopleSoft does not like blank rows. Any unused rows will need to be deleted prior to navigating away from the page. <i>It is recommended that one line be added at a time.</i></p> <p>Click the OK button.</p> 
46.	<p>Percent</p> <p>When the cost of an item(s) is split between two chartstrings, the percentage to be applied to each must be designated using the Percent field. When the new row is added, the system will assign 100% of the cost to the original chartstring. Users <u>must</u> change the percentage based on how funds will be split (e.g., 50% charged to row 1 and 50% charged to row 2).</p>
47.	<p>A duplicate row of row one (1) is added.</p> <p>In this example, users will change the Percent so that each chartstring is charged 50% of the cost of the item(s) to be ordered.</p> <p>Enter the desired information into the Percent field. Enter "50".</p>
48.	<p>Enter the desired information into the Percent field. Enter "50".</p>

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Step	Action
49.	In this example, change the Department for <i>row 2</i> to 1497120 . Click the Look up Dept button. 
50.	Enter the desired information into the Department: field. Enter " 14971 ".
51.	Click the Look Up button. 
52.	Click in the 1497120 field. 
53.	The two rows now have two distinct chartstrings. Click the Right scrollbar. 
54.	Row 2 will be deleted since splitting the costs of all line items is not desired for this requisition. Click the Delete row 2 button. 
55.	A warning message displays asking you to confirm the deletion of row 2. Click the OK button. 
56.	Click the Left scrollbar. 
57.	The Percent for <i>row 1</i> <u>must</u> be changed back to 100% . Enter the desired information into the Percent field. Enter " 100 ".
58.	Once all default information has been entered, click the OK button to return to the Maintain Requisitions page. Click the OK button. 
59.	This completes <i>Enter Requisition Header and Default Information</i> . End of Procedure.

Enter Item Information and Save the Requisition

Topic Contents:

1. Step 4: Enter Item Information and Save the Requisition (required)

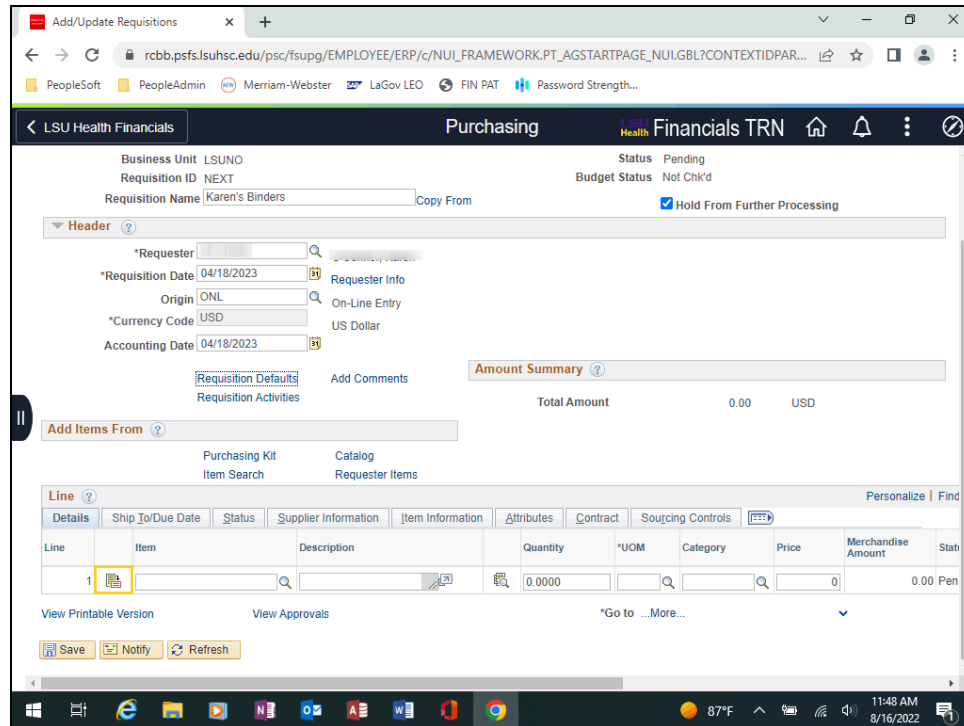
- a. Enter Transaction Item Description
- b. Spell Check
- c. Expand All
 - 1) Supplier Information
 - 2) Item Information
- d. Enter Quantity
- e. Enter UOM
- f. Enter Category Code
- g. Enter Price
- h. Save
 - 1) Requisition ID
 - 2) Minimal data to save and generate Requisition ID number
- i. Add a new row
- j. Repeat steps a. - h.



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Step	Action
1.	<p>Step 4: Enter Item(s) and Save the requisition (required)</p> <p>Step 4 is a multi-pronged. It requires users to <i>enter item information and save</i> the requisition.</p> <p>In this exercise, users will request the following items: Binders and Gel Pens. After entering item information for Binders, the user will <i>save</i> the requisition. The system will automatically assign the next available requisition number to the requisition.</p>
2.	<p>The <i>Tabs above Line 1</i> (Ship To/Due Date, Status, Supplier Information, Item Information, Attributes, Contract, and Sourcing Controls) provide a compilation of the information entered into the requisitions. The system automatically defaults needed information into the tabs.</p> <p>NOTE: Users should never change any information on these tabs. The Details tab is only tab in which users will enter information.</p>
3.	<p>NOTE: The Item Number will always be left blank when entering a requisition.</p>
4.	<p>Description</p> <p>A description <u>must</u> be entered for each line item. You may enter the description <i>directly</i> into the Description field if the description is <i>no more than 20 characters</i> long.</p> <p>If the description is more than 20 characters, users will enter the description on the Details page in the Transaction Item Description box. The <i>Details</i> page is located to the <i>right of the line number</i>.</p>

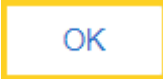


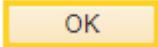
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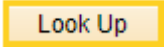


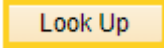



Step	Action
5.	Click the Details button. 
6.	<p>Transaction Item Description</p> <p>The Transaction Item Description is a free-text edit field. This means any type of character can be entered into the field (e.g., letters, numbers special characters, etc.). Description information must be entered in ALL CAPS.</p> <p>The box is limited to 254 characters, which includes spaces. The system will allow you to enter more than 254 characters, but the system will truncate the number of characters entered down to 254.</p>
7.	<p>In this example, you will enter the <i>Transaction Item Description</i> for the Binder item.</p> <p>Enter the desired information into the Transaction Item Description field. Enter "D-RING BINDER, 3 - 5" RINGS, PURPLE".</p>
8.	<p>A spell check (<i>blue book with a check mark</i>) feature is also available and works the similarly as spell check used in Word and other Microsoft applications.</p> <p>Click the Spell Check Transaction Item Description button. </p>

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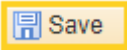


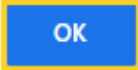

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Step	Action
9.	Click the OK button. 
10.	Below the Transaction Item Description box are five (5) collapsed sections: Supplier Information, Item Information, Attributes, Contract and Sourcing Controls. The Expand All link allows you to expand all five (5) sections at one time. The Collapse All link minimizes all five (5) sections at one time. Individual lines may be expanded by selecting the Expand arrow for a specific line. Click in the Expand All field. 
11.	The supplier information defaults into the Supplier Information fields. The fields will remain as defaulted. If a user has found the desired item in a supplier's catalog, the user may enter the Supplier Catalog name and Supplier Item ID in the Item Information section. These are the only two fields users should utilize, and most end-users will not enter information into these fields. Also, if the user knows the requisition will need to go out for quote, the checkbox to the left of the RFQ Required for each line item. If the user is unsure as to whether the requisition will go out for quote, do not check the RFQ Required.
12.	Click the Down scrollbar. 
13.	Click the OK button. 
14.	<p>Quantity</p> <p>The Quantity must be entered in whole numbers (e.g., 10 or 11 rather than 10.5)</p> <p><i>NOTE: Delete the value in the Quantity field before entering the new value to prevent keying errors. The system will automatically populate the decimal point and trailing zeros when the page is refreshed (e.g., 10.0000)</i></p> <p>Enter the desired information into the Quantity field. Enter "10".</p>




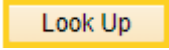

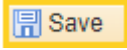
Step	Action
15.	<p>Unit of Measure (UOM)</p> <p>The UOM is a required field and may be entered in upper, lower, or mixed case. The system will automatically change the UOM to upper case when the page is refreshed. You may enter the UOM directly into the field, or search for it by clicking the <i>Look up UOM</i> button to the right of the field.</p> <p>Click the Look up UOM button.</p> 
16.	Enter the desired information into the Unit of Measure: field. Enter " E ".
17.	Click the Look Up button.
	
18.	Click the EA link.
	
19.	<p>Category</p> <p>The Category is a value from the Inventory Tables of the State Commodity Code. The Category code will <u>vary</u> by business unit.</p> <p>LSUNO users will search for the appropriate Category code using the <i>Look up Category</i> option. If the appropriate code <u>cannot</u> be found, contact Purchasing for assistance.</p> <p>Click the Look up Category button.</p> 
20.	Enter the desired information into the Description field. Enter " BINDER ".
21.	Click the Look Up button.
	
22.	Click the 61509 - BINDERS: CHAIN, POST, PRONG, link.
	
23.	<p>Price</p> <p>When entering the cost of an item into the Price field, users <u>must</u> enter the <i>decimal point</i> to indicate <i>cents</i> (e.g., 12.95).</p> <p>NOTE: Delete the value in the Price field before entering the new value to prevent keying errors. The system will automatically populate the trailing zeros when the page is refreshed (e.g., 12.9500)</p> <p>Enter the desired information into the Price field. Enter "48.59".</p>

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Step	Action
24.	The total amount of Line 1 will display in the Merchandise Amount field.
25.	<p>NOTE: The first time you save the requisition the system will automatically assign the next available requisition id number to the requisition.</p> <p>You cannot successfully Save the requisition until <i>all required fields are populated</i>. The minimal date required is:</p> <ol style="list-style-type: none"> 1. Requester 2. Requisition Date 3. Accounting Date 4. Account 5. Department 6. Location 7. Fund 8. Program 9. Class 10. Description 11. Quantity 12. UOM (unit of measure) 13. Category 15. Price
26.	<p>NOTE: If a multiple line item requisition is created, and a red box or Save Edit message is received, the line item containing the blank field(s) will not be identified. It is strongly recommended the user save after the completion of each line item.</p> <p>Click the Save button.</p> 
27.	<p>The Requisition ID displays. The Requisition ID is not the PO number. A separate PO will be assigned by Purchasing when the PO is generated. The Status will remain as "Pending" until the Hold From Further Processing is uncheck and the requisition is saved.</p> <p>Users will <i>add another line</i> to the requisition for <i>gel pens</i>.</p>
28.	<p>Click the Right scrollbar.</p> 
29.	<p>Click the Add multiple new rows at row 1 button.</p> 
30.	<p>Click the OK button.</p> 
31.	<p>Click the Details button.</p> 

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Step	Action
32.	Enter the desired information into the Transaction Item Description field. Enter " GEL PENS, MEDIUM POINT, PURPLE ".
33.	Click the Down scrollbar. 
34.	Click the OK button. 
35.	Enter the desired information into the Quantity field. Enter " 2 ".
36.	Enter the desired information into the UOM field. Enter " BOX ".
37.	Click the Look up Category button. 
38.	Enter the desired information into the Description: field. Enter " PENS ".
39.	Click the Look Up button. 
40.	Click the 62080 - PENS (GENERAL WRITING TYPES): link. 
41.	Enter the desired information into the Price field. Enter " 8.95 ".
42.	Click the Save button. 
43.	This completes <i>Enter Item Information and Save the Requisition</i> . End of Procedure.

Training Guide
Managing Requisitions Fluid

Adjust Chartstring Information

Topic Contents:

1. Step 5: Adjust Chartstring Information (required)

2. Access Schedule page

3. Access Distribution page

a. Change Distribute By to Amount

b. Using Multi-SpeedChart link

1) Overwrite existing chartstring using speedchart 0497100012 and 485.90 as Amount to Distribute

2) Use Account code 546700 and change Dept to 1497120

3) Create row 2 by selecting Append as the SpeedCharts Process Option and enter speedchart 0497100013

4) Change Percent to 50% for each row

5) Add Account code 546700 to row 2

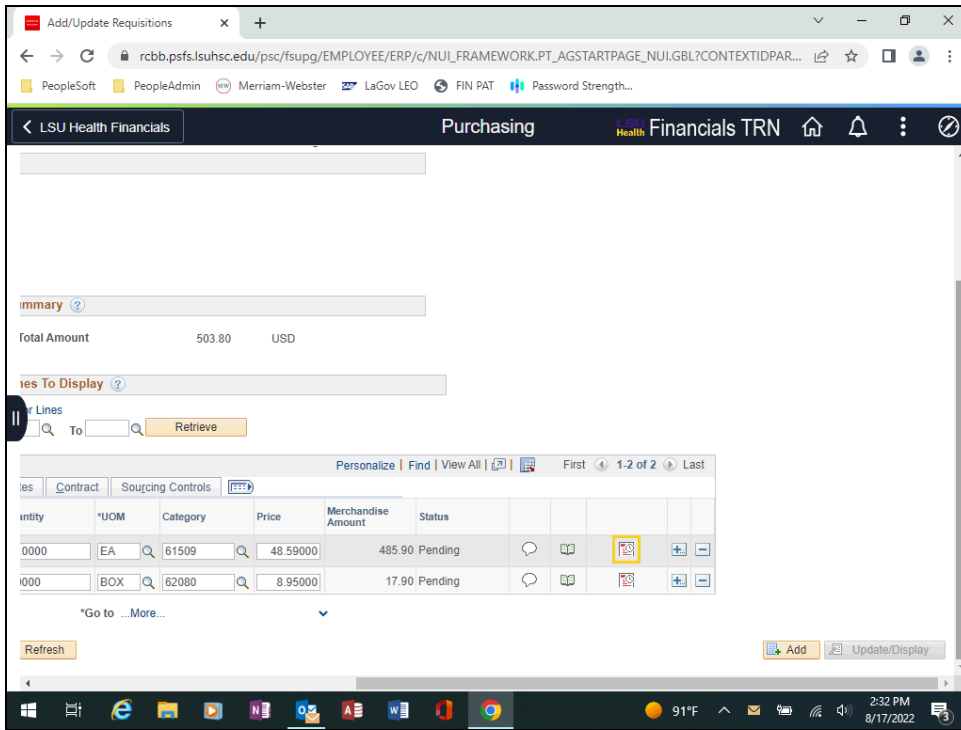
6) Delete row 1



7) Change Percent to 100 and change Distribute By to Quantity

8) Save the requisition


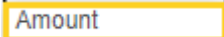

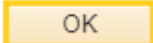

Training Guide

Managing Requisitions Fluid









Step	Action
1.	<p>Step 5: Adjust Chartstring Information (required)</p> <p>Users can change the Distribute By for a <i>specific line item</i>. The Distribute By for a requisition is either <i>Quantity</i> or <i>Amount</i>. The Distribute By can be <i>changed</i> on the Distribution page for the specific line item. Users can also add, change, or delete chartstring information for a <i>specific line item</i> on the Distribution page as well. The <i>Distribution</i> page is located on the line item's Schedule page.</p> <p>Click the Schedule... button.</p> 
2.	<p>The Schedule defines when and where the user wants the specific item delivered.</p> <p>Click the Distribution button.</p> 

Training Guide Managing Requisitions Fluid


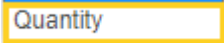
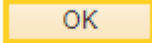

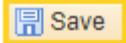
Step	Action
3.	<p>The Distribution page defines <i>how departments and accounts are charged</i> for an item.</p> <p>In this example, users will <i>change</i> the <i>Distribute By</i> from Quantity to Amount. The <i>Multi-SpeedChart</i> link will be used to first overwrite the current chartstring, and then used again to append the overwritten chartstring so that two chartstring split the cost of the item.</p>
4.	<p>Begin by changing the <i>Distribute By</i> from Quantity to Amount.</p> <p>Click the button to the right of the Distribute By field.</p> 
5.	<p>Click the Amount list item.</p> 
6.	<p>By changing the Distribute By to Amount, the system automatically <i>removed Quantity</i> from Distributions line and <i>moved Merchandise Amount</i> next to Percent.</p>
7.	<p>The Multi-SpeedCharts link can be utilized if the wrong speedchart was previously used, or if the user needs to change the chartstring for this specific item.</p> <p>Click in the Multi-SpeedCharts field.</p> 
8.	<p>In this example, the <i>SpeedCharts Process Option</i> will remain as "Overwrite". The <i>speedchart</i> will be 0497100012 to overwrite the current chartstring information. The <i>Amount to Distribute</i> will be 485.90.</p>
9.	<p>Enter the desired information into the SpeedChart field. Enter "0497100012".</p>
10.	<p>Enter the desired information into the Amount to Distribute field. Enter "485.90".</p>
11.	<p>Click the OK button.</p> 
12.	<p>The new chartstring has overwritten the previous chartstring. The Program previously was <i>00654</i> and now is <i>00653</i>. The Account is <u>not</u> copied over, so the user must enter the Account information.</p> <p>Enter the desired information into the Account field. Enter "546700".</p>
13.	<p>The user will also change the <i>Dept</i> to 1497120.</p> <p>Enter the desired information into the field. Enter "1497120".</p>
14.	<p>Click the Multi-SpeedCharts link.</p> 

Training Guide

Managing Requisitions Fluid

Step	Action
15.	Users will append the speedchart, which will add a second row and chartstring to the Distributions. Multiple chartstring can be used on the Distributions page, Unlike the Defaults page, to make splitting a the cost of an item easier and reduce keying errors.
16.	<p>In this example, users will select the Append option. the original speedchart will be entered as the SpeedChart: 0497100013. The <i>Amount to Distribute</i> will be left blank, so that the user can enter the desired split on the individual distribution lines.</p> <p>Click the Append option.</p> 
17.	Enter the desired information into the SpeedChart field. Enter " 0497100013 ".
18.	<p>Click the OK button.</p> 
19.	Enter the desired information into the Percent - Line 1 field. Enter " 50 ".
20.	Enter the desired information into the Percent - Line 2 field. Enter " 50 ".
21.	<p>The Account code is not part of the chartstring, so <u>must</u> be entered manually by the user.</p> <p>Enter the desired information into the Account field. Enter "546700".</p>
22.	<p>The chartstrings for bother lines are complete and show the cost of the binders being slip evenly between the two chartstrings.</p> <p>The user will now <i>return</i> the Distributions to the <i>original chartstring (row 2)</i> and have the entire cost (<i>100%</i>) charged to that chartstring. The Distribute By will be changed back to <i>Quantity</i>.</p> <p>Click the Right scrollbar.</p> 
23.	<p>Click the Delete row 1 button.</p> 
24.	<p>A warning message displays to confirm the delete of row 1.</p> <p>Click the OK button.</p> 
25.	<p>Click the Left scrollbar.</p> 

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Step	Action
26.	<p>The Percent <u>must</u> be changed back to <i>100%</i>.</p> <p>Enter the desired information into the Percent field. Enter "100".</p>
27.	<p>Change the Distribute By back to <i>Quantity</i>.</p> <p>Click the button to the right of the Distribute By field.</p> 
28.	<p>Click the Quantity list item.</p> 
29.	<p>Notice the Quantity field again displays to the <i>right</i> of the <i>Percent</i> field.</p> <p>Click the OK button.</p> 
30.	<p>Click in the Return to Main Page field.</p> 
31.	<p>Changes have been made on the Distribution page, so the requisition needs to be saved.</p> <p>Click the Save button.</p> 
32.	<p>This completes <i>Adjust ChartString Information</i>.</p> <p>End of Procedure.</p>

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Managing Requisitions Fluid

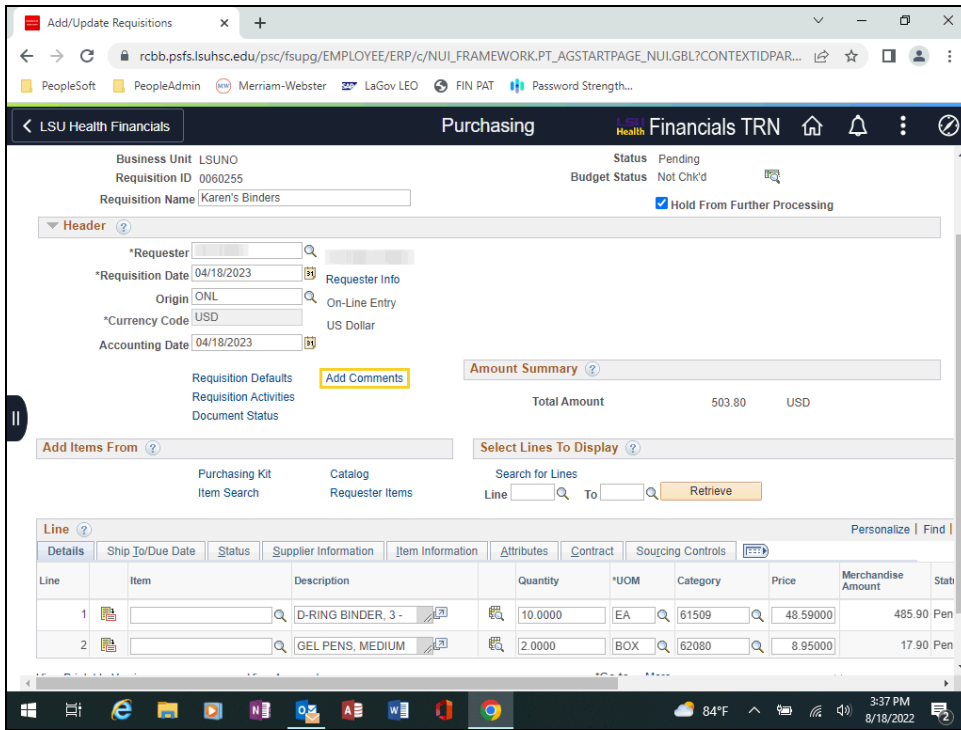
Enter Comments and Attach Documents

Topic Contents:





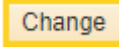
1. **Step 6: Enter Comments and Attach Documents (optional)**
2. Header Comments
 - a. Apply to the entire requisition
 - 1) New supplier information
 - 2) Specific shipping and delivery instructions
 - b. Approval Justification
 - c. Displays above all line information on the requisition
3. Line Comments
 - a. Apply to specific line item
 - b. Displays and print after specific line item information on the requisition
 - c. Comments boxes
 - 1) Free-text box limited to half a page
 - 2) No limit on number of comment boxes - boxes list in ascending order
 - 3) Can copy and paste information into comment boxes
 - 4) Can attach documents to comment boxes
 - 5) Can Inactivate but cannot delete comment boxes
4. Dots in Line Comments bubble denotes comments available
5. Attach a document
 - a. Choose a file and click Open button
 - b. Upload file
 - c. File name displays next to Attachment - can View to verify file
 - d. Delete button activates once user navigates away from page and saves

Training Guide

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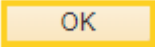



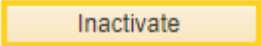


Step	Action
1.	<p>Step 6: Enter Comments and Attach Documents (optional)</p> <p>Comments can be added at the Header level using the "Add Comments" link.</p> <p>Click the Add Comments link.</p> <p>Add Comments</p>
2.	<p><i>NOTE: The method used to add, change and delete comments is the same method used to add comments on the Line level. In this exercise, comments will be demonstrated at the Line level. However, comments that can added at the Header level will be discussed first.</i></p> <p><i>NOTE: Comments entered at the Header level will display and print above all line item information on the requisition. Please do <u>not</u> include any comments you do not wish to be seen or shared.</i></p>
3.	<p>Users will only enter information at the Header level that <i>applies to the entire requisition</i> (e.g., new supplier information, suggested suppliers for bid, address for the mailing the Purchase Order when the supplier has multiple locations, etc.). <i>Specific shipping or delivery instructions</i> applicable to all line items may also be entered at the Header level.</p>
4.	<p>Likewise, <i>justification for purchase</i> can be added as well at the Header level. The Approval Justification box will be checked, and will display on the requisition approval page when the Approver selects the requisition.</p>

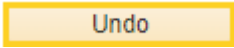
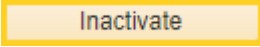

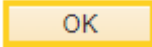

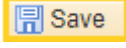


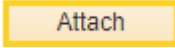
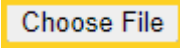
Step	Action
5.	Click the Close button. 
6.	Click the Right scrollbar. 
7.	There is no link to click when entering comments at the Line level. Instead, users will click the speech/text bubble (Line Comments) found to the right of the Status field. <i>NOTE: Comments added at the Line level will display and print below the corresponding line item information on the requisition. Please do <u>not</u> include any comments you do not wish to be seen or shared.</i> Click the Line Comments button. 
8.	Only information that pertains to the <i>specific line</i> (e.g., item specifications) will be added to Line Comments. The Comments field is a free-text field, and your Enter key on your keyboard can be used to move between lines. It is recommended users limit comments in each box to half a page. The first comment box defaults onto the page. Additional comment boxes can be generated if required. PeopleSoft is a web-based application, so data (e.g., item specifications) from the web or other Microsoft sources can be copied and pasted into the comment boxes. The spell check feature is also available for each comment box.
9.	If the comments are lengthy, the user can elect to utilize the attach option and upload any supporting documents such as specification, quotes, etc. <i>Attaching and uploading documents will be demonstrated later in this topic.</i>
10.	The "Use Standard Comments " and "Use Item Specifications " links are not used by LSUNO.
11.	Enter the desired information into the Comments field. Enter " MAKE SURE BINDERS ARE DURRABLE AND HAVE 3 RINGS ".
12.	Click the Spell Check button. 
13.	The word "DURRABLE" is misspelled and must be corrected. Click the Change button. 

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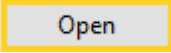

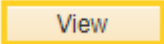

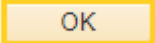
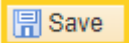
Step	Action
14.	<p>A message displays that spell check is complete, so no other misspellings were found.</p> <p>Click the OK button.</p> 
15.	<p>Purchasing will determine at the PO level if Comment options such as "Send to Supplier", "Show at Voucher", and/or "Show at Receipt" are required.</p>
16.	<p>If additional space is needed, a new row can be inserted.</p> <p>Click the Add a new row at row 1 button.</p> 
17.	<p>When the new row is added, users can only see the new row. The View All link allows users to view all comment box rows.</p> <p>Click the View All link.</p> 
18.	<p>Inserted rows are independent of each other, and will be viewed in ascending order unless sort sequencing is changed.</p> <p>Click the Down scrollbar.</p> 
19.	<p>Enter the desired information into the Comments - Row 2 field. Enter "TEST".</p>
20.	<p>Inactivate</p> <p>Comments cannot be deleted, but can be inactivated so they will not show in the system or on the requisition. The comments box will be grayed out by the system when the Inactivate button is clicked.</p> <p><i>NOTE: When users navigate away from the Line Comments page, the system will remove the inactivated comment boxes from the page. Inactivated boxes cannot be retrieved once a user navigates away from the page; they must be re-entered.</i></p> <p>Click the Inactivate - Row 2 button.</p> 

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Step	Action
21.	<p>Undo</p> <p>Notice the comments area is grayed out. The Undo button will re-activate a comment box as long as the user has not navigated away from the Line Comments page.</p> <p>Click the Undo - Row 2 button.</p> <p style="text-align: center;"></p>
22.	<p>Click the Inactivate - Row 2 button.</p> <p style="text-align: center;"></p>
23.	<p>Click the Down scrollbar.</p> <p style="text-align: center;"></p>
24.	<p>Click the OK button to navigate away from the Line Comments page.</p> <p style="text-align: center;"></p>
25.	<p>Click the Left scrollbar.</p> <p style="text-align: center;"></p>
26.	<p>Click the Save button.</p> <p style="text-align: center;"></p>
27.	<p>Click the Right scrollbar.</p> <p style="text-align: center;"></p>
28.	<p>Notice the Line Comments bubble now contains blue dots which denote that comments are available.</p> <p>Click the Line Comments button.</p> <p style="text-align: center;"></p>
29.	<p>If comments are lengthy, documents can be attached rather than typing or copying and pasting information.</p> <p>Click the Attach button.</p> <p style="text-align: center;"></p>
30.	<p>In this example, users will attach the Binders document.</p> <p>Click the Choose File button.</p> <p style="text-align: center;"></p>

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Step	Action
31.	Click the Binders list item. 
32.	Click the Open button. 
33.	Click the Upload button. <i>NOTE: If you receive a "File Failed to Attach" message, check the file name length. If the file name contains more than 60 characters, the file will <u>not</u> attach. Rename the file to reduce the number of characters and repeat the attachment process.</i> 
34.	The <i>file name</i> displays to the <i>right</i> of Attachment. Users are able to view the file to verify the correct file was selected. Click the View button. 
35.	Click the Close button. 
36.	The Delete button will <i>activate</i> once the user navigates away from the Line Comments page and saves the requisition. Click the OK button. 
37.	Click the Save button. 
38.	This completes <i>Enter Comments and Attach Documents</i> . End of Procedure.

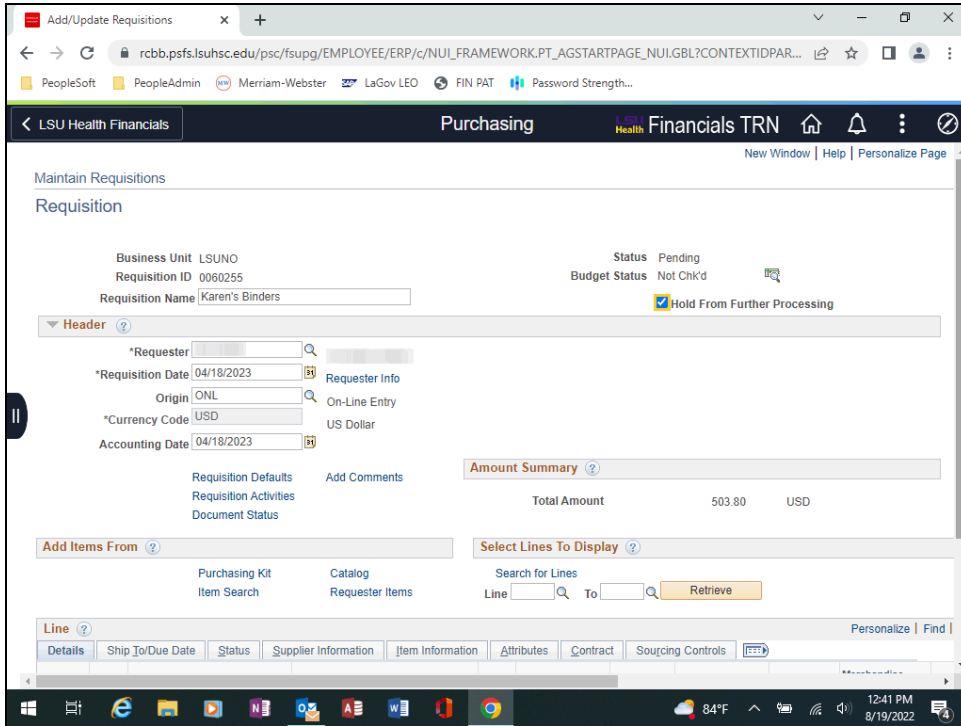
View Approvals and Print a Requisition



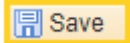

Topic Contents:

1. **Step 7: View Approvals and Print a Requisition (optional)**
2. Uncheck Hold From Further Processing
3. Save the Requisition
4. View Approvals link
5. ***Requisition can only be printed ONE AT A TIME***
6. Two methods for printing a requisition
 - a. View Printable Version link
 - 1) SQR Report box displays
 - 2) Statuses - Queued, Processing, Success, Preparing Report
 - 3) Select Printer icon to designate number of copies and where to print
 - b. Access the Process Scheduler
 - 1) Select Reports and then Print Requisition from left-side Navigation Menu
 - 2) Select Add a New Value tab
 - 3) Enter Run Control ID
 - 4) Enter Print Requisition parameters
 - a) Business Unit, Requisition ID, Select ALL Statuses, ON Hold AND Not On Hold
 - 6) Select the Run button
 - a) Type = Web, Format = PDF
 - 7) Select Process Monitor
 - a) Click Refresh until Run Status = Success, Distribution Status = Posted
 - 8) Select Report Manager
 - a) Select Administration tab
 - b) Report is blue link in Description column named Requisition Print SQR
 - 9) Return to Print Requisition page to print another requisition

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Step	Action
1.	<p>Step 7: View Approvals and Print a Requisition (optional)</p> <p>The Hold From Further Processing must be <i>unchecked</i> and the requisition Saved in order to move the requisition forward in the Purchasing process.</p> <p>Click the Hold From Further Processing option.</p> 
2.	<p>Click the Down scrollbar.</p> 
3.	<p>Even though the <i>Hold From Further Processing</i> has been <i>unchecked</i>, the requisition still must be Saved for it to move forward in the Purchasing process.</p> <p>Click the Save button.</p> 
4.	<p>If the <i>Requester</i> is their <i>own approver</i>, the system will <i>automatically run the approval process and approve</i> the requisition.</p> <p>Click the Down scrollbar.</p> 

Step	Action
5.	<p>Step 7: View Approvals and Print the Requisition (optional)</p> <p>Users can view requisition approval steps on the View Approvals page.</p> <p>Click the View Approvals link.</p> <p style="text-align: center;">View Approvals</p>
6.	<p>In this example, the requester is their own approver and the requisition has been approved. If the requester is <u>not</u> their own approver, the Status = Pending and the name of the approver would display.</p> <p>Click the Return button.</p> <p style="text-align: center;">Return</p>
7.	<p>There are two (2) methods that can be used to Print a requisition:</p> <ol style="list-style-type: none"> 1. View Printable Version 2. Accessing the Process Scheduler <p><i>NOTE: Users may only <u>REQUEST AND PRINT ONE REPORT AT A TIME.</u></i></p> <p><i>NOTE: The View Printable Version cannot be used for printing once the Status = Complete or Closed. You must use the Accessing the Process Monitor option once the Status = Complete or Closed.</i></p> <p>Click the View Printable Version link.</p> <p style="text-align: center;">View Printable Version</p>
8.	<p>The SQR Report box displays with Status = Processing. The SQR process begins with <i>Queued</i>, then <i>Processing</i>, and then change to <i>Success</i>. When the Status = Success, a line will appear stating the system is preparing the report. The report will <i>open automatically</i> in the SQR Report box.</p>


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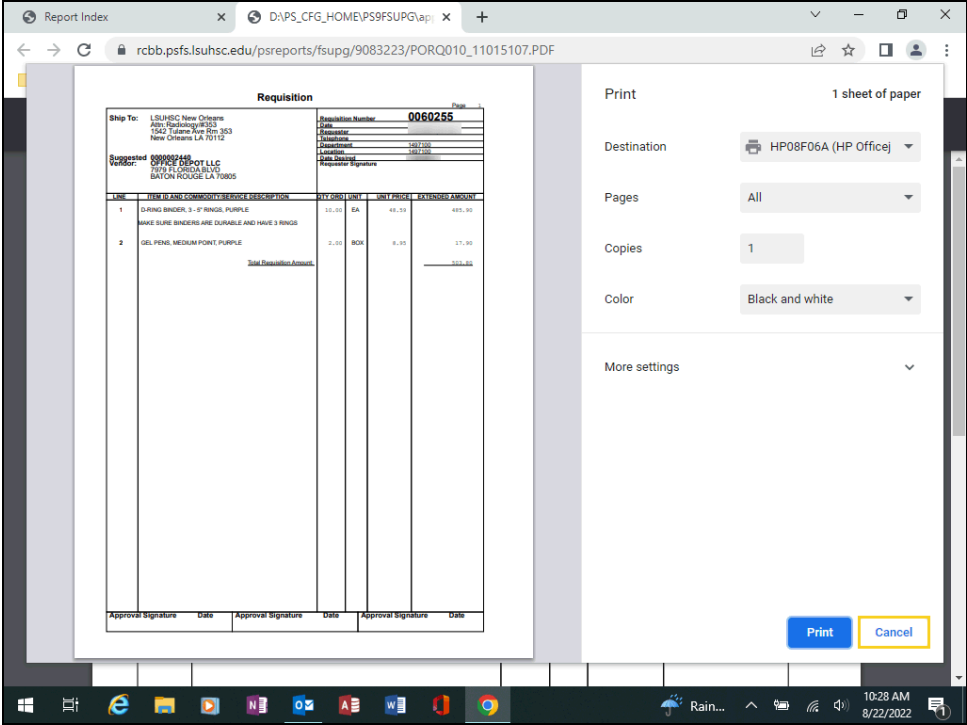
Requisition Page 1


Ship To: LSUHSC New Orleans Attn: Radiology/#353 1542 Tulane Ave Rm 353 New Orleans LA 70112	Requisition Number 0060255
Suggested Vendor: 000002440 OFFICE DEPOT LLC 7979 FLORIDA BLVD BATON ROUGE LA 70805	Date 04/18/2023
	Requester
	Telephone
	Department 1497100
	Location 1497100
	Date Desired 04/28/2023
	Requester Signature

LINE	ITEM ID AND COMMODITY/SERVICE DESCRIPTION	QTY	ORD	UNIT	UNIT PRICE	EXTENDED AMOUNT
1	D-RING BINDER, 3 - 5" RINGS, PURPLE MAKE SURE BINDERS ARE DURABLE AND HAVE 3 RINGS	10.00		EA	48.59	485.90
2	GEL PENS, MEDIUM POINT, PURPLE	2.00		BOX	8.95	17.90
<u>Total Requisition Amount:</u>						503.80

Step	Action
9.	<p>Select the Printer icon to print the requisition.</p> <p>Click the Printer button.</p> 

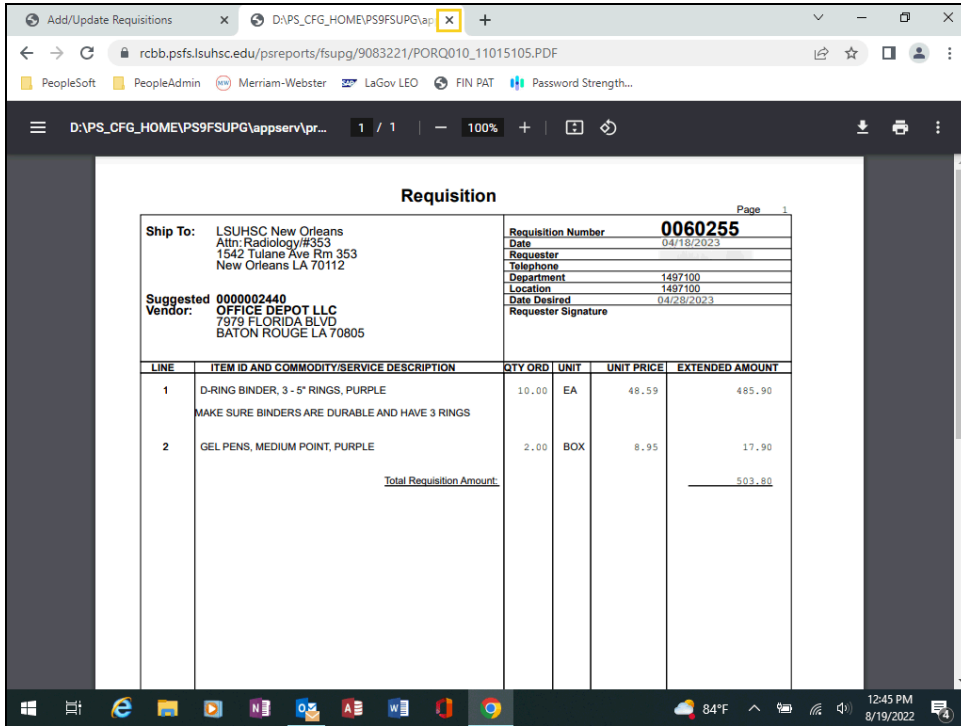
Training Guide Managing Requisitions Fluid







Step	Action
10.	<p>Users can designate the number of copies to print, the destination printer, etc.</p> <p>For training purposes only, click the Cancel button.</p> 

Training Guide

Managing Requisitions Fluid


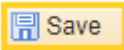
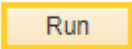


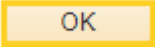

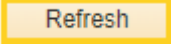

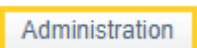


Step	Action
11.	Click the Close Print tab. 
12.	The second method for printing the requisition is using the Process Scheduler . Click the Navigation Area button. 
13.	Click the (select to expand or collapse child steps) Reports button. 
14.	Click the Down scrollbar.
15.	Click the Print Requisition button. 


Step	Action
16.	<p>The first time you run the Requisition Print process, you must create a Run Control ID.</p> <p><i>See the Create/Find a Run Control ID topic under Requisition Basics for instructions on how to create a valid run control id.</i></p> <p>Click the Add a New Value tab.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Add a New Value</div>
17.	Enter the desired information into the Run Control ID: field. Enter " PRINT_REQ ".
18.	Click the Add button.
19.	Click the Navigation Area button.
20.	<p>The parameters entered on the Print Requisition's page will be saved to a <i>specified run control id</i>. When running the report in the <i>future</i>, the user will <i>only change</i> the <i>Requisition ID</i> - all other fields will remain as defaulted.</p> <p>Enter the desired information into the Business Unit field. Enter "LSUNO".</p>
21.	<p>Requisition ID</p> <p>The user may enter the requisition id <i>directly</i> into the Requisition ID field, or <i>search</i> for it using the <i>Look up Requisition ID</i> option. It is recommended the user note the requisition id when attempting to enter it on the page and print the requisition</p> <p>Enter the desired information into the Requisition ID field. Enter "0060255".</p>
22.	<p>NOTE: Do <u>not</u> enter From Date, Through Date or Requester on the Print Requisition page. If this information is entered incorrectly, it can prevent the requisition from printing. Since requisitions must be <u>REQUESTED AND PRINTED ONE AT A TIME</u>, entering the requisition id will be sufficient to identify the requisition.</p>
23.	<p>Selecting all statuses to be included means that the requisition ID that you enter will be printed regardless of the current status of the requisition.</p> <p>Click the Select All button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Select All</div>
24.	Click the button to the right of the Statuses to Include field.
	<div style="border: 1px solid black; padding: 2px; display: inline-block;">▼</div>

Training Guide

Managing Requisitions Fluid

Step	Action
25.	<p>For simplicity, users will want to select the most inclusive option.</p> <p>Click the On Hold AND Not on Hold list item.</p> 
26.	<p>Click the Save button.</p> 
27.	<p>Process Scheduler</p> <p>The <i>Process Scheduler</i> defines the Run Location and Output Destination of the print request.</p> <p>Click the Run button.</p> 
28.	<p>Click the button to the right of the Server Name field.</p> 
29.	<p>Click the pane.</p> 
30.	<p><i>NOTE: The Type field will default as Web and the Format field as PDF. These fields will remain as defaulted. If the Type and Format fields do not default correctly, the user will need to correct them.</i></p>
31.	<p>Click the OK button.</p> 
32.	<p>Click the Process Monitor link.</p> 
33.	<p><i>NOTE: If the <u>Run Status</u> is not <u>Success</u> and the <u>Distribution Status</u> is not <u>Posted</u>, click the <u>Refresh</u> button until both statuses are achieved.</i></p> <p>Click the Refresh button.</p> 
34.	<p>Users will view the report in the Administration tab of the Report Manager.</p> <p>Click in the Report Manager field.</p> 
35.	<p>Click the Administration tab.</p> 

Training Guide Managing Requisitions Fluid

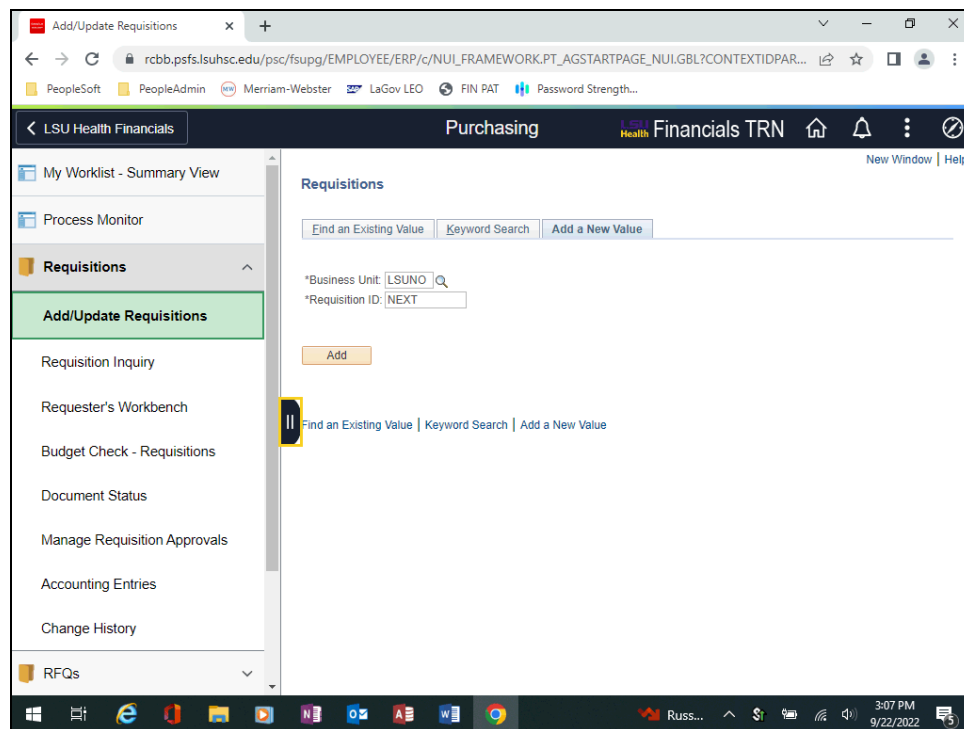
Step	Action
36.	<p>The <i>top line</i> is always the most <i>current</i> print. The report is complete and ready for viewing when the Requisition Print SQR under the Description column turns into a blue link and the Status = Posted.</p> <p><i>NOTE: Click the Refresh button until the Status = Posted and the Requisition Print SQR link becomes active.</i></p> <p>Click the Requisition Print SQR link.</p> <p><i>NOTE: Clicking the Requisition SQR link will open and display in a new tab.</i></p> <p style="text-align: center;">Requisition Print SQR</p>
37.	<p>Select the Printer icon to set parameters and print your report.</p> <p>Click the Close tab.</p> <p style="text-align: center;"></p>
38.	<p>Click the Go back to Process Requests link.</p> <p style="text-align: center;">Go back to Process Requests</p>
39.	<p>Click in the Go back to Requisition Print field.</p> <p style="text-align: center;">Go back to Requisition Print</p>
40.	<p>Users can enter another Requisition ID to print another requisition. All other parameters will remain as defaulted.</p>
41.	<p>This completes <i>View Approvals and Print a Requisition</i>.</p> <p>End of Procedure.</p>

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Managing Requisitions Fluid

View and Copy an Existing Requisition





Topic Contents:

1. **Step 8: View and Copy an Existing Requisition (optional)**
2. Add a new requisition and check Hold From Further Processing
3. Scenario
 - a. Copy own requisition rather than another user's
 - b. Copying a cancelled requisition or a requisition with cancelled lines
4. Search for requisition to copy
 - a. Requisition ID, Requester
 - b. Search select requisition from existing list
 - 1) Utilize Req Inquiry in search and selection
5. Make appropriate changes to requisition
 - a. Requester if necessary
 - b. Accounting Date if necessary
 - c. Requisition Defaults
 - 1) Ship To if necessary
 - 2) Due Date
 - 3) Distribution information
 - a) Account, Department, Fund, Program, Class, Project, etc.
6. Make adjustments to Line information
 - a. Quantity, UOM, Category, and/or Price
 - b. Delete any unneeded lines
7. Uncheck Hold From Further Processing and Save



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Managing Requisitions Fluid


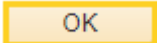



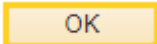
Step	Action
1.	<p>Step 8: View and Copy an Existing Requisition (optional)</p> <p>Click the Close Navigation Area button.</p> 
2.	<p>A new requisition must be added in order to copy a requisition. The <i>Business Unit</i> will default as LSUNO and the <i>Requisition ID</i> will default as NEXT.</p> <p>Click the Add button.</p> 
3.	<p>Click the Hold From Further Processing option.</p> 
4.	<p>Scenario</p> <p>Users may copy their own requisitions or the requisition of another requester. In this exercise, a new requisition will be created by copying a Requester's own requisition using the Copy From option.</p>
5.	<p>When copying a requisition, you will not perform Step 3: Enter Requisition Defaults. The defaults, line item(s), distribution of funds, and comments are copied from the old requisition to the new requisition. Once copied, the requester will make any necessary additions/changes/deletions to the line items, Schedule page, Distributions page, and/or Comments page.</p> <p><i>NOTE: It is recommended to enter a new requisition rather than copying a requisition if extensive changes will be made to the requisition.</i></p>
6.	<p>Cancelled Lines and Requisitions</p> <p>A requisition with cancelled rows or a cancelled requisition can be copied to a new requisition. If the user copies a requisition that has <i>one or more lines cancelled</i>, only the active lines from the existing requisition will be copied to the new requisition. If the user copies a <i>cancelled requisition</i>, all the lines from the cancelled requisition are copied to the new requisition and the status of the lines are made active.</p> <p>Users can override any values that are copied over with the requisition. <i>Activity and original requisition dates are not copied over.</i></p>
7.	<p>Click the Copy From link.</p> 

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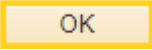




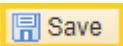
Step	Action
8.	<p>Search for an Existing Requisition to Copy</p> <p>Users may search for an existing requisition to copy by entering all or part of one of the following Search criteria:</p> <ul style="list-style-type: none"> • Requisition ID - to view a specific requisition; or • Requester – to view requisitions associated with a specific requester.
9.	<p>Requisition ID</p> <p>It is highly recommended you note the Requisition ID you wish to use when copying a requisition. You will then be able to enter it directly into the Requisition ID field. You may search for a requisition id using the Look up Requisition ID magnifying glass.</p>
10.	<p>Requester</p> <p>You must enter the User ID of the person who requisition you wish to copy in the Requester field. the user id must be entered in ALL CAPS. If you enter the requester's name, or enter the user id in lower case, you will receive a warning message stating you entered an invalid value. You may search for the requester's user id using the Look up Requester option.</p> <p><i>NOTE: If is not recommended that any of the remaining options be used when searching for a requester user id.</i></p>
11.	Enter the desired information into the Requester field. Enter " KOCONN ".
12.	<p>Click the Search button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px 0;">Search</div>
13.	<p>The system defaulted the check into the Sel box since the Requester has only one requisition that can be copied. Requisition information can be reviewed by selecting the Req ID.</p> <p><i>NOTE: This will open a new tab and display the Req Inquiry page.</i></p> <p>Click the 0060255 link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px 0;">0060255</div>
14.	<p>You are taken to the Req Inquiry page. Select the requisition number to view requisition items.</p> <p><i>NOTE: This will take you to the Requisition Details panel.</i></p> <p>Click the 0060255 link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px 0;">0060255</div>

Training Guide

Managing Requisitions Fluid


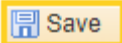
Step	Action
15.	<p>Additional requisition information displays.</p> <p>Click the Close Requisitions tab.</p> 
16.	<p><i>NOTE: If there were more requisitions to review and this was not the desired requisition, you would click other Req ID links and repeat the previous steps until the desired requisition was located.</i></p> <p>Click the OK button to copy the requisition.</p> 
17.	<p>The information copied from the old requisition displays in the new requisition.</p> <p><i>NOTE: Any changes made to the new requisition will have no effect on the original requisition that was copied.</i></p>
18.	<p>The Requester's user id for the requisition being copied defaults into the Requester field. No changes are required since the Requester and person copying the requisition are the same. However, if you copy someone else's requisition, the Requester must be changed to your user id.</p> <p><i>NOTE: The Requester user id must be entered in ALL CAPS.</i></p>
19.	<p>Click the Requisition Defaults link.</p> 
20.	<p>Users must enter default information onto the Requisitions Default page or on the Distributions page for each line item. In this example, users will enter the new Due Date of 04/28/23.</p> <p><i>NOTE: Users may also enter the Due Date directly into the field.</i></p> <p>Click the Calendar Due Date button.</p> 
21.	<p>Click the 28 date.</p> 
22.	<p><i>NOTE: If the user was copying someone else's requisition, additional default information would need to be checked and changed as needed, such as: Ship To, Distribute By, chartstring information, account information, etc.</i></p> <p>Click the OK button.</p> 

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Step	Action
23.	<p>The "Mark All" option is selected so that all listed settings will automatically be changed by the system for all Distribution lines.</p> <p>Click in the Mark All field.</p> 
24.	<p>Click the OK button.</p> 
25.	<p>Line items must be checked and necessary changes made. For this example, the user will make the following changes:</p> <p>Line 1 - Quantity: change quantity from 10 to 5 Line 1 - Price: change from 48.59 to 47.65 Line 2: Delete line 2</p>
26.	<p>Line 1 - Quantity: change quantity from 10 to 5</p> <p>Enter the desired information into the Quantity field. Enter "5".</p>
27.	<p>Line 1 - Price: change from 48.59 to 47.65</p> <p>Enter the desired information into the Price field. Enter "47.65".</p>
28.	<p>Click the Right scrollbar.</p> 
29.	<p>Line 2: Delete line 2</p> <p>Click the Delete row 2 button.</p> 
30.	<p>A confirmation message to delete the row displays.</p> <p>Click the OK button.</p> 
31.	<p>Click the Left scrollbar.</p> 
32.	<p>The system will assign the Requisition ID number since this is the first time the requisition is saved.</p> <p>Click the Save button.</p> 

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Step	Action
33.	<p>If all changes have been made to the requisition, users must uncheck Hold From Further Processing and Save the requisition for it to move through the Purchasing process.</p> <p>Click the Hold From Further Processing option.</p> 
34.	<p>Click the Save button.</p> 
35.	<p>This completes <i>View and Copy an Existing Requisition</i>. End of Procedure.</p>

Review Requisition Documents and Process Status

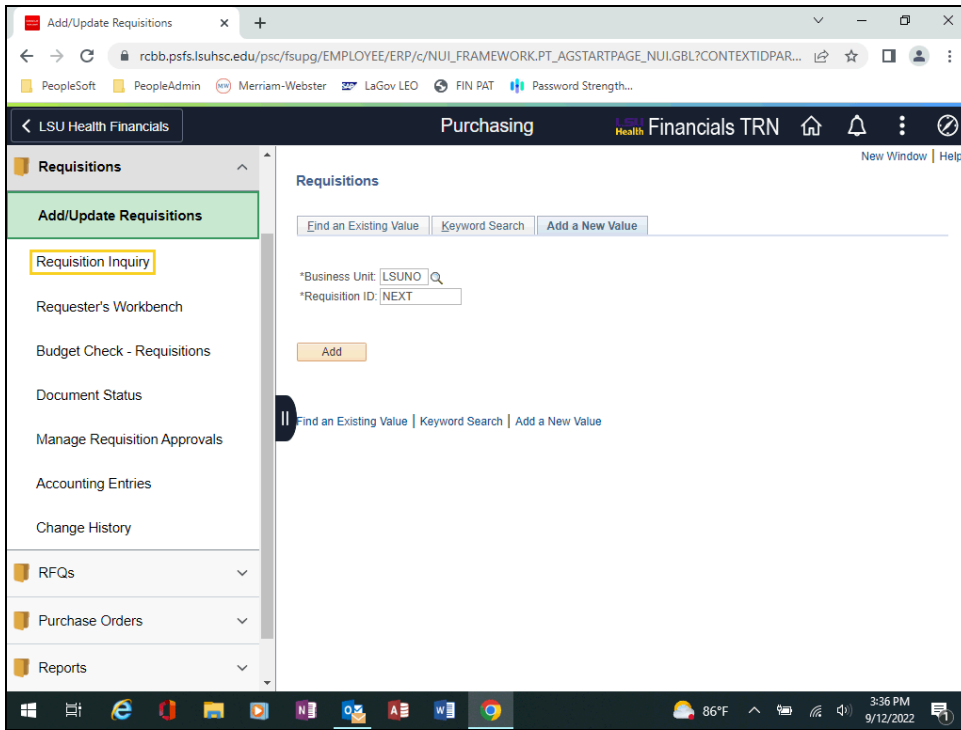
Inquire on a Requisition using Requisition Inquiry

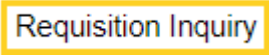


Topic Contents:

- 1.** Utilize Requisition Inquiry Search page to find requisition
 - a.** Requisition ID
 - b.** Req Status
 - c.** Requester
 - d.** Supplier ID
 - e.** Department
- 2.** Review Requisition page
 - a.** Details tab
 - 1)** Access Requisition Details panel
 - b.** Status tab
 - 1)** Linked "Y"s
 - a)** PO Inquiry page
 - b)** Voucher Inquiry page
 - c)** Voucher Payment page

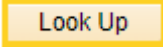



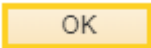



Training Guide

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Step	Action
1.	Click the Requisition Inquiry button. 
2.	Click the Close Navigation Area button. 
3.	Users may search to inquire on an existing requisition by entering all or part of the following search criteria: <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition; • Req Status – used in conjunction with Requester, can focus search to specific requisition status; • Requester – to view requisitions associated with a specific user; • Supplier ID – to view requisitions for a specific supplier; or • Department – to view requisitions for a specific department.
4.	In this example, users will search for the Requester and the Req Status of <i>Complete</i> . Click the Look up Requester button. 

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Step	Action
5.	<p>In this example, the requester is Jennifer Crisp. Use the Description field to enter the Last Name of the requester.</p> <p><i>NOTE: Use the Last Name <u>only</u> when entering information into the Description field. If you attempt to enter the entire user name, and it is not entered in the correct format, you will receive a "No Matching Values Found" message.</i></p> <p>Enter the desired information into the Description: field. Enter "crisp".</p>
6.	<p>Click the Look Up button.</p> <p style="text-align: center;"></p>
7.	<p>Click the JCRIS1 link.</p> <p style="text-align: center;"></p>
8.	<p>Click the Look up Req Status button.</p> <p style="text-align: center;"></p>
9.	<p>Select the appropriate requisition status to focus search results.</p> <p>Click the Complete link.</p> <p style="text-align: center;"></p>
10.	<p>Click the OK button.</p> <p style="text-align: center;"></p>
11.	<p>The first six (6) options of twelve display. Use the View All link to display all twelve options at one time if desired. The Requisition Name column can aid in identifying the requisition sought.</p>
12.	<p>In this example, the <i>subscription renewal</i> for the <i>American Assoc. of Advanced Science</i> will be selected, which is requisition number 0057873.</p> <p>Click the 0057873 link.</p> <p style="text-align: center;"></p>
13.	<p>From the Requisition Details panel, users can view Description information, supplier information, quantity, and UOM.</p>
14.	<p>Selecting the Show All Columns button allows users to see the merchandise amount and the Schedule button. The Distribution button is found on the Schedule Details panel which displays additional chartstring information.</p>
15.	<p>Click the Close Requisition Details button.</p> <p style="text-align: center;"></p>
16.	<p>Click the Status tab.</p> <p style="text-align: center;"></p>

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Step	Action
17.	<p>The linked "Y" values on the Req Inquiry page allow the user to review additional information such as the Purchase Order Inquiry page or the Voucher Inquiry page. The linked "Y" values display only in columns for which documents are available.</p> <p>Click the On PO - Y link for Requisition 0057873.</p> 
18.	<p>Select the linked Purchase Order number (00389819) to view the PO Inquiry page.</p> <p>Click the Close Requisition to Purchase Order List button.</p> 
19.	<p>Click the On Voucher - Y link for requisition 0057873.</p> 
20.	<p>Select the linked Voucher number (00406345) to view the Voucher Inquiry page.</p> <p>Select the Payment Information link to view the Voucher Payments page.</p> <p>Click the Close Requisition to Voucher List button.</p> 
21.	<p>Click the Open Navigation Area button.</p> 
22.	<p>This completes <i>Inquire on a Requisition using Requisition Inquiry</i>. End of Procedure.</p>

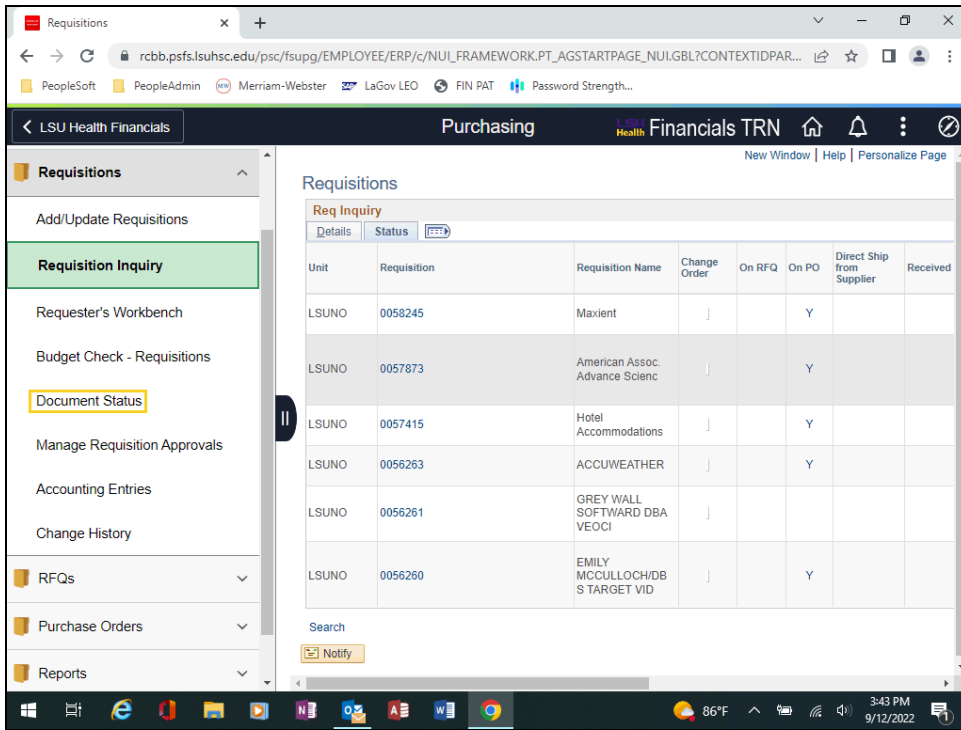
Inquire on a Requisition using Document Status

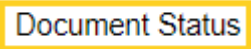


Topic Contents:

- 1.** Access Document Status page
 - a.** Requisition ID
 - b.** Requester
- 2.** Purchasing Document Status page
 - a.** Pictorial buttons for related documents
 - b.** Doc ID Number hyperlinks for related documents
- 3.** Actions button associated with related documents



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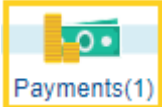


Step	Action
1.	<p>The Document Status page provides a process stream view of a requisition from entry to completion. Documents associated with the various steps within the process stream are available for review such as: Requisition Inquiry page, the PO Inquiry page, the Voucher Inquiry page and the Payment Inquiry page.</p> <p><i>NOTE: You may only view the Voucher and Payment Inquiry pages if you have the required security access.</i></p> <p>Click in the Document Status field.</p> 
2.	<p>Click the Close Navigation Area button.</p> 
3.	<p>It is recommended users search by Requisition ID or Requester. <i>Requisition Status</i> can be used in conjunction with <i>Requester</i> to help focus on requisitions retrieved.</p> <p>Enter the desired information into the Requisition ID: field. Enter "0057873".</p>
4.	<p>Click the Search button.</p> 

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Step	Action
5.	<p>The Document Status page provides a pictorial as well as Doc ID hyperlinks for available process stream documentation.</p> <p>Click the Req ID 0057873 link.</p> <p></p>
6.	<p>The Req Inquiry panel displays.</p> <p>Click the Close Requisitions tab.</p> <p></p>
7.	<p>Users may select the Purchase Orders(1) picture or the Doc ID link to view PO information.</p> <p>Click the Purchase Orders(1) link.</p> <p></p>
8.	<p>The Purchasing Document Status page displays. Select the Doc ID to view the Purchase Order Inquiry page.</p> <p>Click the 00389819 link.</p> <p></p>
9.	<p>The Purchase Order Inquiry displays.</p> <p>Click the Close Purchase Order tab.</p> <p></p>
10.	<p>Click the Vouchers(1) link.</p> <p></p>
11.	<p>The Voucher Documents Status page displays. Select the Doc ID to view the Voucher Inquiry page.</p> <p>Click the 00406345 link.</p> <p></p>
12.	<p>The Voucher Inquiry page displays.</p> <p>Click the Actions dropdown button to activate the menu.</p> <p></p>

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Step	Action
13.	<p>A list of additional Purchasing documents displays. The user must have the appropriate security access to access any of the listed pages.</p> <p>Click the Close Voucher tab.</p> 
14.	<p>Click the Payments(1) link.</p> 
15.	<p>The Purchasing Document Status page displays. Select the Doc ID to view the Payment Inquiry page.</p> <p>Click the 682693 link.</p> 
16.	<p>From the Payment Inquiry users can see when payment was made, where it was sent, etc.</p> <p>Click the Close Payment tab.</p> 
17.	<p>This completes <i>Inquire on a Requisition using Document Status</i>. End of Procedure.</p>

Requisition Basics

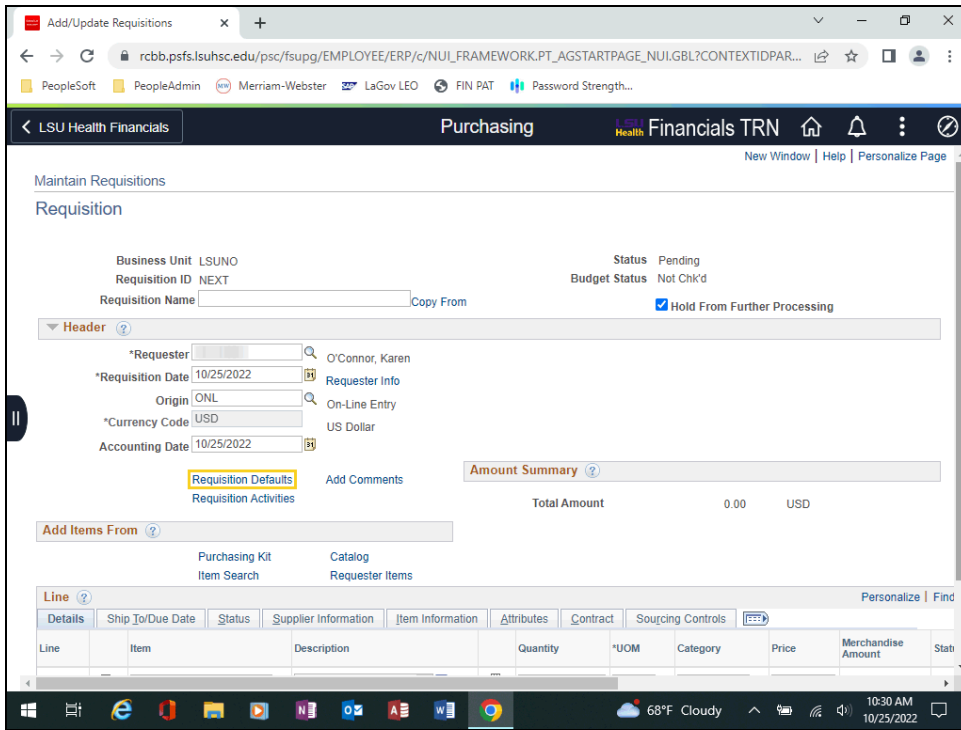
Use the Look up Feature

Topic Contents:

- 1.** Navigate to Requisition Defaults page
- 2.** Look up Feature
 - a.** What does it do?
 - b.** How do you access it?
- 3.** Look up Supplier
 - a.** Results auto displayed
 - b.** Fields to narrow search scope
 - 1)** Supplier ID
 - 2)** Short Supplier Name
 - c.** Operands used to narrow search scope
 - 1)** begins with
 - 2)** contains
 - d.** Select desired link from search results
 - e.** Supplier ID and Supplier Name display on Requisition Defaults page

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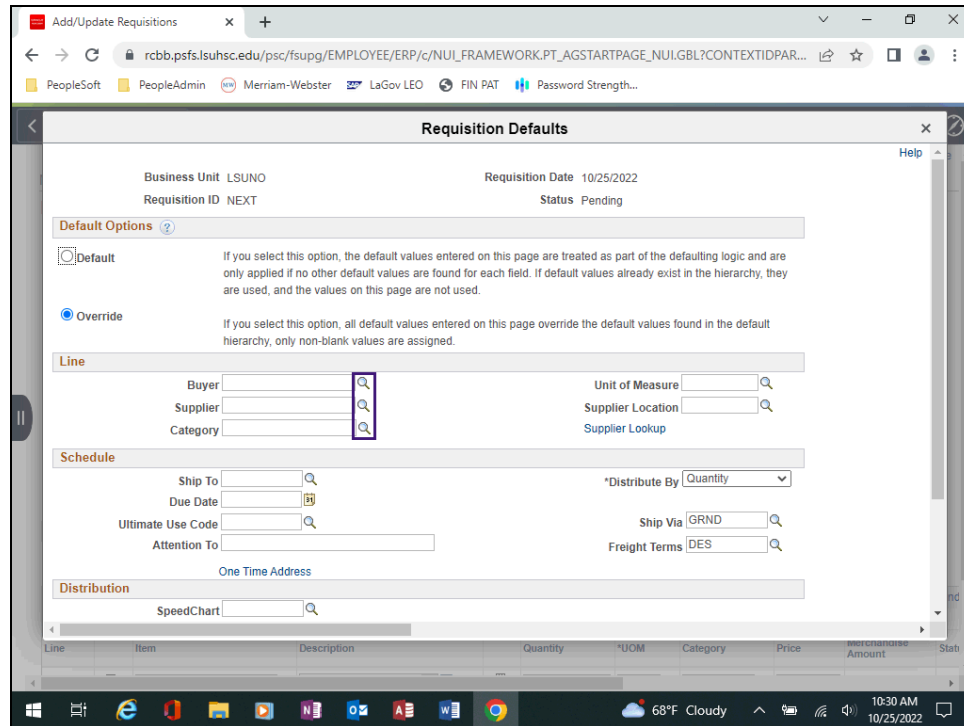
Managing Requisitions Fluid




Step	Action
1.	<p>Navigation:</p> <ul style="list-style-type: none"> • LSU Health Financials homepage • Purchasing tile • Requisitions • Add/Update Requisitions <p>Click the Requisition Defaults link.</p> <p>Requisition Defaults</p>

Training Guide

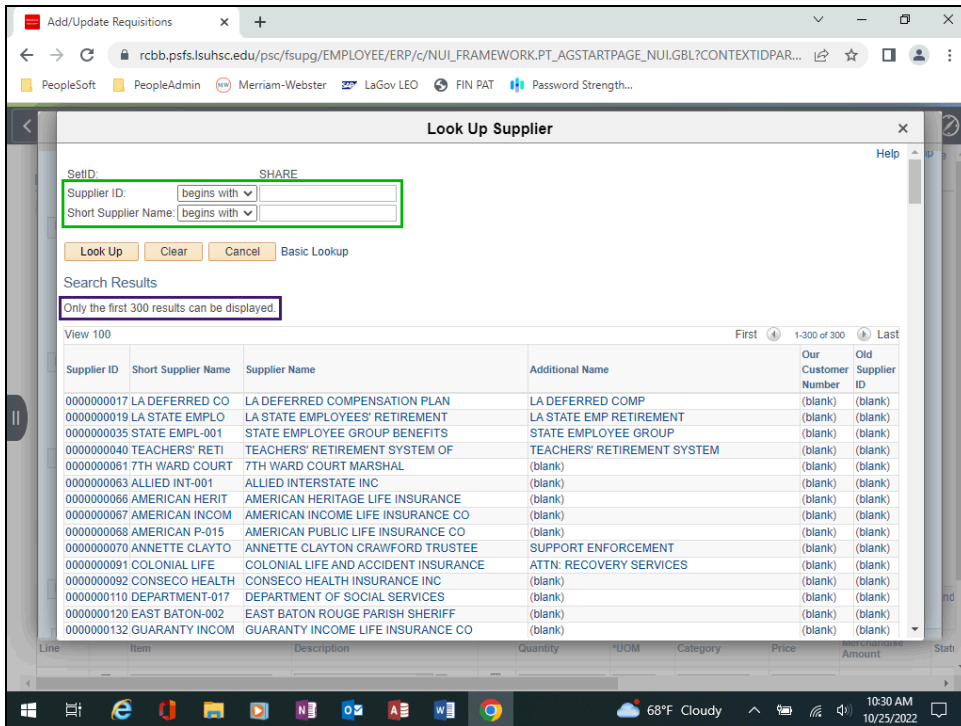
Managing Requisitions Fluid



Step	Action
2.	<p>The Look up feature allows you to search for all valid values in the database for a specific field. It can also be used to narrow the scope of your search when a large number of values are returned.</p> <p>The Look up feature is depicted as a magnifying glass in PeopleSoft. Anytime you see a magnifying glass next to a field, you have look up capability.</p>
3.	<p>Scenario</p> <p>In this exercise, you will search for an appropriate <i>value</i> for the Supplier field. The 10-digit Supplier ID number is the value needed for the Supplier field rather than the supplier name. You will use Office Depot as the supplier. You will locate and select Office Depot utilizing the Look up feature. Once selected, the system will auto populate the Supplier ID number into the Supplier field, thus completing the Look up process.</p>
4.	<p>Click the Look up Supplier button.</p> 

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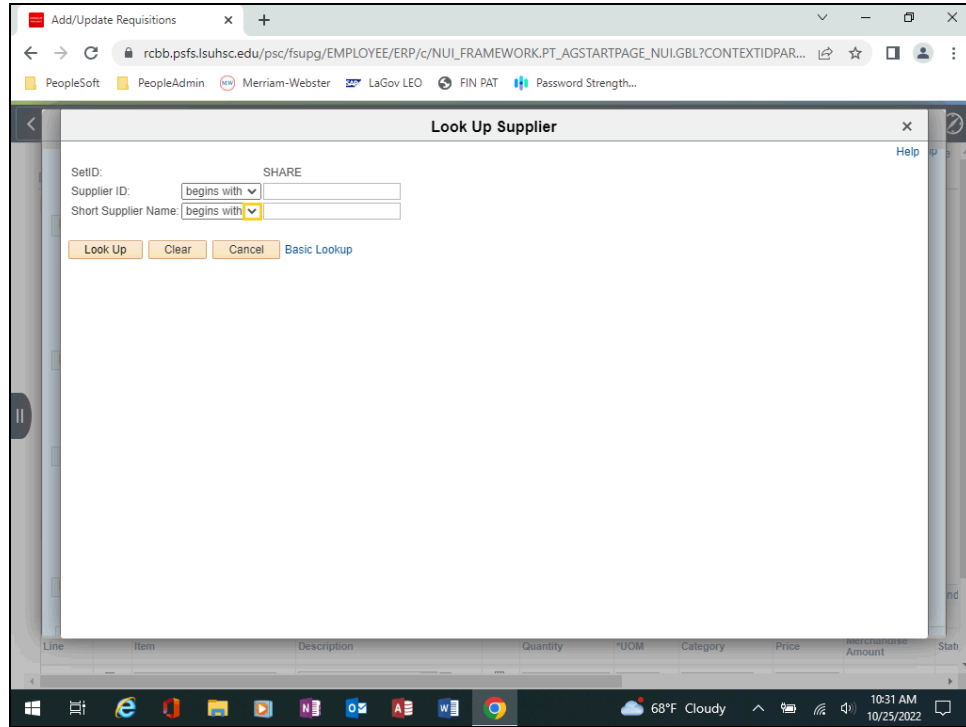


Step	Action
5.	The system will automatically display up to 300 results on the Look up pagelet. If more than 300 results are available, a message will display above the returned results. You will then use the provided search fields to narrow the scope of your search.
6.	<p>The number of results retrieved can be reduced by entering <i>all or part</i> of either the Supplier ID or the Supplier Short Name into the search field provided. Most users will utilize the Short Supplier Name option as their search parameter.</p> <p>There are two operators that can be used to help narrow your search results. They are:</p> <ul style="list-style-type: none"> • begins with and • contains.
7.	<p>begins with</p> <p>The system defaults the "begins with" operand for all search fields. In this example, you will search for <i>Office Deport</i> using the <i>Short Supplier Name</i> field and the "begins with" operand.</p>
8.	Enter the desired information into the Short Supplier Name: field. Enter " OFFICE ".
9.	Click the Look Up button. <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 10px;"> Look Up </div>

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Step	Action
10.	<p>The system returned supplier names that begin with the word "Office", thus reducing the list of options to 16.</p> <p>Click the Clear button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 10px;">Clear</div>



Step	Action
11.	<p>contains</p> <p>The second search option is "contains". The "contains" option searches for any supplier name that "contains" the portion of the Short Supplier Name entered. The operand can be selected by clicking the drop-down arrow to the right of the Short Supplier Name field.</p> <p>Click the button to the right of the Short Supplier Name field.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 10px;">▼</div>
12.	<p>Click the list item.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 10px;">contains</div>

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Step	Action
13.	<p>In this example, you will use "Depot" as your search component rather than Office.</p> <p>Enter the desired information into the Short Supplier Name: field. Enter "DEPOT".</p>
14.	<p>Click the Look Up button.</p> 
15.	<p>The system has returned supplier names that contains the word "<i>Depot</i>". Using the "contains" operand reduced the original search results to 5.</p> <p>Each line contains a series of links for the specified supplier. Links are generally underlined and blue in color. You can click anywhere on the desired supplier's line and the system will default the needed information into the Supplier field on the Requisition Defaults page.</p> <p>Click in the OFFICE DEPOT field.</p> 
16.	<p>The 10-digit Supplier ID defaults into the Supplier field and the Supplier name displays to the right of the field.</p>
17.	<p>This completes <i>Use the Look up Feature</i>.</p> <p>End of Procedure.</p>

Create/Find a Run Control ID

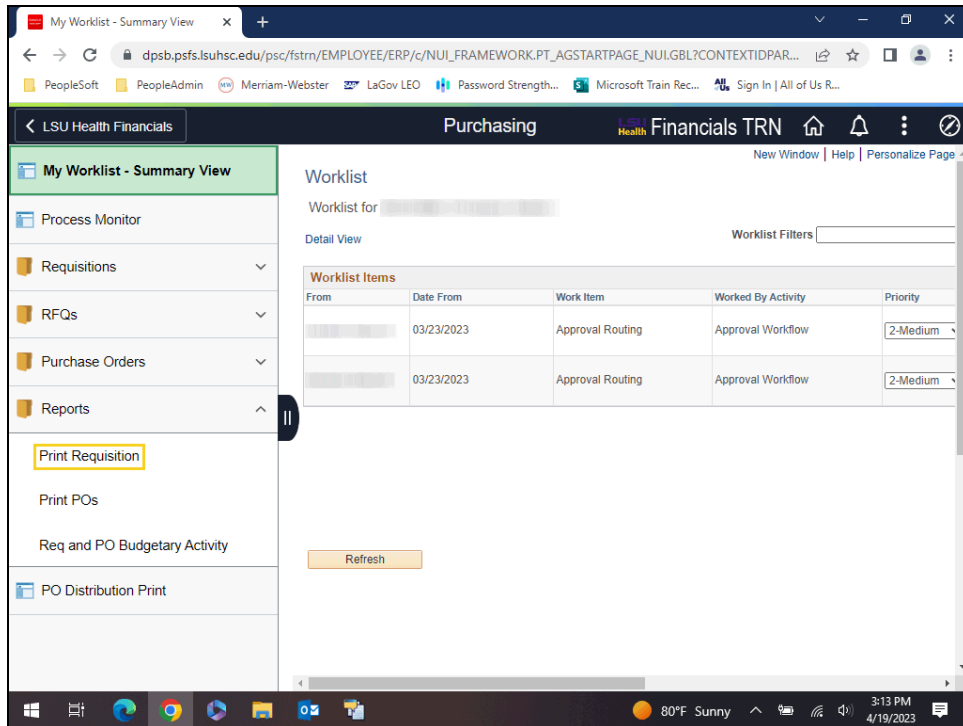
Topic Contents:



1. Navigation
 - a. LSU Health Financials page
 - b. Purchasing tile
 - c. Reports
 - d. Print Requisition
 - 1) Requisition Print
 - a) Add a New Value tab
2. Run Control ID
 - a. Specifications
 - b. Can be re-used
3. Parameters
 - a. Business Unit
 - b. Requisition ID
 - c. All Statuses
 - d. On Hold AND Not On Hold
 - e. Save
4. Print Requisition
 - a. Requisition Print
 - 1) Find an Existing Value
 - 2) Search List
 - 3) Select Run Control ID
 - b. Previous Print Requisition page

Step	Action
1.	<p>Users are able to print a requisition using the View Printable Version link on the Maintain Requisitions page. You can also print a requisition through the Process Scheduler.</p> <p><i>NOTE: See the 'Access the Process Scheduler' section in the <u>View Approvals and Print a Requisition</u> topic for instructions on printing a requisition using the Process Scheduler.</i></p>

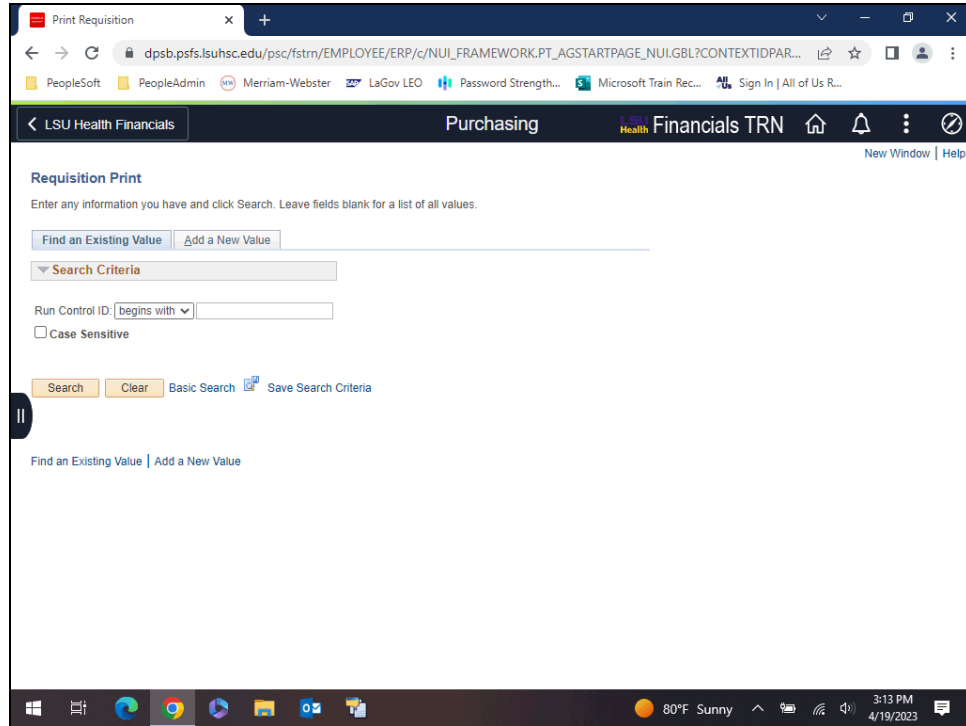
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Step	Action
2.	<p>Navigation:</p> <ul style="list-style-type: none"> • LSU Health Financials homepage • Purchasing tile • Reports • Print Requisition <p>Click the Print Requisition button.</p> 
3.	<p>Click the Close Navigation Area button.</p> 

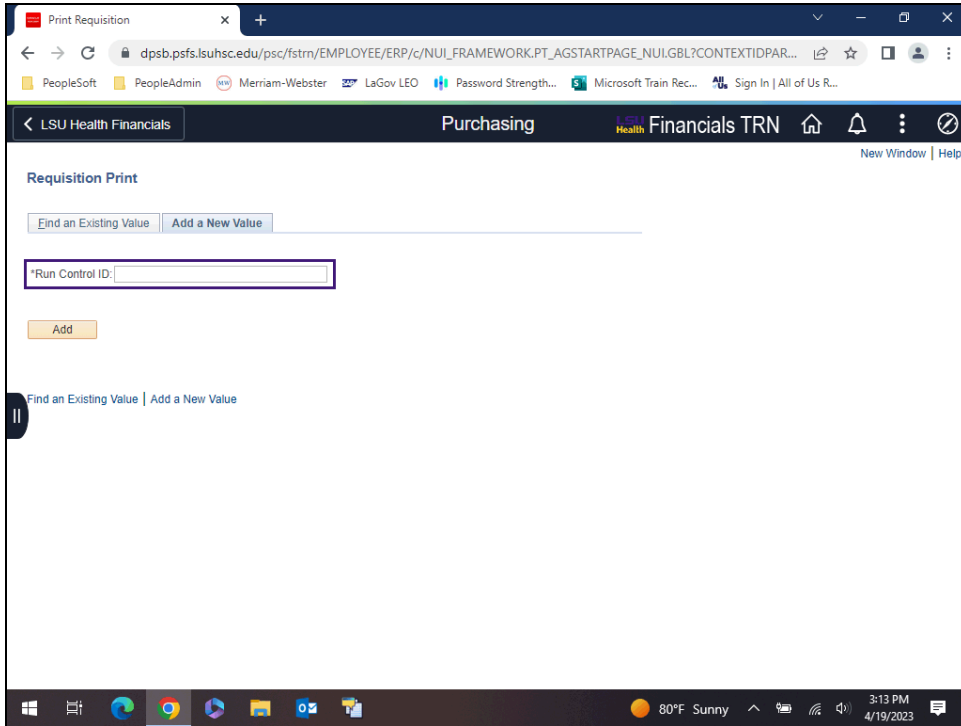
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Step	Action
4.	<p>The first time you use Requisition Print, you will need to create a Run Control ID in order to access the Process Scheduler.</p> <p>The system defaults you into the Find an Existing Value tab. Clicking the Search button will display any existing run control ids. Create a new run control id by clicking the Add a New Value tab or hyperlink.</p> <p><i>NOTE: On all subsequent prints, you will use the Find an Existing Value tab to search for existing run control ids.</i></p>
5.	<p>Click in the Add a New Value field.</p> <div data-bbox="440 1377 672 1428" style="border: 1px solid black; padding: 2px; display: inline-block;">Add a New Value</div>


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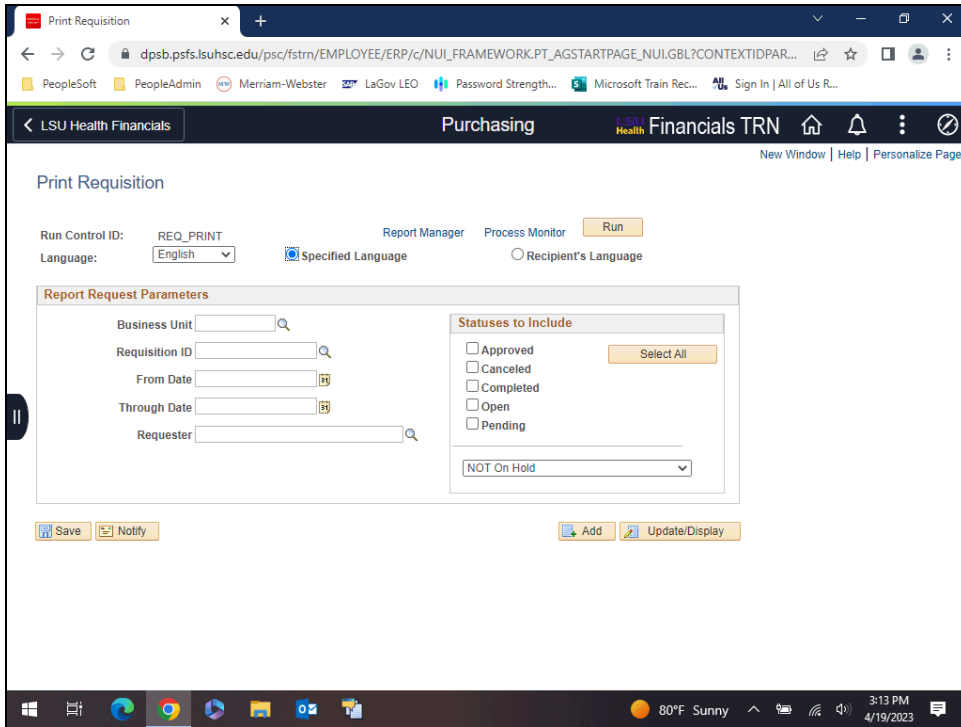
Step	Action
6.	<p>Run Control ID</p> <p>A Run Control ID is used to access the Process Scheduler. Users may save parameters to a particular process or report to a run control id to minimize data entry when running recurring processes or reports.</p> <p>A Run Control ID is:</p> <ul style="list-style-type: none"> • Specific to an end-user's Operator (User) ID; • Can be entered in upper, lower or mixed case; • Can be up to 30 characters long; • Characters can be either number or letters, but cannot include any special characters (e.g., \$, #, &, etc.) • Cannot contain blank spaces; and • Must be one continuous string of characters or words must be linked by an underscore.
7.	<p>Examples of run control ids that meet the requirements:</p> <ol style="list-style-type: none"> 1. PRINT_REQ can be used since the underscore links the two words together; or 2. PRINTREQUISITION can be used because it is one continuous string of character.

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Step	Action
8.	Examples of run control ids that do not meet the requirements: 1. PRINT REQ because there is a blank space between the two words; or 2. PRINT_REQUISITION'S because a special character , and apostrophe, is used.
9.	A run control id must be created to run many reports in PeopleSoft . If a run control is created to a specific type of report , such as printing a requisition, it can be used to run that specific type of report in the future. The advantage to this method is that all parameters are saved with the run control. When running future reports, a user would only have to change the Requisition ID instead of entering all report parameters again. If the user creates a run control id to use for all reports , then the user will need to change the report parameters each time the report is run.
10.	Enter the desired information into the Run Control ID: field. Enter "REQ_PRINT" .
11.	Click the Add button. 

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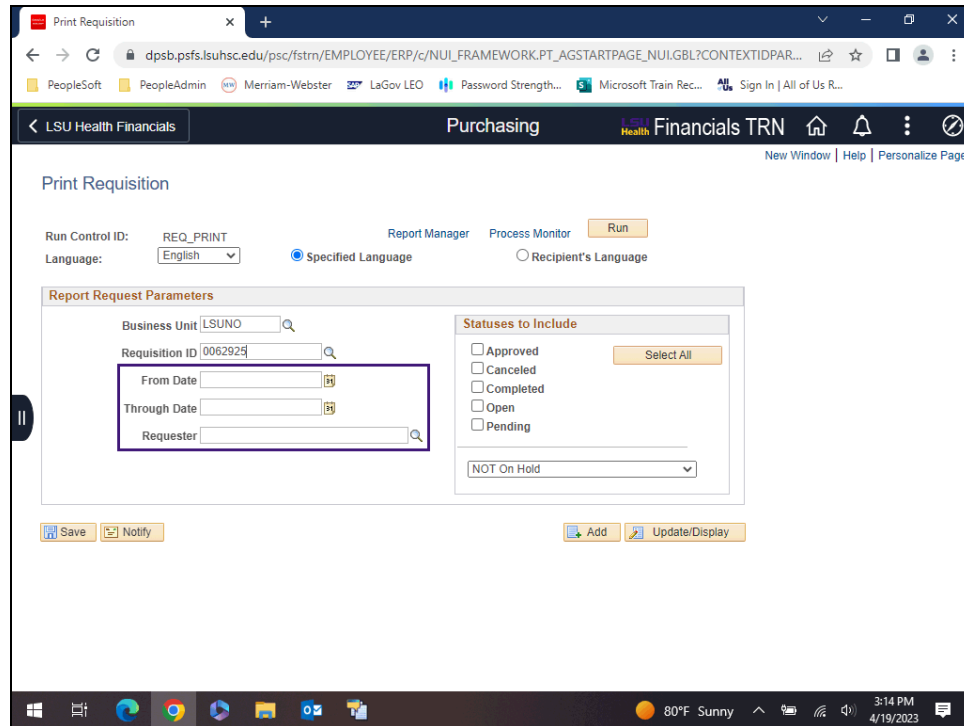
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Step	Action
12.	<p>The parameters you enter on the Print Requisitions page will be saved to the specific run control id just created. When running the report in the future, you will only change the Requisition ID; all other fields will remain as defaulted. If you do not save your parameters to the run control id, the user will have to enter the parameters the next time the report is run.</p> <p><i>NOTE: See the View Approvals and Print a Requisition topic for instructions on printing your report.</i></p>
13.	<p>If your Business Unit does not default, it must be entered.</p> <p>Enter the desired information into the Business Unit field. Enter "LSUNO".</p>
14.	<p>Enter the desired information into the Requisition ID field. Enter "0062925".</p>

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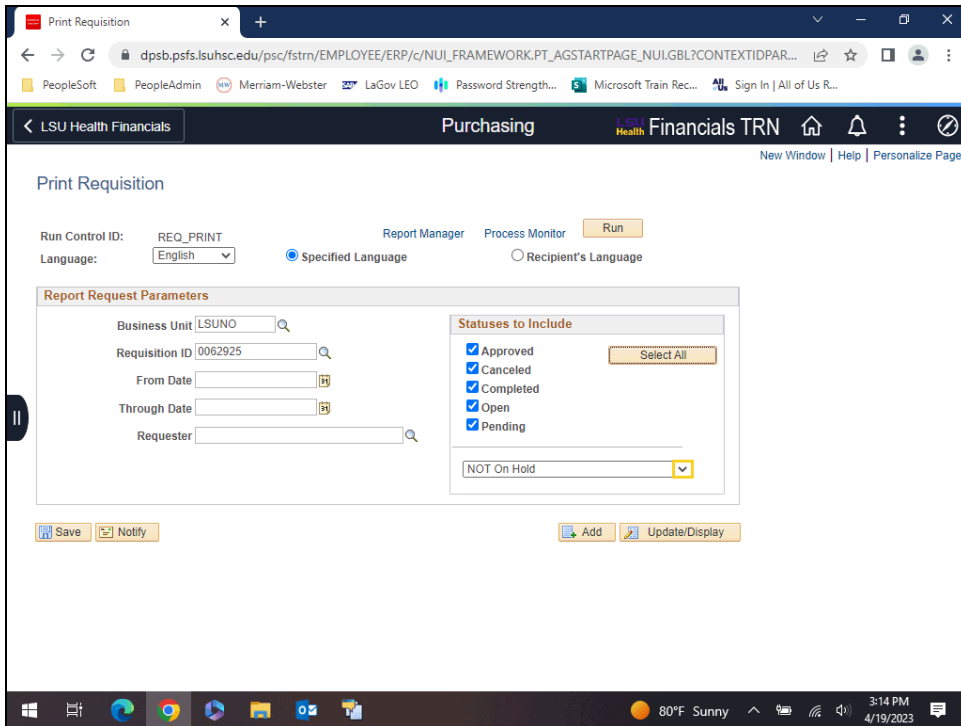
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Step	Action
15.	NOTE: Do not enter From Date, Through Date, or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions must be <u>REQUESTED AND PRINTED ONE AT A TIME</u>, entering the Requisition ID will be sufficient to identify the requisition.
16.	<p>Statuses to Include</p> <p>If the user selects the wrong status of the requisition, it will prevent the requisition from printing (i.e., the end-user checked Pending, but the requisition is already Approved). By clicking the Select All button, users will be able to print the requisition in any status.</p> <p>Click the Select All button.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 10px;"> <p style="text-align: center; margin: 0;">Select All</p> </div>

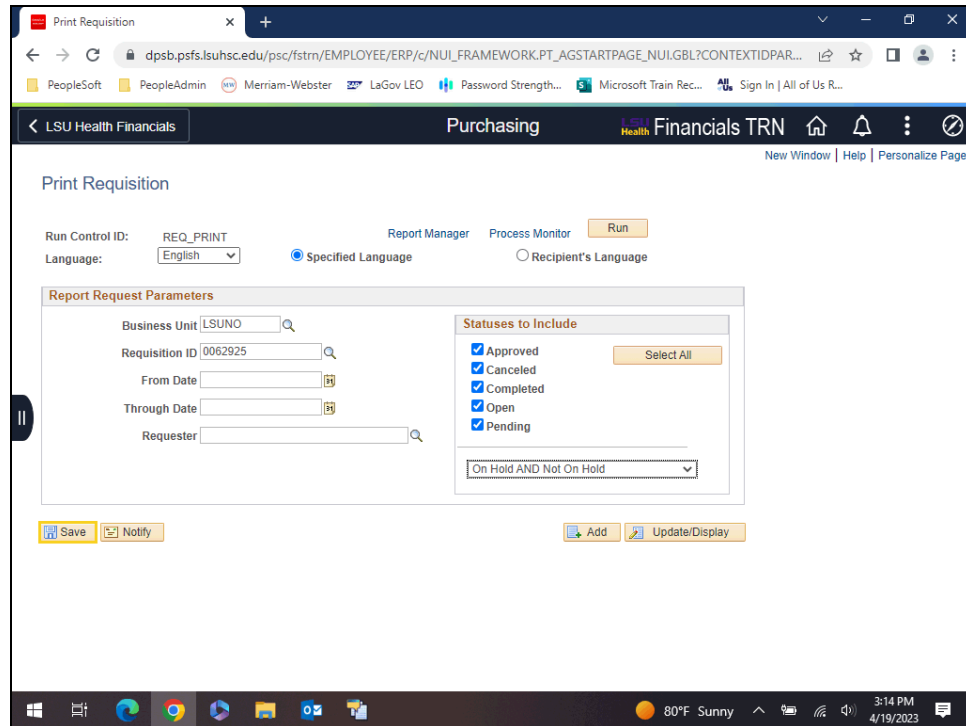
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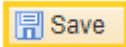



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Step	Action
17.	<p>Statuses to Include (continued)</p> <p>As previously stated, selecting the wrong status will prevent the requisition from printing. This is also true if the user selects the wrong Hold type. In this case, using the default NOT On Hold rather than On Hold AND Not On Hold. If the requisition is on hold, meaning the <i>Hold from Further Processing</i> box is checked on the Maintain Requisitions page, the requisition would not print using the NOT On Hold option. By selecting On Hold AND Not On Hold, you will be able to print the requisition regardless of whether the <i>Hold From Further Processing</i> box is checked or unchecked.</p> <p>Click the button to the right of the NOT On Hold field.</p> 
18.	<p>Click the On Hold AND Not On Hold list item.</p> 

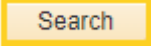
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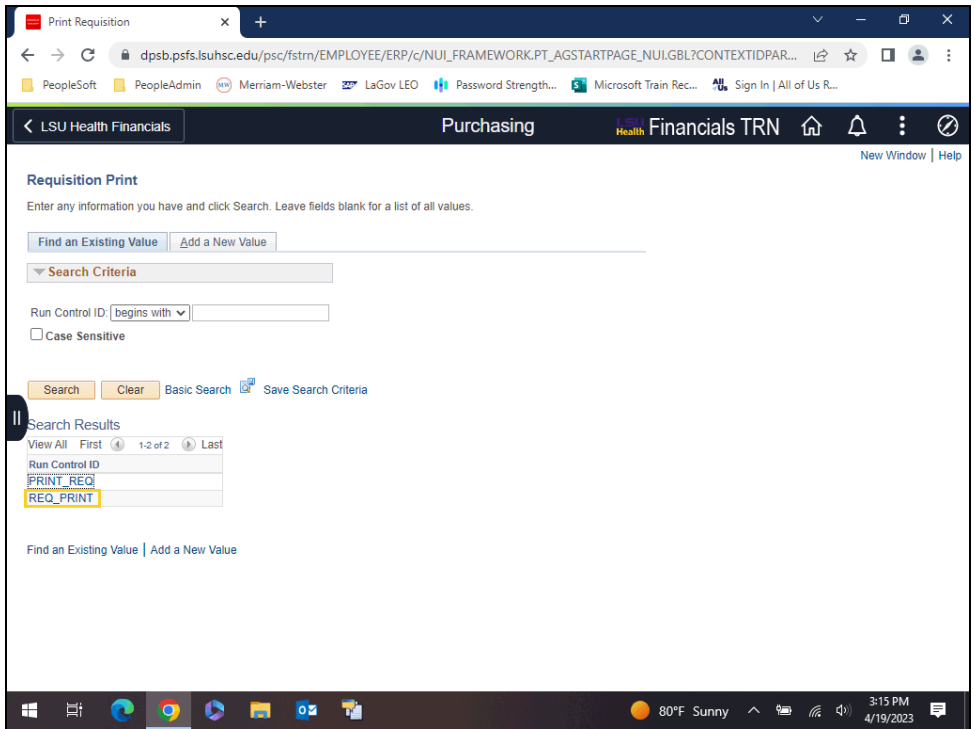


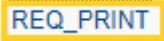
Step	Action
19.	<p>Click the Save button.</p> <p><i>NOTE: Parameters must be saved in order for them to default when printing in the future.</i></p> 
20.	<p>After saving your parameters, the user would click the Run button to begin the print process. The user must access the Report Manager to view and print the report.</p> <p><i>See the View Approvals and Print a Requisition topic for instructions on how to print a report.</i></p> <p>For <i>training purposes only</i>, click the Open Navigation Area button.</p> 
21.	<p>Click the Print Requisition button.</p> 
22.	<p>Click the Close Navigation Area button.</p> 

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Step	Action
23.	<p>The system defaults you into the Find an Existing Value tab.</p> <p>Select the Search button for a list of existing run control ids.</p> <p>Click the Search button.</p> 



Step	Action
24.	<p>A list of available run control ids displays. Once a run control has been selected, the Print Requisition page displays the parameters from the most recent print request for that run control id.</p> <p>Click the REQ_PRINT cell.</p> 
25.	<p>This completes <i>Create/Find a Run Control ID</i>.</p> <p>End of Procedure.</p>