

# Managing Requisitions Quick Reference Guide



## **CART OVERVIEW**

Items that you wish to order are initially put into a Cart where you define your products, quantities, ship to address, and accounting fields. Once your Cart is submitted into workflow, it becomes a Purchase Requisition (PR).

1. When you have finished shopping, click the 7,250.00 US

7,250.00 USD icon at the

top right of the page followed by View My Cart to access your active cart.

2. Each cart icon will look different, updated with the dollar total in the cart.

## EDIT CART

The first screen you see when clicking into your cart is the Edit Cart page:

Name this cart: 2015-0	Cart for Test Requeste 6-17 regtest 39			Continue Shapping Solo barries for a total of 7.250. Memory for a total of 7.250				
Have you made changes	? Update		🖨 I 👁	Help   Empty cart Per	form an action on (	0 items select	ed) 🔹 Select All	
LSUHSC Scientifie	c Supply Center more in	fo						
	Product Description				Unit Price	Quantity	Total 😑	
Zeen added on Jun 18, 2015 Add to Favorites Remove More Actions	PD CARE STERILIZING Part Number Manufacturer Info Contract	SOLUTION 3.4% GLUTARALDEHYDE, 1 GALLON			14.50 USD gal, EA	500 Update	7,250.00 usp 🗎	
	Distributor Name Distributor Part Number	HENRY SCHEIN 087-7043						

Here you can update the Cart Name for your cart. To update the quantity of an item,

change the value in the Quantity field, and click Update. When you have

finished making all necessary changes, click

## **REVIEW CART**

The Review Cart page is where you will enter the ship to address, accounting codes, and make any other changes prior to submitting your cart for approvals.

### SHIP TO ADDRESS

The Ship to address is a required field on all carts. To update the Ship to address:

- 1. Click the Summary Tab underneath the Requisition Tab.
- 2. Locate the Shipping section and click



**Proceed to Checkout** 

to the right of the address.

3. A pop-up window will appear where you can click select from org addresses to locate a power on alternative

to locate a new or an alternative address.

4. Verify the information that appears is correct, and if not, make any

necessary changes, and then click

#### ACCOUNTING CODES

You can assign accounting codes to the entire cart or individually to each line item. The Account and Speedchart are required values. Once selected, the Dept, Fund, Program, Class & GL Business Unit will automatically populate based upon the values chosen

1. To assign account codes, navigate to the Accounting Codes section below

Shipping and click on the edit button to the far right.

2. From here, you can search for values for each required code.

Account Speedchart Dept Fund Program Class Project PC Bus Unit Activity ID GL Business Unit Cells Control Con

- 3. Under Account, click the Select from all values... link to locate the appropriate value from the search menu. Follow the same process to select the Speedchart value.
- 4. Click Save when all values have been entered.

Accounting Codes											
Account	Speedchart	Dept	Fund	Program	Class	Project	PC Bus Unit	Activity ID	GL Business Unit	edit	
530230 Advertising-Lsuhsc Services	0050100003 INTERDISCIPLINARY HUMAN STUDIE	1050100 A/H-Administration	111	00066	10105		LSUNO		LSUNO		

To update the account codes for each line individually:

- 1. Click the edit button next to each line item.
- 2. Follow the instructions above to update the account codes for each line item.

## **REQUISITION APPROVALS**

Based on the contents of your cart, each line item cost, the total PR cost, and the accounting code values, your cart will be subjected to one or more approvals before becoming a Purchase Order. To see which approvals your cart is subject to:

- 1. Prior to submitting your cart, click the PR Approvals tab.
- 2. You will see a diagram with future workflow steps similar to this one:



# PLACE ORDER

Once all required fields have been completed and verified, click

#### Submit Requisition

Requisition and the system will provide you with a Requisition number that can be used to track the progress of the requisition through the approval process.