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

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.
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
<table>
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<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **What is a Requisition?**  
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 *not* final and binding with the supplier. Requisitions allows users to create, review, edit, approve or cancel a requisition. |
| 2.   | 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:  
1. The requisition **must** be **approved**.  
2. The requisition **must** **pass** the **budget check** process.  
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. |
<table>
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</table>
| 3.   | There are **four (4) basic elements** that comprise a requisition:  
1. Headers  
2. Lines  
3. Schedules  
4. Distributions  

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.   | The <strong>schedule</strong> defines when and where you want the item(s) delivered. The <strong>distribution</strong> defines how accounts and departments are charged for the item(s), as well as how much of the total price the department should pay. |
| 5.   | Anytime you see a <strong>star (*)</strong> 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>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>6.</td>
<td><strong>Add a New Value</strong>&lt;br&gt;The system defaults you into the &quot;Add a New Value&quot; tab.&lt;br&gt;The appropriate <strong>Business Unit</strong> will display in the Business Unit field. When working in Production. If the Business Unit does not default correctly, enter it or select it by clicking the magnifying glass (<strong>Look up Business Unit</strong>) to the right of the Business Unit field. It is recommended that you do not attempt to continue with the requisition, as save errors are likely to occur. Contact the <strong>Purchasing</strong> so that the defaults can be set appropriately.</td>
</tr>
<tr>
<td>7.</td>
<td><strong>Requisition ID</strong>&lt;br&gt;The <strong>Requisition ID</strong> will default as <strong>NEXT</strong>. This allows the system to auto-assign the next available requisition number for the business unit the first time the requisition is saved. <strong>The Requisition ID is not the Purchase Order (PO) number.</strong> A separate PO number will be assigned by Purchasing once the PO is generated.&lt;br&gt;&lt;br&gt;<strong>NOTE:</strong> 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.</td>
</tr>
<tr>
<td>8.</td>
<td>Users can access an existing requisition by clicking the &quot;Find an Existing Value&quot; tab.&lt;br&gt;&lt;br&gt;<strong>See the Review a Requisition topic for instructions on how to find an existing requisition in PeopleSoft.</strong></td>
</tr>
</tbody>
</table>
9. When entering a new requisition, the following four (4) fields must default as follows on the Maintain Requisitions page to enter a new requisition:

1. Business Unit = LSUNO
2. Requisition ID = NEXT
3. Status = Pending
4. Budget Status = Not Chk’d

10. The Business Unit and Requisition ID default from the Add a New Value page. The Status will default as Pending. If the Status does not default as Pending, contact Purchasing so that default information can be set up appropriately.

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 after a requisition is approved, but prior to Purchasing generating a Purchase Order or RFQ (Request for Quote).

It is recommended you do not attempt to continue with the requisition, as save errors are likely to occur, if any of these fields default incorrectly.

11. Steps for Entering a Requisition

There are three (3) required steps and five (5) optional steps for entering a requisition. 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.
### Steps for Entering a Requisition (continued)

1. Check Hold from Further Processing (optional)
2. Enter Requisition Name (optional)
3. Enter Requisition Defaults (required)
4. Enter Item(s) and Save the requisition (required)
5. Adjust Chartstring Information (required)
6. Enter Comments and Attach Documents (optional)
7. View Approvals, and Print the requisition (optional)
8. View and Copy an existing requisition (optional)

Each step, whether required or optional, will be discussed in detail in the topics included in this manual.
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<tr>
<th>Step</th>
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<tbody>
<tr>
<td>13.</td>
<td><strong>Step 3: Enter Requisition Defaults (required)</strong></td>
</tr>
</tbody>
</table>

You must first enter data on the Requisition Defaults page for two reasons:

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.

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.
### Step 14. Entering Supplier Information

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 **10-digit** 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.

### Step 15. Entering Supplier Information (continued)

If the Supplier ID 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 **blank**. However, supplier information **must** then be entered in the **Header Comments** 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.

### Step 16. Navigating on PeopleSoft Pages

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.

Use only the **buttons and links** provided **on** the PeopleSoft pages. **Do not use** the **Back** and **Forward** arrows on your browser.
<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>17.</td>
<td><strong>Request for Quote</strong>&lt;br&gt;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.&lt;br&gt;&lt;br&gt;<em>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.</em></td>
</tr>
<tr>
<td>18.</td>
<td>This completes <strong>Requisition Basics</strong>.&lt;br&gt;<strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
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
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.
<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>2.</td>
<td>NOTE: SpeedType and SpeedChart are used interchangeably for LSU Health.</td>
</tr>
</tbody>
</table>
### Step 3

Please review the following definitions on SpeedChart, Chartfield and ChartString.

- **SpeedChart/SpeedType** – A SpeedChart is a combination of chartfields values, excluding the Account Code, that define how transactional information and budget data is categorized. The Account Code is not part of the SpeedChart values and must 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 included in a chartstring are: **Fund, Program, Class**, and **Project** (if needed). The **Account Code** is excluded.
## ChartString Values

The **ChartString** is comprised of the following values:

1. **Account Code**
2. **Dept**
3. **Location**
4. **Fund**
5. **Program**
6. **Class**
7. **Project**
8. **PC Bus Unit**

## Account Code

The **Account Code** is a transaction code for the item(s) being ordered (e.g., office supplies, medical supplies, dental supplies, etc.). The correct Account Code must be entered for each line item. The Account Code can be entered on the Requisition Defaults page when *entering a single line requisition*, or when *entering multiple lines items using the same Account Code* (e.g., office supplies, dental supplies, etc.).

If, however, a user is ordering multiple line items, and each line has a different Account Code, the Account Code will be left **blank** on the Requisitions Defaults page. The user must then enter the appropriate Account Code on the Distribution page for each line item.

*Contact your Finance/Accounting group for a list of Account Codes.*

## Dept and Location

The **Dept** is the cost center paying for the item(s). The Dept is always a 7-digit department number.

The **Location** is a business unit designation. It is recommended that **LSUNO** be used as the Location code for all requisitions.

## Fund, Program and Class

The **Fund Code** identifies the funding source for the item(s) being ordered. If the item(s) involve a *Project/Grant*, enter the **Fund Code associated** with the specified Project/Grant (e.g., 113,115,116, etc.).

The **Program Code** classifies the and reports expenses according to the type of activity for which the expenses were incurred.

The **Class Code** indicates the accounting class for a sub ledger journal line (e.g., Receivables, Revenue, Expenditure, etc.)
### Step 8: Project and PC Bus Unit

The **Project/Grant** number **must** 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 **Requisitions Default** page if **all** items on the requisition will be charged to the project/grant. Otherwise, the Project/Grant number will be entered on the **Distribution** page for the **specific line item**.

The **PC Bus Unit** **must** contain a value. The user's **business unit** designation will default into the field. If it does **not** default, the user **must enter it** or select it using the **Look up** feature.

---

### Step 9: Single SpeedCharts and Multiple SpeedCharts

- **Single SpeedCharts** can be utilized on the **Requisition Defaults** page and the line item **Distribution** page.

- **Multiple SpeedCharts** are utilized on the line item Distribution page **only**.
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<tr>
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<tbody>
<tr>
<td>10.</td>
<td>SpeedChart information can be found in the Navigator menu under <strong>LSU Processes &gt; LSU SpeedType Lookup</strong>. Click the <strong>NavBar</strong> button.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Navigator Menu</strong> button.</td>
</tr>
<tr>
<td>12.</td>
<td>Click the <strong>Down</strong> scrollbar.</td>
</tr>
<tr>
<td>13.</td>
<td>Click the <strong>LSU Processes</strong> button.</td>
</tr>
<tr>
<td>14.</td>
<td>Click the <strong>LSU Speedtype Lookup</strong> button.</td>
</tr>
</tbody>
</table>
### Training Guide
#### Managing Requisitions Fluid

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<thead>
<tr>
<th>Step</th>
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</table>
| 15. | **Scenario**  
   In this exercise, you will search for two SpeedCharts using the following Search criteria:  
   **SetID:** LSUNO  
   **Department:** 1497100  
   **SpeedType Key:** 0497100013  
   **SpeedType Key:** 0497100012 |
| 16. | Enter the desired information into the **SetID:** field. Enter "LSUNO". |
| 17. | Enter the desired information into the **Department:** field. Enter "1497100". |
| 18. | Click the **Search** button. |
| 19. | Click the **SpeedType Key - 0497100013** link. |
| 20. | 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 note of the **SpeedType Key** so that you can later enter it on your requisition.  
   
   *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.*  
   
   Click the **Return to Search** button. |
| 21. | Click the **Down** scrollbar. |
| 22. | Click the **SpeedType Key - 0497100012** link. |
| 23. | 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 note of the **SpeedType Key** so that you can later enter it on your requisition.  
   
   *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.*  
   
   Click in the **My Financials Home** field. |
<table>
<thead>
<tr>
<th>Step</th>
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</thead>
</table>
| 24.  | This completes *Lookup SpeedChart*.  
      | *End of Procedure*. |
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
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate to <strong>Maintain Requisitions</strong> page. Click the button to the right of the <strong>My Financials Home</strong> field.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>LSU Health Financials</strong> list item.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Purchasing</strong> button.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the button to the right of the <strong>Requisitions</strong> field.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Add/Update Requisitions</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Hide Navigation Area</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
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7. | **Add a New Value**

A new requisition is being entered. Verify the **Business Unit** and **Requisition ID** default correctly.

Click the **Add** button to begin the **Enter a Requisition** process.

<table>
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<th>Action</th>
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</table>
8. | The **Maintain Requisitions** page displays. |

The **Business Unit** and **Requisition ID** that have defaulted from the Add a New Value page display on the top left of the page.

The "**Requisition Name**" field can display a *note or description of the item(s) being ordered* if desired. PeopleSoft does not like blank fields, so if no note or description is written, the requisition id will be defaulted into the field when the requisition is first saved.

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.
## Step 9
The **Status** will default as "Pending" and the **Budget Status** as "Not Chk'd."

The "Hold From Further Processing" allows the user to *control* the requisition. By selecting the "Hold From Further Processing" option, the user determines when the requisition will *move forward* in the Purchasing process. If "Hold From Further Processing" is *not* selected, the requisition will move to the Approver's worklist the first time the requisition is *saved*.

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>10.</td>
<td>The <strong>Header</strong> section of the <em>Maintain Requisitions</em> page contains information that will be found on the <strong>Header</strong> (top) section of the requisition when printed. Not all fields/links are used by LSUNO. For example, the <em>Requisition Activities</em> link is not used when entering a requisition.</td>
</tr>
</tbody>
</table>
11. 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 not default into the Requester field, contact Purchasing so that default parameters can be set for entering future requisitions.

   NOTE: You will not be able to save the requisition if your User ID does not default.

12. Requisition Date vs. Accounting Date

   The Requisition Date defaults to the current date and may remain as defaulted.

   The Accounting Date also defaults to the current date. However, it may need to be adjusted 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.

13. The Requisition Defaults page is an optional feature that automatically populates each line item with the information entered 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.

   Click the Requisition Defaults link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 14.  | The **Requisitions Defaults** page allows users to enter buyer, supplier, shipping, distribution, chartstring, etc., information on one page rather than for each line item. *Only information that will apply to all lines of the requisition should be entered on the Requisition Defaults page.*

Click the **Close** button. |
| 15.  | **Add Comments**

Comments can be added at the **Header** level or the line level. *Only comments that will apply to all lines of the requisition should be entered at the Header level.* Comments pertaining to a specific line item will be entered at the line level.

Comments added to the **Header** can be *specific shipping instructions, supplier information* if the supplier is not listed in look up supplier on the requisition defaults page, etc. Files can be attached |
| 16.  | **Add Items From**

**None** of the links associated with **Add Items From** are used by LSUNO for creating a requisition. |
| 17.  | **Line**

The **Line** section contains **all** 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.

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. |
| 18.  | This completes **Maintain Requisitions Navigation and Overview**.

End of Procedure. |
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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>NOTE:</strong> The Buyers names, chartstrings, and other values being shown in this exercise are for demonstration purposes only. When working in Production, users must enter their requisition information.</td>
</tr>
</tbody>
</table>
Step 2: Check Hold From Further Processing (optional)

Although this is an optional step, it is highly recommended 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.

Click the **Hold From Further Processing** option.

Step 3: Enter Requisition Name (optional)

"**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 not required. If the field is left blank, the system will automatically populate it with the **Requisition ID** number the first time you save the requisition.

Enter the desired information into the **Requisition Name** field. Enter "**Karen's Binders**".

Step 4: 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 not attempt to continue with the requisition, as save errors are likely to occur.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>5.</td>
<td><strong>Requisition Date vs. Accounting Date</strong>&lt;br&gt;The <strong>Requisition Date</strong> defaults to the current date and may remain as defaulted. The <strong>Accounting Date</strong> also defaults to the current date. 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. <strong>NOTE: Requisition Date is a required field, but Accounting Date is not, for PeopleSoft. However, for LSUNO, Accounting Date is a required field.</strong></td>
</tr>
<tr>
<td>6.</td>
<td><strong>Step 3: Enter Requisition Defaults (required)</strong>&lt;br&gt;The &quot;<strong>Requisition Defaults</strong>&quot; 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. Click the <strong>Requisition Defaults</strong> link.</td>
</tr>
<tr>
<td>7.</td>
<td><strong>Default Options</strong>&lt;br&gt;The <strong>Override</strong> option is selected and will remain as defaulted.</td>
</tr>
<tr>
<td>8.</td>
<td><strong>Scenario</strong>&lt;br&gt;In this exercise, users will enter the following requisition default information:&lt;br&gt;&lt;br&gt;1. Buyer - Deborah Holmes&lt;br&gt;2. Supplier - Office Depot&lt;br&gt;3. Ship To - 1497100 (Radiology)&lt;br&gt;4. Due Date - August 26, 2022&lt;br&gt;5. Distribute By - Quantity&lt;br&gt;6. Ship Via - As Defaulted&lt;br&gt;7. Freight Terms - As Defaulted&lt;br&gt;8. SpeedChart - 0497100013&lt;br&gt;9. Account Code - 546700</td>
</tr>
<tr>
<td>9.</td>
<td><strong>Buyer</strong>&lt;br&gt;The <strong>Buyer</strong> is a required field for LSUNO. If you do not 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.&lt;br&gt;&lt;br&gt;<a href="https://www.lsuhs.edu/administration/SupplyChain/buyers_by_department.aspx">https://www.lsuhs.edu/administration/SupplyChain/buyers_by_department.aspx</a></td>
</tr>
</tbody>
</table>
10. If you know your Buyer, you can search for his/her user id using the **Look up Buyer** option.

   Click the **Look up Buyer** button.

11. In this example, the Buyer is Deborah Holmes.

   Enter the desired information into the **Name:** field. Enter "HO".

12. Click the **Look Up** button.

13. Click in the **DHOLME2** field.

14. In this example, the Supplier will be **Office Depot**. Use the **Look up Supplier** feature to search for the 10-digit Supplier ID number.

   Click the **Look up Supplier** button.

15. Click the button to the right of the **Short Supplier Name begins with** field.

16. 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.

   Click the **begins with** list item.

17. Enter the desired information into the **Short Supplier Name:** field. Enter "OFFICE".

18. Click the **Look Up** button.

19. Sixteen (16) results are returned using the Short Supplier Name "Office."

   Click the **0000002440 - OFFICE DEPOT** link.

20. When the **Supplier** field contains a value, the **Supplier Name** will display to the right of the Supplier field. The **Supplier Location** will also default into the page. The **Supplier Location will remain as defaulted.**
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</thead>
</table>
| 21.  | **Category and Unit of Measure**  
   *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.* |
| 22.  | The **Ship To** is the Department designation where the item(s) will be delivered.  
   Click the **Look up Ship To** button. |
| 23.  | For this example, the Radiology department will be used.  
   Enter the desired information into the **Ship To Location:** field. Enter "Radiology". |
| 24.  | Click the **Look Up** button. |
| 25.  | Click the **1497100** link. |
| 26.  | 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.  
   Click the **Calendar Due Date** button. |
| 27.  | Click the **28** date. |
| 28.  | Click the **Down** scrollbar. |
| 29.  | The **Ultimate Use Code** field is not used by LSUNO.  
   The **Attention To** can be used if desired for designate a contact person or room for item delivery  
   The **One Time Address** link is not used by LSUNO. |
| 30.  | **Distribute By**  
   Funds are distributed either by **Quantity** or **Amount**. The distribution method is important when:  
   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 *blanket* Purchase Orders are distributed by **Amount**. |
### Step Action

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<tbody>
<tr>
<td>31.</td>
<td><strong>Distribute By</strong> (continued)</td>
</tr>
<tr>
<td></td>
<td>The Distribute By is designated on the Requisition Defaults page. However, the distribution method can be changed on the Distribution page for a specific line item.</td>
</tr>
<tr>
<td>32.</td>
<td>In this example, the <strong>Distribute By</strong> will be &quot;<strong>Quantity</strong>&quot;, so it will remain as defaulted.</td>
</tr>
<tr>
<td></td>
<td><em>See the Adjust ChartString Information topic for distributing funds by Amount.</em></td>
</tr>
<tr>
<td>33.</td>
<td>The <strong>Ship Via and Freight Terms</strong> will remain as defaulted unless instructed otherwise by Purchasing.</td>
</tr>
<tr>
<td>34.</td>
<td>As previously stated, a <strong>SpeedChart</strong> is a shortcut users' can enter to automatically populate individual chartfield values on the Distributions line. In this example, users will enter the first <strong>SpeedChart</strong> from the &quot;<strong>Lookup SpeedChart</strong>&quot; exercise: 0497100013</td>
</tr>
<tr>
<td></td>
<td>Enter the desired information into the <strong>SpeedChart</strong> field. Enter &quot;0497100013&quot;.</td>
</tr>
<tr>
<td>35.</td>
<td><strong>Press [Tab]</strong> on your keyboard to populate chartfield values.</td>
</tr>
<tr>
<td></td>
<td><em>NOTE: The Account Code will not populate. Users must manually enter the Account Code on the Distributions line.</em></td>
</tr>
<tr>
<td>36.</td>
<td>The chartstring displays.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Look up Account</strong> button.</td>
</tr>
<tr>
<td>37.</td>
<td>In this example, users will search for the <strong>Account Code</strong> for &quot;<strong>Office Supplies.</strong>&quot;</td>
</tr>
<tr>
<td></td>
<td>Enter the desired information into the <strong>Description:</strong> field. Enter &quot;<strong>OFFICE</strong>&quot;.</td>
</tr>
<tr>
<td>38.</td>
<td>Click the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td>39.</td>
<td>Click in the <strong>546700</strong> field.</td>
</tr>
<tr>
<td></td>
<td>![Office Supplies E]</td>
</tr>
<tr>
<td>40.</td>
<td>Click the <strong>Right</strong> scrollbar.</td>
</tr>
<tr>
<td>41.</td>
<td><strong>Project</strong></td>
</tr>
<tr>
<td></td>
<td>The <strong>Project/Grant</strong> number must be entered on the Requisitions Defaults page <strong>only if all</strong> requisition items are being charged to the Project/Grant. No Project/Grant is associated with this requisition, so no Project number will be entered.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>42.</td>
<td>Your business unit designation will be your PC Bus Unit. It is recommended that LSUNO be used for <em>all requisitions</em>. Enter the desired information into the <strong>PC Bus Unit</strong> field. Enter &quot;LSUNO&quot;.</td>
</tr>
<tr>
<td>43.</td>
<td>Click the <strong>Right</strong> scrollbar.</td>
</tr>
</tbody>
</table>
| 44.  | 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.  

*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.*  

Click the **Add multiple new rows at row 1** button. |
| 45.  | 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. *It is recommended that one line be added at a time.*  

Click the **OK** button. |
| 46.  | **Percent**  

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 must change the percentage based on how funds will be split (e.g., 50% charged to row 1 and 50% charged to row 2).  

A duplicate row of row one (1) is added.  

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.  

Enter the desired information into the **Percent** field. Enter "50". |
<p>| 48.  | Enter the desired information into the <strong>Percent</strong> field. Enter &quot;50&quot;. |</p>
<table>
<thead>
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<tbody>
<tr>
<td>49.</td>
<td>In this example, change the <strong>Department</strong> for row 2 to <strong>1497120</strong>. Click the <strong>Look up Dept</strong> button.</td>
</tr>
<tr>
<td>50.</td>
<td>Enter the desired information into the <strong>Department:</strong> field. Enter &quot;<strong>14971</strong>&quot;.</td>
</tr>
<tr>
<td>51.</td>
<td>Click the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td>52.</td>
<td>Click in the <strong>1497120</strong> field.</td>
</tr>
<tr>
<td>53.</td>
<td>The two rows now have two distinct chartstrings. Click the <strong>Right</strong> scrollbar.</td>
</tr>
<tr>
<td>54.</td>
<td>Row 2 will be deleted since splitting the costs of all line items is not desired for this requisition. Click the <strong>Delete row 2</strong> button.</td>
</tr>
<tr>
<td>55.</td>
<td>A warning message displays asking you to confirm the deletion of row 2. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>56.</td>
<td>Click the <strong>Left</strong> scrollbar.</td>
</tr>
<tr>
<td>57.</td>
<td>The <strong>Percent</strong> for row 1 must be changed back to <strong>100%</strong>. Enter the desired information into the <strong>Percent</strong> field. Enter &quot;<strong>100</strong>&quot;.</td>
</tr>
<tr>
<td>58.</td>
<td>Once all default information has been entered, click the OK button to return to the Maintain Requisitions page. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>59.</td>
<td>This completes <strong>Enter Requisition Header and Default Information. End of Procedure.</strong></td>
</tr>
</tbody>
</table>
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.
### Step 1: Step 4: Enter Item(s) and Save the requisition (required)

Step 4 is a multi-pronged. It requires users to enter item information and save the requisition.

In this exercise, users will request the following items: Binders and Gel Pens. After entering item information for **Binders**, the user will save the requisition. The system will automatically assign the next available requisition number to the requisition.

### Step 2: The Tabs above Line 1 (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.

**NOTE:** Users should never change any information on these tabs. The Details tab is only tab in which users will enter information.

### Step 3: NOTE: The Item Number will always be left blank when entering a requisition.

### Step 4: Description

A description must be entered for each line item. You may enter the description directly into the **Description** field if the description is no more than 20 characters long.

If the description is more than 20 characters, users will enter the description on the **Details** page in the **Transaction Item Description** box. The **Details** page is located to the right of the line number.
5. Click the **Details** button.

6. **Transaction Item Description**

   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**.

   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.

7. In this example, you will enter the **Transaction Item Description** for the **Binder** item.

   Enter the desired information into the **Transaction Item Description** field. Enter "**D-RING BINDER, 3 - 5" RINGS, PURPLE"**.

8. A **spell check** (*blue book with a check mark*) feature is also available and works similarly as spell check used in Word and other Microsoft applications.

   Click the **Spell Check Transaction Item Description** button.
### Training Guide
Managing Requisitions Fluid

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<tr>
<td>9.</td>
<td>Click the OK button.</td>
</tr>
<tr>
<td>10.</td>
<td>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.</td>
</tr>
<tr>
<td>11.</td>
<td>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.</td>
</tr>
<tr>
<td>12.</td>
<td>Click the Down scrollbar.</td>
</tr>
<tr>
<td>13.</td>
<td>Click the OK button.</td>
</tr>
<tr>
<td>14.</td>
<td><strong>Quantity</strong> The Quantity must be entered in whole numbers (e.g., 10 or 11 rather than 10.5) 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) Enter the desired information into the Quantity field. Enter &quot;10&quot;.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>15.</td>
<td><strong>Unit of Measure (UOM)</strong>&lt;br&gt;The UOM is a <strong>required</strong> 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 <em>Look up UOM</em> button to the right of the field. Click the <strong>Look up UOM</strong> button.</td>
</tr>
<tr>
<td>16.</td>
<td>Enter the desired information into the <strong>Unit of Measure</strong>: field. Enter &quot;E&quot;.</td>
</tr>
<tr>
<td>17.</td>
<td>Click the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td>18.</td>
<td>Click the <strong>EA</strong> link.</td>
</tr>
<tr>
<td>19.</td>
<td><strong>Category</strong>&lt;br&gt;The Category is a value from the Inventory Tables of the State Commodity Code. The Category code will <strong>vary</strong> by business unit.&lt;br&gt;LSUNO users will search for the appropriate Category code using the <em>Look up Category</em> option. If the appropriate code <strong>cannot</strong> be found, contact Purchasing for assistance. Click the <strong>Look up Category</strong> button.</td>
</tr>
<tr>
<td>20.</td>
<td>Enter the desired information into the <strong>Description</strong> field. Enter &quot;BINDER&quot;.</td>
</tr>
<tr>
<td>21.</td>
<td>Click the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td>22.</td>
<td>Click the <strong>61509 - BINDERS: CHAIN, POST, PRONG</strong>, link.</td>
</tr>
<tr>
<td>23.</td>
<td><strong>Price</strong>&lt;br&gt;When entering the cost of an item into the Price field, users <strong>must</strong> enter the <em>decimal point</em> to indicate <em>cents</em> (e.g., 12.95).&lt;br&gt;&lt;br&gt;<strong>NOTE:</strong> <em>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</em> (e.g., 12.9500)&lt;br&gt;Enter the desired information into the <strong>Price</strong> field. Enter &quot;48.59&quot;.</td>
</tr>
</tbody>
</table>
### Step 24
The total amount of Line 1 will display in the Merchandise Amount field.

### Step 25
**NOTE:** The first time you save the requisition the system will automatically assign the next available requisition id number to the requisition.

You **cannot** successfully Save the requisition until *all required fields are populated.*
The **minimal** date required is:
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
14. Price

### Step 26
**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.*

Click the **Save** button.

### Step 27
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.

Users will *add another line* to the requisition for *gel pens*.

### Step 28
Click the **Right** scrollbar.

### Step 29
Click the **Add multiple new rows at row 1** button.

### Step 30
Click the **OK** button.

### Step 31
Click the **Details** button.
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</thead>
<tbody>
<tr>
<td>32.</td>
<td>Enter the desired information into the <strong>Transaction Item Description</strong> field. Enter &quot;GEL PENS, MEDIUM POINT, PURPLE&quot;.</td>
</tr>
<tr>
<td>33.</td>
<td>Click the <strong>Down</strong> scrollbar.</td>
</tr>
<tr>
<td>34.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>35.</td>
<td>Enter the desired information into the <strong>Quantity</strong> field. Enter &quot;2&quot;.</td>
</tr>
<tr>
<td>36.</td>
<td>Enter the desired information into the <strong>UOM</strong> field. Enter &quot;BOX&quot;.</td>
</tr>
<tr>
<td>37.</td>
<td>Click the <strong>Look up Category</strong> button.</td>
</tr>
<tr>
<td>38.</td>
<td>Enter the desired information into the <strong>Description:</strong> field. Enter &quot;PENS&quot;.</td>
</tr>
<tr>
<td>39.</td>
<td>Click the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td>40.</td>
<td>Click the <strong>62080 - PENS (GENERAL WRITING TYPES):</strong> link.</td>
</tr>
<tr>
<td>41.</td>
<td>Enter the desired information into the <strong>Price</strong> field. Enter “8.95&quot;.</td>
</tr>
<tr>
<td>42.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>43.</td>
<td>This completes <strong>Enter Item Information and Save the Requisition</strong>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
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
**Step 1**

**Step 5: Adjust Chartstring Information (required)**

Users can change the **Distribute By** for a **specific line item**. The Distribute By for a requisition is either **Quantity** or **Amount**. The Distribute By can be changed on the **Distribution** page for the specific line item. Users can also add, change, or delete chartstring information for a **specific line item** on the Distribution page as well. The **Distribution** page is located on the line item's **Schedule** page.

Click the **Schedule...** button.

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</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Step 5: Adjust Chartstring Information (required)</strong></td>
</tr>
<tr>
<td></td>
<td>Users can change the <strong>Distribute By</strong> for a <strong>specific line item</strong>. The Distribute By for a requisition is either <strong>Quantity</strong> or <strong>Amount</strong>. The Distribute By can be changed on the <strong>Distribution</strong> page for the specific line item. Users can also add, change, or delete chartstring information for a <strong>specific line item</strong> on the Distribution page as well. The <strong>Distribution</strong> page is located on the line item's <strong>Schedule</strong> page.</td>
</tr>
<tr>
<td>2.</td>
<td>The <strong>Schedule</strong> defines when and where the user wants the specific item delivered.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Distribution</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
</tbody>
</table>
| 3.   | The **Distribution** page defines *how departments and accounts are charged* for an item.  
In this example, users will *change* the *Distribute By* from *Quantity* to *Amount*. The **Multi-SpeedChart** 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. |
| 4.   | Begin by changing the *Distribute By* from *Quantity* to *Amount*.  
Click the button to the right of the **Distribute By** field.  
-  |
| 5.   | Click the **Amount** list item.  
- **Amount** |
| 6.   | By changing the *Distribute By* to *Amount*, the system automatically *removed Quantity* from Distributions line and *moved Merchandise Amount* next to Percent.  
| 7.   | 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.  
Click in the **Multi-SpeedCharts** field.  
- **Multi-SpeedCharts** |
| 8.   | In this example, the **SpeedCharts Process Option** will remain as "**Overwrite**". The *speedchart* will be **0497100012** to overwrite the current chartstring information. The *Amount to Distribute* will be **485.90**.  
| 9.   | Enter the desired information into the **SpeedChart** field. Enter "**0497100012**".  
| 10.  | Enter the desired information into the **Amount to Distribute** field. Enter "**485.90**".  
| 11.  | Click the **OK** button.  
- **OK** |
| 12.  | The new chartstring has overwritten the previous chartstring. The **Program** previously was **00654** and now is **00653**. The **Account** is not copied over, so the user must enter the Account information.  
Enter the desired information into the **Account** field. Enter "**546700**".  
| 13.  | The user will also change the **Dept** to **1497120**.  
Enter the desired information into the field. Enter "**1497120**".  
| 14.  | Click the **Multi-SpeedCharts** link.  
- **Multi-SpeedCharts** |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td>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.</td>
</tr>
</tbody>
</table>
| 16. | In this example, users will select the **Append** option. The original speedchart will be entered as the SpeedChart: **0497100013**. The Amount to Distribute will be left **blank**, so that the user can enter the desired split on the individual distribution lines.  

Click the **Append** option. |
| 17. | Enter the desired information into the **SpeedChart** field. Enter "**0497100013**". |
| 18. | Click the **OK** button. |
| 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. | The **Account** code is not part of the chartstring, so **must** be entered manually by the user.  

Enter the desired information into the **Account** field. Enter "**546700**". |
| 22. | The chartstrings for both lines are complete and show the cost of the binders being slip evenly between the two chartstrings.  

The user will now **return** the Distributions to the **original chartstring (row 2)** and have the entire cost (**100%** charged to that chartstring. The **Distribute By** will be changed back to **Quantity**.  

Click the **Right** scrollbar. |
| 23. | Click the **Delete row 1** button. |
| 24. | A warning message displays to confirm the delete of row 1.  

Click the **OK** button. |
<p>| 25. | Click the <strong>Left</strong> scrollbar. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>26.</td>
<td>The <strong>Percent</strong> must be changed back to <strong>100%</strong>. Enter the desired information into the <strong>Percent</strong> field. Enter <strong>&quot;100&quot;</strong>.</td>
</tr>
<tr>
<td>27.</td>
<td>Change the <strong>Distribute By</strong> back to <strong>Quantity</strong>. Click the button to the right of the <strong>Distribute By</strong> field.</td>
</tr>
<tr>
<td>28.</td>
<td>Click the <strong>Quantity</strong> list item.</td>
</tr>
<tr>
<td>29.</td>
<td>Notice the <strong>Quantity</strong> field again displays to the <strong>right</strong> of the <strong>Percent</strong> field. Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>30.</td>
<td>Click in the <strong>Return to Main Page</strong> field.</td>
</tr>
<tr>
<td>31.</td>
<td>Changes have been made on the Distribution page, so the requisition needs to be saved. Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>32.</td>
<td>This completes <em>Adjust ChartString Information</em>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>Step 6: Enter Comments and Attach Documents (optional)</strong>&lt;br&gt;Comments can be added at the <strong>Header</strong> level using the &quot;Add Comments&quot; link.&lt;br&gt;Click the <strong>Add Comments</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td><strong>NOTE:</strong> The method used to add, change and delete comments is the same method used to add comments on the <strong>Line</strong> level. In this exercise, comments will be demonstrated at the <strong>Line</strong> level. However, comments that can added at the <strong>Header</strong> level will be discussed first.&lt;br&gt;&lt;br&gt;<strong>NOTE:</strong> Comments entered at the <strong>Header</strong> level will display and print above all line item information on the requisition. Please do not include any comments you do not wish to be seen or shared.</td>
</tr>
<tr>
<td>3.</td>
<td>Users will only enter information at the <strong>Header</strong> level that applies to the entire requisition (e.g., new supplier information, suggested suppliers for bid, address for the mailing the Purchase Order when the supplier has multiple locations, etc.). Specific shipping or delivery instructions applicable to all line items may also be entered at the <strong>Header</strong> level.</td>
</tr>
<tr>
<td>4.</td>
<td>Likewise, <strong>justification for purchase</strong> can be added as well at the <strong>Header</strong> level. The <strong>Approval Justification</strong> box will be checked, and will display on the requisition approval page when the Approver selects the requisition.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Close</strong> button.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Right</strong> scrollbar.</td>
</tr>
</tbody>
</table>
| 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.  

**NOTE:** Comments added at the Line level will display and print below the corresponding line item information on the requisition. Please do **not** include any comments you do not wish to be seen or shared.  

Click the **Line Comments** button. |
| 8.   | Only information that pertains to the *specific line* (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.  

*Attaching and uploading documents will be demonstrated later in this topic.* |
| 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. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 14. | A message displays that spell check is complete, so no other misspellings were found.  

Click the **OK** button.  

![OK](image)

| 15. | 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. |
| 16. | If additional space is needed, a new row can be inserted.  

Click the **Add a new row at row 1** button.  

![Add a new row at row 1](image)

| 17. | 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.  

Click the **View All** link.  

![View All](image)

| 18. | Inserted rows are independent of each other, and will be viewed in ascending order unless sort sequencing is changed.  

Click the **Down** scrollbar.  

![Down scrollbar](image)

| 19. | Enter the desired information into the **Comments - Row 2** field. Enter "**TEST**". |

| 20. | **Inactivate**  

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.  

*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.*  

Click the **Inactivate - Row 2** button.  

![Inactivate](image)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td><strong>Undo</strong>&lt;br&gt;Notice the comments area is grayed out. The <em>Undo</em> button will re-activate a comment box as long as the user has not navigated away from the Line Comments page.&lt;br&gt;Click the <strong>Undo - Row 2</strong> button.</td>
</tr>
<tr>
<td>22.</td>
<td>Click the <strong>Inactivate - Row 2</strong> button.</td>
</tr>
<tr>
<td>23.</td>
<td>Click the <strong>Down</strong> scrollbar.</td>
</tr>
<tr>
<td>24.</td>
<td>Click the <strong>OK</strong> button to navigate away from the Line Comments page.</td>
</tr>
<tr>
<td>25.</td>
<td>Click the <strong>Left</strong> scrollbar.</td>
</tr>
<tr>
<td>26.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
<tr>
<td>27.</td>
<td>Click the <strong>Right</strong> scrollbar.</td>
</tr>
<tr>
<td>28.</td>
<td>Notice the Line Comments bubble now contains blue dots which denote that comments are available.&lt;br&gt;Click the <strong>Line Comments</strong> button.</td>
</tr>
<tr>
<td>29.</td>
<td>If comments are lengthy, documents can be attached rather than typing or copying and pasting information.&lt;br&gt;Click the <strong>Attach</strong> button.</td>
</tr>
<tr>
<td>30.</td>
<td>In this example, users will attach the <strong>Binders</strong> document.&lt;br&gt;Click the <strong>Choose File</strong> button.</td>
</tr>
</tbody>
</table>
## Step 31
Click the **Binders** list item.

<table>
<thead>
<tr>
<th>Binders</th>
</tr>
</thead>
</table>

## Step 32
Click the **Open** button.

<table>
<thead>
<tr>
<th>Open</th>
</tr>
</thead>
</table>

## Step 33
Click the **Upload** button.

*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 not attach. Rename the file to reduce the number of characters and repeat the attachment process.*

<table>
<thead>
<tr>
<th>Upload</th>
</tr>
</thead>
</table>

## Step 34
The file name displays to the right of Attachment. Users are able to view the file to verify the correct file was selected.

Click the **View** button.

<table>
<thead>
<tr>
<th>View</th>
</tr>
</thead>
</table>

## Step 35
Click the **Close** button.

<table>
<thead>
<tr>
<th>Close</th>
</tr>
</thead>
</table>

## Step 36
The **Delete** button will *activate* once the user navigates away from the Line Comments page and saves the requisition.

Click the **OK** button.

<table>
<thead>
<tr>
<th>OK</th>
</tr>
</thead>
</table>

## Step 37
Click the **Save** button.

<table>
<thead>
<tr>
<th>Save</th>
</tr>
</thead>
</table>

## Step 38
This completes *Enter Comments and Attach Documents*.  
**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
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Step 7: View Approvals and Print a Requisition (optional)**  
The Hold From Further Processing must be unchecked and the requisition Saved in order to move the requisition forward in the Purchasing process.  
Click the **Hold From Further Processing** option. |
| 2.   | Click the **Down** scrollbar. |
| 3.   | Even though the Hold From Further Processing has been unchecked, the requisition still **must** be Saved for it to move forward in the Purchasing process.  
Click the **Save** button. |
| 4.   | If the Requester is their own approver, the system will automatically run the approval process and approve the requisition.  
Click the **Down** scrollbar. |
### Step 5: View Approvals and Print the Requisition (optional)

Users can view requisition approval steps on the View Approvals page.

Click the **View Approvals** link.

### Step 6

In this example, the requester is their own approver and the requisition has been approved. If the requester is not their own approver, the **Status = Pending** and the **name of the approver** would display.

Click the **Return** button.

### Step 7

There are **two (2) methods** that can be used to **Print** a requisition:

1. View Printable Version
2. Accessing the Process Scheduler

**NOTE:** **Users may only REQUEST AND PRINT ONE REPORT AT A TIME.**

**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.*

Click the **View Printable Version** link.

### Step 8

The SQR Report box displays with **Status = Processing**. The SQR process begins with **Queued**, then **Processing**, and then change to **Success**. When the **Status = Success**, a line will appear stating the system is preparing the report. The report will open automatically in the SQR Report box.
9. Select the Printer icon to print the requisition.

Click the **Printer** button.
Step 10. Users can designate the number of copies to print, the destination printer, etc.

For **training purposes only**, click the **Cancel** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Users can designate the number of copies to print, the destination printer, etc. For <strong>training purposes only</strong>, click the <strong>Cancel</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>11.</td>
<td>Click the Close Print tab.</td>
</tr>
<tr>
<td>12.</td>
<td>The second method for printing the requisition is using the <strong>Process Scheduler</strong>. Click the Navigation Area button.</td>
</tr>
<tr>
<td>13.</td>
<td>Click the (select to expand or collapse child steps) Reports button.</td>
</tr>
<tr>
<td>14.</td>
<td>Click the Down scrollbar.</td>
</tr>
<tr>
<td>15.</td>
<td>Click the Print Requisition button.</td>
</tr>
</tbody>
</table>
## Training Guide
### Managing Requisitions Fluid

<table>
<thead>
<tr>
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<th>Action</th>
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</thead>
</table>
| 16.  | The first time you run the Requisition Print process, you must create a Run Control ID.  

*See the Create/Find a Run Control ID topic under Requisition Basics for instructions on how to create a valid run control id.*  

Click the **Add a New Value** tab.  

| 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.  | The parameters entered on the Print Requisition's page will be saved to a specified run control id. When running the report in the future, the user will *only change* the **Requisition ID** - all other fields will remain as defaulted.  

Enter the desired information into the **Business Unit** field. Enter "LSUNO".  

| 21.  | **Requisition ID**  

The user may enter the requisition id *directly* into the Requisition ID field, or *search* for it using the **Look up Requisition ID** option. It is recommended the user note the requisition id when attempting to enter it on the page and print the requisition.  

Enter the desired information into the **Requisition ID** field. Enter "0060255".  

| 22.  | **NOTE: Do not 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 **REQUESTED AND PRINTED ONE AT A TIME**, entering the requisition id will be sufficient to identify the requisition.** |
| 23.  | 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.  

Click the **Select All** button.  

<p>| 24.  | Click the button to the right of the <strong>Statuses to Include</strong> field. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 25.  | For simplicity, users will want to select the most inclusive option.  
      | Click the **On Hold AND Not on Hold** list item. |
| 26.  | Click the **Save** button. |
| 27.  | **Process Scheduler**  
      | The *Process Scheduler* defines the **Run Location** and **Output Destination** of the print request.  
      | Click the **Run** button. |
| 28.  | Click the button to the right of the **Server Name** field. |
| 29.  | Click the pane. |
| 30.  | **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.** |
| 31.  | Click the **OK** button. |
| 32.  | Click the **Process Monitor** link. |
| 33.  | **NOTE: If the Run Status is not Success and the Distribution Status is not Posted, click the Refresh button until both statuses are achieved.**  
      | Click the **Refresh** button. |
| 34.  | Users will view the report in the **Administration** tab of the **Report Manager**.  
<pre><code>  | Click in the **Report Manager** field. |
</code></pre>
<p>| 35.  | Click the <strong>Administration</strong> tab. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 36.  | The *top line is always* the most *current* 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**.  

**NOTE:** Click the **Refresh button** until the **Status = Posted** and the **Requisition Print SQR link** becomes active.  

Click the **Requisition Print SQR** link.  

**NOTE:** Clicking the **Requisition SQR link** will open and display in a new tab. |
| 37.  | Select the Printer icon to set parameters and print your report.  

Click the **Close** tab. |
| 38.  | Click the **Go back to Process Requests** link. |
| 39.  | Click in the **Go back to Requisition Print** field. |
| 40.  | Users can enter another Requisition ID to print another requisition. All other parameters will remain as defaulted. |
| 41.  | This completes **View Approvals and Print a Requisition**.  

**End of Procedure.** |
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
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | **Step 8: View and Copy an Existing Requisition (optional)**  

Click the Close Navigation Area button. |
| 2.   | A new requisition must be added in order to copy a requisition. The Business Unit will default as LSUNO and the Requisition ID will default as NEXT.  

Click the Add button. |
| 3.   | Click the **Hold From Further Processing** option. |
| 4.   | **Scenario**  

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. |
| 5.   | **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.  

*NOTE: It is recommended to enter a new requisition rather than copying a requisition if extensive changes will be made to the requisition.* |
| 6.   | **Cancelled Lines and Requisitions**  

A requisition with cancelled rows or a cancelled requisition can be copied to a new requisition. If the user copies a requisition that has *one or more lines cancelled*, only the **active lines** from the existing requisition will be copied to the new requisition. If the user copies a cancelled requisition, all the **lines** from the cancelled requisition are copied to the new requisition and the status of the lines are made **active**.  

Users can override any values that are copied over with the requisition. *Activity and original requisition dates are not copied over.* |
| 7.   | Click the **Copy From** link. |
### Step 8: Search for an Existing Requisition to Copy

Users may search for an existing requisition to copy by entering all or part of one of the following search criteria:
- **Requisition ID** - to view a specific requisition; or
- **Requester** – to view requisitions associated with a specific requester.

### Step 9: Requisition ID

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.

### Step 10: Requester

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.

> **NOTE:** It is not recommended that any of the remaining options be used when searching for a requester user id.

### Step 11: Enter the desired information into the Requester field. Enter "KOCONN".

### Step 12: Click the Search button.

<table>
<thead>
<tr>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

### Step 13: 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.

> **NOTE:** This will open a new tab and display the Req Inquiry page.

Click the **0060255** link.

### Step 14: You are taken to the Req Inquiry page. Select the requisition number to view requisition items.

> **NOTE:** This will take you to the Requisition Details panel.

Click the **0060255** link.
### Step 15
Additional requisition information displays.
- Click the **Close Requisitions** tab.

### Step 16
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.
- Click the **OK** button to copy the requisition.

### Step 17
The information copied from the old requisition displays in the new requisition.
NOTE: Any changes made to the new requisition will have no effect on the original requisition that was copied.

### Step 18
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.
NOTE: The Requester user id must be entered in ALL CAPS.

### Step 19
- Click the **Requisition Defaults** link.

### Step 20
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.
NOTE: Users may also enter the Due Date directly into the field.
- Click the **Calendar Due Date** button.

### Step 21
- Click the **28** date.

### Step 22
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.
- Click the **OK** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>The &quot;Mark All&quot; option is selected so that all listed settings will automatically be changed by the system for all Distribution lines. Click in the <strong>Mark All</strong> field.</td>
</tr>
<tr>
<td>24.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
| 25.  | Line items must be checked and necessary changes made. For this example, the user will make the following changes:  
**Line 1 - Quantity**: change quantity from 10 to 5  
**Line 1 - Price**: change from 48.59 to 47.65  
**Line 2**: Delete line 2 |
| 26.  | **Line 1 - Quantity**: change quantity from 10 to 5  
Enter the desired information into the **Quantity** field. Enter "5". |
| 27.  | **Line 1 - Price**: change from 48.59 to 47.65  
Enter the desired information into the **Price** field. Enter "47.65". |
| 28.  | Click the **Right** scrollbar. |
| 29.  | **Line 2**: Delete line 2  
Click the **Delete row 2** button. |
| 30.  | A confirmation message to delete the row displays.  
Click the **OK** button. |
| 31.  | Click the **Left** scrollbar. |
| 32.  | The system will assign the Requisition ID number since this is the first time the requisition is saved.  
Click the **Save** button. |
### Training Guide
#### Managing Requisitions Fluid

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 33.  | 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.  
  Click the **Hold From Further Processing** option. |
| 34.  | Click the **Save** button. |
| 35.  | This completes **View and Copy an Existing Requisition**.  
  **End of Procedure.** |
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
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Requisition Inquiry</strong> button.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Close Navigation Area</strong> button.</td>
</tr>
</tbody>
</table>
| 3.   | Users may search to inquire on an existing requisition by entering all or part of the following search criteria:  
|      | • **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 **Complete**.  
<p>|      | Click the <strong>Look up Requester</strong> button. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 5.   | In this example, the requester is Jennifer Crisp. Use the **Description** field to enter the **Last Name** of the requester.  

**NOTE:** *Use the Last Name only 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.* 

Enter the desired information into the **Description:** field. Enter "crisp".  

6.   | Click the **Look Up** button. |
| 7.   | Click the **JCRIS1** link. |
| 8.   | Click the **Look up Req Status** button. |
| 9.   | Select the appropriate requisition status to focus search results.  

Click the **Complete** link. |
| 10.  | Click the **OK** button. |
| 11.  | 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. |
| 12.  | In this example, the *subscription renewal* for the *American Assoc. of Advanced Science* will be selected, which is requisition number **0057873**.  

Click the **0057873** link. |
| 13.  | From the **Requisition Details** panel, users can view Description information, supplier information, quantity, and UOM. |
| 14.  | 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. |
| 15.  | Click the **Close Requisition Details** button. |
| 16.  | Click the **Status** tab. |
## Training Guide
### Managing Requisitions Fluid

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>The linked &quot;Y&quot; 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 &quot;Y&quot; values display only in columns for which documents are available. Click the <strong>On PO - Y</strong> link for Requisition <strong>0057873</strong>.</td>
</tr>
<tr>
<td>18.</td>
<td>Select the linked <strong>Purchase Order number (00389819)</strong> to view the PO Inquiry page. Click the <strong>Close Requisition to Purchase Order List</strong> button.</td>
</tr>
<tr>
<td>19.</td>
<td>Click the <strong>On Voucher - Y</strong> link for requisition <strong>0057873</strong>.</td>
</tr>
<tr>
<td>20.</td>
<td>Select the linked <strong>Voucher number (00406345)</strong> to view the Voucher Inquiry page. Select the <strong>Payment Information</strong> link to view the Voucher Payments page. Click the <strong>Close Requisition to Voucher List</strong> button.</td>
</tr>
<tr>
<td>21.</td>
<td>Click the <strong>Open Navigation Area</strong> button.</td>
</tr>
<tr>
<td>22.</td>
<td>This completes <strong>Inquire on a Requisition using Requisition Inquiry</strong>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
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
1. 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.

   **NOTE:** You may only view the Voucher and Payment Inquiry pages if you have the required security access.

   Click in the **Document Status** field.

2. Click the **Close Navigation Area** button.

3. It is recommended users search by **Requisition ID** or **Requester**. **Requisition Status** can be used in conjunction with **Requester** to help focus on requisitions retrieved.

   Enter the desired information into the **Requisition ID**: field. Enter "0057873".

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

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

**Navigation:**
- LSU Health Financials homepage • Purchasing tile
- Requisitions
- Add/Update Requisitions

Click the **Requisition Defaults** link.

[Requisition Defaults](#)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | 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.  

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. |
| 3.   | **Scenario**  

In this exercise, you will search for an appropriate **value** 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. |
| 4.   | Click the **Look up Supplier** button. |
### Step 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.

### Step 6
The number of results retrieved can be reduced by entering *all or part* 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.

There are two operators that can be used to help narrow your search results. They are:
- begins with
- contains.

### Step 7
**began with**

The system defaults the "began with" operand for all search fields. In this example, you will search for *Office Deport* using the **Short Supplier Name** field and the "began with" operand.

### Step 8
Enter the desired information into the **Short Supplier Name:** field. Enter "OFFICE".

### Step 9
Click the **Look Up** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>The system returned supplier names that begin with the word &quot;Office&quot;, thus reducing the list of options to 16. Click the <strong>Clear</strong> button.</td>
</tr>
<tr>
<td>11.</td>
<td><strong>contains</strong>&lt;br&gt;The second search option is &quot;<strong>contains</strong>&quot;. The &quot;contains&quot; option searches for any supplier name that &quot;<strong>contains</strong>&quot; 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. Click the button to the right of the <strong>Short Supplier Name</strong> field.</td>
</tr>
<tr>
<td>12.</td>
<td>Click the list item. <strong>contains</strong></td>
</tr>
</tbody>
</table>
## Step 13
In this example, you will use "Depot" as your search component rather than Office.

Enter the desired information into the **Short Supplier Name:** field. Enter "DEPOT".

## Step 14
Click the **Look Up** button.

## Step 15
The system has returned supplier names that **contains** the word "Depot". Using the "contains" operand reduced the original search results to 5.

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.

Click in the **OFFICE DEPOT** field.

## Step 16
The 10-digit Supplier ID defaults into the Supplier field and the Supplier name displays to the right of the field.

## Step 17
This completes **Use the Look up Feature**.

**End of Procedure.**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13.</td>
<td>In this example, you will use &quot;Depot&quot; as your search component rather than Office. Enter the desired information into the <strong>Short Supplier Name:</strong> field. Enter &quot;DEPOT&quot;.</td>
</tr>
<tr>
<td>14.</td>
<td>Click the <strong>Look Up</strong> button.</td>
</tr>
<tr>
<td>15.</td>
<td>The system has returned supplier names that <strong>contains</strong> the word &quot;Depot&quot;. Using the &quot;contains&quot; operand reduced the original search results to 5. 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. Click in the <strong>OFFICE DEPOT</strong> field.</td>
</tr>
<tr>
<td>16.</td>
<td>The 10-digit Supplier ID defaults into the Supplier field and the Supplier name displays to the right of the field.</td>
</tr>
<tr>
<td>17.</td>
<td>This completes <strong>Use the Look up Feature</strong>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>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.</td>
</tr>
</tbody>
</table>

_NOTE: See the 'Access the Process Scheduler' section in the View Approvals and Print a Requisition topic for instructions on printing a requisition using the Process Scheduler._
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 2.   | **Navigation:**  
|      | • LSU Health Financials homepage • Purchasing tile  
|      | • Reports  
|      | • Print Requisition  
<p>|      | Click the <strong>Print Requisition</strong> button. |
| 3.   | Click the <strong>Close Navigation Area</strong> button. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4.   | The first time you use Requisition Print, you will need to create a Run Control ID in order to access the Process Scheduler.  
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.  
NOTE: On all subsequent prints, you will use the Find an Existing Value tab to search for existing run control ids. |
| 5.   | Click in the Add a New Value field. |

![Image of Requisition Print interface]
### Step 6: Run Control ID

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.

A **Run Control ID** is:
- 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.

### Step 7: Examples of run control ids that meet the requirements:

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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Examples of run control ids that <strong>do not meet</strong> the requirements:</td>
</tr>
<tr>
<td></td>
<td>1. <strong>PRINT REQ</strong> because there is a <strong>blank</strong> space between the two words; <strong>or</strong></td>
</tr>
<tr>
<td></td>
<td>2. <strong>PRINT_REQUISITION'S</strong> because a <strong>special character</strong>, and apostrophe, is used.</td>
</tr>
<tr>
<td>9.</td>
<td>A run control id <strong>must</strong> be created to run many reports in <strong>PeopleSoft</strong>. If a run control is created to a <strong>specific type of report</strong>, 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 <strong>parameters</strong> are <strong>saved</strong> 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 <strong>all reports</strong>, then the user will need to <strong>change</strong> the report <strong>parameters</strong> each time the report is run.</td>
</tr>
<tr>
<td>10.</td>
<td>Enter the desired information into the <strong>Run Control ID:</strong> field. Enter &quot;<strong>REQ_PRINT</strong>&quot;.</td>
</tr>
<tr>
<td>11.</td>
<td>Click the <strong>Add</strong> button.</td>
</tr>
</tbody>
</table>
12. 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.

*NOTE: See the View Approvals and Print a Requisition topic for instructions on printing your report.*

13. If your **Business Unit** does not default, it **must** be entered.

Enter the desired information into the **Business Unit** field. Enter "LSUNO".

14. Enter the desired information into the **Requisition ID** field. Enter "0062925".
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15.</td>
<td><strong>NOTE:</strong> 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 <strong>REQUESTED AND PRINTED ONE AT A TIME</strong>, entering the Requisition ID will be sufficient to identify the requisition.</td>
</tr>
<tr>
<td>16.</td>
<td><strong>Statuses to Include</strong>&lt;br&gt;&lt;br&gt;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 <strong>Select All</strong> button, users will be able to print the requisition in any status.&lt;br&gt;&lt;br&gt;Click the <strong>Select All</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action |
--- | --- |
17. | **Statues to Include (continued)**

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 **Hold from Further Processing** 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 **Hold From Further Processing** box is checked or unchecked.

Click the button to the right of the **NOT On Hold** field.

18. | Click the **On Hold AND Not On Hold** list item. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 19.  | Click the **Save** button.  

*NOTE: Parameters must be saved in order for them to default when printing in the future.* |
| 20.  | 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.  

*See the View Approvals and Print a Requisition topic for instructions on how to print a report.*  
For **training purposes only**, click the **Open Navigation Area** button. |
| 21.  | Click the **Print Requisition** button. |
| 22.  | Click the **Close Navigation Area** button. |
### Step 23
The system defaults you into the **Find an Existing Value** tab.

Select the **Search** button for a list of existing run control ids.

Click the **Search** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>The system defaults you into the <strong>Find an Existing Value</strong> tab. Select the <strong>Search</strong> button for a list of existing run control ids. Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>

### Step 24
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.

Click the **REQ_PRINT** cell.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.</td>
<td>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. Click the <strong>REQ_PRINT</strong> cell.</td>
</tr>
</tbody>
</table>

### Step 25
This completes **Create/Find a Run Control ID**. **End of Procedure.**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>25.</td>
<td>This completes <strong>Create/Find a Run Control ID</strong>. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>