Managing Requisitions 9_2
LSUNO and LSUSH

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Managing Requisitions 9_2 LSUNO and LSUSH

Welcome to the **PeopleSoft 9.2 Managing Non-Contract Requisitions** module! This module contains the tools needed to learn many of the concepts and procedures involved in Requisitioning items.

Goal
To have the skills and knowledge necessary to create a Non-Contract Requisition ***(hereinafter referred to as a "Requisition")*** and perform the objectives listed below.

Participant Objectives
At the end of this module you will be able to…..

1. Enter a Requisition.
2. Add comments to a Requisition.
3. View an existing Requisition.
4. Print a Requisition.
5. Copy a Requisition from an existing Requisition.
6. Inquire on a Requisition.

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.

Requisitions

What is a Requisition?
A requisition is a request for items to be ordered from a supplier. Once the requisition is entered into the PeopleSoft system, the following two things must occur in order for Purchasing to be able to generate a Purchase Order to the supplier in the PeopleSoft system:

• The requisition must be **approved**;
• The requisition must pass the **Budget Check process**.

Throughout the procurement process, Budget Checking ensures that financial obligations and expenditures do not exceed budget limitations. 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 that the ChartString entered into the requisition is valid and that the funds are available for the ChartString.

Requisitions in PeopleSoft

The two types of **items** that can be entered into the PeopleSoft system are as follows:
• **State Contract Items:**

Louisiana State Law requires that any item purchased be bid out. However, one exception to this rule is ordering an item from the State Contract. Each year, the Louisiana Office of State Purchasing (OSP) negotiates items with Suppliers. Since the price, quantity and unit of measurement of each item on State Contract have already been negotiated, it is not necessary for the item to be bid out.

• **Non-Contract Items:**
This is any item that is not on State Contract. These items will be ordered "by description" (i.e. typing a description of the item(s) you wish to order into the requisition in the PeopleSoft system).

Contacts for Assistance
The following will be your contacts for entering and managing requisitions:

• For **technical assistance** with PeopleSoft (e.g. problems accessing PeopleSoft, assistance with changing password, 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.

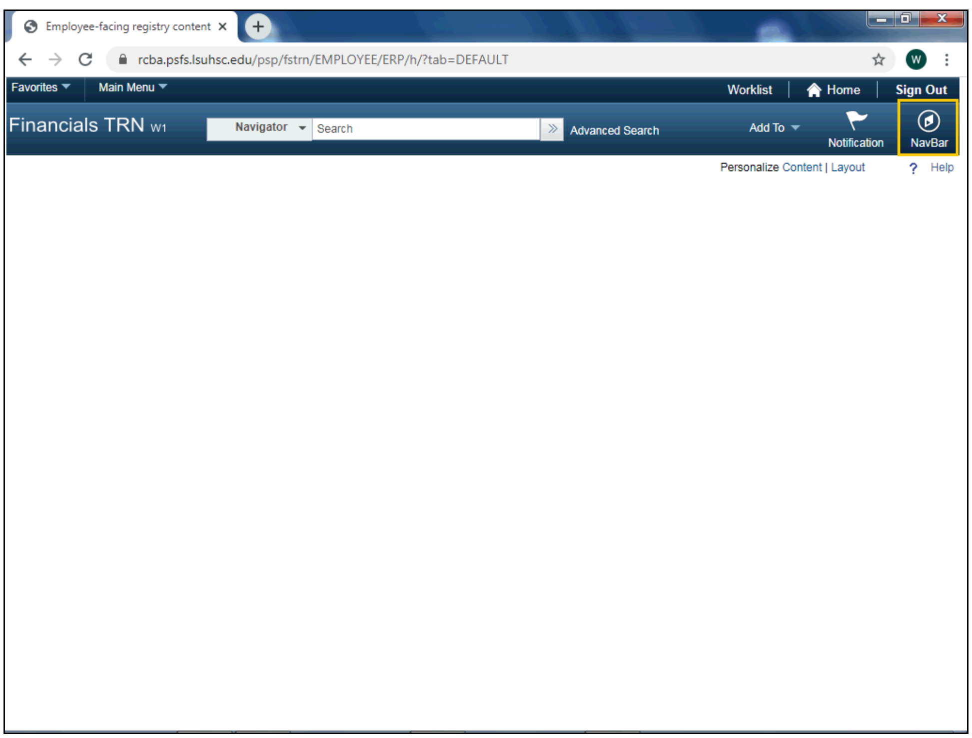
• For **functional assistance** with PeopleSoft (e.g. questions about entering requisitions, items being ordered, the bid process or other purchasing procedures), contact your Buyer or Purchasing Superuser if your Buyer is not available.

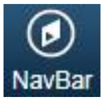
Enter a Non-Contract Requisition

Procedure

In this topic you will learn how to **Enter a Non-Contract Requisition**.

Step	Action
1.	**Three (3) Steps to Entering a Requisition** There are three steps to entering a requisition: **Step 1: Enter Defaults (Requisition Defaults page)** Users **must** enter the Defaults (i.e. the chartstring(s) to which the item(s) is being charged) in the Requisition Defaults page first in order to properly save the requisition. **Step 2: Enter Item (Requisition page)** Enter the Item(s) to be ordered in the Requisition page; **Step 3: Adjust ChartString (Schedule page)** If necessary, users will adjust the Distribution of Funds (i.e. the ChartString(s) the item(s) is being charged to) on the Distribution page located in the Schedule page. ***NOTE: Changing the order of these steps may cause save errors which will result in the re-entering of the requisition by the Requester.*** ***NOTE: The Buyer names, chartstrings and other values being shown in the exercises in this manual are only used for demonstration purposes. When working in Production, you must enter your own chartstrings and information.***



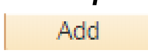
Step	Action
2.	Click the **NavBar** button. 
3.	Click the **Navigator** button. 
4.	Click the **Purchasing** menu. Purchasing
5.	Click the **Requisitions** menu. Requisitions
6.	Click the **Add/Update Requisitions** menu. Add/Update Requisitions
7.	**Business Unit** The appropriate Business Unit should default unto the Business Unit field when working in Production. If the Business Unit does not default into the field, enter it or select it by clicking the magnifying glass **(Look up Business Unit button)** to the right of the Business Unit field. Contact the Purchasing department so that the default can be set for entering future requisitions.

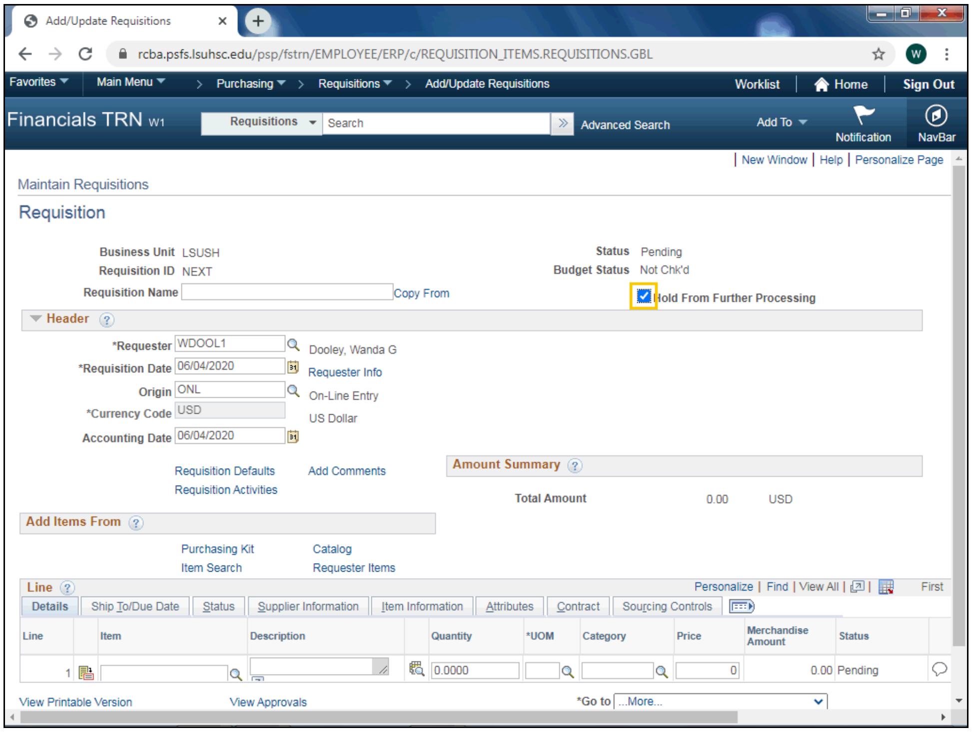
NOTE: The following is a list of the **Business Units** that should be entered into the dialog box, depending on the facility at which the end-user is employed.

LSUNO: LSU Health New Orleans

LSUNA: LSU Health New Orleans Auxillary

LSUSH: LSU Health Shreveport

Step	Action
8.	**Requisition ID** The Requisition ID should default as NEXT. This allows the system to auto-assign the requisition number. Once the requisition is entered and saved, the system will generate the next Requisition ID (number) assigned to the Business Unit. The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned by Purchasing once the PO is generated. ***NOTE: Blanket Orders or Standing Orders will be entered in PeopleSoft one time to cover the entire year and thereafter, the Purchase Order number will be used to place additional orders for the year. See your buyer or Purchasing for more information about Blanket Orders or Standing Orders.***
9.	**LSUSH Confirming Purchase Orders** Enter the assigned requisition number in the Requisition ID field when creating a requisition assigned to a Confirming Purchase Order.
10.	Click the **Add** button. ***NOTE: To access and view an existing requisition, click the Find an Existing Value tab. See the "View a Requisition in the Activity Log topic for instruction on how to find an existing requisition in the PeopleSoft system.*** 
11.	**Status** The Status should default as Pending. If the Status does not default as Pending, contact the Purchasing department so that the appropriate defaults can be set for entering future requisitions. The requisition must be saved in Pending status to move forward on the Purchasing Process Sequence (i.e. approval of the requisition).
12.	**Budget Status** The Budget Status field indicates whether the Budget Check process has been run. The Budget Check process must be run prior to Purchasing sourcing (i.e., generating) the Requisition to a Purchase Order or RFQ - Request for Quote (for bid). The Budget Status should default as Not Chk'd.



Step	Action
13.	Click the **Hold From Further Processing** link.

Hold From Further Processing

When the user saves his/her requisition it will automatically be routed to the Approver's Worklist, even if the requisition is not complete and the requisition page is still open. In order to prevent the requisition from being routed to the Approver's Worklist prior to completion of the requisition, the Hold From Further Processing field **must** be turned on (i.e. place a check in the checkbox in front of the Hold From Further Processing field). Approvers who enter their own requisitions should also check the Hold **From Further Processing** field to prevent approval of the requisition prior to completion.

As long as the Hold From Further Processing field is checked, the requisition will not be routed to the Approver's Worklist, nor will an Approver have his/her own requisition approved. This is a great benefit to the user since it allows the user the ability to close the requisition and then open it again to continue working on it at a later time. However, if this field is checked, it is imperative that the Hold From Further Processing field be unchecked when the requisition is ready for approval. If it remains checked, the requisition will not be routed to the Approver's Worklist, nor will an Approver have his/her own requisition approved.

Step	Action
14.	**Requisition Name** This field can be used to enter a description of the item(s) being purchased or free text. If the field is not populated upon saving the Requisition ID will populate to this field.
15.	The Requester (your User ID) should default into the page. If the Requester does not default, contact the Purchasing department so that the appropriate defaults can be set for entering future requisitions. You may enter the Requester or select it by clicking the **Look Up Requester** magnifying glass. If you enter the Requester, it must be entered in **ALL CAPITAL** letters.
16.	**The Requisition Date and the 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 be adjusted as needed (e.g., when entering a requisition for the next fiscal year).

Enter a Requisition for the Next Fiscal Year

When a requisition is entered for the next fiscal year, the **Accounting Date** **must** be changed. It is not necessary to change the Requisition Date. The Accounting Date **must** be changed prior to entering information in the Requisition Defaults page to ensure that the Budget Period defaults appropriately (i.e. for the next fiscal year). If the Budget Period is not correct, an error message will display advising that the Accounting Date and Budget Period do not match when attempting to save the requisition. The **Due Date** on the Requisitions Default page **must** also be changed.

The dates must be changed as follows when entering a requisition for the next fiscal year:

Accounting Date - 07/01/XX for the next fiscal year
Due Date - 07/01/XX or later of the next fiscal year

Step	Action
17.	View the links on the Maintain Requisitions page.

Additional Maintain Requisitions Page Links

Copy From link is used to copy a requisition from an existing requisition. ***See the "Copying a Requisition from an Existing Requisition"*** topic for instructions on how to use the **Copy From** link.

Requisition Activities link is not used by most end-users. You may enter notes here, but they will not print on the requisition.

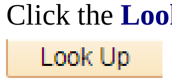
Document Status link is used to access other documents associated with the requisitions.

Purchasing Kit, **Item Search**, **Catalog**, **and Requester Items** links are not used at this time.

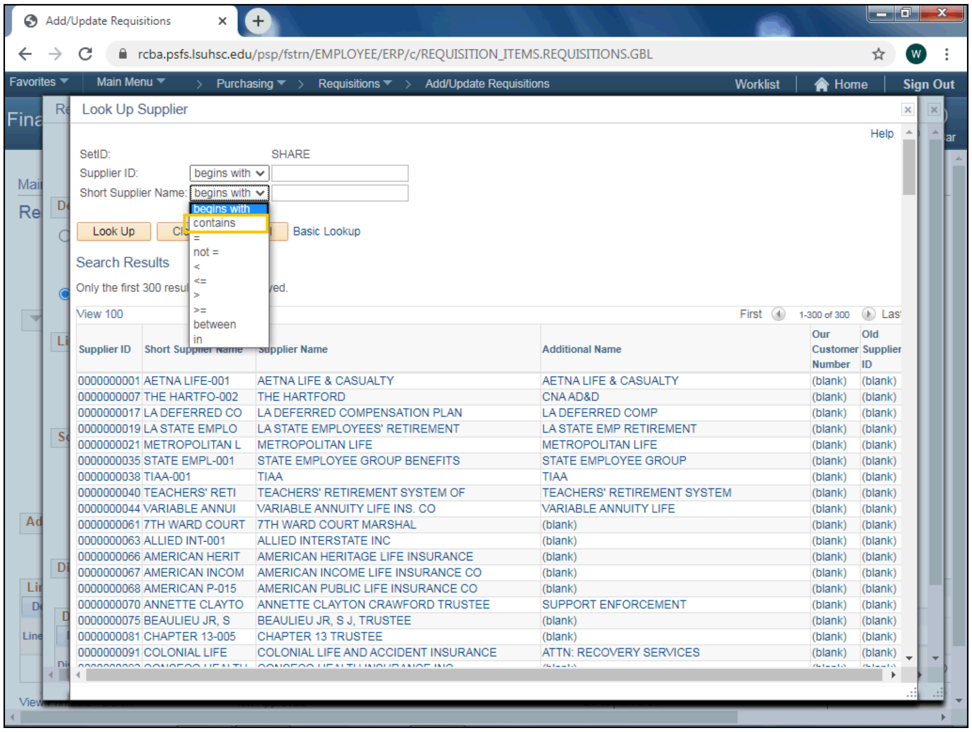
View Printable Version link is used to print your requisition.

View Approvals link is used to view the approval process for the requisition.

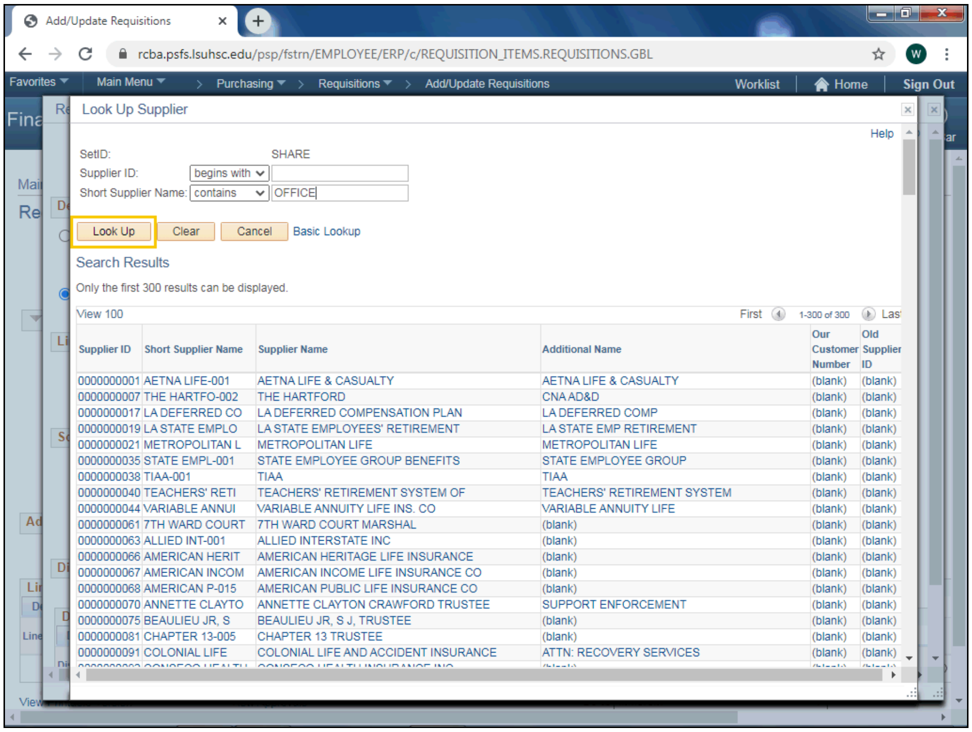
Step	Action
18.	The **Requisition Defaults** link is used to enter default chartstring information. Click the **Requisition Defaults** link. Requisition Defaults
19.	The Requisition Defaults page allows users to enter supplier, shipping, chartstring, etc., information on one page rather than for each line item. Information entered on this page will automatically be "defaulted" to each line item, thus minimizing data entry. ***NOTE: Only information that will apply to all lines of the requisition should be entered on the Requisitions Defaults page.***

Step	Action
20.	**Step 1: Enter Requisition Defaults** You **<u>must first enter</u>** data into the Requisitions 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 the requisition 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.
21.	In the **Defaults Options** section, the **Override** option is selected as the default and should remain as is.
22.	Certain fields in the requisition are required fields, meaning the requisition cannot be saved if the field is left blank. Generally these fields have an asterisk next to the field name. There are a few fields, however, that are viewed as required fields by LSUHSC that may not be designated with an asterisk. An example of this is the Buyer field. The Buyer field is not a required field, but you may enter the Buyer information. If the Buyer is unknown, you can check with your Purchasing Department for this information, or use the link below to find your Buyer on the the Buyers by Department webpage: **https://www.lsuhsc.edu/administration/supplychain/buyers_by_department.aspx**.
23.	If you know the buyer's User ID, you may enter it directly into the field. The User ID must be typed in **ALL CAPS**. If you do not know the buyer's User ID, you may search for it by clicking the **Look up Buyer** (magnifying glass) to the right of the Buyer field.
24.	Click the **Look up Buyer** button. 
25.	Enter the desired information into the **Name** field. Enter "**ANDERSON**". ***NOTE: If you enter the full name, the name must be entered in proper PeopleSoft format (i.e. last name, first name with no space between).*** ***See "Using the Look Up Feature" topic for instruction on how to search for information in the database.***
26.	Click the **Look Up** button. 

Step	Action
27.	A name or list of names will display in the Search Results area. Click the **AANDER1** link.
28.	Press the Tab key to move from field to field within PeopleSoft. The **Enter** key **cannot** be used to move from field to field. The Enter key acts as a Save button, so do not use it when entering requisition information.
29.	The Unit of Measure field will be left **blank** on the Requisition Defaults page. You will enter the Unit of Measure in the Line Details on the Maintain Requisitions page. ***NOTE: Entering the Unit of Measure on the Requisition Defaults page may cause problems with saving the requisition.***
30.	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.
31.	If the Supplier ID is unknown, the requester should attempt to locate the supplier in the database. If the supplier does not appear in the list of suppliers in the PS system, the Supplier field 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. ***NOTE: Entering information in the Header comments page is shown in the Add, Change, and Delete Comments topic.***
32.	For this example, the supplier id is unknown but can be found in the PS database. Click the **Look Up Supplier** button.
33.	***See Using the Look Up Feature topic in the Requisition Basics section for information on how to use the Look up feature to search for a supplier.***
34.	Click the **Short Supplier Name** list.



Step	Action
35.	Click the **contains** list item. contains
36.	Enter the desired information into the **Short Supplier Name** field. Enter "**OFFICE**".

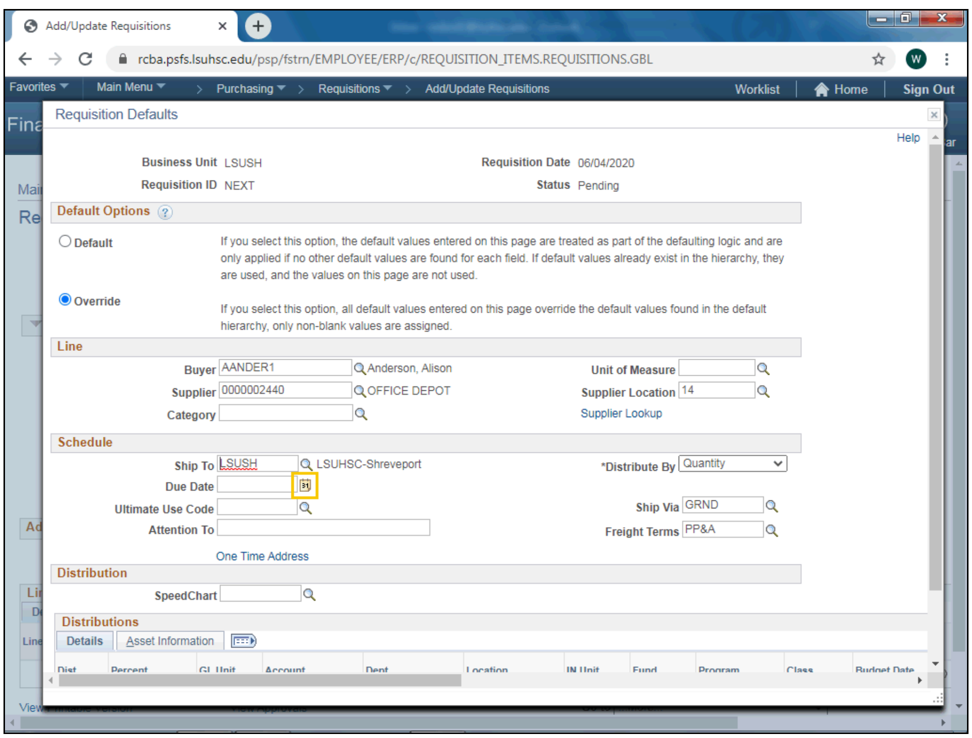


Step	Action
37.	Click the **Look Up** button. Look Up
38.	Click the **0000002440** link. 0000002440
39.	When the Supplier field contains a value, the Supplier name will default to the right of the Supplier field. The Supplier Location will also default into the page. **The Supplier Location will remain as defaulted.**
40.	The Category field will remain blank on the Requisition Defaults page. The Category code will be entered in the Line Details on the Maintain Requisition page. ***NOTE: Entering Category information on the Requisition Defaults page may cause problems with saving the requisition.***
41.	The **Ship To** is the location designation where the item(s) will be delivered. For **LSUNO** requesters, the **Ship To** location is specific to the requester's department. For **LSUSH** requesters, **LSUSH** is used for the **Ship To** location. Click the **Look Up Ship To** button.

Specific shipping or delivery instructions that apply to the entire requisition may be entered using the **Add Comments** link in the ***Header*** section on the Maintain Requisitions page. If multiple items are being ordered, and the shipping or delivery instructions apply only to a specific line item, the user will enter the shipping or delivery instructions on the **Line Comments** page for the specified line item.

See the Add, Change and Delete Comments section for additional information on entering comments in the Add Comments and Line Comments pages.

Step	Action
42.	For this example, LSUSH is being used as the Business Unit so it will also be selected as the Ship To. Click the **LSUSH** link. LSUSH



Step	Action
43.	Click the **Due Date** button.

Due Date:
Although the Due Date is not a required field, in order to save the requisition and generate a requisition number, the end-user **must** enter the Due Date.

The Due Date is the date you expect to receive the merchandise:
• **One Time Orders:** The Due Date is the expected delivery date .
• **Blanket Orders or Standing Orders:** The Due Date is the last day of the last month you expect to receive the merchandise.

The following are two examples:
1. If you have a **Standing Order** for the delivery of 10 cases per month for 3 months beginning September and ending November, the Due Date would be the last day of November.

2. If you have a **Blanket PO** for rental equipment or supplies where the contract period is through the end of the fiscal year, the Due Date would be the last day of June.

Date Boxes:
Enter a date by one of the following methods:

1. To enter today's date, enter a **T** in the date field and click Refresh .

2. To view the calendar and select the date, click the Calendar icon next to the Due Date field. Select the month and year if necessary, and then click on the desired date.

3. Enter the date (mm/dd/yy) – PeopleSoft requires that **6 digits** be entered, but the user **does** **not** have to type the slashes (e.g. 120105). The slashes will populate once the user clicks the Refresh button or moves to another page. This includes actually navigating to another page, or clicking the search button on another field on the same page, since searching on a field actually brings you to another page.

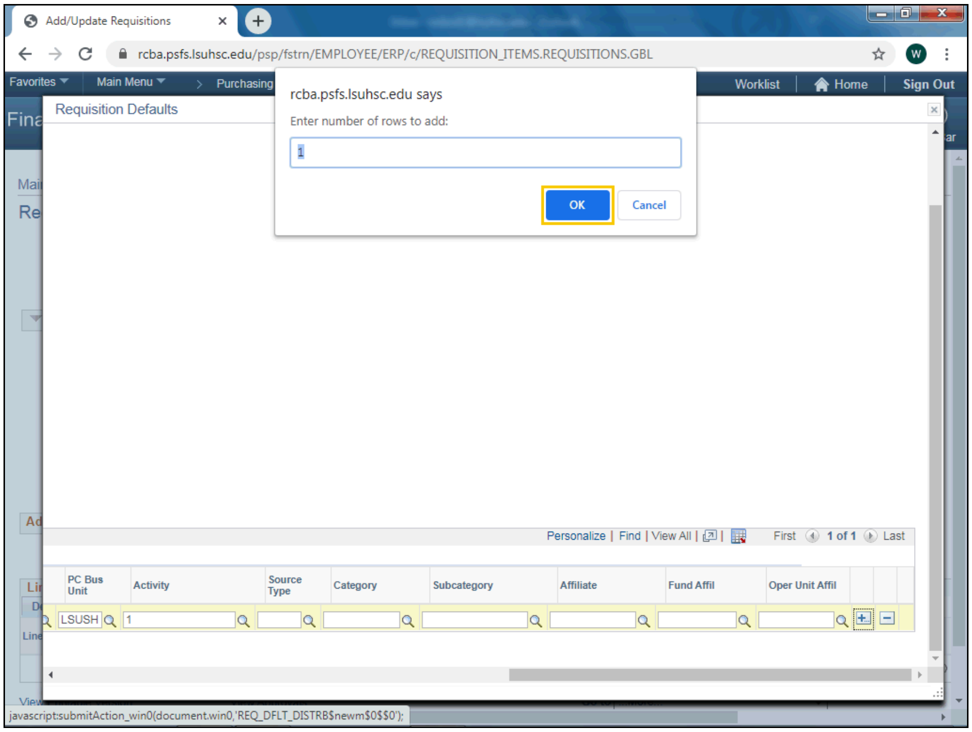
Enter a Requisition for the Next Fiscal Year
When a requisition is entered for the next fiscal year, the Due Date **must** be changed as follows:

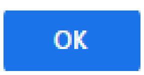
• Due Date will be entered as July 1st (07/01/XX) or later of the next fiscal year. A warning message may display advising the date is "out of range" (i.e., more than 30 days from the original date). When the warning message is received, click OK.

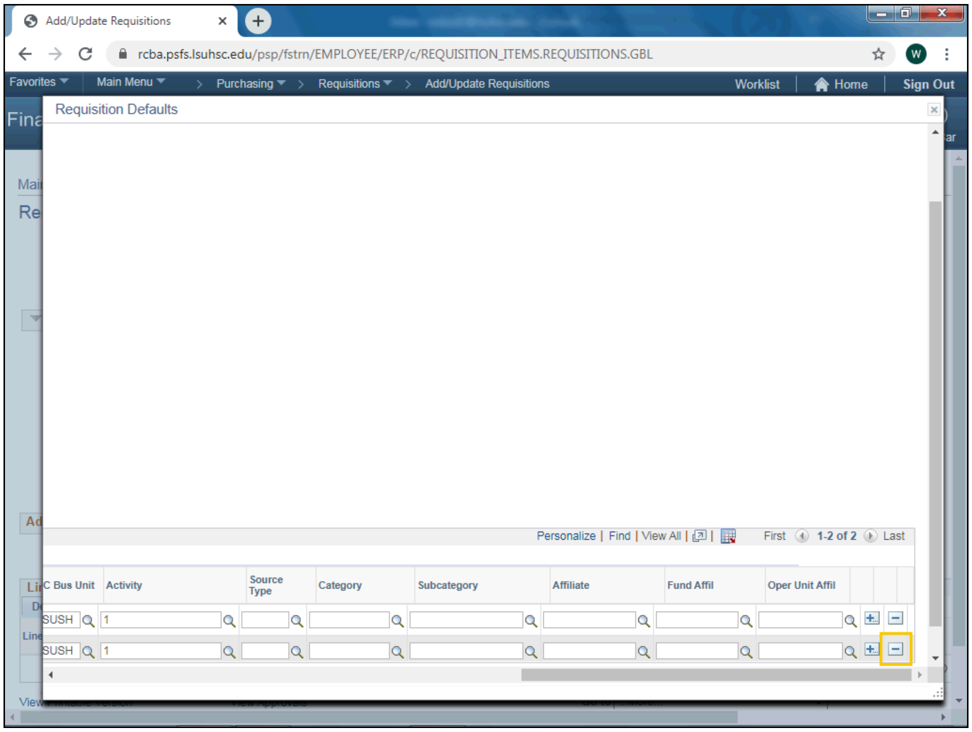
Step	Action
44.	Click the **26** link. 26
45.	**Distribute By** Funds are distributed either by **Quantity** or **Amount**. The distribution method is important when: 1. An item(s) is being charged to more than one account or department; or 2. An item(s) is a product or a service. Most blanket purchase orders are distributed by Amount.
46.	The Distribute By can be designated either on the Requisition Defaults page or the Distribution page. When entering multiple line item requisitions, if the distribution method is designated one way on the Requisitions Defaults page, you can change the distribution option on the Distribution page for a specific line item. Changing the distribution method on the Distribution page will be shown later in this topic. ***Contact your Buyer for additional information about distributing funds by Quantity or Amount.***
47.	In this example, you will distribute by Quantity, so the Distribute By will remain as defaulted. Distributing funds by Amount is shown later in this topic.
48.	The Ultimate Use Code and Attention To fields will remain blank. The One Time Address link is not used at this time.
49.	**Enter ChartString Values** You will enter the ChartString combination to which the item(s) is being charged in the Distribution section of the Requisition Defaults page. If there are multiple items being ordered, each line on the requisition can have a different ChartString value. Therefore, the various ChartString values will **<u>only</u>** be entered on the Requisition Defaults page if they **apply** to **most** items ordered on the requisition. ***NOTE: If chartstring information is not entered on the Requisition Defaults page, it <u>must</u> be entered on the Distribution page for each line item on the requisition.***
50.	**Using SpeedCharts To Simplify Data Entry** A SpeedChart is a shortcut the users can enter to automatically fill in the individual ChartField values on the distribution line. 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. Please refer to the **SpeedCharts** section for additional information.

Step	Action
51.	**Account Code** The Account Code is a transaction code for the item(s) being ordered (e.g. computer, office supplies, medical supplies, etc.). Lines on a requisition may have different Account Codes and the correct Account Code **must** be entered on each line item. ***NOTE: If you are ordering multiple items on the requisition and each item has a different Account Code, you should leave the Account Code field blank on the Requisition Defaults page. You must then enter the appropriate Account Code in the Distribution page for each line item. If most of the line items have the same Account Code, you may opt to enter the Account Code that applies to most of the line items on the Requisition Defaults page. You would then need to change the Account Code for those items requiring a different Account Code on the Distributions page.*** ***Contact your Finance/Accounting group for a list of account codes.***
52.	In this example, the Account Code for Office Supplies, General is used. Enter the desired information into the **Account** field. Enter "**546700**".
53.	The Dept is the cost center paying for the item(s). The Dept is always a 7-digit department number. Enter the desired information into the **Dept** field. Enter "**1053000**".
54.	**Location** The Location is a business unit designation. Whether the defaulted location should be changed is dependent on the Business Unit for which you work. **LSUNO** It is recommended that LSUNO be used as the Location code for all requisitions.
55.	**LSUSH** LSUSH uses an 8-10 alphanumeric code, so the default will be changed for all LSUSH requisitions. Each department has an assigned code. Below are examples of two LSUSH Location codes: 1. Surgery Department - MB010303: MB designates Medical B building, 01 designates that it is located on the 1st floor of the building, and 0303 is room 303; or 2. Hospital Anesthesiology - HH03H0015A: HH designates Hospital H wing, 03 designates it is located on the 3rd floor, and H0015A is room H315A.
56.	Enter the desired information into the **Location** field. Enter "**MB010303**".

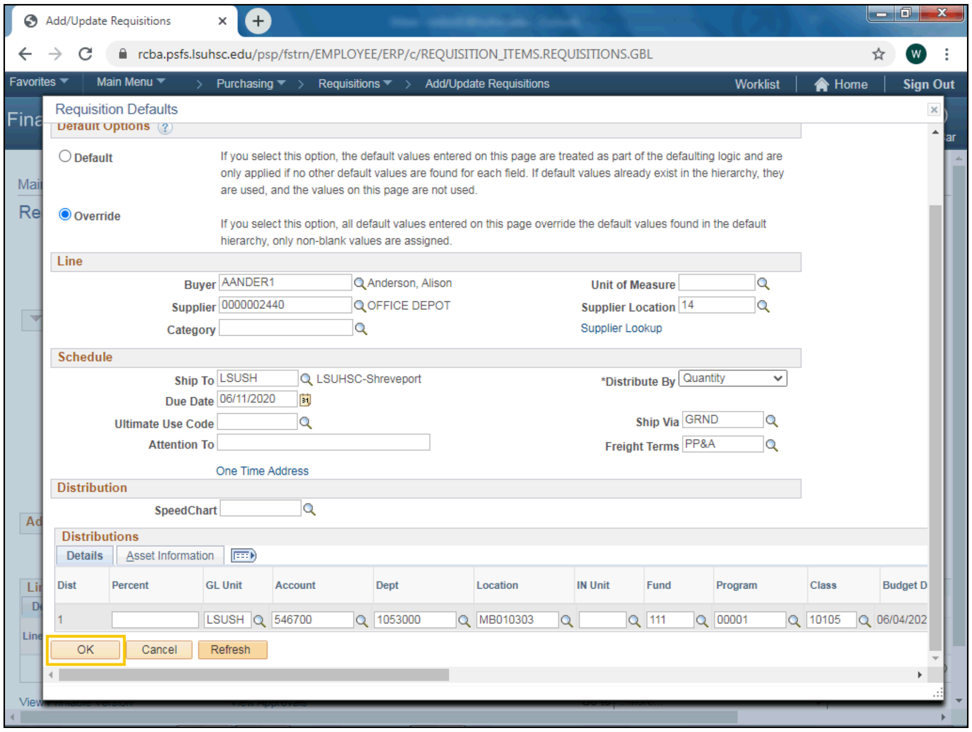
Step	Action
57.	**Fund Code** The Funding Code identifies the funding source for the item(s) being ordered. If the item(s) involves a Project/Grant, you will need to enter the Fund Code associated with the specified Project/Grant (e.g. 113, 115, 116, etc). Enter the desired information into the **Fund** field. Enter "**111**". ***Contact your Finance/Accounting department for applicable chartstring information.***
58.	Enter the desired information into the **Program** field. Enter "**00001**".
59.	Enter the desired information into the **Class** field. Enter "**10105**".
60.	**Project** If the items being ordered are associated with a specific project or grant, you will enter the project/grant number in the Project field. The project/grant number will **only** be entered on the defaults page if **all** items on the requisition will be charged to the project/grant. Otherwise the project/grant information will be entered on the Distribution page for the specific line item.
61.	**PC Bus Unit** The PC Bus Unit is now part of the chartfield information and **must** contain a value. Your business unit designation will default into the field. If it does not default, you must enter it or select it using the look up feature.
62.	**Enter Multiple ChartStrings** Items can be charged to more than one chartstring; for instance if more than one department is paying for an item. More than one chartstring can be entered on the Requisition Defaults page if the added chartstring will apply to most of the line items on the requisition. If the added chartstring does not apply to most of the line items, it should not be added on the Requisition Defaults, but instead should be entered on the specific line item's Distribution page.
63.	Click the **Add multiple new rows at row 1** button to add a second chartstring. 



Step	Action
64.	A prompt box will display asking you to enter the number of rows you wish to add. The prompt will default to 1. Add only the number of rows needed as the system will not save blank lines. Click the **OK** button. 
65.	The new row displays. Line 2 has all the same chartstring values (Account, Department, Location, Fund, Program and Class) as line 1. One or more of the chartstring values on line 2 **must** be changed for a second chartstring to be charged.
66.	**Percent** When the cost of an item(s) is split between more than one chartstring, the percentage to be applied to each **must** be designated using the Percent field. When the new row is added, the system still assigns 100% of the cost to the original chartstring. You will need to change that percentage based on how funds will be split (e.g. 50% charged to line 1 and 50% to line 2).



Step	Action
67.	Adding a new chartstring will be demonstrated later in this topic. Click the **Delete row 2** button. 
68.	A warning message displays to confirm the delete. Click the **OK** button. 



Step	Action
69.	Once all default information has been entered on the page, click the **OK** button to return to the **Maintain Requisitions** page. 
70.	**Step 1:** Entering Requisition Defaults is complete. **Step 2:** Enter Item(s) on the Requisition page will now be demonstrated.
71.	**Description** A description must be entered for each line item. You may enter the description directly into the Description field or in the Transaction Item Description box located on the Details page. ***NOTE: Only 20 characters can be viewed in the Description field at a time. Users should enter description information in the Transaction Item Description box if more than 20 characters are needed.***
72.	Click the **Details...** button. 

Step	Action
73.	**Transaction Item Description** The Transaction Item Description is a required field and is a free-text edit box (i.e., there is no drop-down arrow from which to select a value). All description information must be entered in **ALL CAPS**. You can enter up to 254 **characters** (this includes spaces) into the field. The system will allow you to enter more than 254 characters, but will then automatically truncate it down to 254 characters.
74.	Enter the desired information into the **Transaction Item Description** field. Enter "**D-RING BINDER, 5" RING, RED**".
75.	**Spell Check** The blue book with the checkmark to the right of the Transaction Item Description is the spell check feature for the field. The spell check works similarly to spell check used for Word and other Microsoft applications. Click the **Spell Check Transaction Item Description** button. 
76.	Click the **OK** button. 
77.	Below the Transaction Item Description box are five collapsed sections: Supplier Information, Item Information, Attributes, Contract, and Sourcing Controls. Click the **Expand All** link to expand all five sections at one time. Click the **Collapse All** link to minimize all five sections. ***NOTE: You may opt to expand or collapse the five sections individually by clicking on the Expand Section arrows located to the left of each section title.***
78.	The window expands to reveal more fields. Although most end-users will not enter information into these fields, you may enter information pertinent to the line such as Supplier's Catalog or Supplier Item ID. ***NOTE: The Manufacturers ID, Description, Manufacturer's Item ID and UPN ID fields should not be used.***
79.	If you know the requisition will need to go out for bid, click the checkbox in front of the RFQ Required (Request for Quote) field for **each** line in the distribution. If you are unsure as to whether or not the requisition will go out for bid, do not check the RFQ Required field.

Requisitions that will not go out for bid:

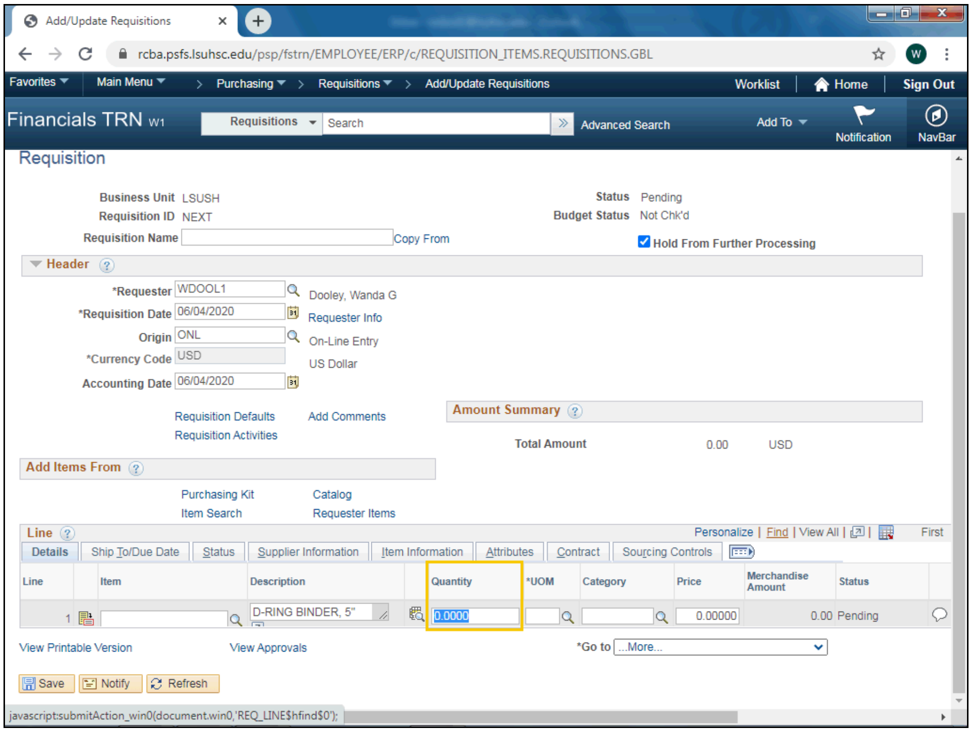
If the total amount of the order does not exceed $5000.00 (including freight, handling or other charges), it **does** **not** need to go out for bid. If the Supplier ID for the supplier is known, it may be entered in the Supplier field. Supplier IDs are always 10 digits in PeopleSoft. If the Supplier ID is unknown, the Requester should attempt to locate the supplier in the database. If the Supplier **does** **not** appear in the list of Suppliers in the PS system, the Supplier information **must** be entered in the **Header Comments** page. The Requester should note the Supplier's name, contact, street address, city, state, zip code, telephone number, fax number and Tax ID Number (or as much information as possible) . The Supplier will be added to the list of Suppliers in the PS database by Purchasing and will be available in the supplier list for future requisitions.

Requisition that will go out for bid:
If the requisition will go out for bid, any suggested Supplier(s) for items on bid should be noted on the **Header Comments** page. The Requester should note the Suppliers' name, contact, telephone number, and fax number.

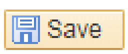
NOTE: See your Buyer for detailed information about the bid process (i.e., the price thresholds, required quotes from Suppliers and items that require and do not require bids, etc.). You may also view the Executive Order for Small Purchases on the Louisiana Office of State Purchasing web site for information about the bid process.

NOTE: Entering information in the Header Comments page is shown in the Add, Change and Delete Comments topic.

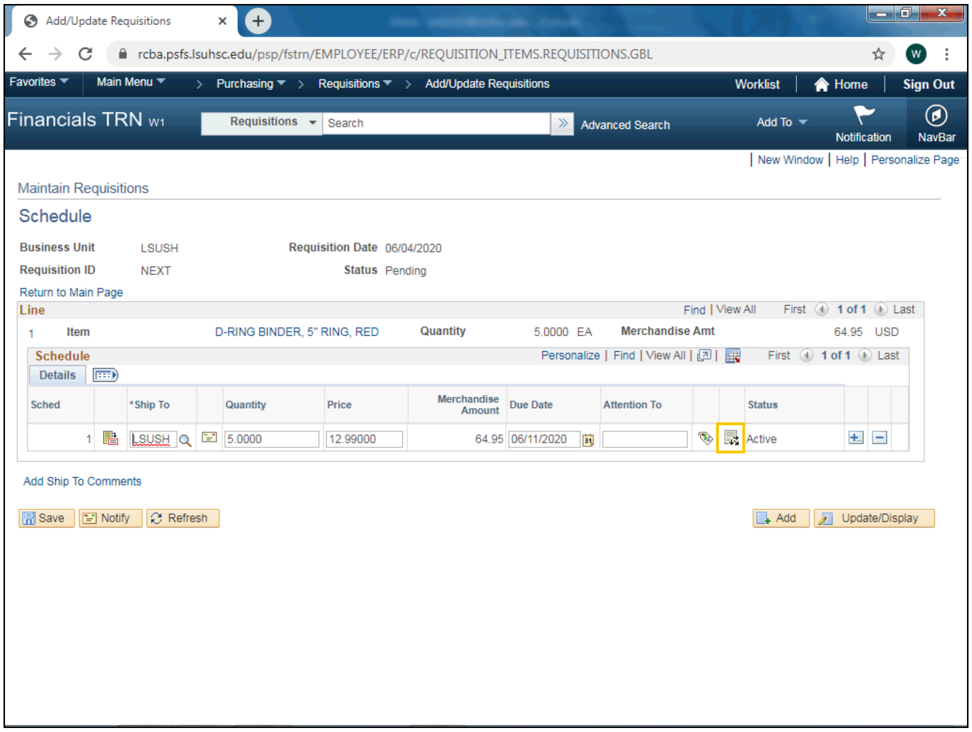
Step	Action
80.	Click the **OK** button. 
81.	When entering non-contract requisition items, the **Item** field will always be left blank.



Step	Action
82.	**Quantity** The Quantity **<u>must</u>** be entered as 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 (i.e. 10.0000).*** Enter the desired information into the **Quantity** field. Enter "**5**".
83.	**Unit of Measure** The UOM (Unit of Measure) is a required field and may be entered in upper, lower or mixed case. The system will automatically change the UOM to upper case when the page is refreshed. You may also search for the UOM by clicking the magnifying glass to the right of the UOM field. Enter the desired information into the **UOM** field. Enter "**EA**".

Step	Action
84.	**Category** The **Category** is a value from the Inventory Tables of the State Commodity Code. The Category code will vary by Business Unit. **LSUSH:** Will enter 00000 (Generic Item Category) in the Category field and the Purchasing Department will change it at the P.O. level. **LSUNO:** Will first search for the appropriate Category code using the Look up Category option. If the appropriate code cannot be found contact your Purchasing Department for assistance.
85.	Enter the desired information into the **Category** field. Enter "**00000**".
86.	**Price** When entering the cost of an item into the Price field, you **must** enter the decimal point to indicate cents (e.g., 12.99). ***NOTE: Delete the value in the Price field before entering the new value to prevent keying errors. The system will automatically populate the trailing zeros when the page is refreshed (i.e., 12.9900).*** Enter the desired information into the **Price** field. Enter "**12.99**".
87.	Click the **Save** button. 
88.	***NOTE: It is recommended that users Refresh the page after entering data for each line to validate the information entered.*** Click the **Refresh** button. 
89.	***NOTE: The total amount of item(s) ordered on Line 1 will display in the Merchandise Amount field.***
90.	**Line 1 Icons** The **Line Comments** button (comment bubble icon) may be used to enter comments specific to the line item (e.g., special delivery or shipping instruction or additional space for item description if needed). ***NOTE: Line Comments may be entered at any time but for training purposes will be demonstrated in the Add, Change, and Delete Comments topic.***

Step	Action
91.	**Line 1 Icons** (continued) The **Line Defaults** button (the open book icon) is not used by LSUHSC. The **Schedule** button (the page with red lines and a clock icon) is used to access the Distribution page to adjust ChartString information entered on the Requisition Defaults page if needed.
92.	**Line 1 Icons** (continued) The **Add a new row** (+) and **Delete a row** (-) signs located on the far right of Line 1 allow you to add or delete row(s) from the requisition. ***NOTE: It is not necessary to return to the Requisition Defaults page when adding rows to the requisition. Begin at Step 2: Enter Items to be Ordered.***
93.	**Go to** The **Go to** field is used to view the Activity Log, which allows you to view the status of saved requisitions. ***See the View the Requisition and Activity Log topic for additional information.***
94.	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.***
95.	**Step 3: Adjust ChartString (Schedule Page)** You can adjust the distribution of funds (i.e., the ChartString(s) to which the item(s) is being charged) on the Distribution page. You must first access the Schedule page to get to the Distribution page. Click the **Schedule...** button. 



Step	Action
96.	Click the **Distribution** button. 
97.	**Distribution** Chartstring information entered on the Requisition Defaults page automatically displays on the Distribution page for **all** line items. Thus, the Distribution page allows users to view and adjust chartstring values for a specific line item. Each line item can have the same chartstring or a different chartstring. Depending on whether the chartstring is the same or different will determine what information, if any, will be entered on a line item's Distribution page.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>98.</td><td>For example:

1. If the chartstring is the same for all line items, no changes will be made on the Distribution page.

2. If the entire chartstring is different for each line item, you would <u>not</u> enter the chartstring on the Requisition Defaults page, but instead <u>must</u> enter it on the Distribution page for each line item.

3. If only one chartfield is different for each line item, that chartfield may be left blank and all other chartfields populated on the Requisition Defaults page. You <u>must</u> then go to the Distribution page for <u>each</u> line item and enter the missing chartfield information.

4. If multiple chartstrings will be charged for a specific line item, you can add a line on the Distribution page and enter the second set of chartstring values.</td></tr>
<tr><td>99.</td><td>Distribute By

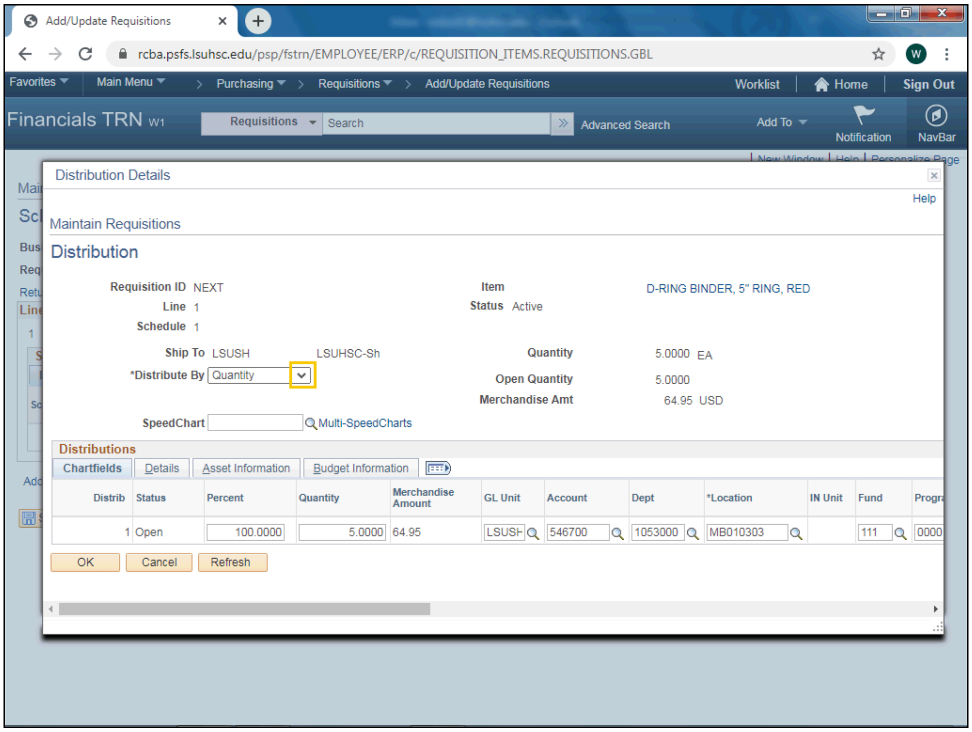
The Distribute By field indicates whether cost is being allocated by Quantity or Amount. Most blanket purchase orders are distributed by amount, especially those covering services.

The Distribute By defaults based on the information entered on the Requisition Defaults page. The Distribute By can be changed on the Distribution page for a specific line item as needed.

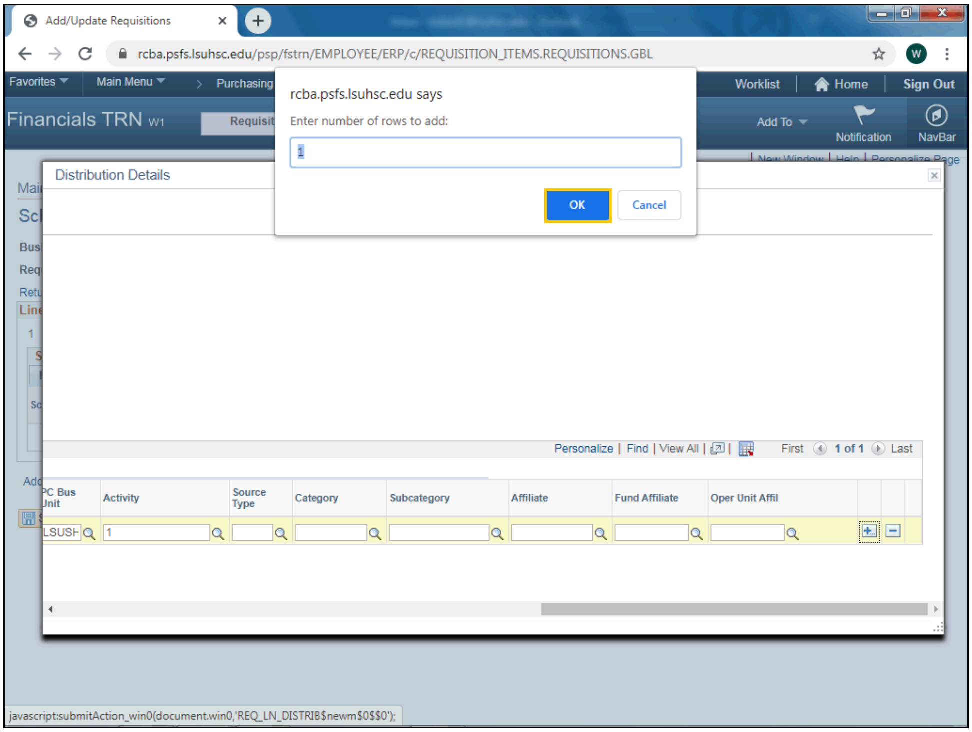
Contact your Buyer for additional information regarding distributing funds by Quantity or Amount.</td></tr>
<tr><td>100.</td><td>Scenario

In this example you will:

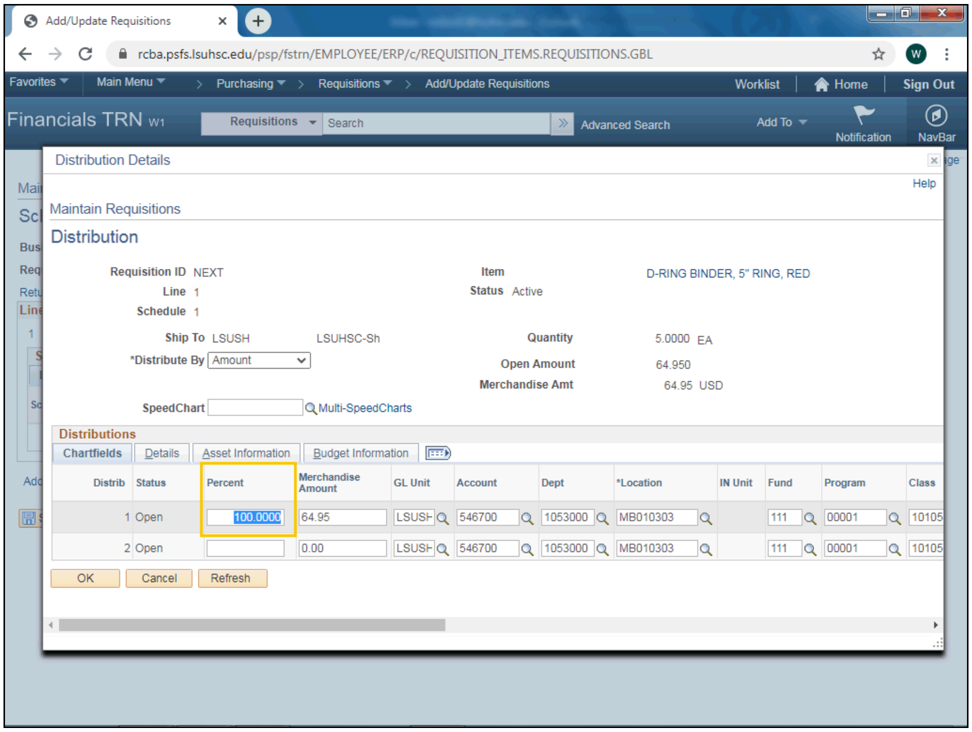
1. Change the Distribute By from Quantity to Amount;
2. Insert a row so a second chartstring can be entered;
3. Charge forty percent (40%) of the cost of the binders to department 1053000; and
3. Charge sixty percent (60%) of the cost of the binders to department 1050100.</td></tr>
</table>



Step	Action
101.	Click the button to the right of the **Distribute By** field. ***NOTE: The Quantity field displays between the Percent and Merchandise Amount fields when the Distribute By is Quantity.*** 
102.	Click the **Amount** list item. Amount
103.	When the Distribute By is changed to Amount, the Quantity field is removed from the page.
104.	Click the **Add multiple new rows at row 1** button. 

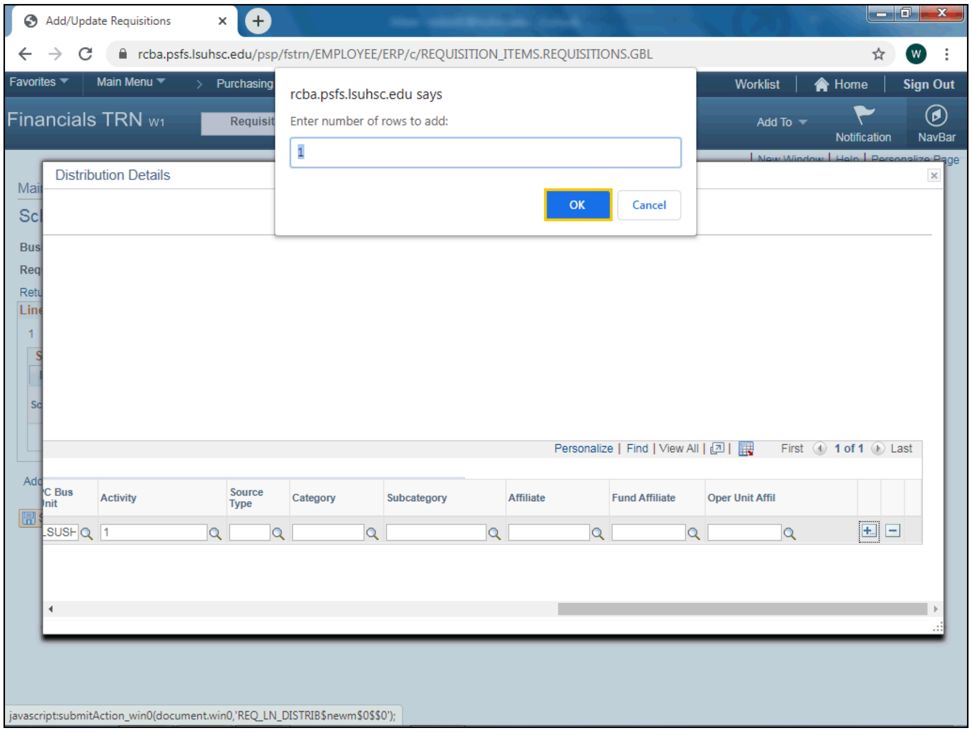


Step	Action
105.	A prompt box displays. The system defaults the number of rows to add to 1, but you can change that number if needed. However, the system will not allow you to save blank rows, so only add the number of rows needed. Click the **OK** button. 
106.	When a row is added the original chartstring values will be duplicated on the new row. At least one chartfield (Account, Dept, Location, etc.) **must** be changed on the new row.

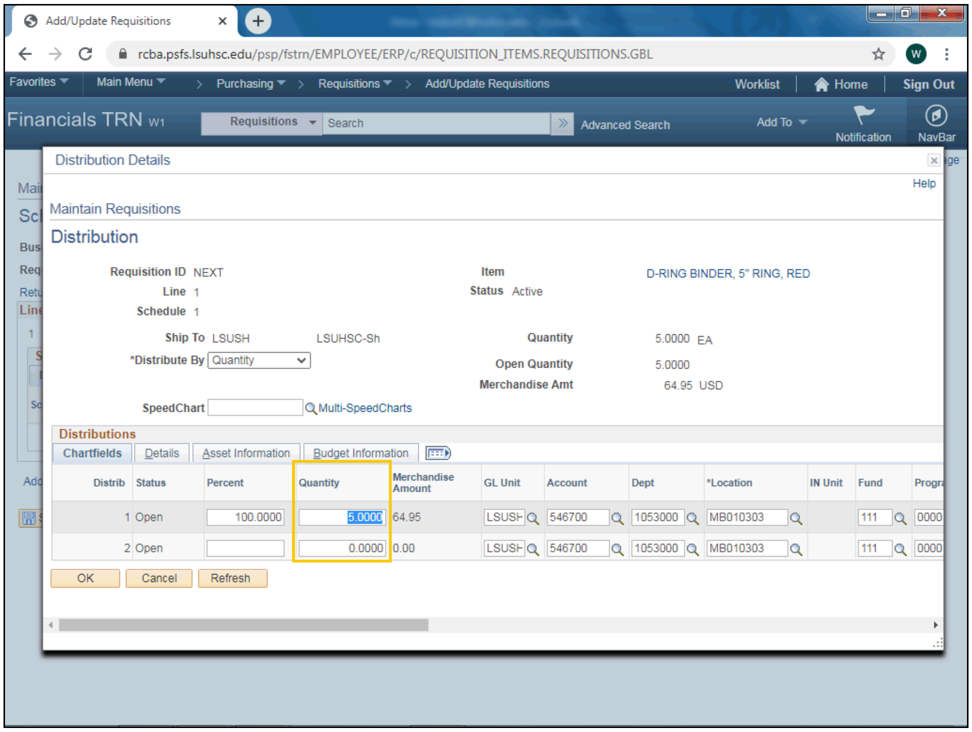


Step	Action
107.	***NOTE: Delete the value in the Percent field for Line 1 before entering the new percentage to prevent keying errors.*** Enter the desired information into the **Percent** field. Enter "**40**".
108.	***NOTE: The system will automatically populate the decimal point and trailing zeroes when you navigate away from the field.*** Enter the desired information into the **Percent** field. Enter "**60**".
109.	The system automatically recalculates the Merchandise Amount based on the new percentage values.
110.	***NOTE: Delete the value in the Dept field for line 2 before entering the new value to prevent keying errors.*** Enter the desired information into the **Dept** field. Enter "**1050100**".
111.	**Project/Grant** Project/Grant information can also be added/adjusted on the Distribution page.
112.	Once you have completed entering chartstring information, you would click the OK button to return to the Schedule page. Click the **Delete row 2** button. 

Step	Action
113.	A message box will display confirming you want to delete the row. Click the **OK** button. 
114.	Distributing funds by Quantity will now be demonstrated. **Scenario** In this example you will: 1. Change the Percent value for line 1 to 100; 2. Change the Distribute By to Quantity; 3. Add a new row to the page; 4. Charge three (3) binders to department 1053000; and 5. Charge two (2) binders to department 1050100.
115.	***NOTE: Delete the value in the Percent field for Line 1 before entering the new percentage to prevent keying errors.*** Enter the desired information into the **Percent** field. Enter "**100**".
116.	***NOTE: The system automatically adjusted the Merchandise Amount to reflect the percentage change.*** Click the button to the right of the **Distribute By** field. 
117.	Click the **Quantity** list item. 
118.	***NOTE: The Quantity field displays again on the page.***
119.	Click the **Add multiple new rows at row 1** button. 



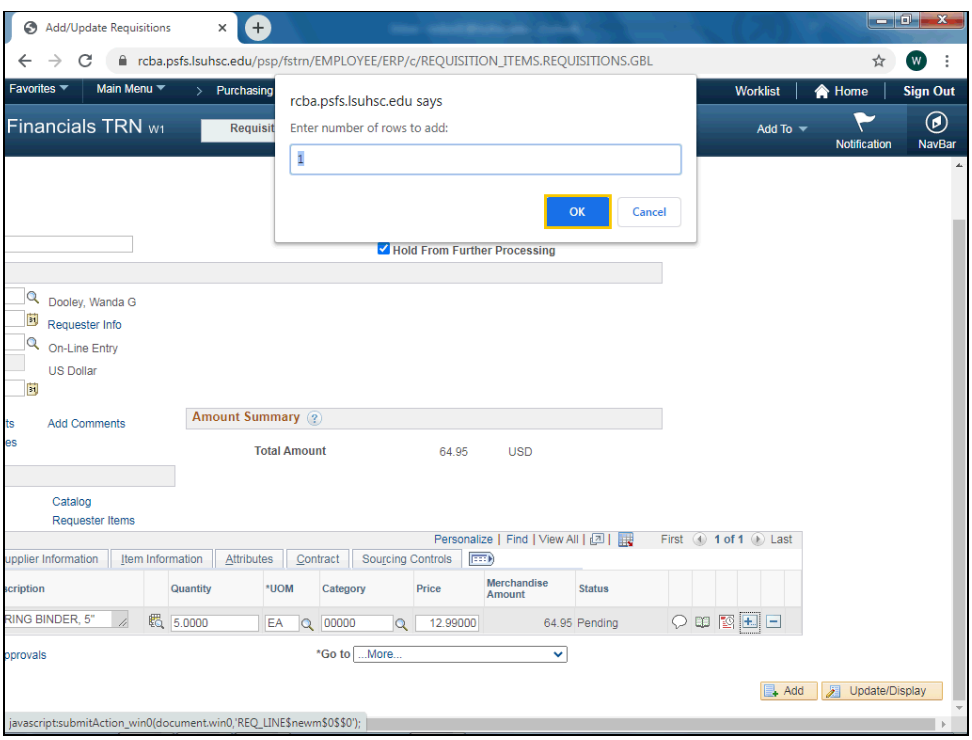
Step	Action
120.	A prompt box displays. The system defaults the number of rows to add to 1, but you can change that number if needed. However, the system will not allow you to save blank rows, so only add the number of rows needed. Click the **OK** button. 
121.	When a row is added the original chartstring values will be duplicated on the new row. At least one chartfield (Account, Dept, Location, etc.) **<u>must</u>** be changed on the new row.



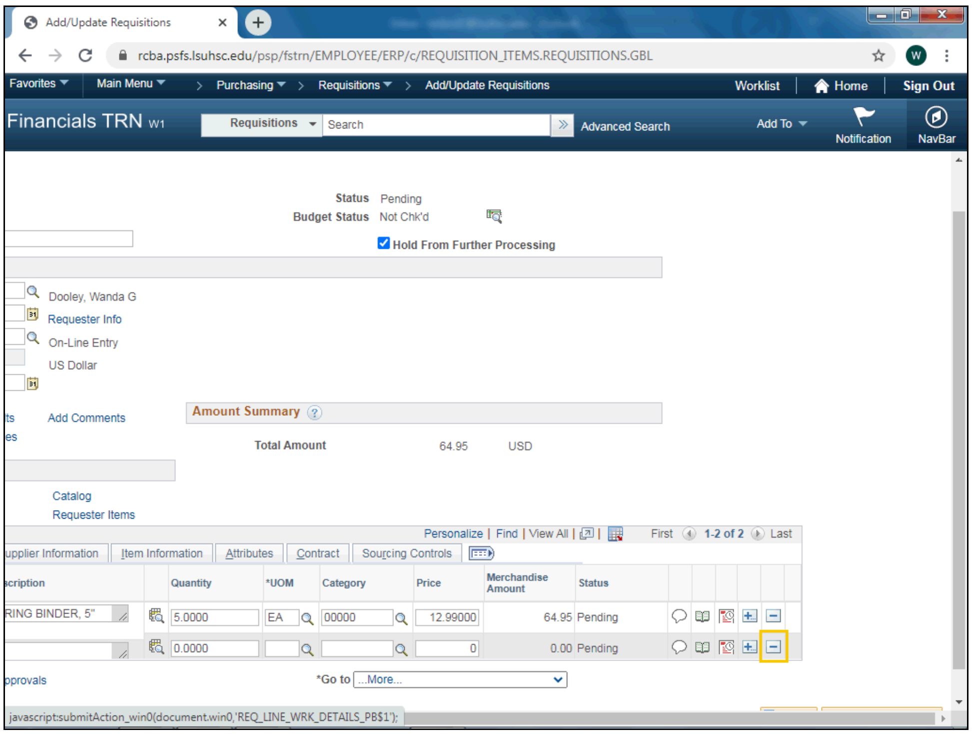
Step	Action
122.	***NOTE: Delete the value in the Quantity field for line 1 completely before entering the new quantity to prevent keying errors.*** Enter the desired information into the **Quantity** field. Enter "**3**".
123.	***NOTE: Delete the value in the Quantity field for line 2 completely before entering the new quantity to prevent keying errors.*** Enter the desired information into the **Quantity** field. Enter "**2**". ***NOTE: The system automatically changed the Merchandise Amount for line 1 to reflect the Quantity change.***
124.	***NOTE: Delete the value in the Dept field completely before entering the new Dept code to prevent keying errors.*** Enter the desired information into the **Dept** field. Enter "**1050100**".
125.	**Project/Grant** Project/Grant information can also be added/adjusted on the Distribution page.
126.	Once you have completed entering chartstring information, you would click the **OK** button to return to the Schedule page. Click the **Delete row 2** button. 

Step	Action
127.	A message box will display confirming you want to delete the row. Click the **OK** button. OK
128.	The Percent and Quantity **<u>must</u>** be restored to the original values once row 2 is deleted. ***NOTE: Delete the value in the Quantity field for Line 1 completely before entering the new quantity to prevent keying errors.*** Enter the desired information into the **Quantity** field. Enter "**5**".
129.	Click the **OK** button. OK
130.	Click the **Return to Main Page** link. Return to Main Page
131.	***NOTE: It is recommended that you Save the requisition after completing each row. The requisition may be saved as often as you desire as long as the Hold From Further Processing box is checked. If the Hold From Further Processing box is not checked, the requisition will move to your Approver's Worklist when it is saved.***
132.	***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. For multiple line item requisitions, it is strongly recommended the user save after the completion of each line item.***
133.	***NOTE: When the Hold From Further Processing box is checked, the requisition Status must be Pending in order to Save the requisition. Once the requisition is completed, and the Hold From Further Processing box is unchecked, the status will change to Open.*** Click the **Save** button. Save
134.	The system assigns a Requisition ID number to the requisition when it is first saved. The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned by Purchasing when the PO is generated. The Status remains as Pending until the Hold From Further Processing box is unchecked and the requisition saved again. **LSUSH** When a Confirmation PO Number is entered, this will be both the Requisition ID and PO number. A separate PO number will **<u>not</u>** be assigned.

Step	Action
135.	The following is the **minimal** data required to save a requisition and generate a Requisition ID number. If any of these fields are left blank, you will receive either a red box or a save edit error message. You **cannot** successfully save the requisition until all required fields are populated. 1. Requester 2. Requisition Date 3. Accounting Date 4. Account 6. Department 7. Location 8. Fund 9. Program 10. Class 11. Description 12. Quantity 13. Unit of Measure 14. Category 15. Price
136.	Multiple items may be entered on the requisition however, all items **must** be ordered from the same supplier. A requisition cannot have multiple suppliers. Click the **Add multiple new rows at row 1** button. 



Step	Action
137.	A Prompt box will display. You may add as many rows as needed. Blank rows, however, cannot be saved to the requisition. It is recommended that you add no more than five (5) lines at a time. Click the **OK** button. 



Step	Action
138.	You would enter information to Line 2 in the same manner as demonstrated in Line 1. For **training purposes** a new line item will **not** be added. Click the **Delete row 2** button. 
139.	A message box will display confirming you want to delete the row. Click the **OK** button. 

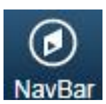
Step	Action
140.	You **must** save the requisition each time a change is made. Click the **Save** button. 
141.	If the requisition is **not complete**, **do not uncheck** the Hold From Further Processing checkbox so that you may continue working on the requisition. ***NOTE: For training purposes only, the Hold From Further Processing box will remain checked at this time.***
142.	When the requisition is complete, you **must uncheck** the Hold From Further Processing checkbox. Unchecking the Hold From Further Processing checkbox will allow the requisition to move to your Approver's Worklist. ***NOTE: You cannot add information to the requisition once the Hold From Further Processing checkbox is unchecked and the requisition is saved.***
143.	This completes ***Enter a Non-Contract Requisition.*** **End of Procedure.**

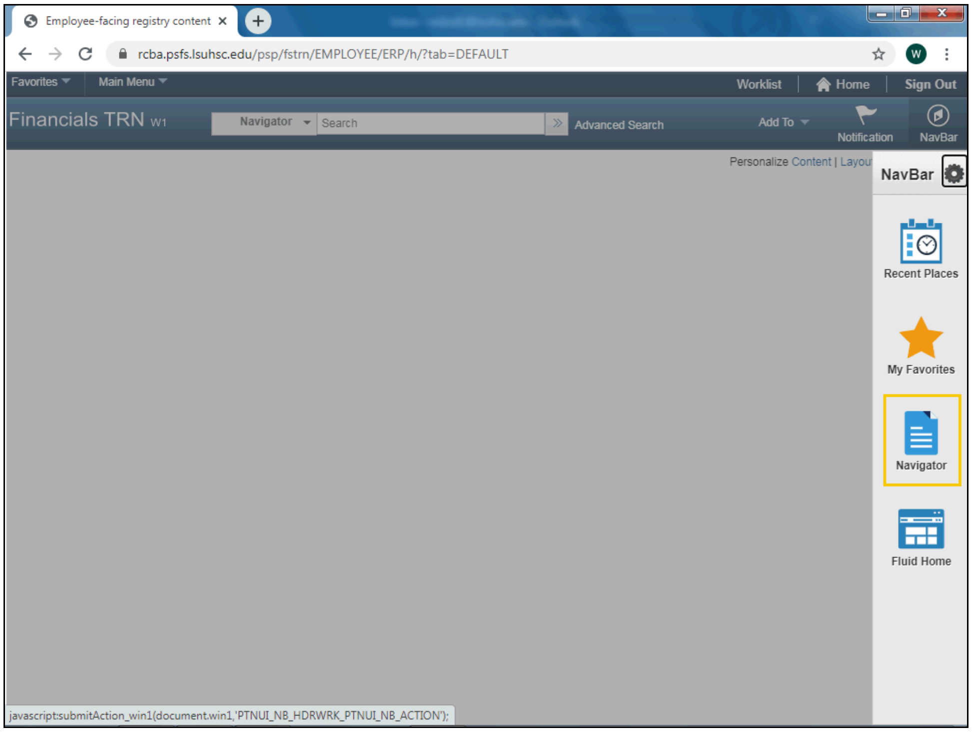
Speedcharts

Procedure

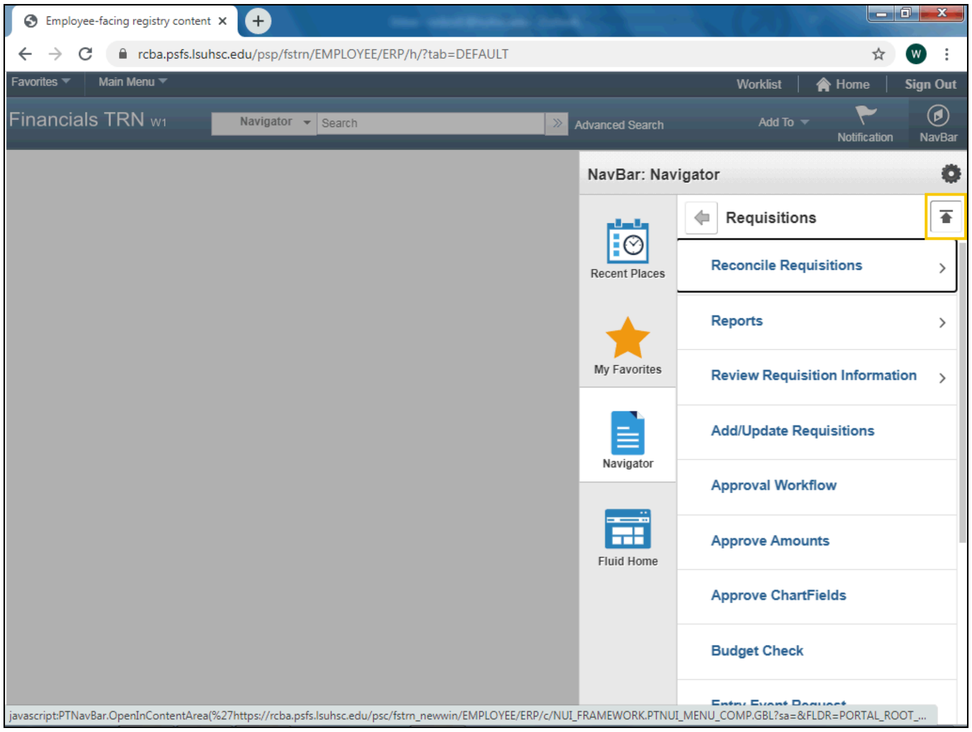
In this topic you will learn how to use **SpeedCharts** to simplify data entry.

Step	Action
1.	A **SpeedChart** is a shortcut the users can enter to automatically fill in the individual ChartField values on the distribution line. 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.

Step	Action
2.	***<u>Please review the following definitions on SpeedChart, ChartField and ChartString used in this training document.</u>*** •**SpeedChart** – is a combination of ChartFields, excluding the Account Code. The Account Code is not part of the SpeedChart values and needs to be entered on the distribution line to complete the ChartString. It is also known as **<u>SpeedType.</u>** •**ChartField –** In Peoplesoft, the Chart of Accounts is comprised of information fields that provide the basic structure to segregate and categorize transactional and budget data. Each informational field is called a **<u>CHARTFIELD.</u>** •**ChartString** – is combining a series of chartfield values into one string. SpeedCharts are utilized on the Requisition Defaults and line distribution page: •**Single SpeedCharts** are accessed on the Requisition default page and the Distribution line. •**Multiple SpeedCharts** are accessed on the Distribution lines.
3.	**Lookup SpeedChart Information:** The SpeedChart information can be found in the SpeedType lookup. Click the **NavBar** button. 

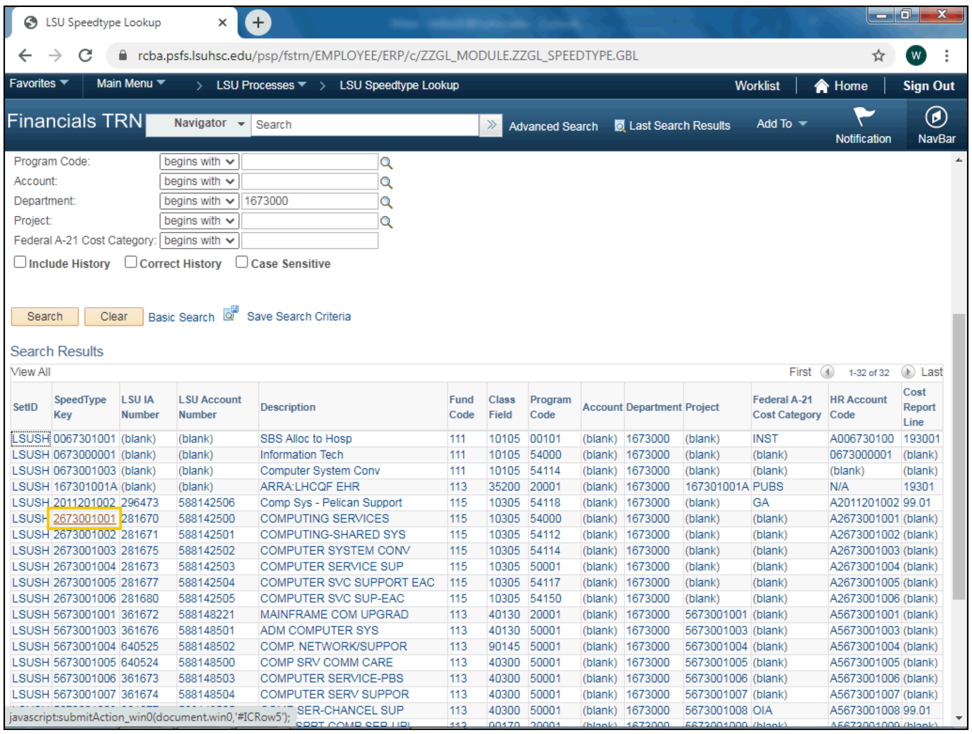


Step	Action
4.	Click the **Navigator** button. 

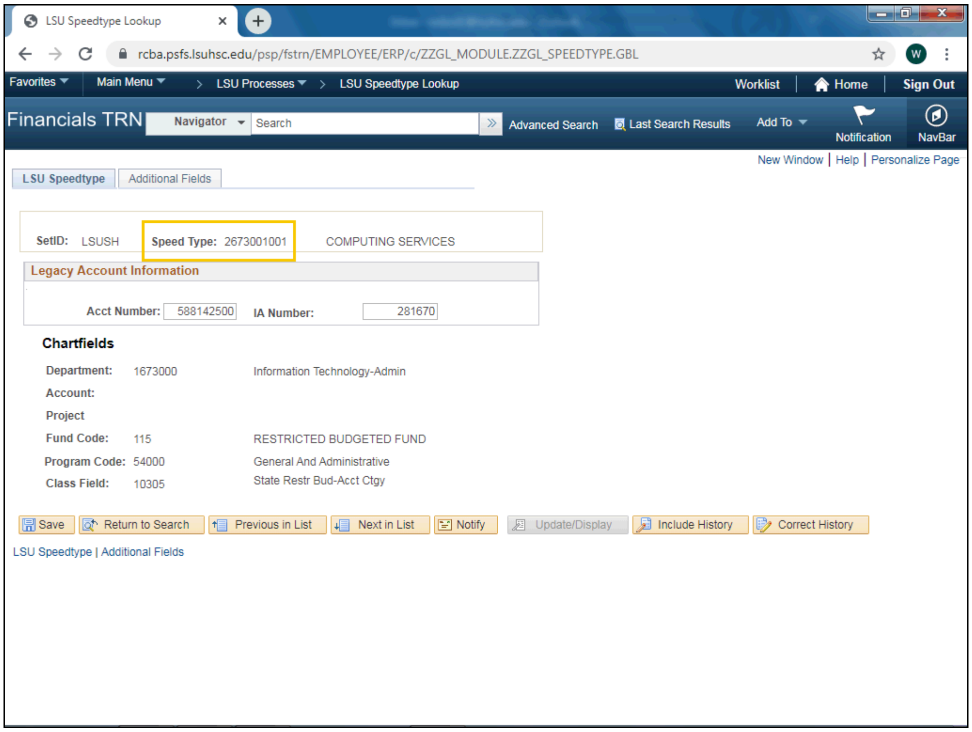


Step	Action
5.	***NOTE: The NavBar Menu* navigation *remains on the last menu option selected. The Back to Root Arrow button, if present, will take you back to the Financials Home page menu. If the Back to Root Arrow is not present, the top of the Financials Home Page menu is being displayed.*** Click the **Back to Root** button. 
6.	Click the **Down** scrollbar. 
7.	Click the **LSU Processes** link. LSU Processes
8.	Click the **LSU SpeedType Lookup** link. LSU Speedtype Lookup

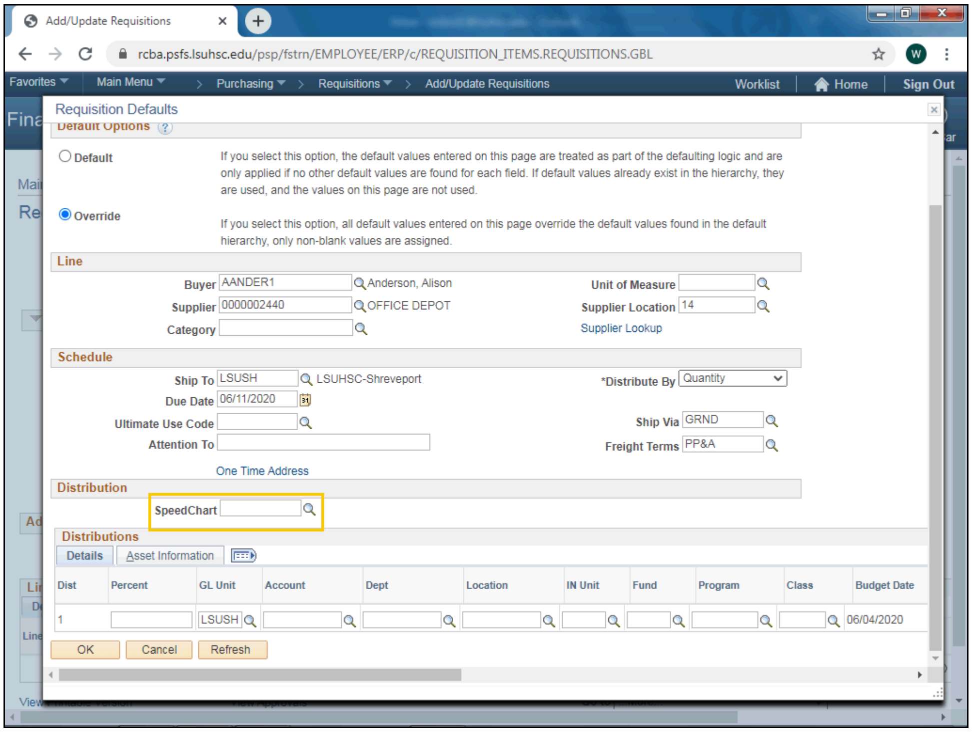
Step	Action
9.	***NOTE: In this example we are searching for all the SpeedCharts for a specific Department.*** Enter your Business Unit in the **SetID** field and the **Department ID** you wish to search for. Click the **Search** button. Search



Step	Action
10.	Select SpeedType Key for the department you wish to review. Click the **SpeedType Key** link. 2673001001

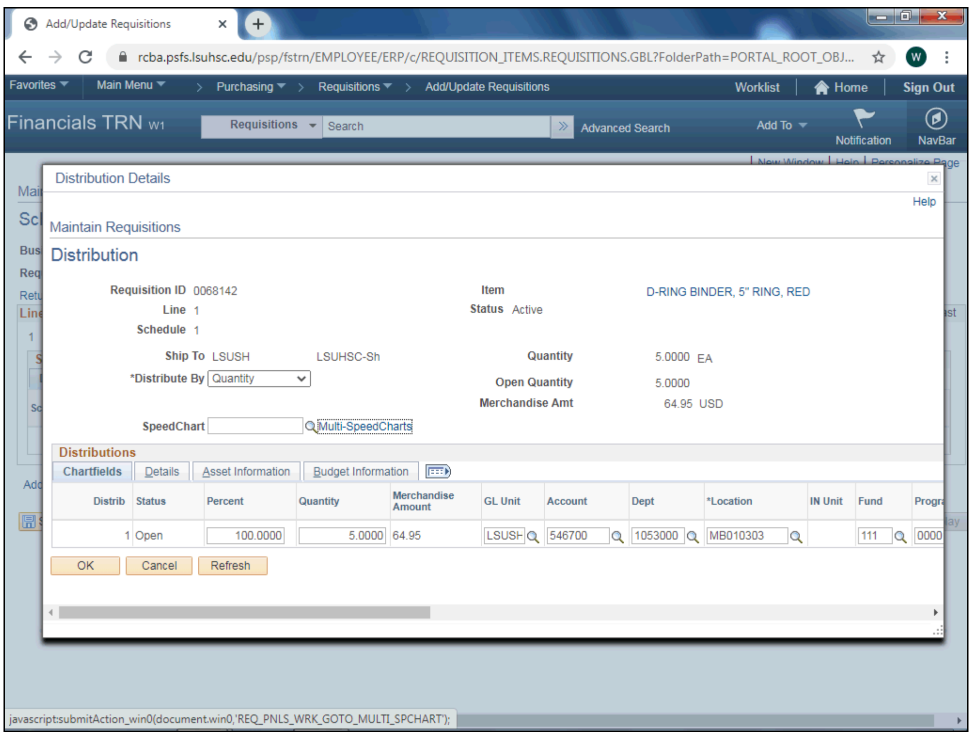


Step	Action
11.	<u>**The SpeedChart information is displayed.**</u> ***NOTE: If you want to use this SpeedChart when creating your information, please make a note of the SpeedType Key to enter in the SpeedChart search field.*** ***NOTE: Only SpeedChart that begin with a numeric value can be used when creating the Requisitions. Speed Charts that begin with a "G" or "R" cannot be used.*** Note the **LSU Speedtype** field value. Press [Enter] to **<u>continue</u>**. 2673001001
12.	**Single SpeedChart** The Single SpeedChart field is located on the Requisition Defaults page above the distribution line. The SpeedChart always overwrites any existing Chartfield values entered on the requisition Distributions line. You will need to enter the SpeedChart before you input the Account Code chartfield value on the Distributions line.
13.	***NOTE: If you know the SpeedChart you want to use, you can enter the complete SpeedChart Key into the SpeedChart field. Or you can enter part of the SpeedChart Key, click the lookup icon and select a SpeedChart from the list.***

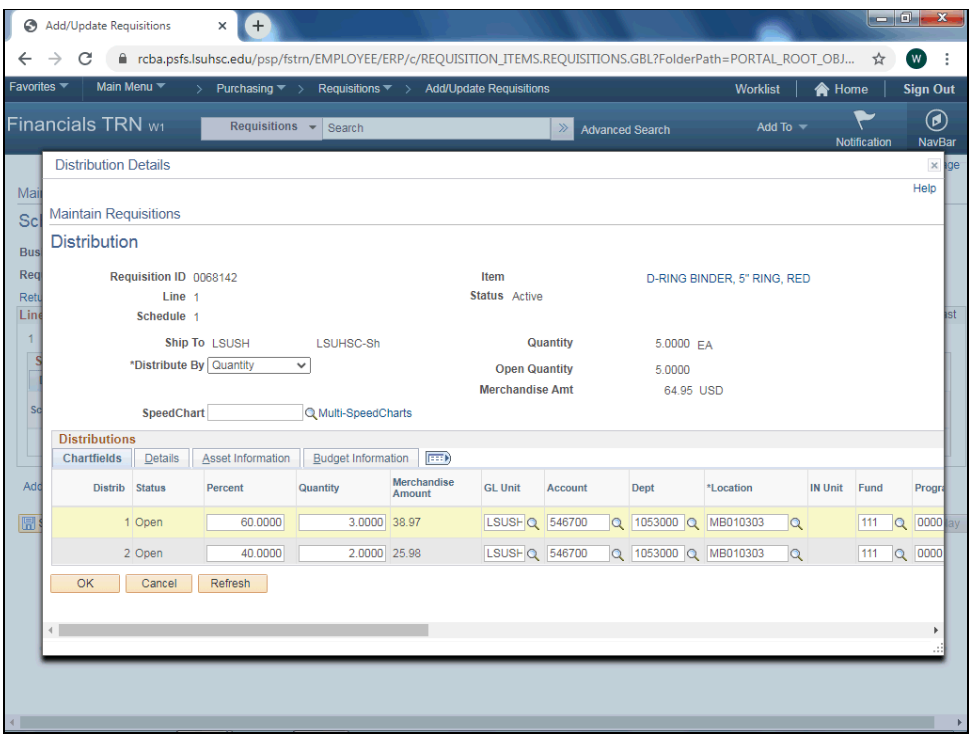


Step	Action
14.	Enter the desired information into the **SpeedChart** field. Enter "**2673%**".
15.	Click the **SpeedChart Look up** button.
16.	Click the **2673001001** link. 2673001001
17.	The Chartfield values are filled in as indicated in the screenshot. Please enter the account number to complete the ChartString.
18.	***NOTE: If you cannot find a SpeedChart that contains the values for which the item(s) is being charged, you can manually enter the ChartString values on the distribution line.*** Click in the **Account** button.

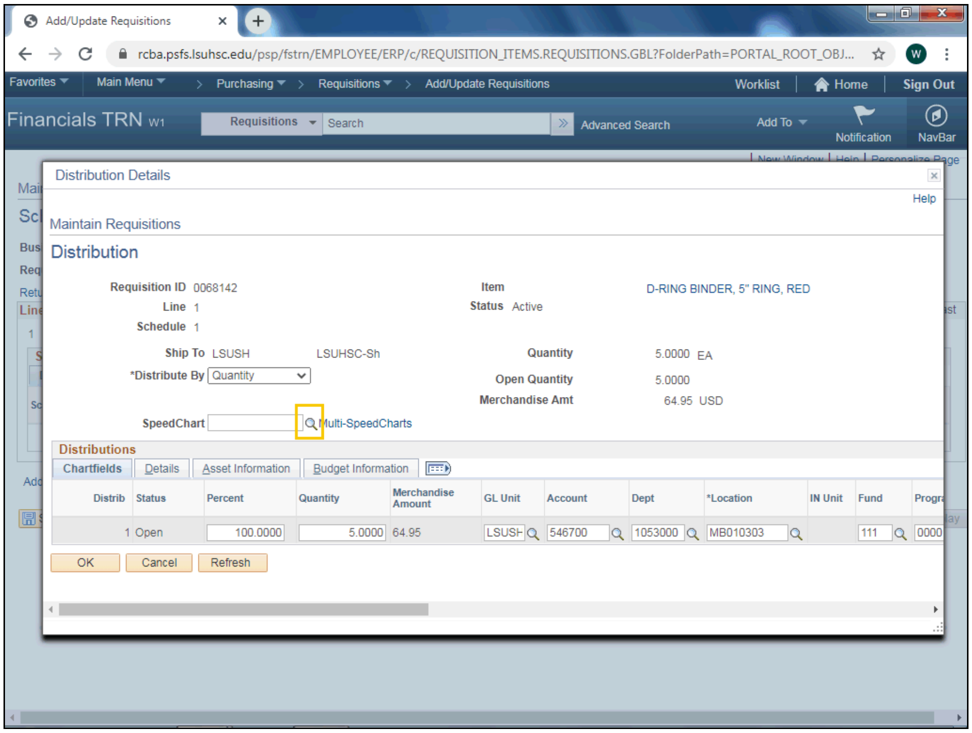
Step	Action
19.	If you want to split the charges between multiple ChartStrings on the Requisition Default page, you can add another distribution line by clicking on the Add Multiple New Rows button (+) located at the end of the distribution line. ***NOTE: You cannot select a SpeedChart for the second distribution line; doing so will overwrite the ChartField values on the <u>first distribution line</u>.*** Click **OK** to continue.
20.	The new row will display the values from distribution line 1. Update the ChartString values on line two to charge to the correct ChartString, and apply the percentage of distribution to each line. ***NOTE: If there are multiple items being ordered and charged to different ChartStrings, you can choose to enter the ChartString on each line instead of on the Requisition Defaults.***



Step	Action
21.	**<u>Using Multiple SpeedCharts per Line Item</u>** **Use this procedure when you want to split the charges or overwrite an existing ChartField at the PO and Requisition line level.** The Multiple SpeedCharts functionality provides you with the ability to choose whether you want to override or append multiple SpeedCharts to existing ChartField Values. You can use multiple SpeedCharts to automatically calculate distribution quantities, amounts, and percentages. Navigation: Click on the Schedule icon on the line item you wish to split the charges for, then click the Distribution/ChartFields icon. Click the **Multi-SpeedCharts** link.
22.	If you know the SpeedChart you want to use, you can enter the complete **SpeedChart Key** or you can enter part of the **SpeedChart Key**, click the **LookUp** icon and select a SpeedChart from the list. Click the **Add a new row at row 1** link. 



Step	Action
23.	Enter how you want to distribute the charges. In this example, the quantity was distributed between the two Chartstrings, 3 and 2.



Step	Action
24.	**<u>Overwrite a SpeedChart:</u>** In this scenario, incorrect ChartField value information was entered for this line item You can lookup the Speedchart information to find the correct SpeedChart. Refer to the SpeedChart Lookup document for assistance. The Speedcharts for the department is displayed, find the SpeedType Key that list the ChartString values you want to use for the line item. Click the SpeedType Key in the SpeedChart field. The ChartString values will be displayed. Click the **SpeedType Key** in the SpeedChart field. The ChartString values will be displayed. 

Step	Action
25.	**<u>Append SpeedChart</u>** In this scenario you will append a new ChartString to an existing one, creating a second distribution row. **Navigation:** Click on the Schedule Icon on the line item you wish to split the charges for, then click the Distribution/ChartFields Icon. Click the **Append** option. 
26.	Enter the Chartfield Key. Click the **OK** button. 
27.	The append SpeedChart action creates a second distribution line. Update the second distribution line to change the percentage of distribution and add the account code.
28.	This completes the **SpeedCharts** section. **End of Procedure.**

Add, Change, or Delete Comments

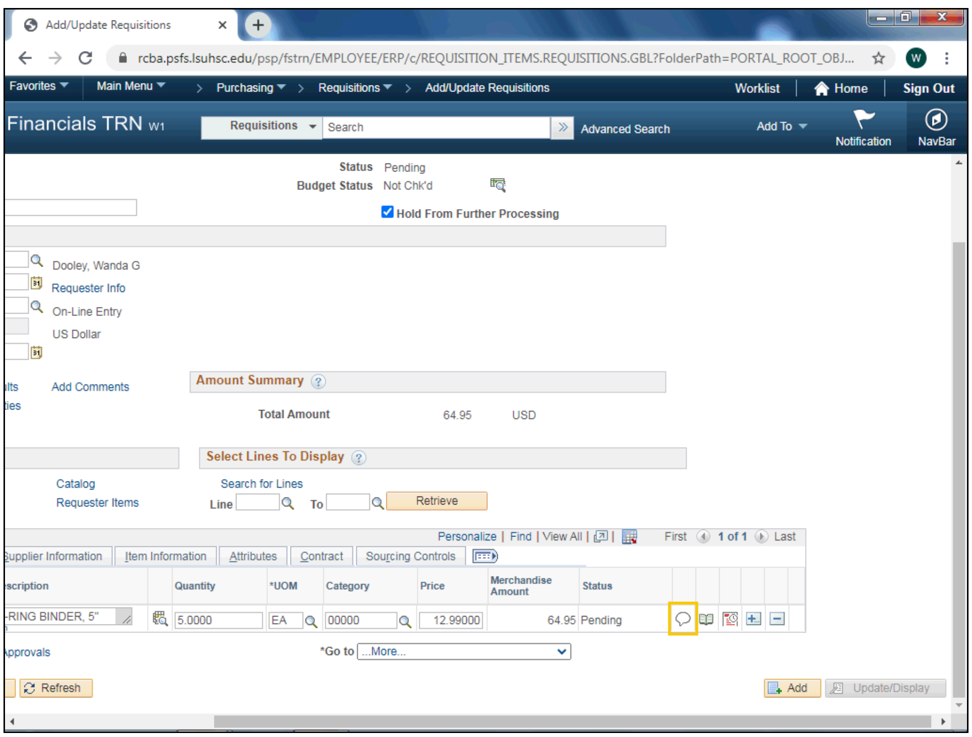
Procedure

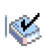
In this topic you will learn how to **Add, Change, or Delete Comments** at the Header and Line level.

NOTE: Comments will be added while entering the Requisitions.

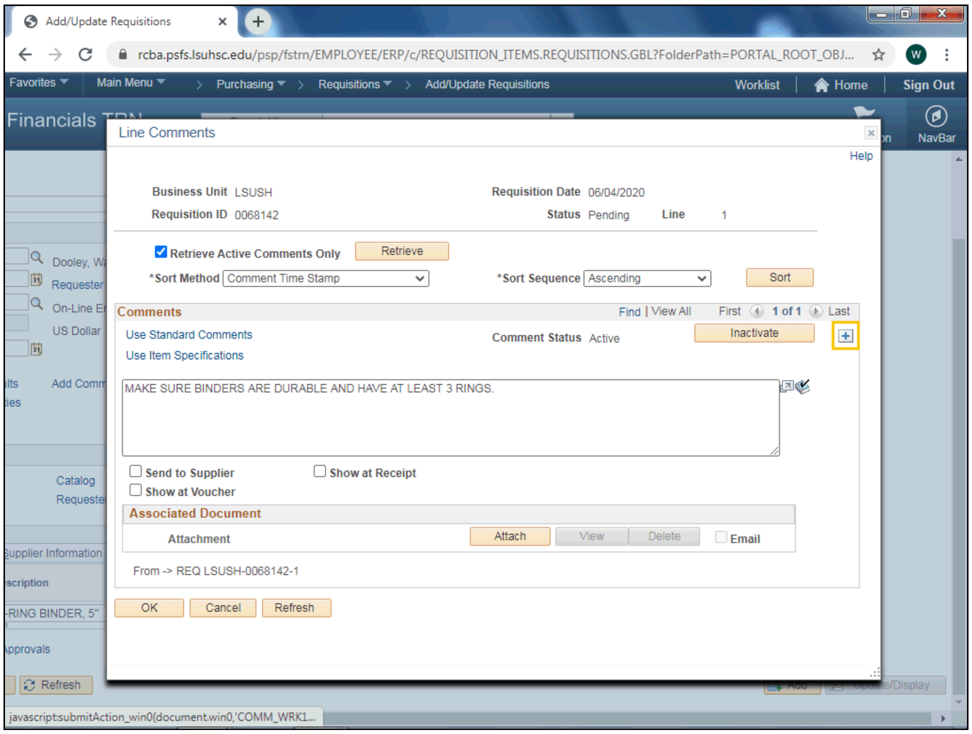
Step	Action
1.	**Header** Comments may be added to a requisition at the Header level using the Add Comments link. Users should only enter information that applies to the **<u>entire</u>** requisition (e.g. new supplier information, suggested suppliers for bid, address for mailing the Purchase Order when the supplier has multiple locations, etc.) at the Header level. Specific shipping or delivery instructions applicable to all line items may also be entered at the Header level.

Step	Action
2.	**Header** (continued) Justification for purchase can be added as header comments. The Approval Justification box should be checked. The information entered as a header comment with the approval justification box checked off will display on the requisition approval page when the approver selects the requisition from his worklist. Comments added at the Header level will display and print after all line item information.
3.	**Line Comments** Comments may also be added for a specific line item in the Line Comments page. Comments added in Line Comments will display and print with the corresponding line item. Only information that applies to that particular line item (i.e. item specifications) should be entered in its Line Comments page. **<u>Do not</u>** enter vendor information or the address for mailing a PO in the Line Comments page. That information **<u>must</u>** be entered at the Header level.



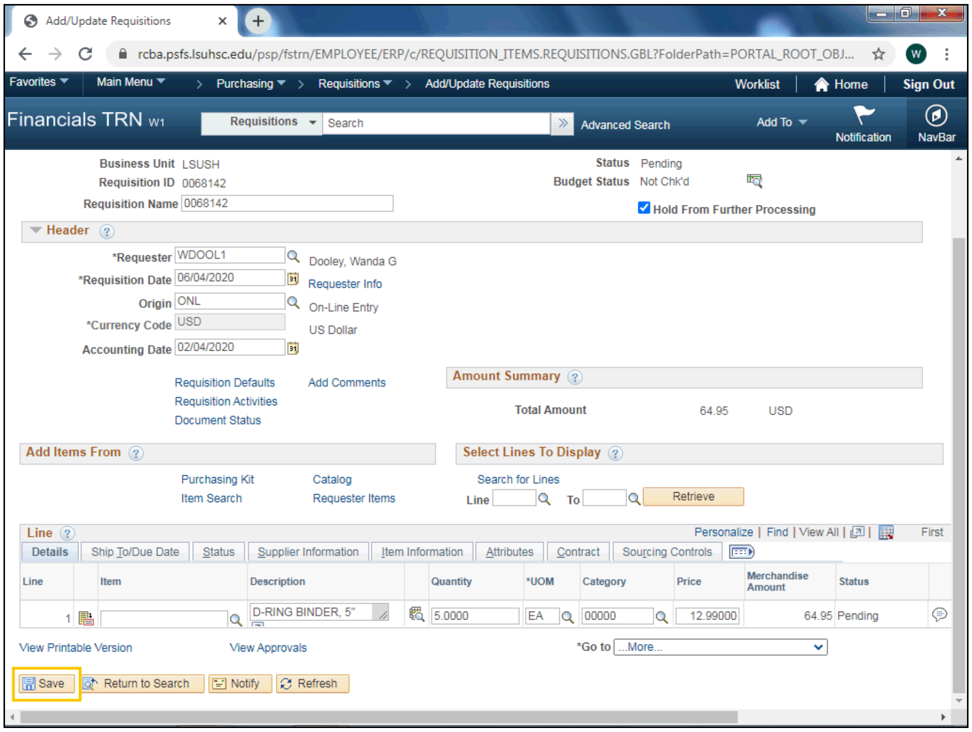
Step	Action
4.	In this exercise you will add comments at the Line level. ***NOTE: The instructions shown here may be used to enter comments at the Line and Header level. The method used to add, change and delete comments is the same for both.*** Click in the **Line Comments** field. 
5.	You may enter free-text comments by typing in the Comments field. You may use the Enter key on your computer keyboard in the comment box to move to the next line. Comment boxes have no limits set for the number of characters entered. It is recommended that users limit comments in each box to half a page. New comments boxes can be added if more space is required. There is no limit on the number of comment boxes that can be added. If you need to enter lengthy comments (e.g. specifications) you may opt to send those electronically, or deliver a hard copy to Purchasing with a notation of the Requisition ID to which it should be attached. Documents can also be attached to the comment box as well. Users may copy and paste comments from the web and Microsoft applications such as Word. The spell check feature is also available for each comment box.
6.	***NOTE: Comments will display and print on the requisition, so do not include any comments you do wish to be seen in Line Comments.*** Enter the desired information into the **Use Item Specifications** field. Enter "**MAKE SURE BINDERS ARE DURRABLE AND HAVE AT LEAST 3 RINGS.**".
7.	Click the **Spell Check Comment Text** button. 
8.	Misspelled words are highlighted and alternative spellings are provided. Click the **Change** button. ***NOTE: Be very careful when using this feature.*** 
9.	Click the **OK** button. 

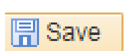
Step	Action
10.	**Send to Supplier** If the Send to Supplier checkbox is checked, any comments shown will be printed on the PO. Purchasing will check this box if needed.
11.	Click the **OK** button. 



Step	Action
12.	Click the **Add a new row at row 1** button to insert a row if additional space is needed. 
13.	You may continue to insert comment boxes as needed. Inserted row(s) are independent of each other and have unlimited characters. Comments will display below line item information on the requisition. Click the **View All** link. 
14.	The **Use Standard Comments** and **Use Item Specifications** links should <u>not</u> be used.

Step	Action
15.	**Inactivate Comments** Comments cannot be deleted, but can be inactivated so that they will not show in the system or on the requisition. The comment box will be grayed out by the system when the Inactivate button is clicked. ***NOTE: When a user navigates away from the Line Comments page, the system will remove the inactivated comment boxes from the page. Inactivated comment boxes cannot be recovered once a user navigates away from the page; they must be re-entered.*** Click the **Inactivate** button. 
16.	Clicking the Undo button will re-activate an inactivated comment box as long as you have not navigated away from the Line Comments page. Inactivated comment boxes cannot be re-activated once you navigate away from the page.
17.	If you create multiple comments and wish to see the order in which the comments print on the requisition, select Ascending for the Sort Sequence and then click the Sort button. The comments will print in Ascending date order from the oldest comment to the newest comment.
18.	Click the **OK** button to return to the Requisition page. 
19.	***NOTE: The white Comment bubble now is now filled with blue dots, indicating comments have been added.***



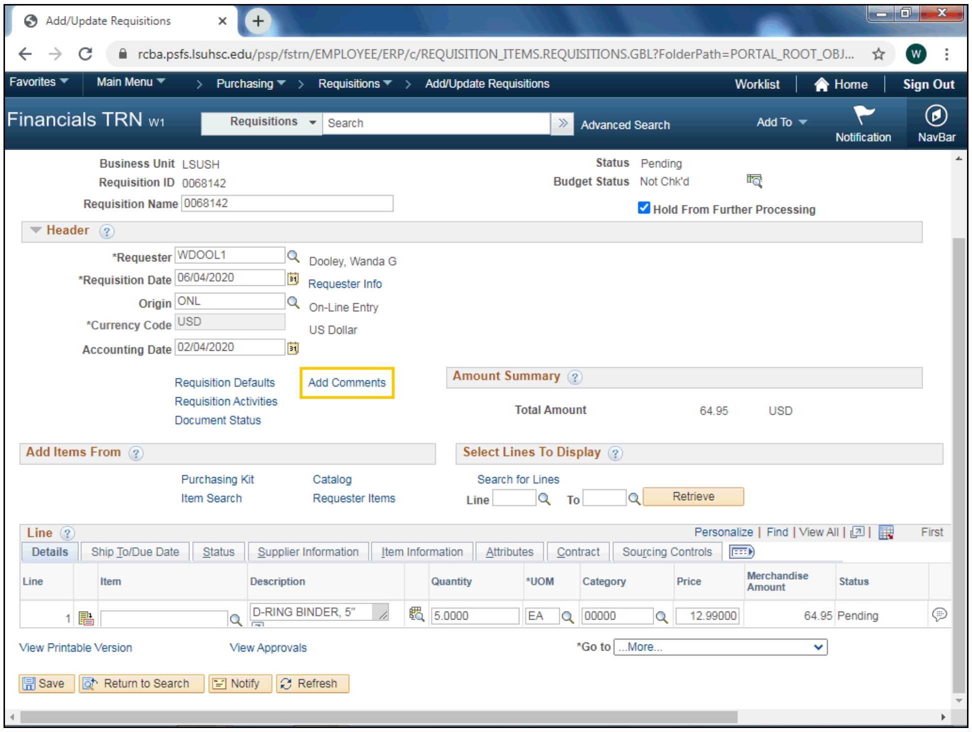
Step	Action
20.	Click the **Save** button. ***NOTE: Users should save whenever a change is made to the requisition.*** 
21.	This completes ***Add, Change, or Delete Comments***. **End of Procedure.**

Attaching a Document to a Requisition

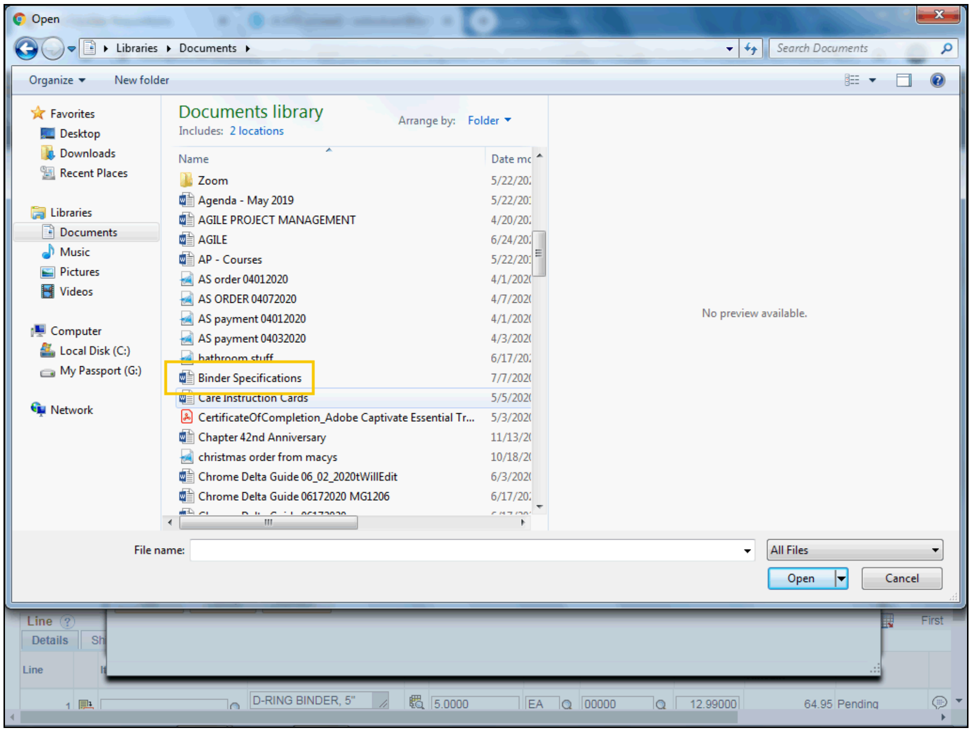
Procedure

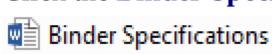
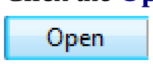
In this topic you learn how to **Attach a Document to a Requisition**.

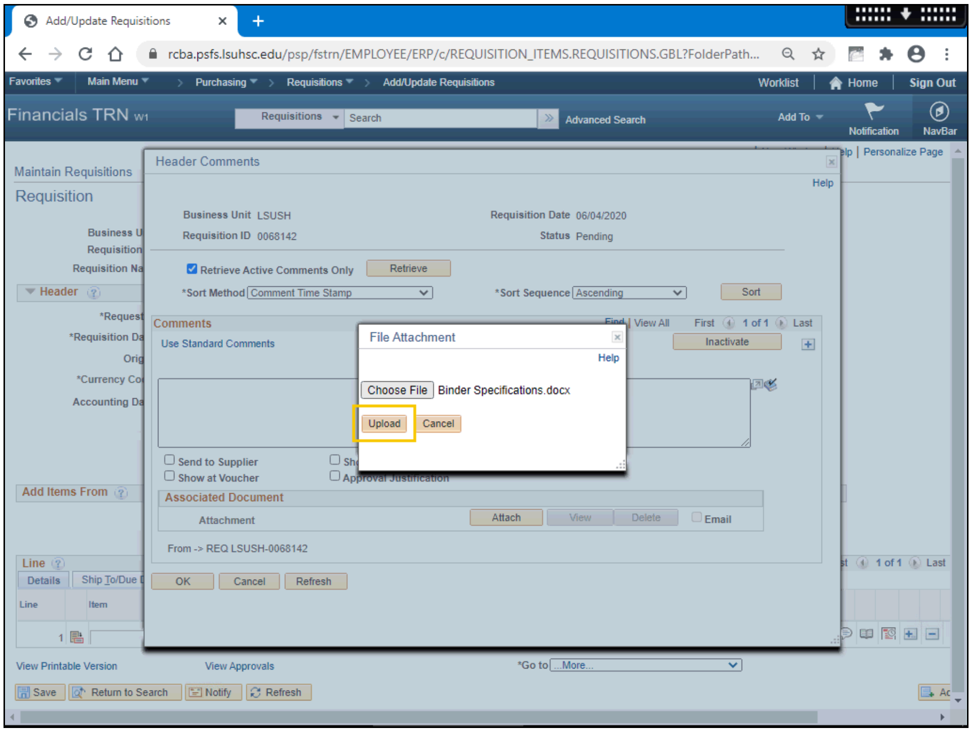
NOTE: Although PeopleSoft allows you to attach a document to a requisition, the document will not print when the Requisition is printed. You must print the attachment separately and attach it to a hard copy of the requisition.



Step	Action
1.	Click the **Add Comments** or **Edit Comments** link. ***NOTE: Once comments are added to the Requisition, the Add Comment Link changes to Edit Comments.*** In this example, comments were previously added to the Requisition. Therefore, the comments link has already changed to Edit Comments. Add Comments
2.	Click the **Attach** button. ***NOTE: The View and Delete buttons are grayed out meaning they are inactive.*** Attach
3.	Enter the file name with the directory in the blank field; OR Click the **Choose File** button to look for the file in your directory. ***NOTE: The following document types can be attached to the Requisition: Excel, Word, PDF, and Notepad*** If you want to attach Internet Information, you must cut and paste the information to a word document before attaching. Choose File

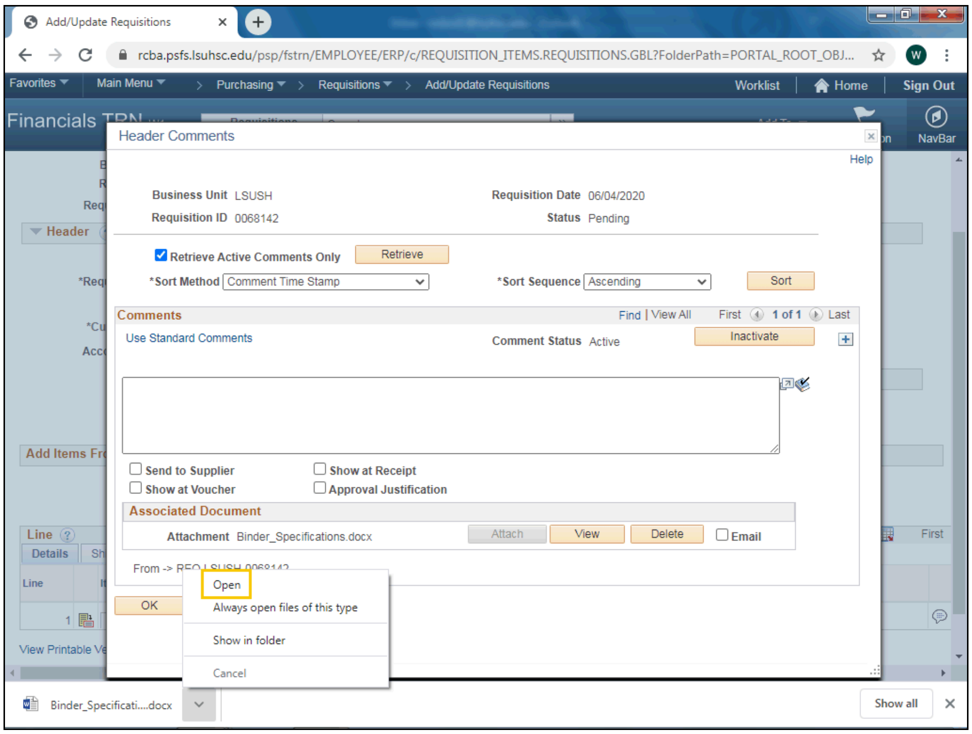


Step	Action
4.	Select the document you wish to attach. Click the **Binder Specifications.docx** file. 
5.	Click the **Open** button. 

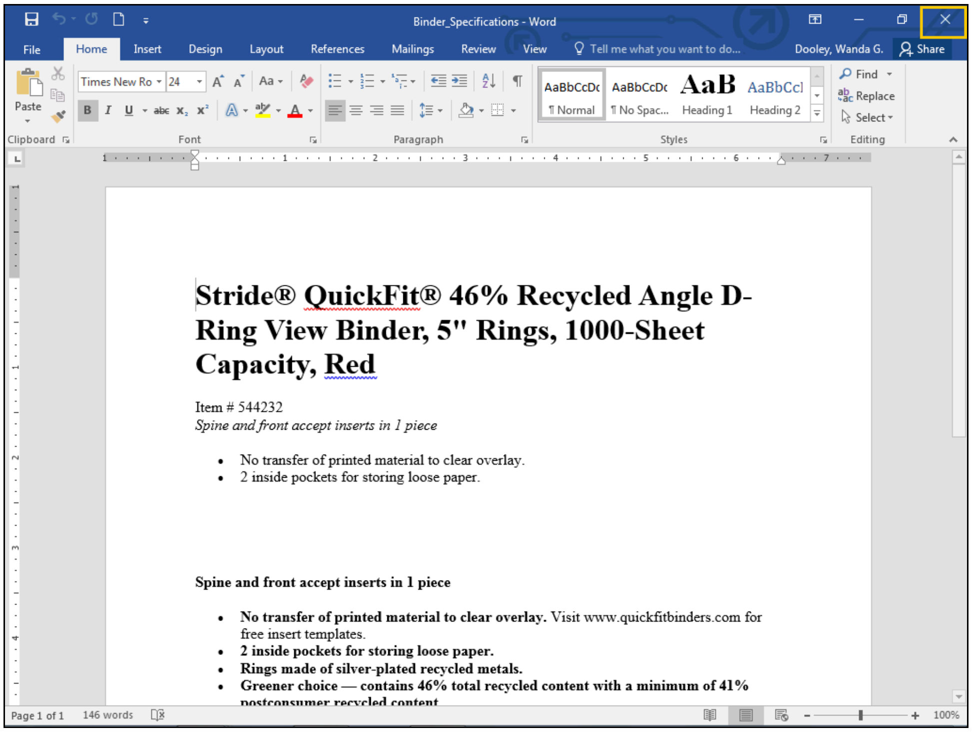


Step	Action
6.	Click the **Upload** button to attach the document.. ***NOTE: If you receive a <u>"File Failed to Attach"</u> message check the file name length. If the file name contains more than 60 characters, the file will not attach. Rename the file to reduce the number of characters, and then repeat the attachment process.*** Upload
7.	***NOTE: The Attach button is now inactive, and the View and Delete buttons are active. The name of the attached document is displayed to the left of the Attach button.***
8.	Click the **OK** button. OK
9.	Click the **Save** button to save the attached document to the requisition. Save
10.	To view the attached document, click the **Edit Comments** link. Edit Comments

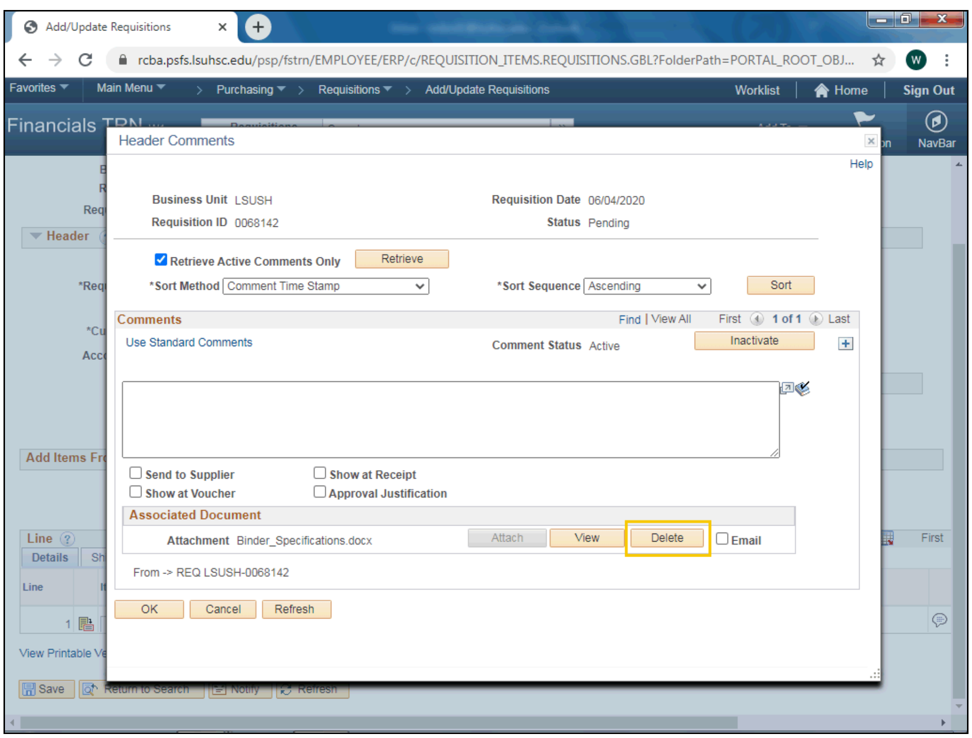
Step	Action
11.	Click the **View** button to view the attachment. This action opens a new window and displays the attachment. ***NOTE: No changes can be made to the attached document within PeopleSoft. If changes to the attached document are required, you must make the changes prior to attaching it to the Requisition.*** View



Step	Action
12.	Click the **Open** button. Open



Step	Action
13.	Click the **Close** button. 

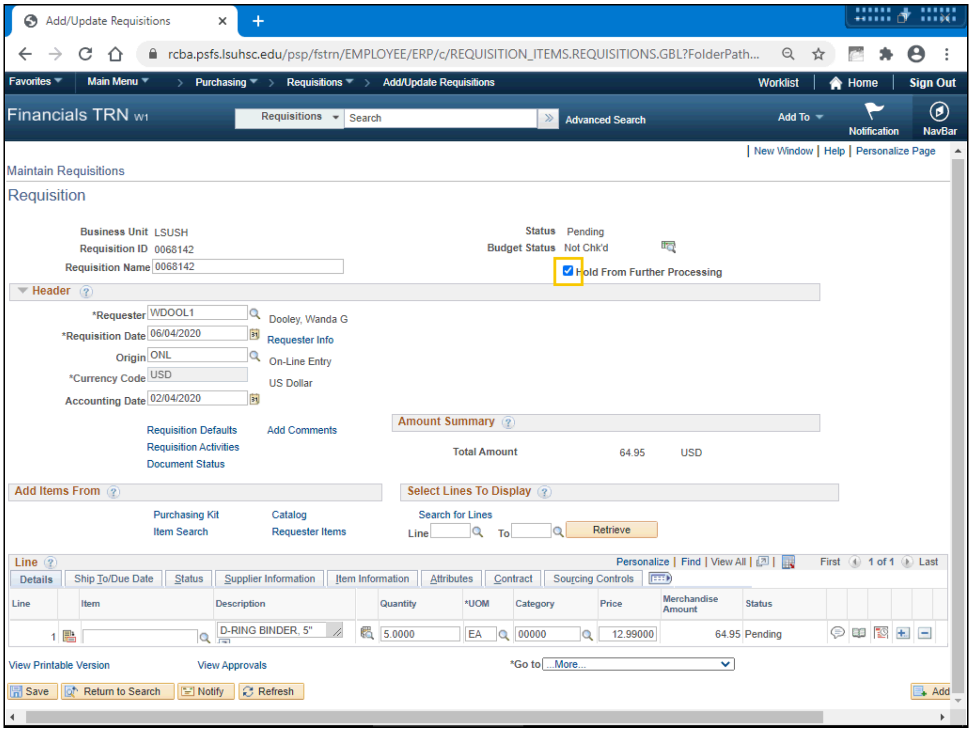


Step	Action
14.	Click the **Delete** button.
15.	Click the **OK** button. ***NOTE: The document name will no longer display to the left of the Attach button.***
16.	Click the **OK** button.
17.	The attached document will not be removed if you do not save the requisition. The requisition must be saved to complete the delete process. Click the **Save** button.
18.	To attach another document, create a new comment by adding a new row. Click the **Edit Comments** link.
19.	The attachment has been removed. Click the **OK** button.
20.	This completes ***Attaching a Document to a Requisition***. **End of Procedure.**

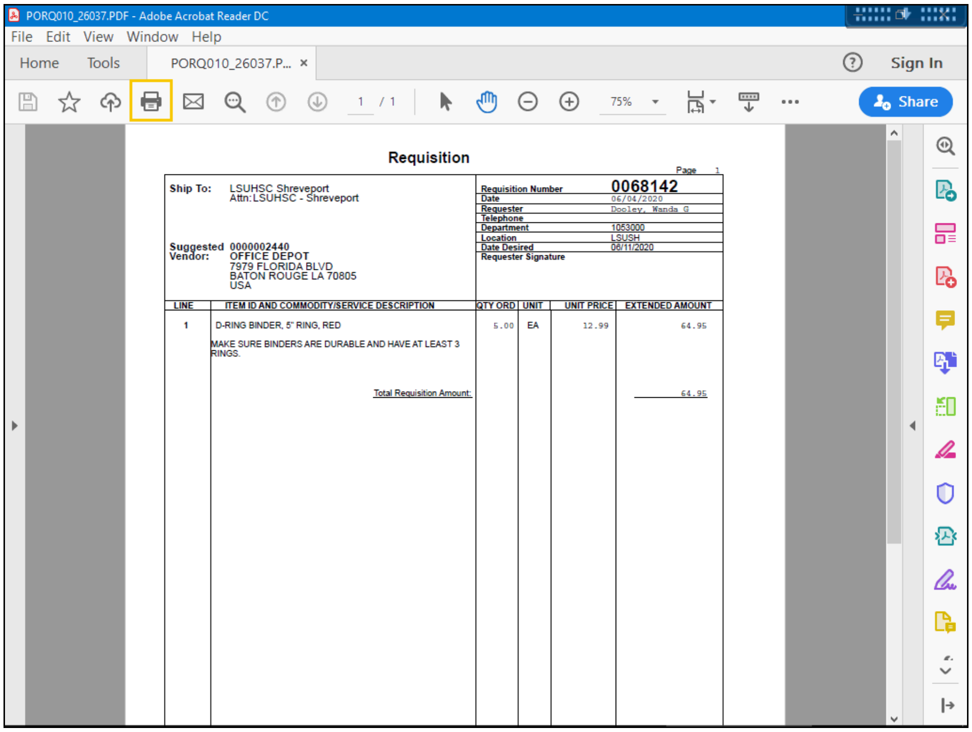
Uncheck Hold From Further Processing and Print a Requisition

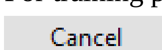
Procedure

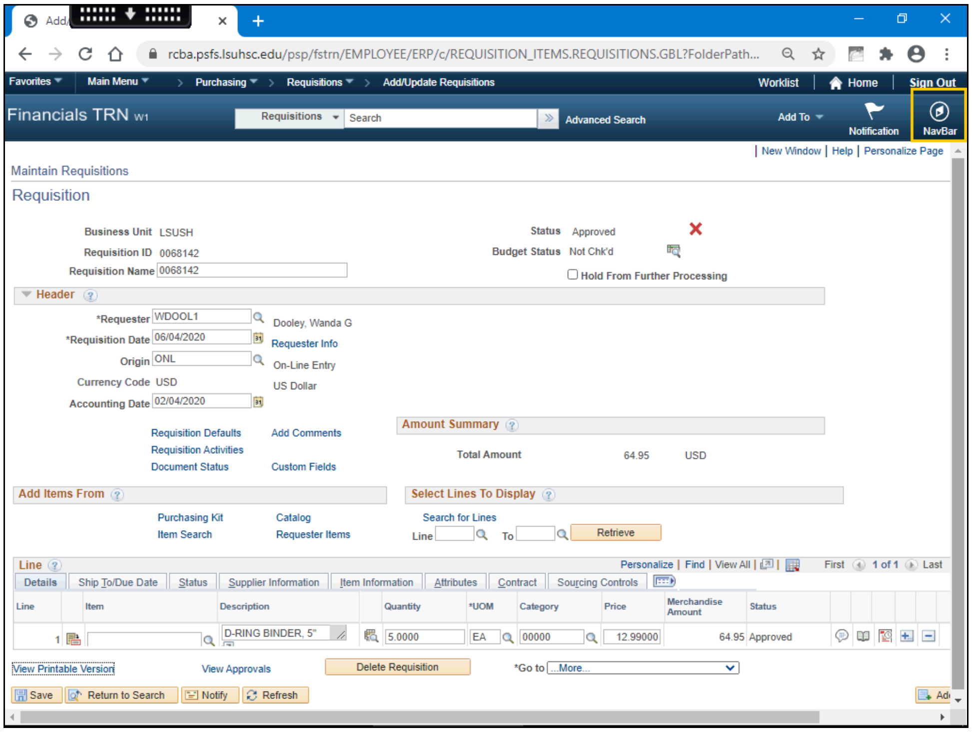
In this topic you will learn how to **Uncheck Hold From Further Processing and Print a Requisition**.

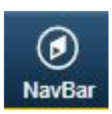
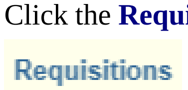


Step	Action
1.	Click the **Hold From Further Processing** option. ☑
2.	Click the **Save** button. Save
3.	After unchecking the **Hold From Further Processing** checked box and saving the requisition, you may print the requisition. There are two methods available for printing a requisition: **View Printable Version** and accessing the **Process Monitor**. Both methods will be demonstrated here. The **View Printable Version** method will be demonstrated first.
4.	Click the **View Printable Version** link. ***NOTE: The View Printable Version button may not be used for printing purposes once the Requisition Status = Complete. The user <u>must print</u> the Requisition by following the steps beginning with Step 11 of this exercise once the Requisition Status = Closed.*** View Printable Version
5.	The SQR Report box displays with Status = Queued. As the request processes through, the Status will change to Processing and then Success. When the Status = Success, a line will display stating that the system is preparing the report. The report will open automatically in the SQR Report box.



Step	Action
6.	Click the **Printer** button. 
7.	You can designate the number of copies you wish to print and then click **OK**. For training purposes only, click the **Cancel** button. 
8.	Click the **Close** button. ***NOTE: This completes the demonstration of View Printable Version.*** 
9.	Click the **Close** button for the processing window. 



Step	Action
10.	The second method, Print a Requisition using the **Process Scheduler**, will be demonstrated now. From the **NavBar** select **Navigator, Purchasing, Requisitions, Reports, Print Requisition**. Click the **NavBar** button. 
11.	Click the **Navigator** button. 
12.	Click the **Purchasing** link. 
13.	Click the **Requisitions** link. 

Step	Action
14.	Click the **Reports** link. Reports
15.	Click the **Print Requisitions** link. Print Requisition
16.	***See the Create/Find a Run Control ID topic 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. Add
19.	The parameters you enter on the Print Requisition page will be saved to the 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.
20.	Enter the desired information into the field. Enter "**LSUSH**".

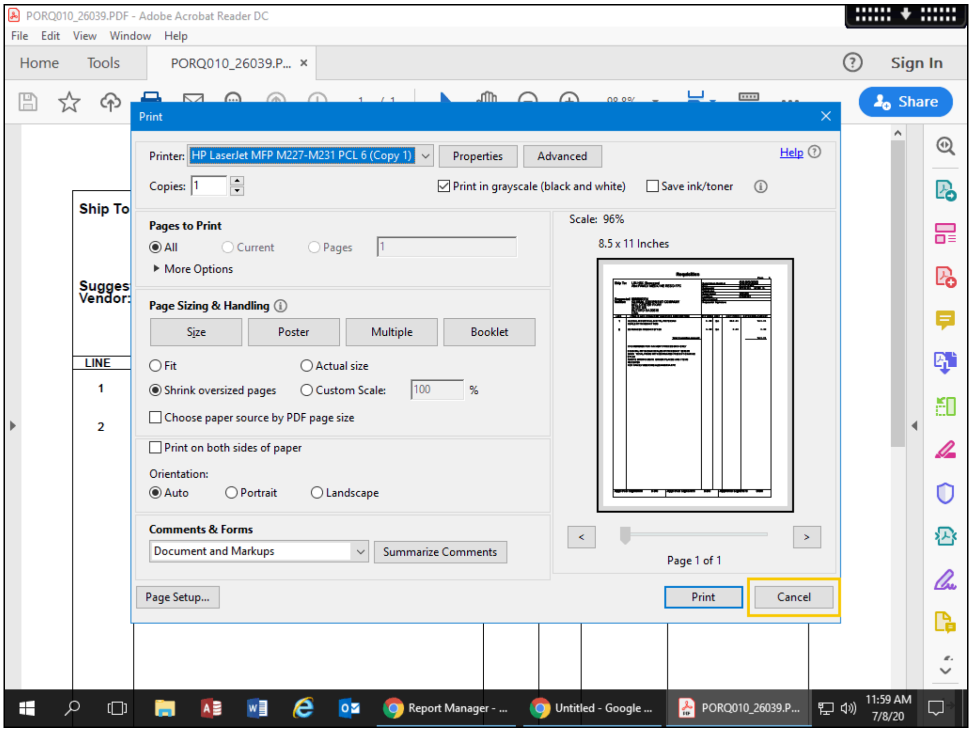
NOTE: The following is a list of the **Business Units** that should be entered into the dialog box, depending on the facility at which the end-user is employed.

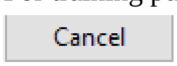
LSUNO: LSU Health New Orleans
LSUNA: LSU Health New Orleans Auxillary
LSUSH: LSU Health Shreveport

Step	Action
21.	**Requisition ID** You may enter your requisition ID directly into the Requisition ID field. It is highly recommended that you note the requisition ID when attempting to print the requisition and enter it in this page. If you do not know the requisition ID, you may search for it as shown in the following steps. Click the **Look Up Requisition ID** button.
22.	Enter the desired information into the **Requester** field. Enter "**SKENN1**".

Step	Action
23.	Click the **Look Up** button. Look Up
24.	Click the **6686088** link. 6686088
25.	***NOTE: Do not enter From Date, Through Date or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions <u>must be requested and printed ONE AT A TIME</u>, entering the requisition ID will be sufficient to identify the requisition.***
26.	Click the **Select All** button. ***See the Create/Find a Run Control ID topic for instructions on selecting Statuses to Include.*** Select All
27.	Click the button to the right of the **Statuses to Include** field.
28.	Click the **On Hold AND Not On Hold** list item. On Hold AND Not On Hold
29.	Click the **Save** button. Save
30.	**Process Scheduler** The Process Scheduler defines the Run Location and Output Destination of the Print Request. Click the **Run** button. Run
31.	Click the button to the right of the **Server Name** field.
32.	Click the **PSNT** list item. PSNT
33.	***NOTE: The Type field should default as Web and the Format field should default as PDF. If the Type and Format fields do not properly default, you will need to correct them.***
34.	Click the **OK** button. OK
35.	Click the **Process Monitor** link. Process Monitor

Step	Action
36.	***NOTE: If the <u>Run Status is not Success</u> and the <u>Distribution Status is not Posted</u>, click the <u>Refresh</u> button until both statuses are achieved.*** Click the **Refresh** button. Refresh
37.	Click the **Go back to Requisition Print** link. Go back to Requisition Print
38.	Click the **Report Manager** link. Report Manager
39.	Click the **Administration** tab. Administration
40.	The report is complete and ready for viewing when **<u>Requisition Print SQR</u>** under the Description column turns into a blue hyperlink 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: The Requisition will open and display in a new window.*** Requisition Print SQR
41.	Click the **Printer** button. 



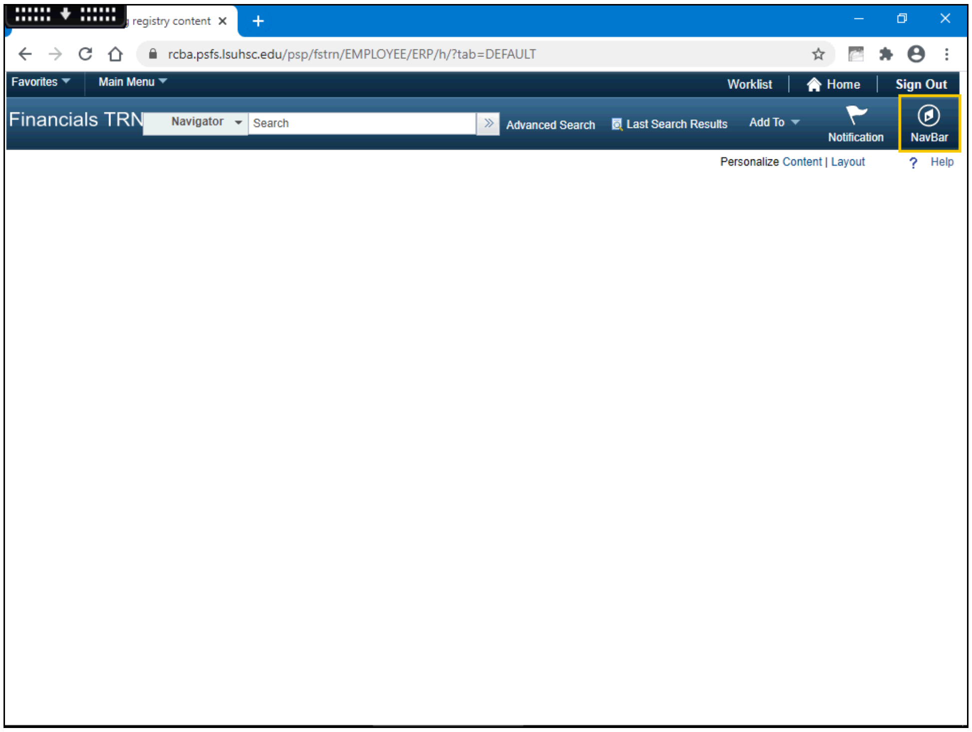
Step	Action
42.	You can designate the number of copies you wish to print and then click OK. For training purposes only, click the **Cancel** button. 
43.	Click the **Close** button. 
44.	This completes ***Uncheck Hold From Further Processing and Print a Requisition***. **End of Procedure.**

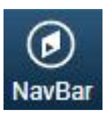
View an Existing Requisition and the Activity Log

Procedure

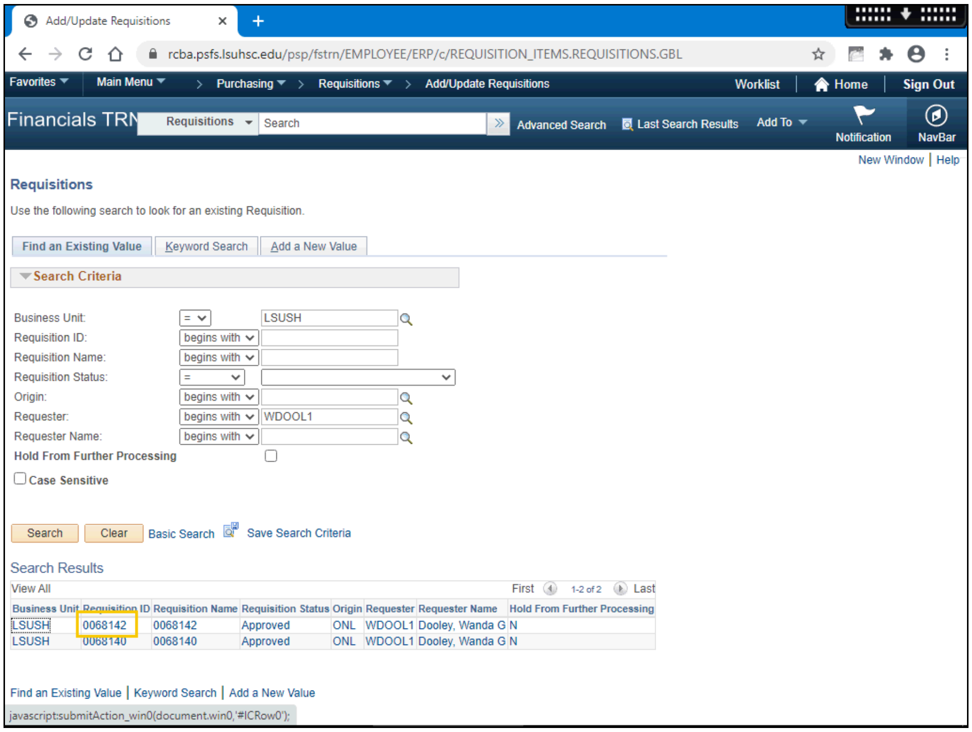
In this topic you will learn how to **View an Existing Requisition and the Activity Log**.

NOTE: The Activity Log provides the User ID of the person who entered, modified and/or approved the requisition, as well as the date and time that each was performed.



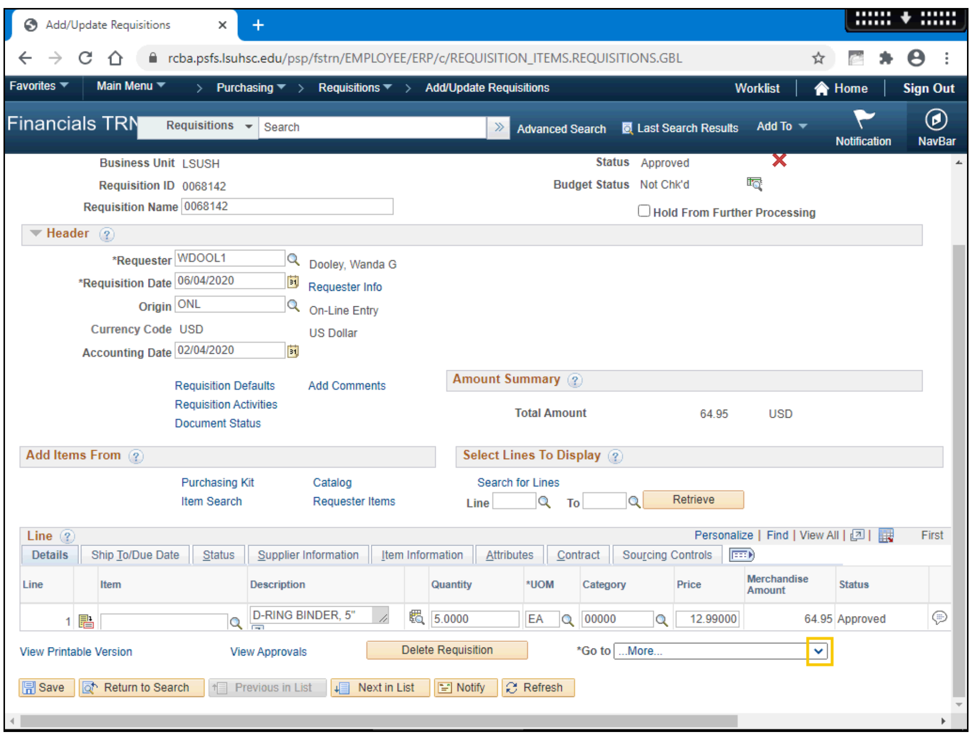
Step	Action
1.	Click the **NavBar** button. 
2.	Click the **Navigator** button. 
3.	Click the **Purchasing** menu. Purchasing
4.	Click the **Requisitions** menu. Requisitions
5.	Click the **Add/Update Requisitions** menu. Add/Update Requisitions
6.	Click the **Find an Existing Value** tab. Find an Existing Value

Step	Action
7.	**Find an Existing Value** To find an existing requisition, you **<u>must</u>** enter all or part of one of the following search criteria: • **Requisition ID** – to view a specific requisition; or • **Requester** – to view the requisitions entered by a specific person.
8.	**Requisition ID** It is highly recommended you make a note of your Requisition ID so that you can enter it directly onto the search page when searching for an existing requisition.
9.	**Search for a Requester** It is recommended the Requester option be used as the search parameter when searching for existing requisition ids. You **<u>must</u>** enter the requester's user id in the Requester field. If you enter the requester's name in the Requester field, you will receive the following message: **"No matching values found"**. ***NOTE: Other than Requisition ID and Requester, the remaining displayed search options are not recommended for use as search parameters.***
10.	The Requester field is not case sensitive. However, if the Case Sensitive checkbox is checked, you **<u>must</u>** enter the Requester information in **ALL CAPITAL (CAPS)** letters. Checking the Case Sensitive box will limit your results since the system will only be looking for an ALL CAPS match. If the Case Sensitive box is unchecked, you will retrieve all records, regardless of whether the text is in ALL CAPS. ***NOTE: It is recommended that the Case Sensitive and Hold From Further Processing boxes remain as defaulted.***
11.	Enter the desired information into the **Requester** field. Enter "**WDOOL1**".
12.	Click the **Search** button. ***NOTE: The Search results will display at the bottom of the page.*** 



Step	Action
13.	The results will display in descending order with the most recent requisition at the top of the list. ***NOTE: If a specific Requisition ID was entered, the Maintain Requisitions page associated with the Requisition ID will display; an option list will not display at the bottom of the page.*** Click the **0068142** link. 
14.	If the **Hold From Further Processing** box is checked, the end-user can continue adding item lines and information to the requisition. As long as the **Hold From Further Processing** box is checked, the requisition will not move to the Approver's Worklist. Once the **Hold From Further Processing** box is unchecked and the requisition saved, the end-user may not enter any additional information into the requisition. The requisition will be routed to the Approver's Worklist when the requisition is saved.

Step	Action
15.	**Buttons on the Maintain Requisitions page** **Return to Search** button allows you to return to the list of requisitions retrieved on the Search page; **Previous in List** button also you to view the previous requisition in the list of requisitions retrieved on the Search page; **Next in List** button allows you to view the next requisition in the list of requisitions retrieved on the Search page. The Next in List button in this example is grayed out because it is the last requisition in the search results list; **Notify** buttons allows you to e-mail the requisition page; **Refresh** button is used to update the information on the page. **Delete Requisitions** button (not viewable on this page) should never be used by the end-user. **Add** button takes you directly to the Add a New Value tab to create a new requisition.



Step	Action
16.	Click the button to the right of the **Go to:** field to access the **Activity Log.** 
17.	Click the **02-Activity Log** list item. 02-Activity Log
18.	The **Activity Log** will **indicate** the following: 1. **Entered -** the User ID of the Requester and the date the requisition was entered into the system; 2. **Modified -** the User ID of the person who most recently modified the requisition, and the date and time the modifications were entered into the system; and 3. **Approved -** the User ID of the person who Approved the requisition, and the date and time the requisition was approved.
19.	Click the **Return** button. 
20.	This completes ***View an Existing and the Activity Log***. **End of Procedure.**

Copy Requisitions

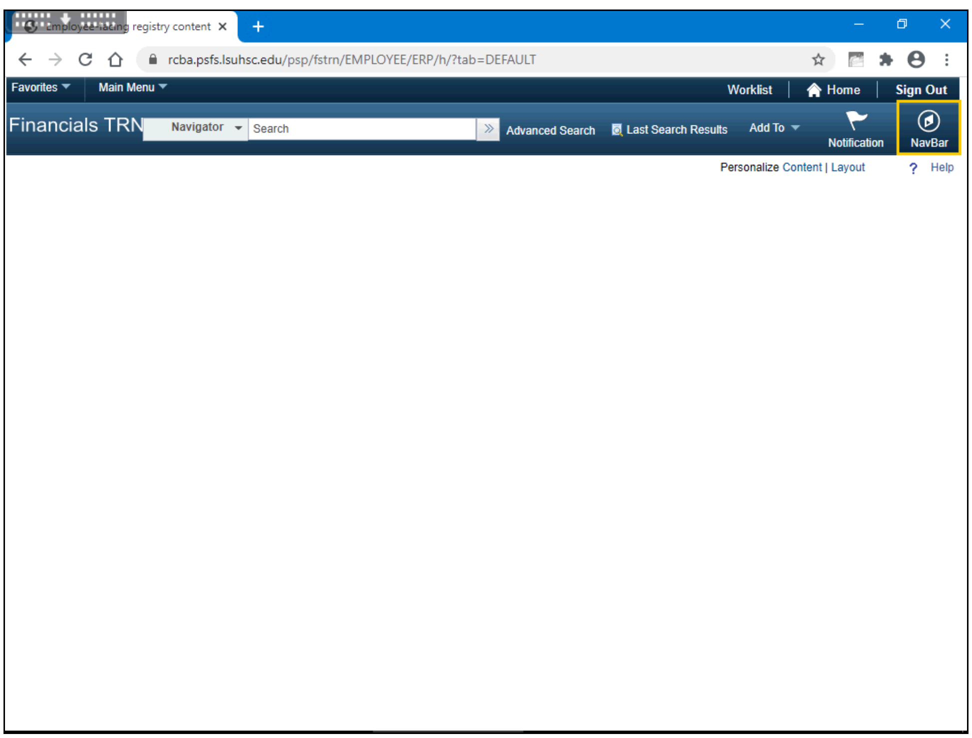
Copy a Requisition

Procedure

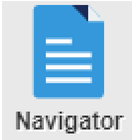
In this topic you will learn how to **Copy a Requisition**.

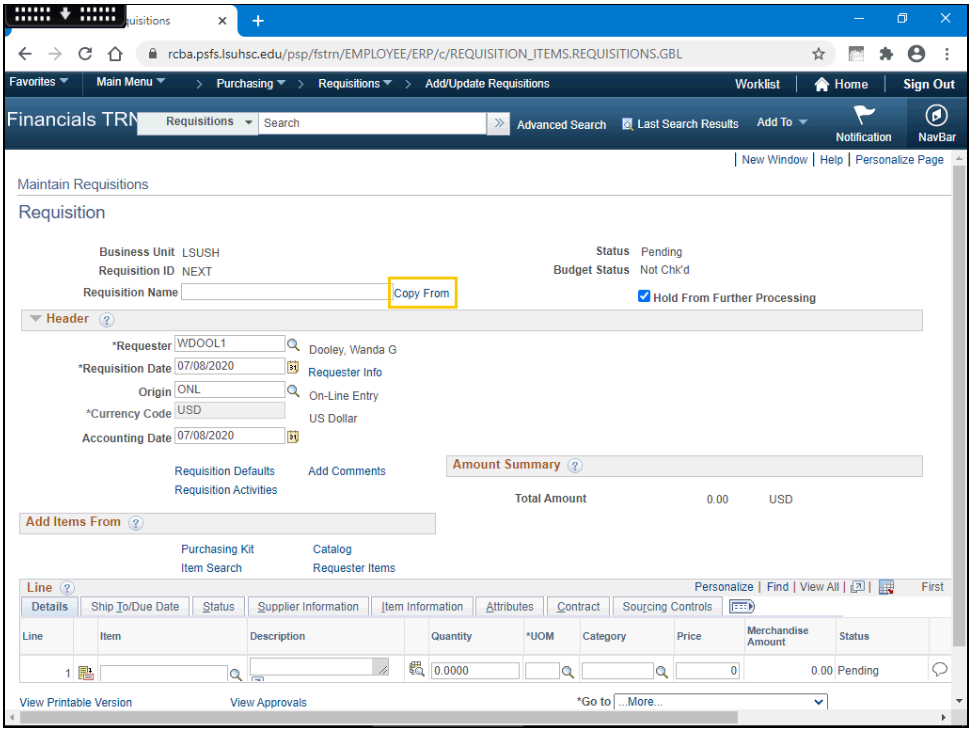
Step	Action
1.	**Scenario** You may copy your own requisitions or the requisition of another Requester. In this exercise you will enter a new requisition by copying a requisition from another Requester using the Copy From option.

Step	Action
2.	**When copying a requisition you will <u>not</u> perform Step 1: Enter Requisition Defaults until after the requisition is copied**. The defaults, line item(s), distribution of funds, and comments are being brought into the new requisition from the requisition that is being copied. Once copied, the Requester will make any necessary additions/changes/deletions to the defaults, line items, Schedule page, Distribution 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 copied requisition.***
3.	You can copy a canceled requisition or a requisition that has canceled lines to a new requisition. If you copy a canceled requisition, all the lines from the canceled requisition are copied over to the new requisition and the status of the lines is made active. If you copy a requisition that has one or more lines canceled, only the active lines from the existing requisition are copied to the new requisition. You can override any values that were copied over with the requisition. Activity and original requisition dates are not copied over.



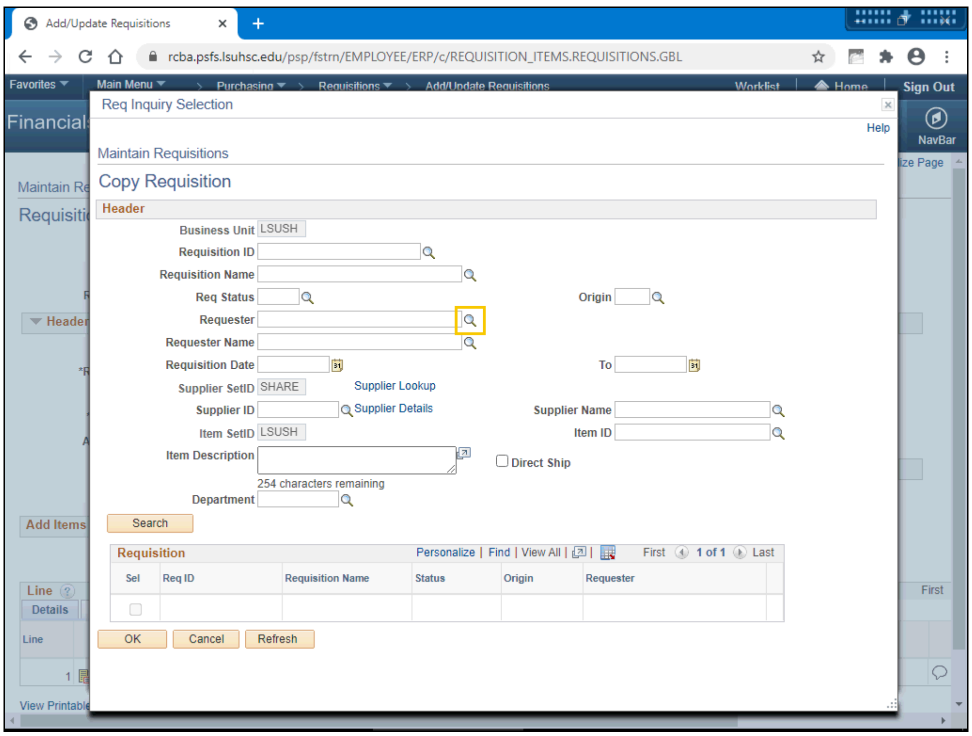
Step	Action
4.	Click the **NavBar** button. 

Step	Action
5.	Click the **Navigator** button. 
6.	Click the **Purchasing** menu. Purchasing
7.	Click the **Requisitions** menu. Requisitions
8.	Click the **Add/Update Requisitions** menu. Add/Update Requisitions
9.	A new requisition must be added in order to copy a requisition. The Business Unit should default, and the Requisition ID of Next will remain as defaulted. Click the **Add** button. 
10.	Click the **Hold From Further Processing** option. 
11.	**Requisition Name -** this is a free text field and can be used to enter a description of the items being purchased. If the field is not populated upon saving, it will be populated with the requisition ID.
12.	**Copy a Prior Year Requisition for Next Fiscal Year** In this exercise you are copying a requisition for the same fiscal year. When you are copying an existing requisition (i.e., from the current or a prior fiscal year) into a requisition for the next fiscal year, the **Accounting Date** **<u>must</u>** be changed before the requisition is copied. If the Budget Period is not correct, an error message will be received when saving the requisition stating that the Accounting Date and Budget Period do not match. The **Due Date** **<u>must</u>** also be changed to reflect receipt in the next fiscal year. The Requisition Date may remain as defaulted. The dates must be changed as follows when copying a requisition for the next fiscal year: **Accounting Date -** 07/01/XX (the next fiscal year); **and** **Due Date -** 07/01/XX or later for the next fiscal year.

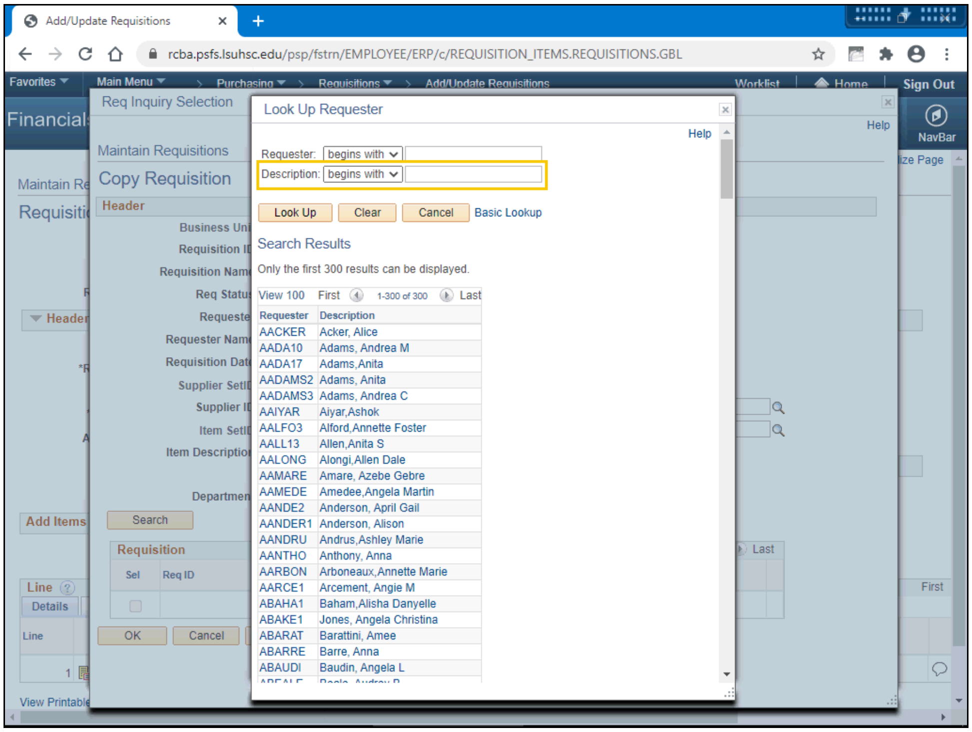


Step	Action
13.	Click the **Copy From** link. Copy From
14.	**Search for an Existing Requisition to Copy** To search for an existing requisition to copy, you may enter all or part of one of the following search criteria: • **Requisition ID** – to view a specific requisition; or • **Requester** – to view requisitions associated with a specific requester.
15.	**Requisition ID** It is highly recommended you note your Requisition ID you wish to use when copying a requisition and enter it into the search page. If you do not know the Requisition ID, you may search for it by clicking the Look Up Requisition ID magnifying glass.

Step	Action
16.	**Requester** You **<u>must</u>** enter the user id of the person whose requisition you wish to copy in Requester field. **The user id <u>must</u> be entered in ALL CAPS**. If you enter the requester's name in the Requester field, or enter the user id in lower case, you will receive a warning message stating you entered an invalid value. If you do not know the requester's user id, you may search for it using the following steps. ***NOTE: It is not recommended that any of the remaining options be used when searching for a requester user id.***

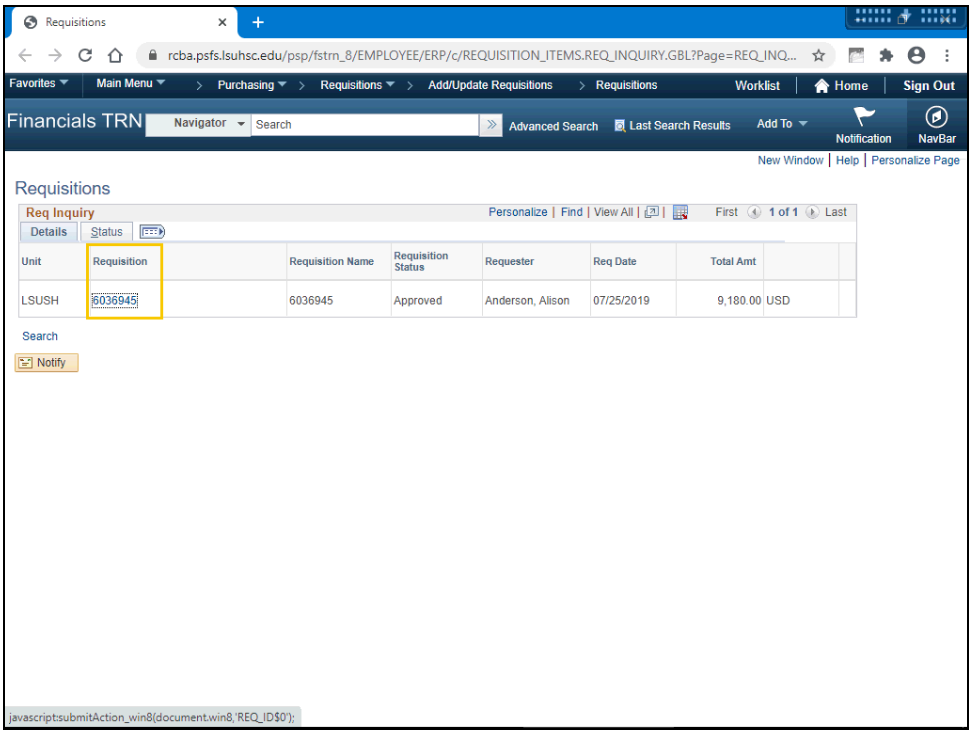


Step	Action
17.	Click the **Look up Requester** button.



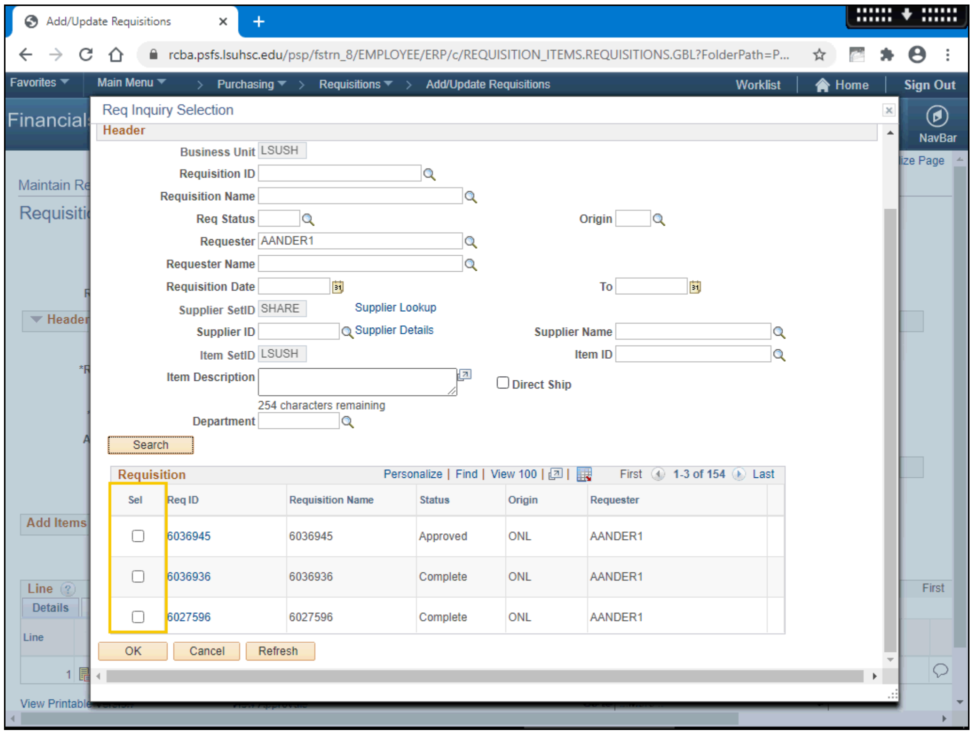
Step	Action
18.	You will search for the User ID using the Description field. The Description column display users' names. You will enter all or part of the user's Last Name in the Description field. Enter the desired information into the **Description** field. Enter "**ANDERSON**".
19.	Click the **Look Up** button. Look Up
20.	Click the **Anderson, Alison** link. Anderson, Alison
21.	Click the **Search** button to view a list of available requisitions for the specified requester. Search
22.	You are viewing options 1 - 3 of 154 options for this requester. You can use the right arrow to view the next group of 3 options, or you can click the View All link to view 100 of 154 options.

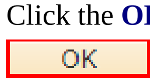
Step	Action
23.	Click the Req ID to view requisition information. ***NOTE: This will open a new window and display the Requisition Inquiry page.*** Click the **6036945** link. 6036945

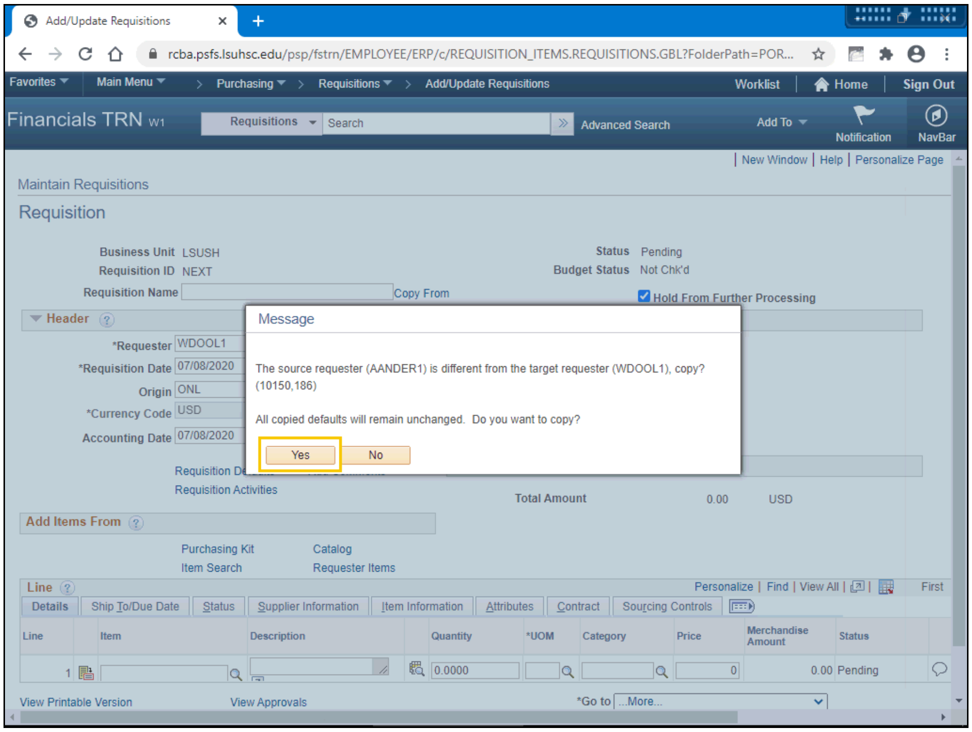


Step	Action
24.	The Requisitions page displays. Click the Requisition link to view line items and other requisition details. ***NOTE: This will take you to the Line Details page.*** Click the **6036945** link. 6036945
25.	Review the requisition information to determine if this is the requisition you wish to copy. ***NOTE: If this is not the desired requisition, you will click other Requisition ID links and repeat the previous steps until the desired requisition is located.***

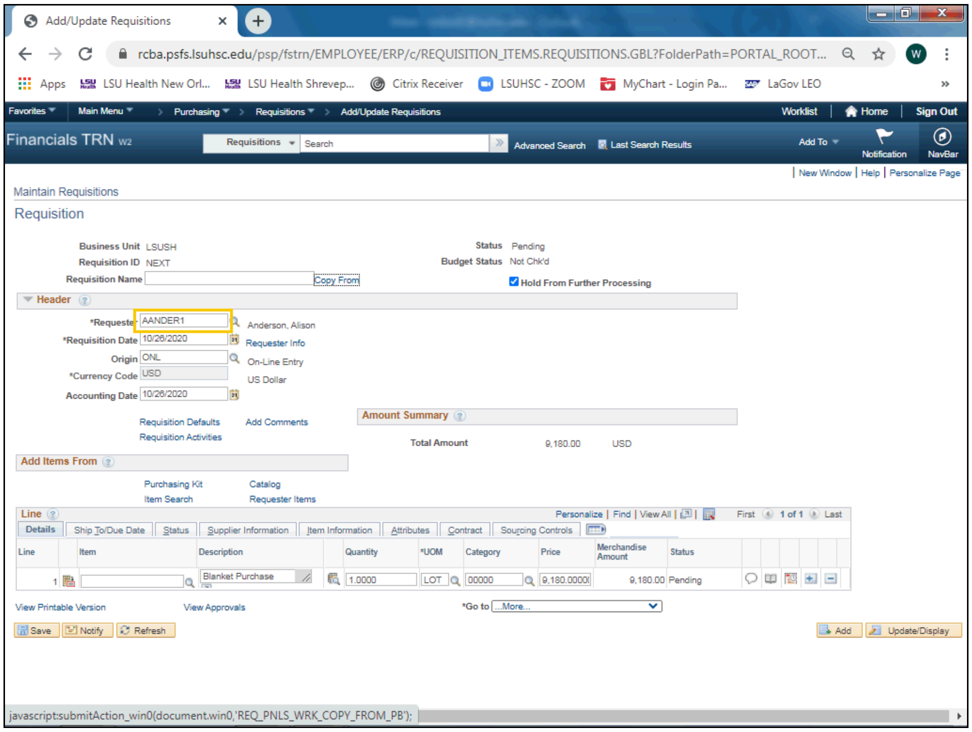
Step	Action
26.	Click the **Close** button.



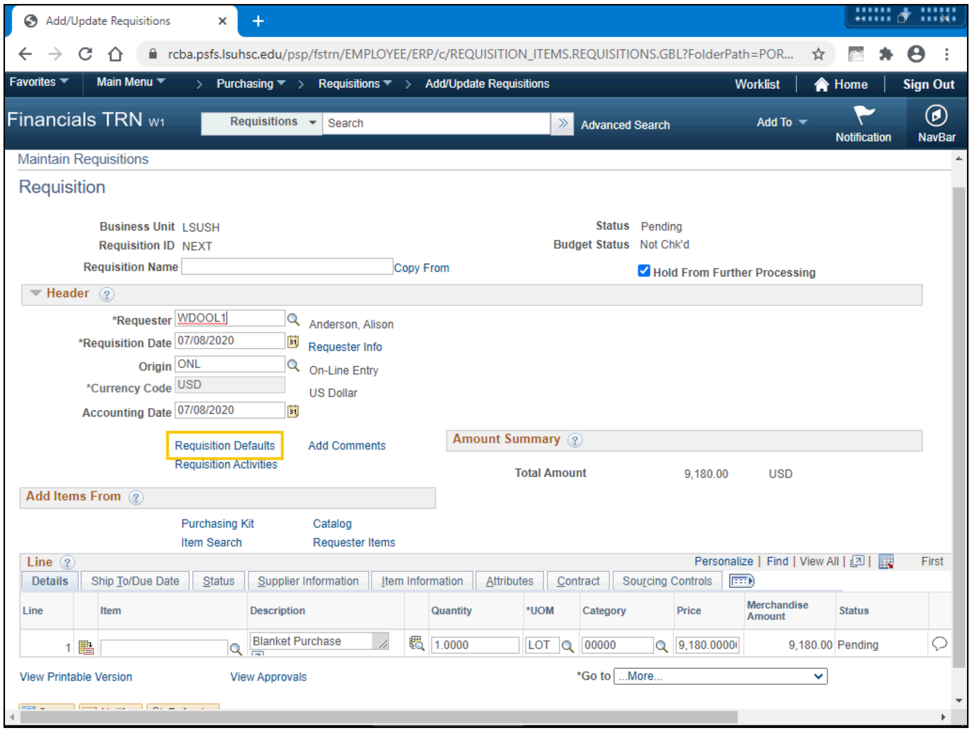
Step	Action
27.	When you find the requisition you wish to copy, click the **Sel - 6036945** option. 
28.	Click the **OK** button. 
29.	A message displays to verify you want to copy the selected requisition information onto the new requisition. When you copy a requisition of another Requester, you will receive a message stating that the source requester (i.e. the person whose requisition you are copying) is different from the target requester (i.e. you). This means the defaults brought in from the copied requisition will remain the same once copied into the new requisition. Since this is not your requisition that you are copying, the system is warning you the defaults on the requisition being copied may not be the same as the defaults you will be using. If the defaults are different, you will need to make the necessary changes on the Schedule and Distribution pages of the new requisition.



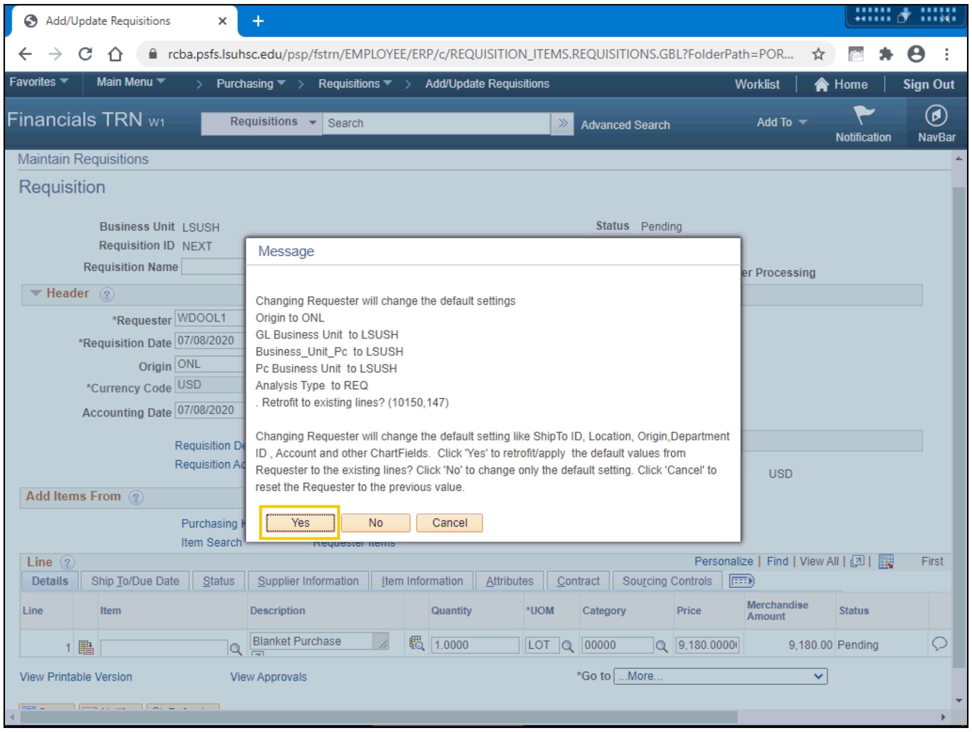
Step	Action
30.	Click the **Yes** button. 

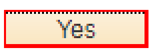


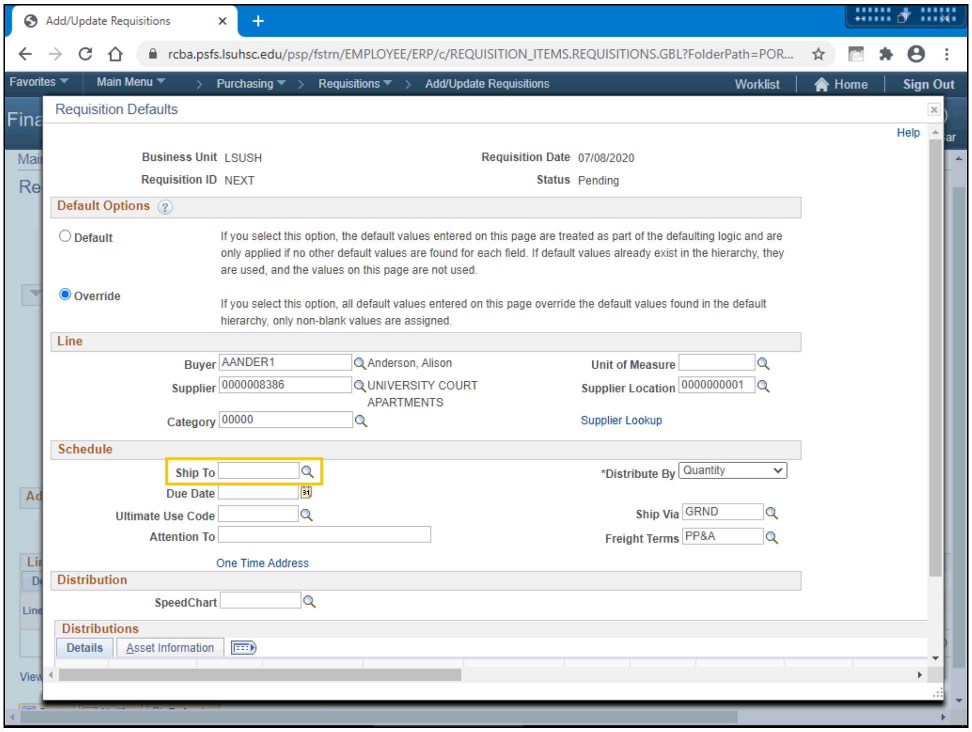
Step	Action
31.	The Requester's User ID for the requisition you copied will default into the Requester field. You **must** enter your User ID into the Requester field when this occurs. If you were to copy your own requisition, no changes would need to be made to the Requester field. ***NOTE: You must enter your User ID in ALL CAPS into the Requester field.*** The information from the copied requisition displays in the new requisition. ***NOTE: Any changes that you make to the new requisition will not affect the original requisition that you copied.*** Enter the desired information into the **Requester** field. Enter "**Your User ID**".



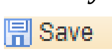
Step	Action
32.	Click the **Requisition Defaults** link. Requisition Defaults



Step	Action
33.	A warning message displays. Click the **Yes** button. 
34.	You must either enter default information onto the Requisitions Defaults page or on the Distribution page for each line. In this example, you will make the following changes on the Requisitions Defaults page. **Requisition Defaults:** **Ship To -** LSUSH **Due Date -** 03/28/16 **Account -** 546700 **Dept -** 1053000 **Location -** MB010303



Step	Action
35.	Enter the desired information into the **Ship To** field. Enter "**LSUSH**".
36.	Click the **Calendar** button to specify the **Due Date**. ***NOTE: You may also enter the date directly into the Due Date field.*** 31
37.	Click the **22** link. 22
38.	Enter the desired information into the **Account** field. Enter "**546700**".
39.	Enter the desired information into the **Dept** field. Enter "**1053000**".
40.	Enter the desired information into the Location field. Enter "**MB010303**". ***NOTE: In this example, the Fund, Program and Class will remain as defaulted. Users should enter the Fund, Program and Class associated their chartstring if different from defaulted values.***
41.	Click the **OK** button. OK
42.	Click the **Mark All** link. Mark All

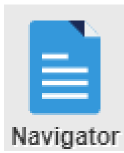
Step	Action
43.	Click the **OK** button. 
44.	Change Line 1 Quantity from 2 to 4. Enter the desired information into the **Quantity** field. Enter "**4**". 
45.	Click the **Save** button. 
46.	A Requisition ID number has been assigned by the system. The Requisition ID is **not** the Purchase Order (PO) number. A separate PO number will be assigned when the PO is generated.
47.	If you do not intend to add other line items to the requisition and it is ready for approval, you **must** uncheck the Hold From Further Processing box and save the requisition. If the Hold From Further Processing box remains checked, the requisition will not be routed to the Approver's Worklist for approval.
48.	In this exercise, you will not add another line item and the requisition is ready for approval. Click the **Hold From Further Processing** option. 
49.	Click the **Save** button. ***NOTE: The requisition must be saved in the "Pending" status. Once the database agent runs the requisition will move to the Approver's Worklist. The database agent runs every 15 minutes, on the quarter of the hour, from 6:00 am - 6:00 pm Monday - Friday.*** 
50.	This completes ***Copy a Requisition***. **End of Procedure.**

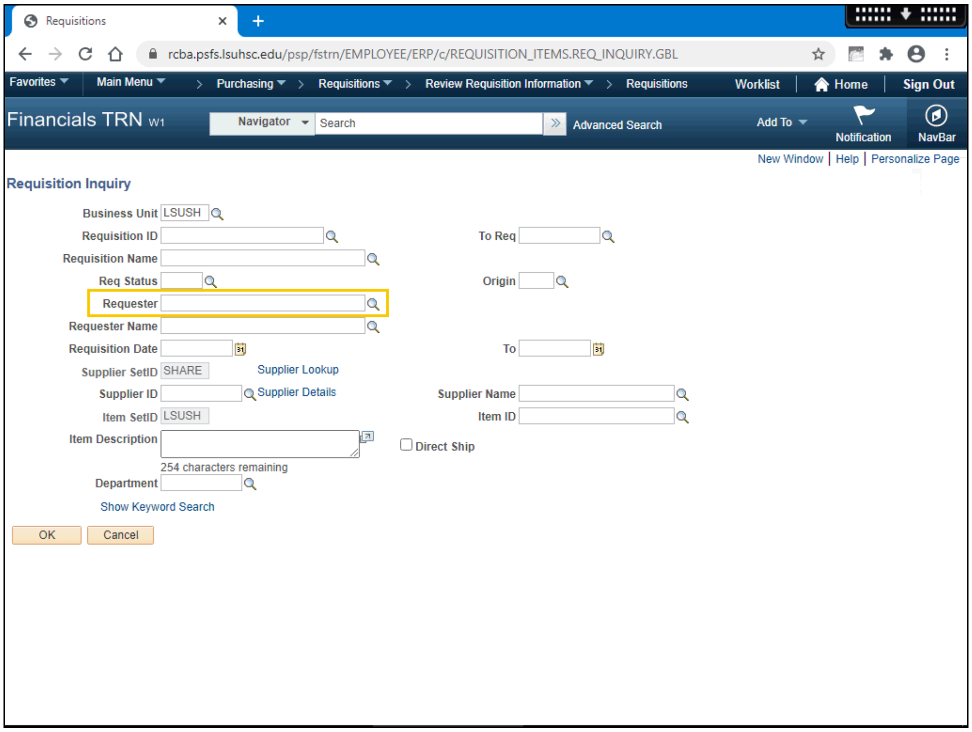
Inquire on Requisition Status

Inquire on a Requisition

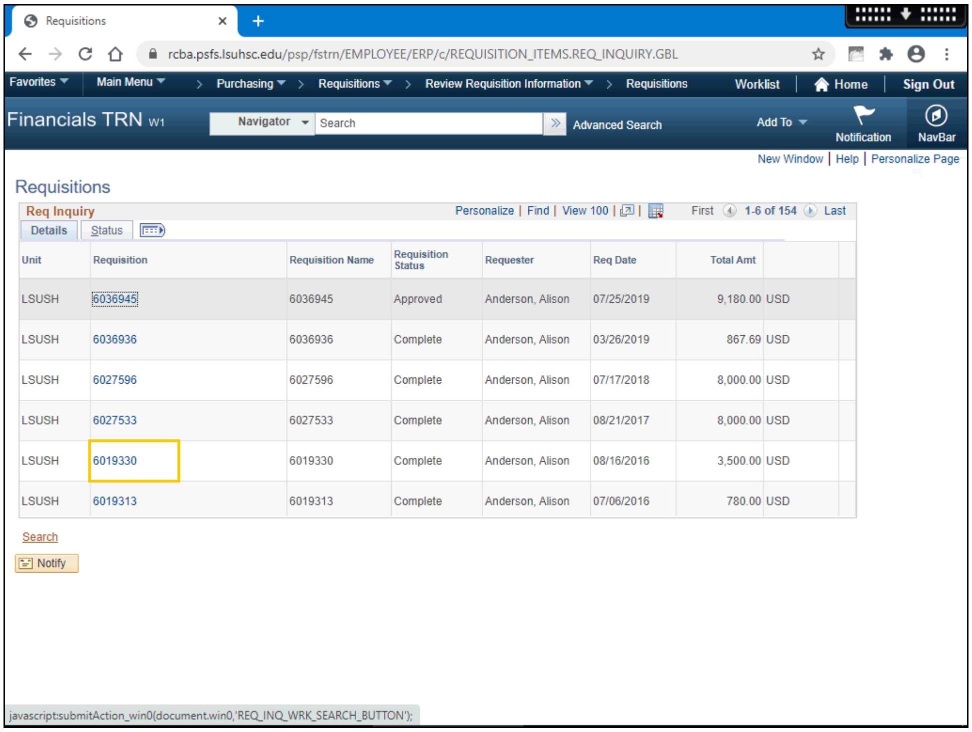
Procedure

In this topic you will learn how to **Inquire on a Requisition**.

Step	Action
1.	Click the **NavBar** button. 
2.	Click the **Navigator** button. 
3.	Click the **Purchasing** link. Purchasing
4.	Click the **Requisitions** link. Requisitions
5.	Click the **Review Requisition Information** link. Review Requisition Information
6.	Click the **Requisitions** link. Requisitions
7.	**Search to Inquire on an Existing Requisition** You may search to inquire on an existing requisition 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.

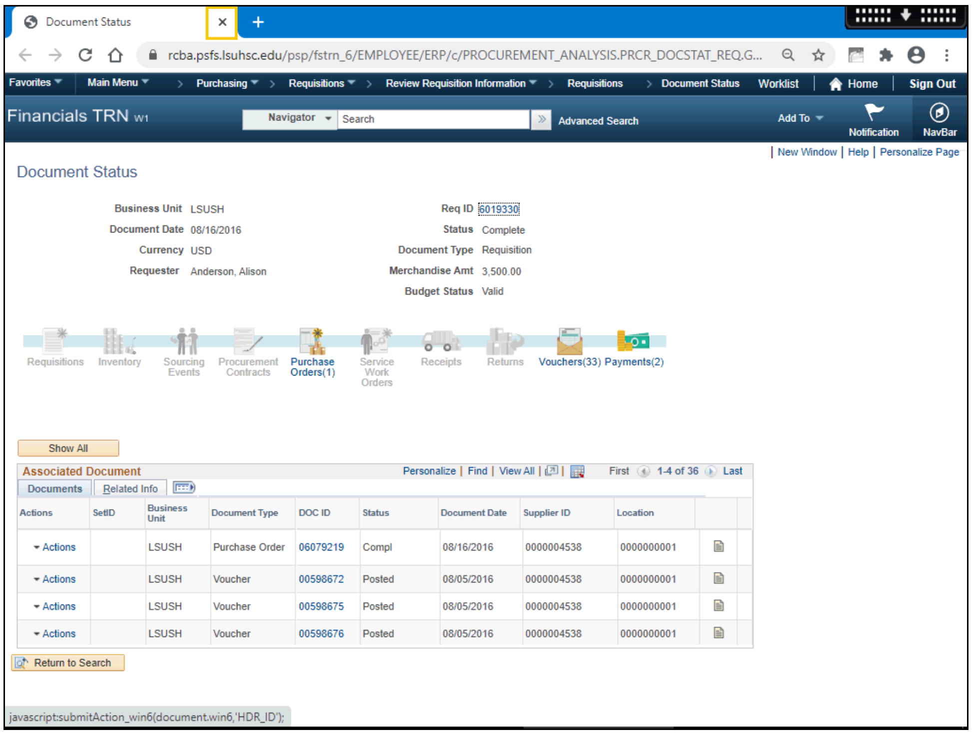


Step	Action
8.	Enter the desired information into the **Requester** field. Enter "**AANDER1**".
9.	Click the **OK** button. 

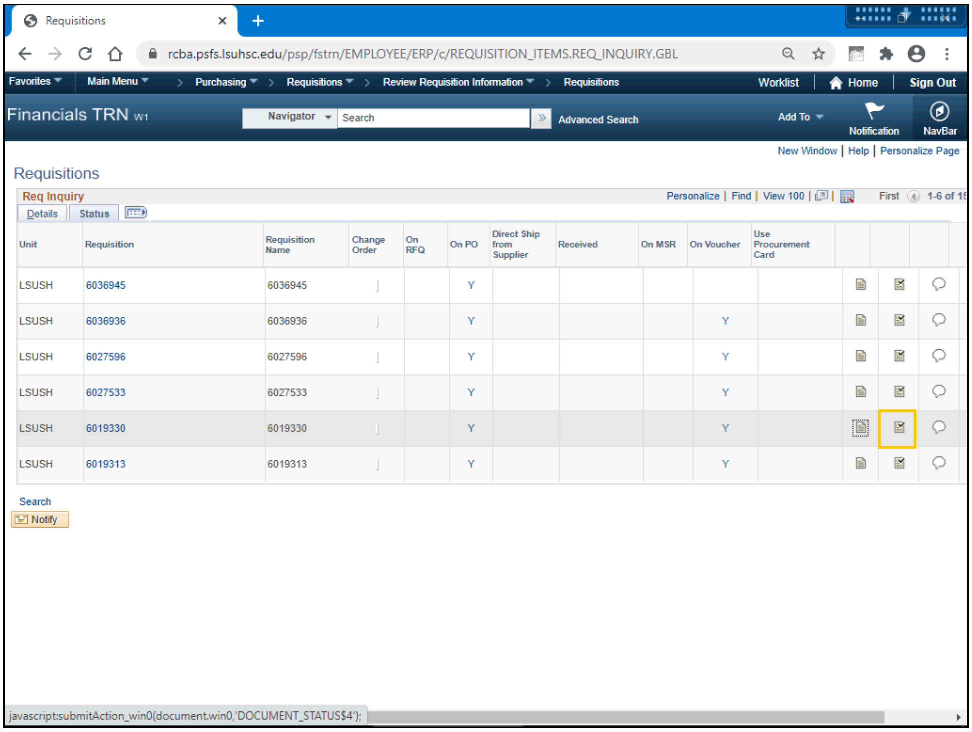


Step	Action
10.	Click the **6019330** link. 6019330
11.	Click the **Show all columns** button.
12.	***NOTE: You may click the Description link to view additional item description information.***
13.	***NOTE: From the Line Details page you can click the Line Comments bubble or the Schedule Details button to view additional requisition information.*** Click the **Right Scroll Bar** to view additional column information.
14.	Click the **Return** button. Return
15.	Click the **Status** tab. Status

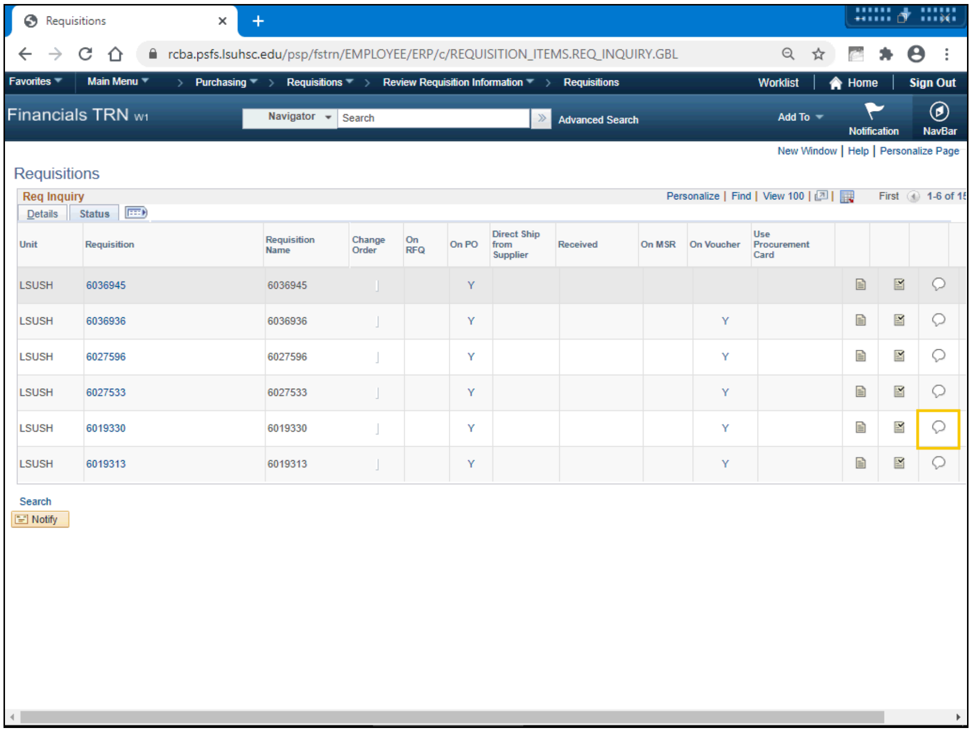
Step	Action
16.	Click the **Document Status** button for Requisition 6019330 to view the Document Status page. This will open a new window. ***NOTE: See the "Inquire on a Requisition Doc Status" topic for detailed instructions on how to access the Req Doc Status page directly and use the document links and buttons.***



Step	Action
17.	***NOTE: Clicking the Req ID link will display the Requisition Inquiry page.*** Click the **Close** button. ✕



Step	Action
18.	Click the **Approval Status** button. 
19.	Click the **Return to Requisition Inquiry** link. Return to Requisition Inquiry

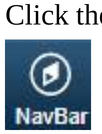


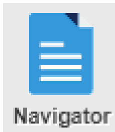
Step	Action
20.	***NOTE: If there are "dots" inside the comment bubble, you will be able to view the comments for the current requisition; otherwise, there are no comments to view.*** Click the **Comments** button. 
21.	This completes ***Inquire on a Reuisition***. **End of Procedure.**

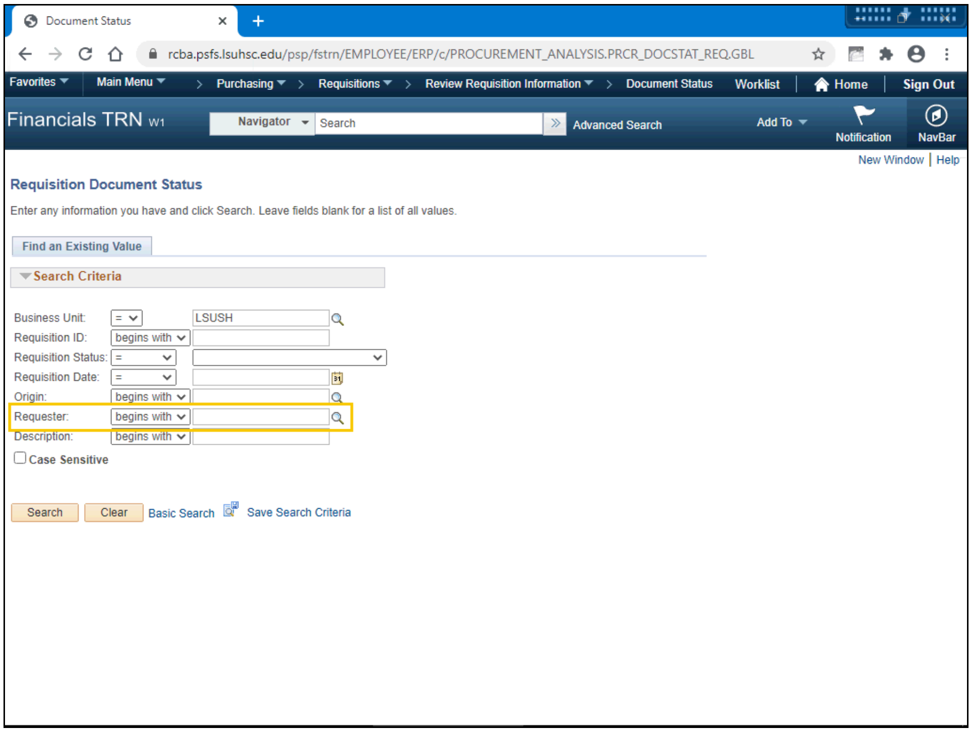
Inquire on the Requisition Doc Status

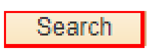
Procedure

In this topic you will learn how to **Inquire on the Requisition Doc Status**.

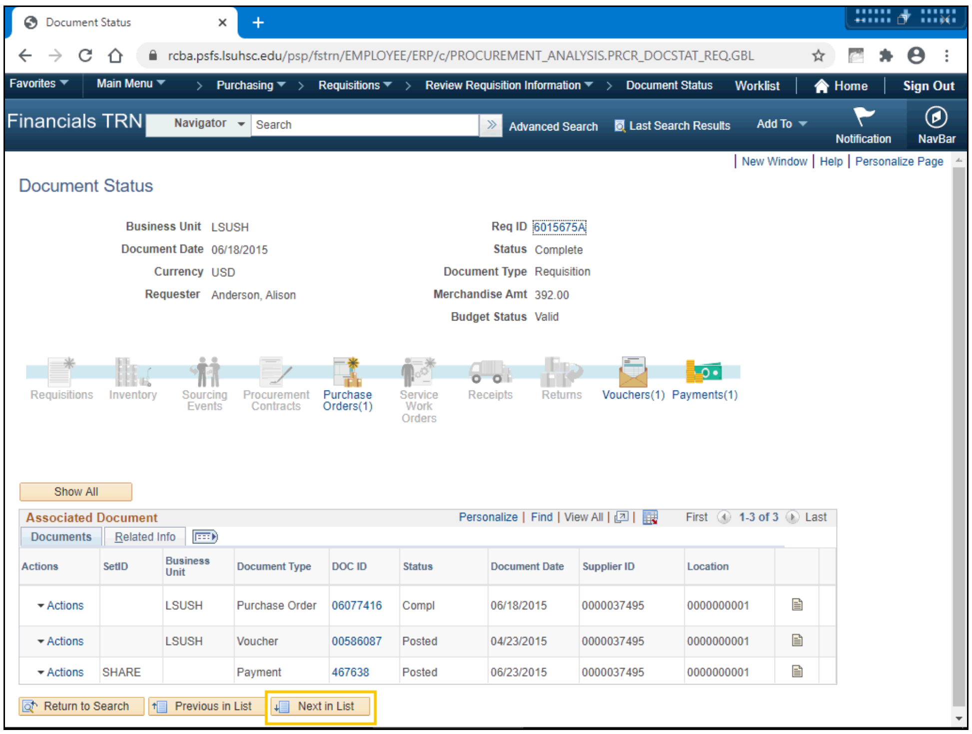
Step	Action
1.	Click the **NavBar** button. 

Step	Action
2.	Click the **Navigator** button. 
3.	Click the **Purchasing** link. Purchasing
4.	Click the **Requisitions** link. Requisitions
5.	Click the **Review Requisition Information** link. Review Requisition Information
6.	Click the **Document Status** link. Document Status
7.	**Inquire on a Requisition Doc Status** You can search to inquire on the document status page 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	Action
8.	Enter the desired information into the **Requester** field. Enter a valid value "**AANDER1**". 
9.	Click the **Search** button. 
10.	Click the **6015675A** link. 
11.	***NOTE: Actions allows the user to review Supplier Information.***
12.	From the Document Status page you may view the following pages associated with the requisition: the *Req Inquiry* page, the *PO Inquiry* page, the *Voucher Inquiry* page and/or *Payment Inquiry* pages. ***NOTE: You may only view the Voucher and Payment Inquiry pages if you have the proper access.***
13.	Click the **6015675A** link. 
14.	Click the **6015675A** link. 

Step	Action
15.	Click the **Close** button.
16.	Click the **Close** button.



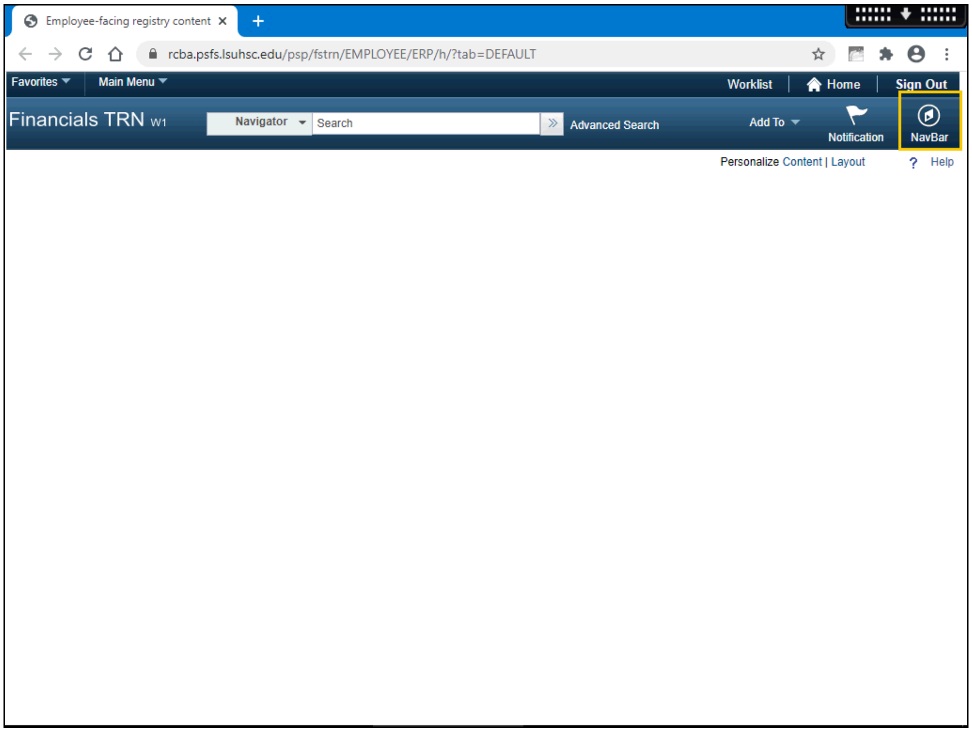
Step	Action
17.	Click the **Next in List** button.
18.	The next requisition's document status page displays. Click the **Previous in List** button.
19.	The original requisition document status page displays.
20.	This completes ***Inquire on the Requisition Doc Status***. **End of Procedure.**

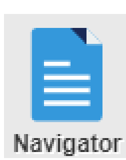
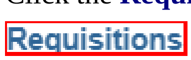
Requisition Basics

Use the Look up Feature

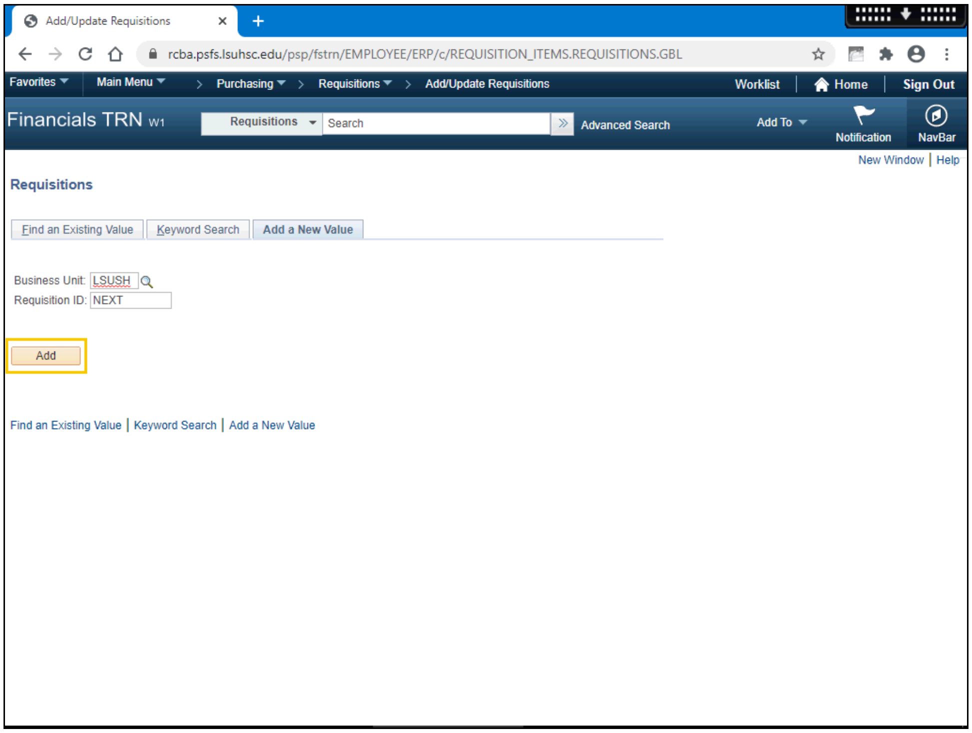
Procedure

In this topic you will learn how to **Use the Look Up Feature**.

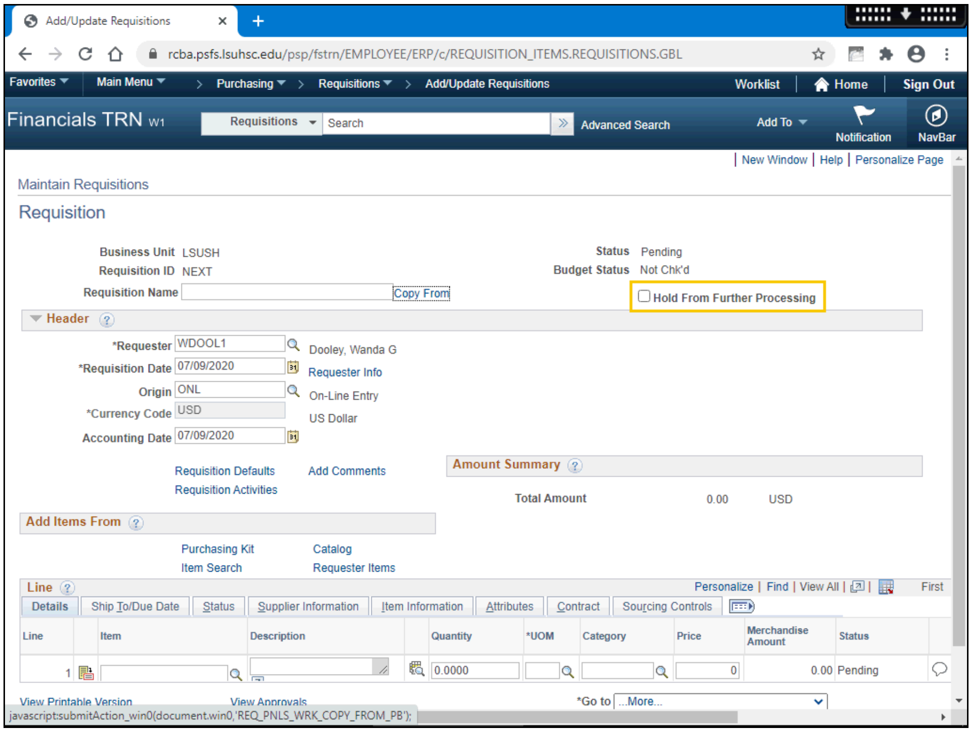


Step	Action
1.	Click the **NavBar** button. 
2.	Click the **Navigator** button. 
3.	Click the **Purchasing** menu. 
4.	Click the **Requisitions** menu. 

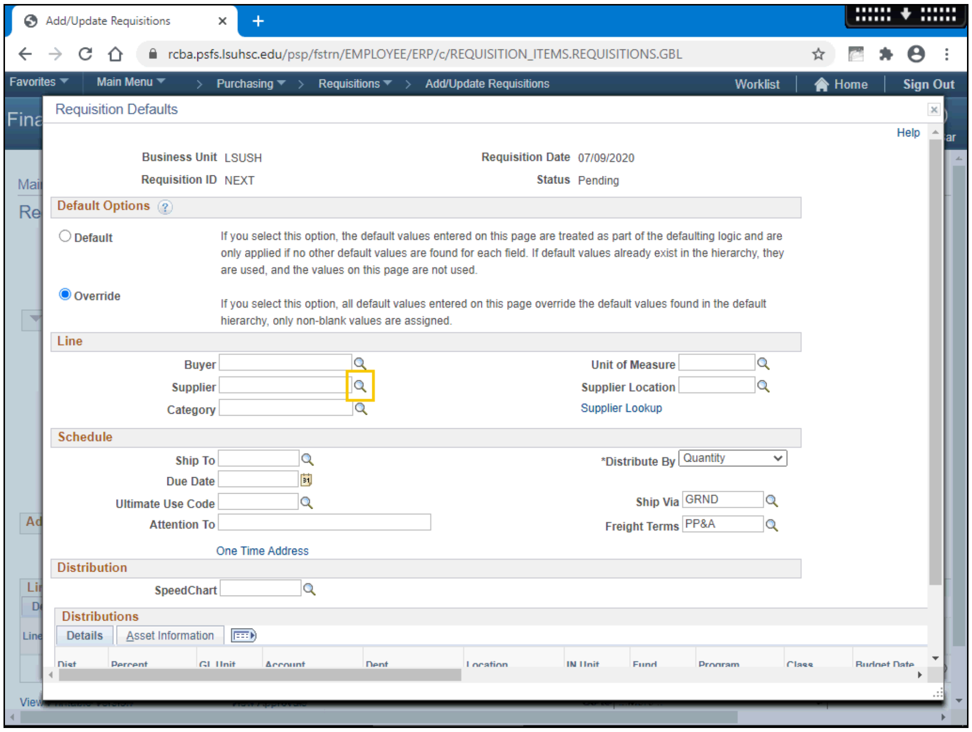
Step	Action
5.	Click the **Add/Update Requisitions** menu. Add/Update Requisitions



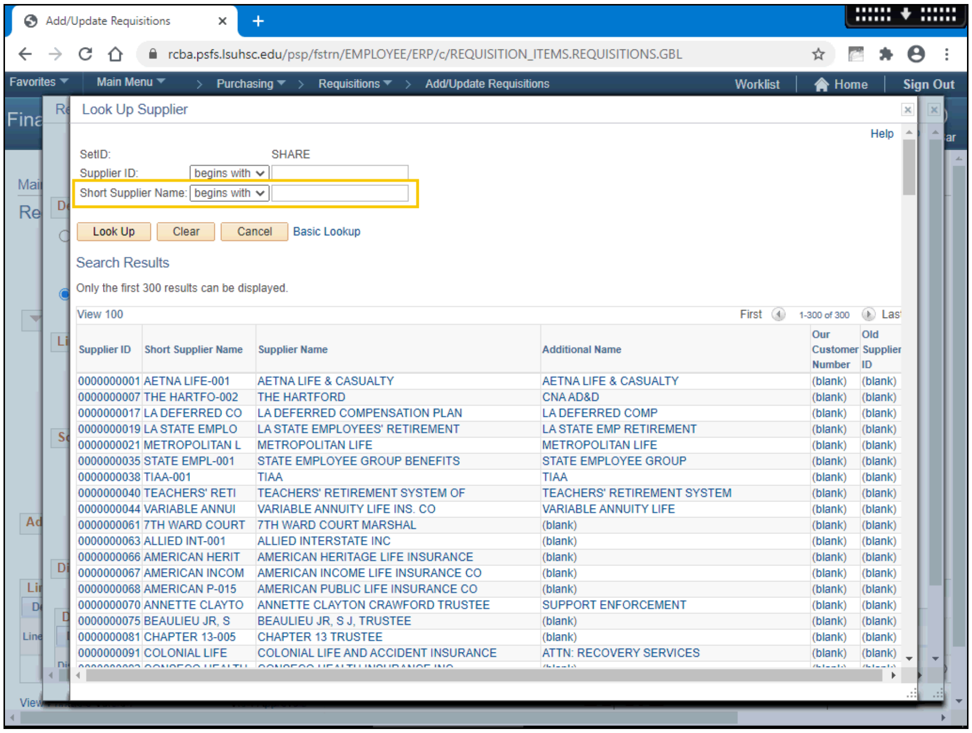
Step	Action
6.	Click the **Add** button. Add

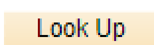
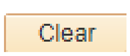


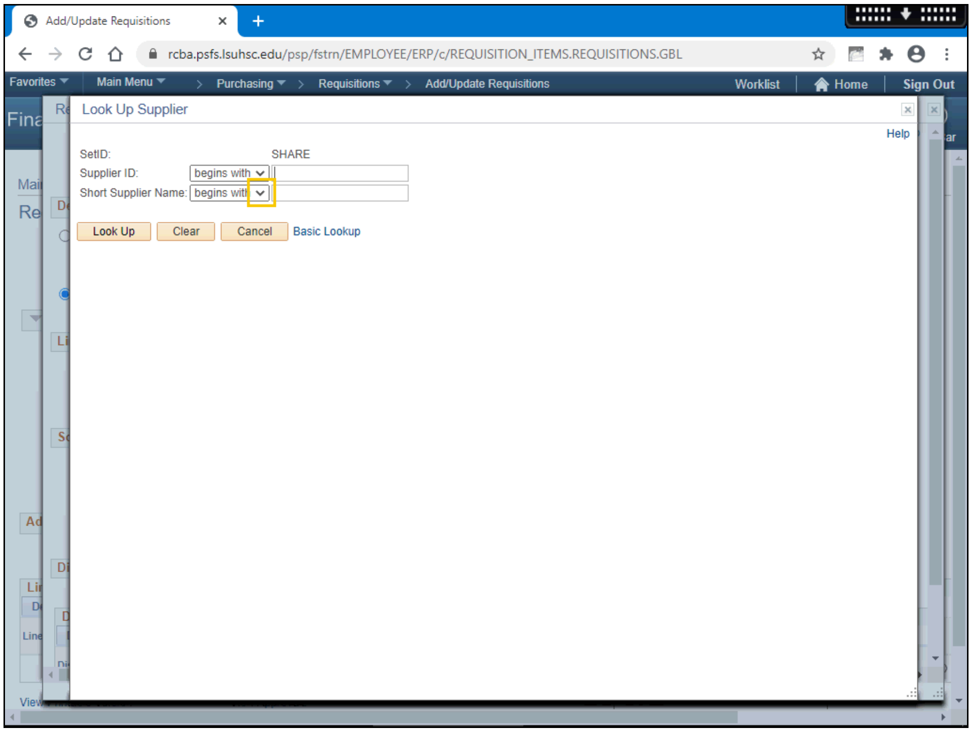
Step	Action
7.	Click the **Hold From Further Processing** option. ☐ Hold From Further Processing
8.	Click the **Requisition Defaults** link. Requisition Defaults
9.	The Look Up feature allows you to search for all valid values in the database for a specific field. It can also be used to narrow the scope of your search when a large number of values are returned. The Look up feature is depicted in the database as a magnifying glass. Anytime you see a magnifying glass next to a field, you have look up capability.
10.	In this example 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 your supplier. You will locate and select Office Depot utilizing the Look up feature. Once selected, the system will default the Supplier ID number into the Supplier field, thus completing the Look up process.



Step	Action
11.	Click the **Look Up Supplier** button. 
12.	The system will automatically display some field values on the Look up pagelet. Only 300 results can be displayed at a time. If there are more than 300 results returned, you must use the search fields provided to help narrow the scope of your search. A message will display above the returned results if more than 300 options are available.
13.	The number of results retrieved can be reduced by entering all or part of either the Supplier ID **or** Short Supplier Name into the search fields provided. Most users will utilize the Short Supplier Name option as their search parameter. There are three operators that can be used to help narrow your search results. They are: • begins with, • contains, and • the wildcard (% sign).
14.	**begins with** The system defaults the "beings with" operand for all search fields. In this example, you will search for Office Depot using the Short Supplier Name field and the "begins with" operand.



Step	Action
15.	Enter the desired information into the **Short Supplier Name** field. Enter "**OFFICE**". 
16.	Click the **Look Up** button. 
17.	The system has only returned supplier names that begin with the word Office thus reducing the list of options to 19.
18.	Click the **Clear** button. 



Step	Action
19.	**contains** The second search option is "contains". The "contains" 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 **Short Supplier Name** field.
20.	Click the **contains** list item. contains
21.	Enter the desired information into the **Short Supplier Name** field. Enter "**OFFICE**".
22.	Click the **Look Up** button. Look Up
23.	The system has returned supplier names that **contain** the word Office. Using the "contains" operand reduced the original search results to 32. Use the vertical scroll to view additional results.
24.	Click the **Clear** button. Clear

Step	Action
25.	**The Wildcard** The third search option is the "wildcard". The **"%"** sign is used as a "wildcard" in the system, taking the place of letters, words, numbers, etc.
26.	Where the **%** sign is placed will determine the type and number of results retrieved. For example: • **OFFICE%** – all supplier names **beginning** with the word office will be returned. This option will return the same number of results as using the "begins with" operand. • **%OFFICE% -** all supplier names **containing** the word office will be returned. This option will return the same number of results as using the "contains" operand.
27.	Enter the desired information into the **Short Supplier Name** field. Enter "**OFFICE%**". OFFICE%
28.	Click the **Look Up** button. Look Up
29.	The system has returned supplier names that **begins with** the word OFFICE. Using the "wildcard" option has reduced the original search results to 19.
30.	Each line contains a series for links for the specified supplier. Links are generally underlined and blue in color. You can click any link on the desired supplier's line and the system will default the needed information onto the Requisitions Defaults page.
31.	In this example, you will click the Supplier ID link to select the Office Depot option. Click the **0000002440** link. 0000002440
32.	The system defaults the desired Supplier ID into the Supplier field.
33.	This completes ***Using the Look Up Feature***. **End of Procedure.**

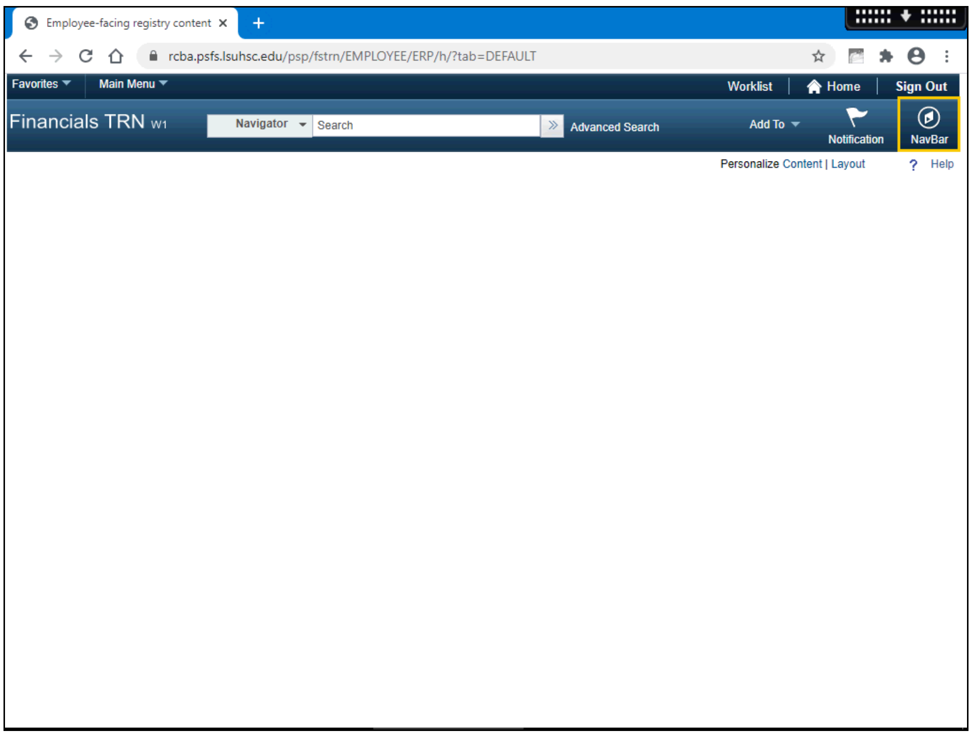
Create/Find a Run Control ID

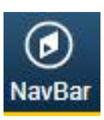
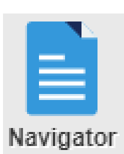
Procedure

In this topic you will learn how to **Create/Find a Run Control ID**.

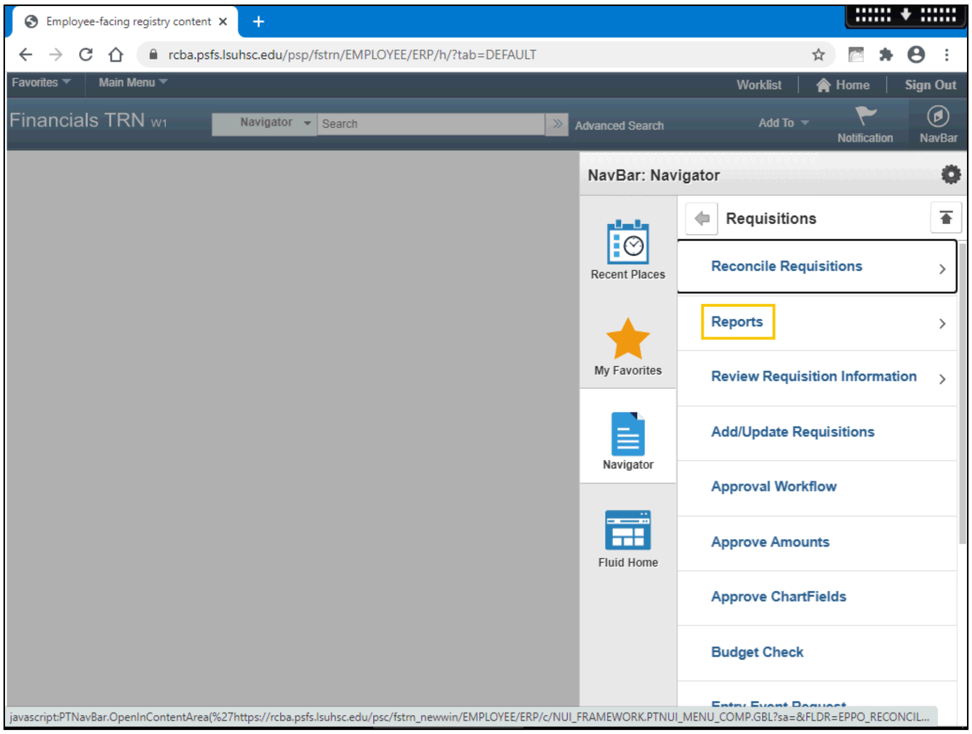
NOTE: All reports and processes are run using a "Run Control ID". You will need to create an ID the FIRST time you run a report or process. All subsequent times you will use "Search" to find your ID. You can create more than one ID.

Step	Action
1.	You 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***. ***NOTE: See the Print a Requisition using the Process Scheduler topic in the <u>Uncheck Hold From Further Processing and Print a Requisition</u> section for instructions on printing a requisition using the Process Scheduler.***

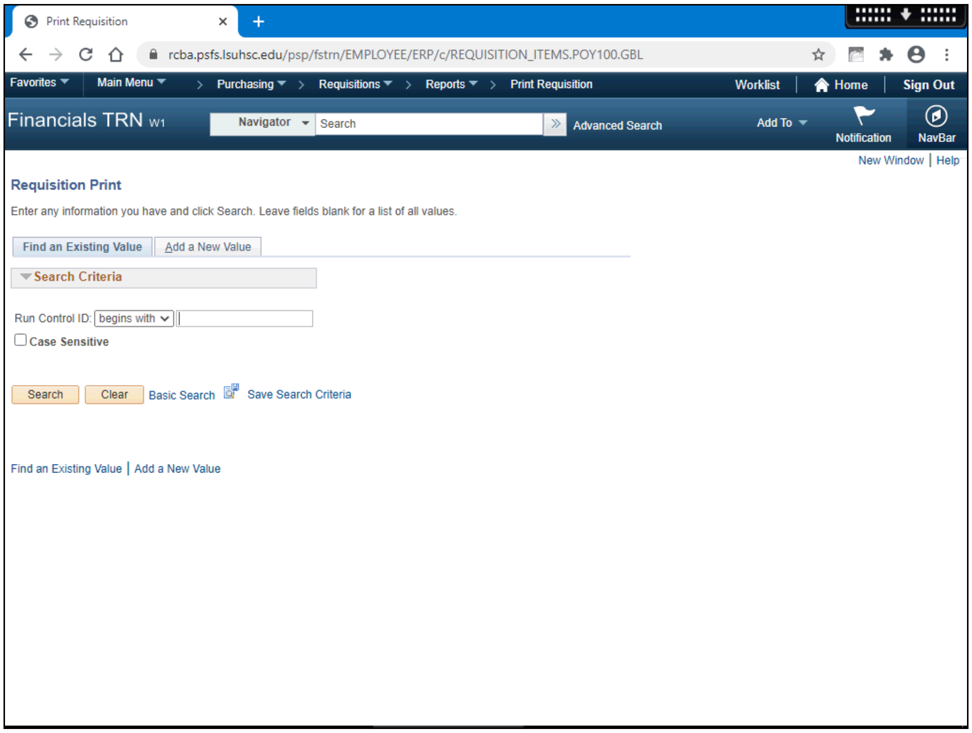


Step	Action
2.	Click the **NavBar** button. 
3.	Click the **Navigator** button. 
4.	Click the **Purchasing** menu. Purchasing

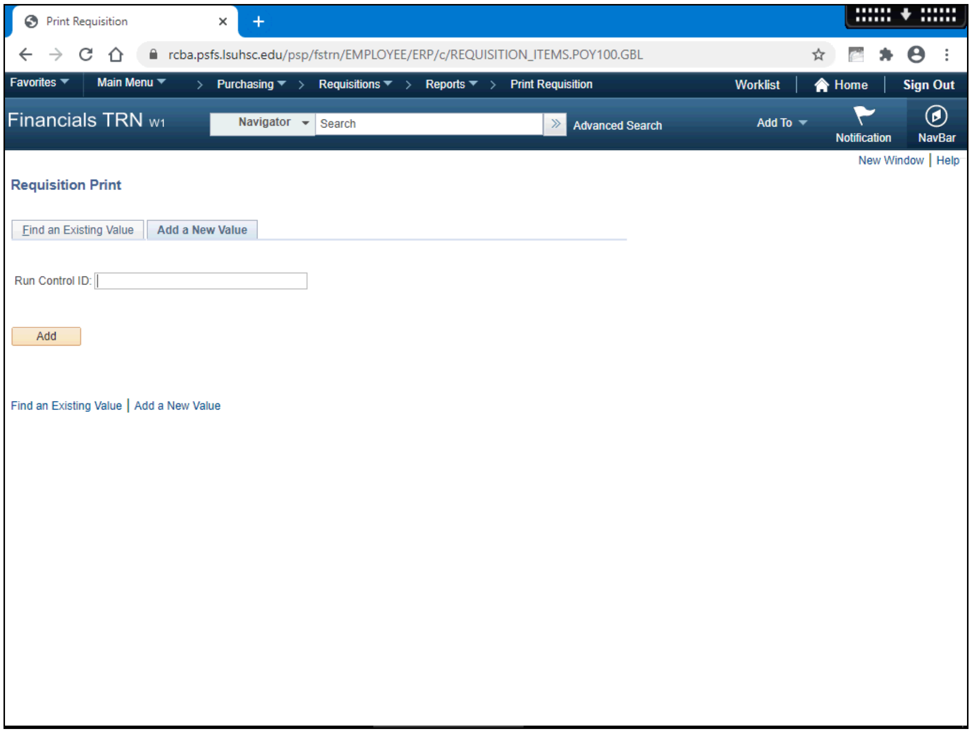
Step	Action
5.	Click the **Requisitions** menu. Requisitions



Step	Action
6.	Click the **Reports** link. Reports
7.	Click the **Print Requisition** link. Print Requisition

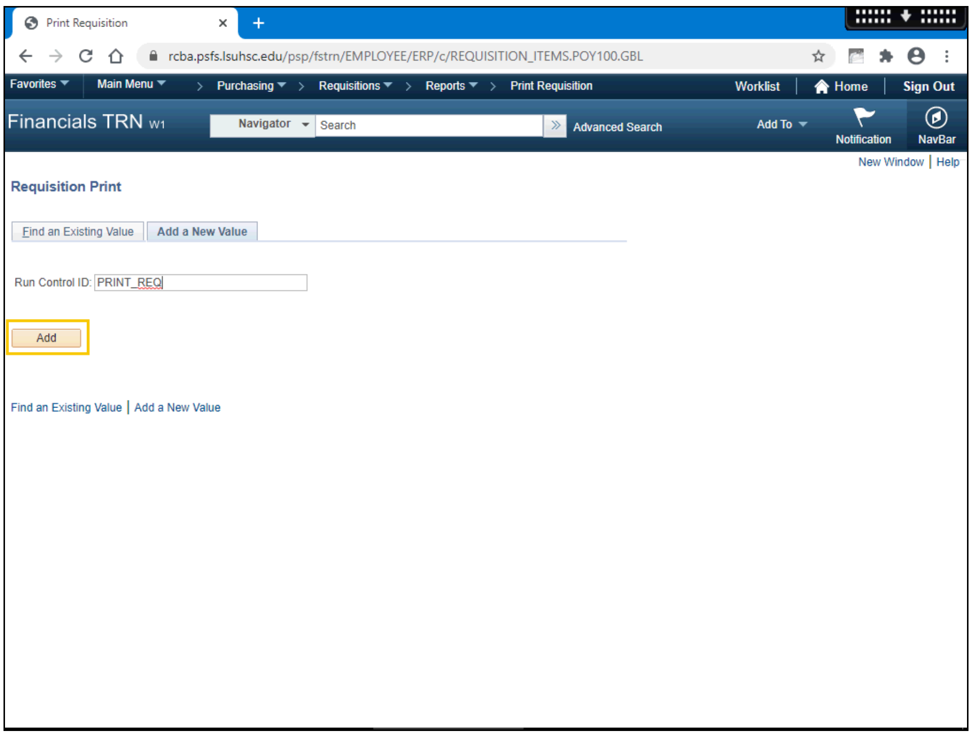


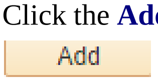
Step	Action
8.	The first time you use ***Requisition Print***, you will need to create a Run Control ID in order to access the ***Process Scheduler***. The system defaults you into the ***Find an Existing Value*** tab. Clicking the ***Search*** button will display any existing run control ids. Create 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.***
9.	Click the **Add a New Value** tab. 

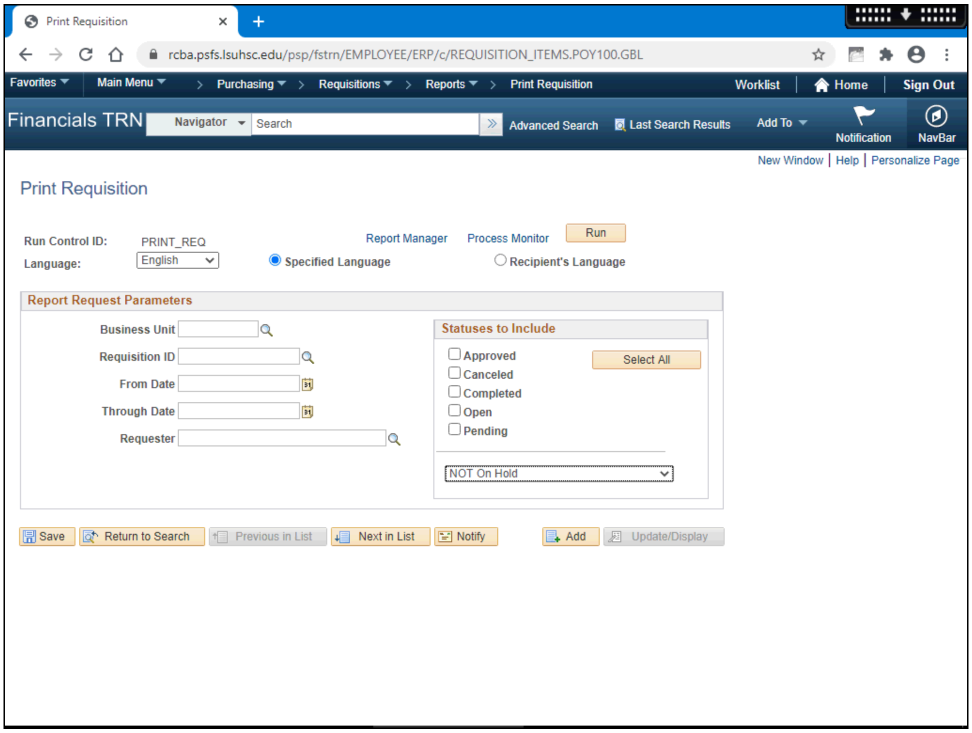


Step	Action
10.	**Run Control ID** A Run Control ID is used to access the Process Scheduler. You may save parameters to a particular process or report to a Run Control ID to minimize data entry when running recurring processes and/or reports. A **Run Control ID** is: • Specific to an end-user's Operator (User) ID; • Can be entered in upper case, lower case, or mixed case; • Can be up to 30 characters long; • Characters can be either numbers or letters, but **cannot** include any **special characters** (e.g., $, #, &); • **Cannot** contain **blank** spaces; and • **Must** be one continuous string of characters **or** words **must** be linked by an underscore.
11.	Examples of Run Control IDs that **meet** the requirement: 1. **PRINT_REQ** can be used since an underscore links the two words together; or 2. **PRINTREQUISITION** can be used because it is one string of characters.
12.	Examples of Run Control IDs that **do not meet** requirements: 1. **PRINT REQ** because there is a blank space between the two words; or 2. **PRINT_REQUISITION'S** because a special character, an apostrophe, is used.

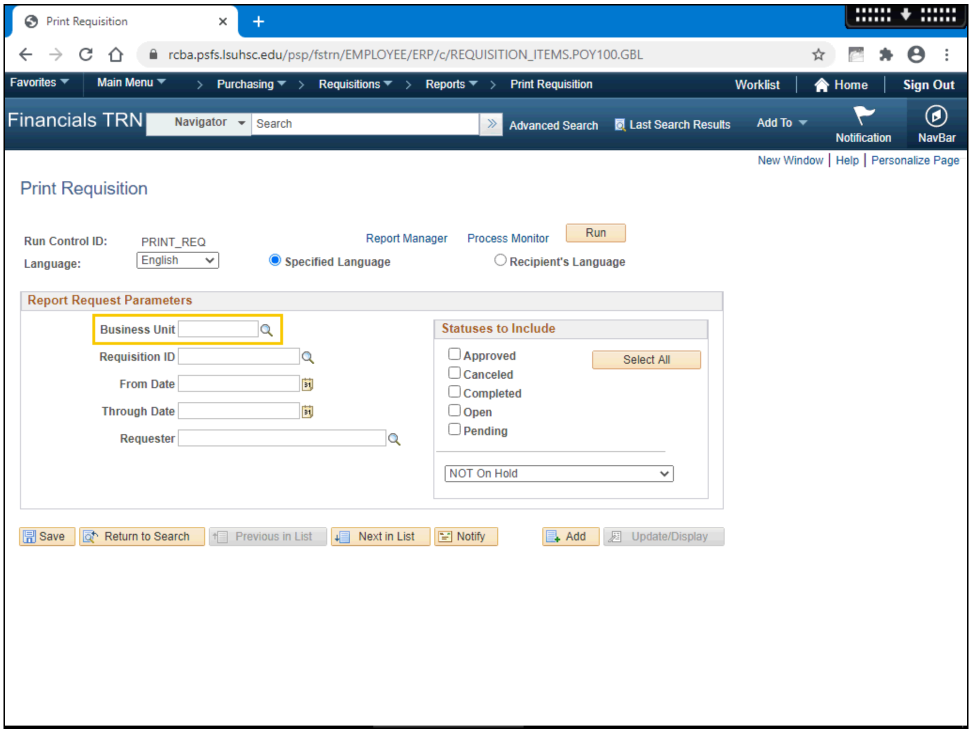
Step	Action
13.	A Run Control ID **must** be created to run many reports in PeopleSoft. If a Run Control ID is created that is unique to a specific report, it can be used to run the specific report in the future. The advantage to this method is that all report parameters are saved with the run control. When running future reports, a user would only have to change the Requisition ID instead of entering all report parameters again. If you create one Run Control ID to use for all reports, then you will need to change all report parameters each time a report is run.
14.	Enter the desired information into the **Run Control ID** field. Enter "**PRINT_REQ**".



Step	Action
15.	Click the **Add** button. 

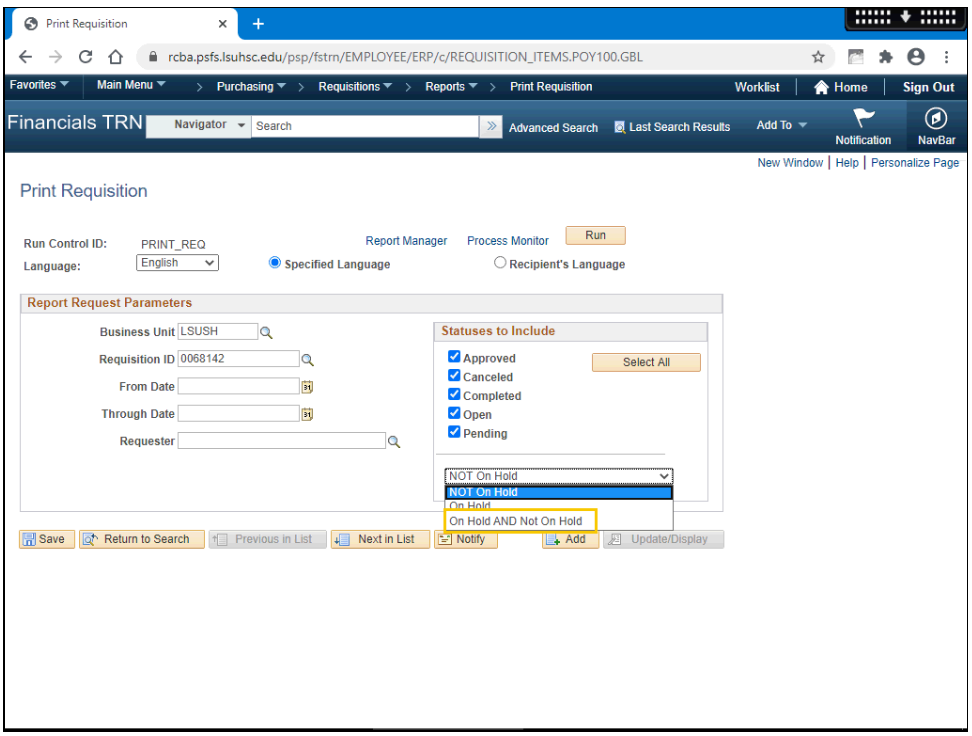


Step	Action
16.	The parameters you enter on the Print Requisition page will be saved to the specified Run Control ID. When running the report in the future, the user will only change the Requisition ID; all other fields will remain as defaulted. You **must** save your parameters in order for your parameters to default in the future. ***NOTE: See the Uncheck Hold and Print Requisition topic for instructions on print your report.***

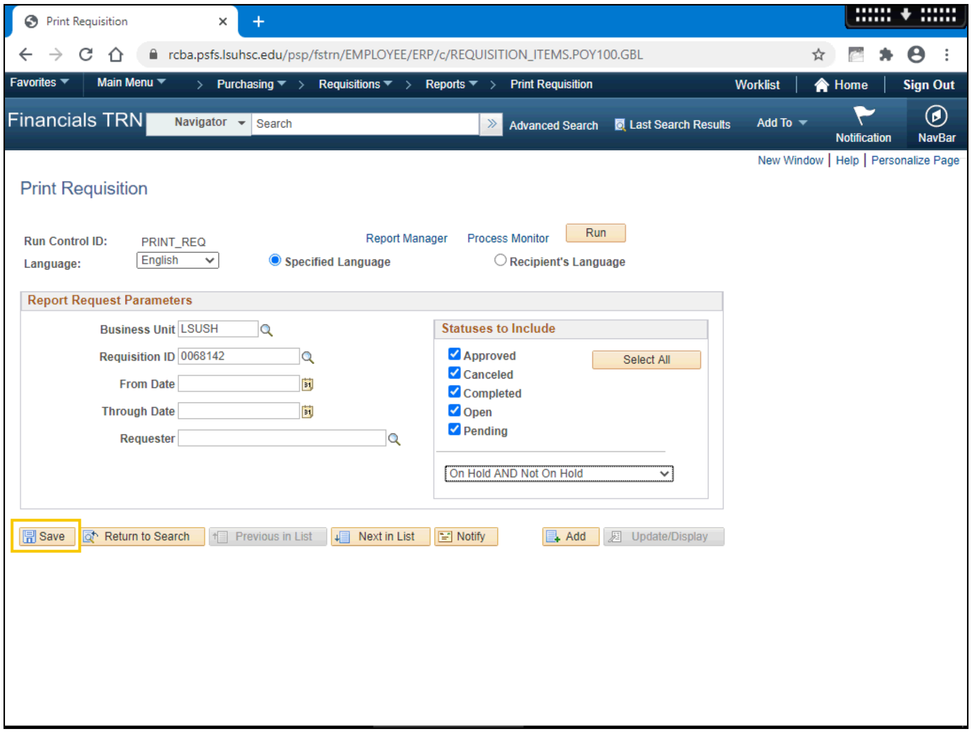


Step	Action
17.	If your Business Unit does not default, it **<u>must</u>** be entered. Enter the desired information into the **Business Unit** field. Enter "**LSUSH**".
18.	Enter the desired information into the **Requisition ID** field. Enter "**0068142**".
19.	***NOTE: Do <u>not</u> enter From Date, Through Date, or Requester. If this information is entered incorrectly, it may prevent the requisition from printing. Since requisitions <u>must</u> <u>be</u> <u>requested</u> <u>and</u> <u>printed</u> <u>ONE</u> <u>AT</u> <u>A</u> <u>TIME</u>, entering the Requisition ID will be sufficient to identify the requisition.***
20.	**Statuses to Include** If you select the wrong status, it will prevent the requisition from printing (i.e.g, the end-user checked Pending, but the requisition is already Approved). By clicking the **Select All** button, you will be able to print the requisition in any status. Click the **Select All** button. Select All

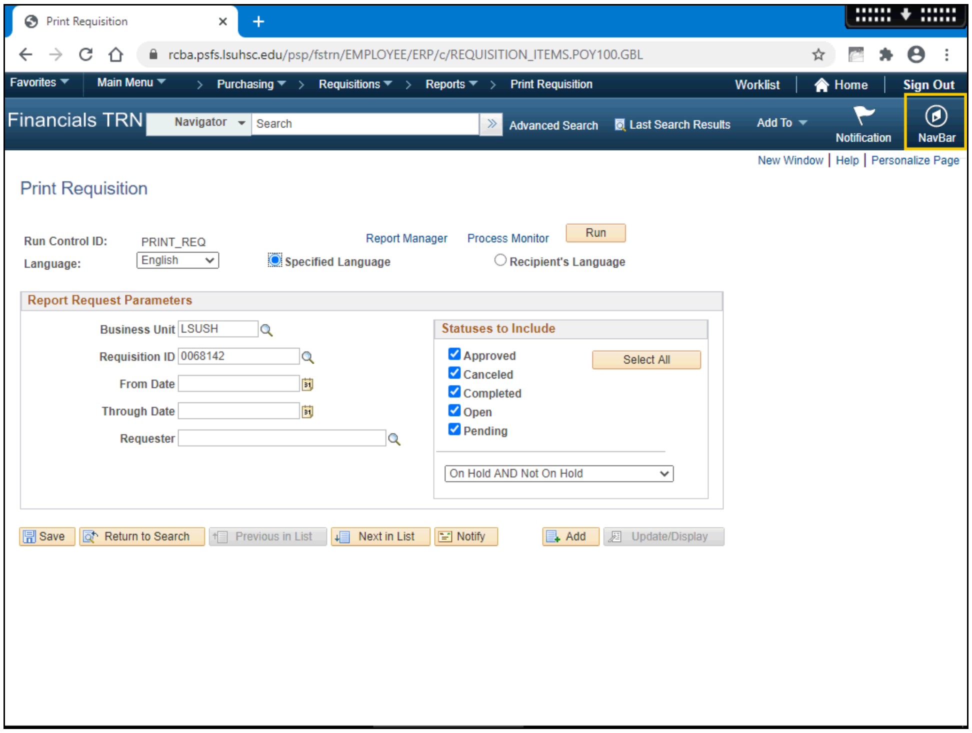
Step	Action
21.	**Statuses to Include** (continued) As previously stated, if you select the wrong status it will prevent the requisition from printing. In this case, using the default ***NOT On Hold*** rather than ***On Hold AND Not On Hold***. If the requisition is on hold, meaning the ***Hold From Further Processing*** box is checked on the ***Maintain Requisition*** page, the requisition would not print using the defaulted ***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.
22.	Click the button to the right of the **NOT on Hold** field. 

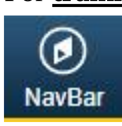


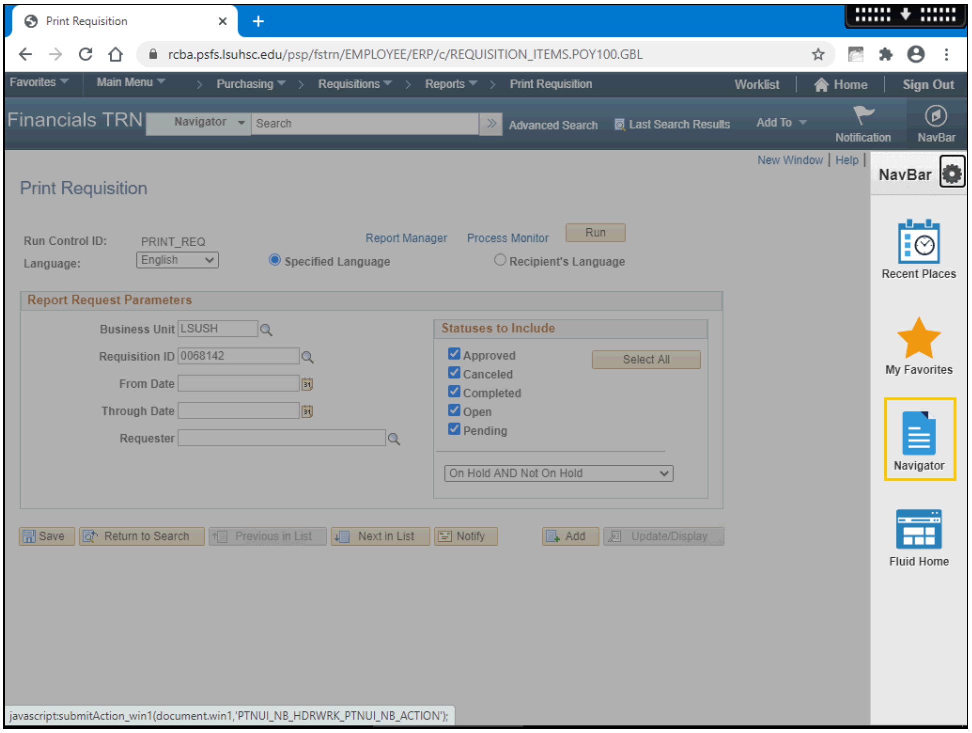
Step	Action
23.	Click the **On Hold AND Not On Hold** list item. On Hold AND Not On Hold

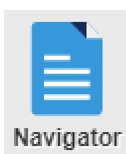


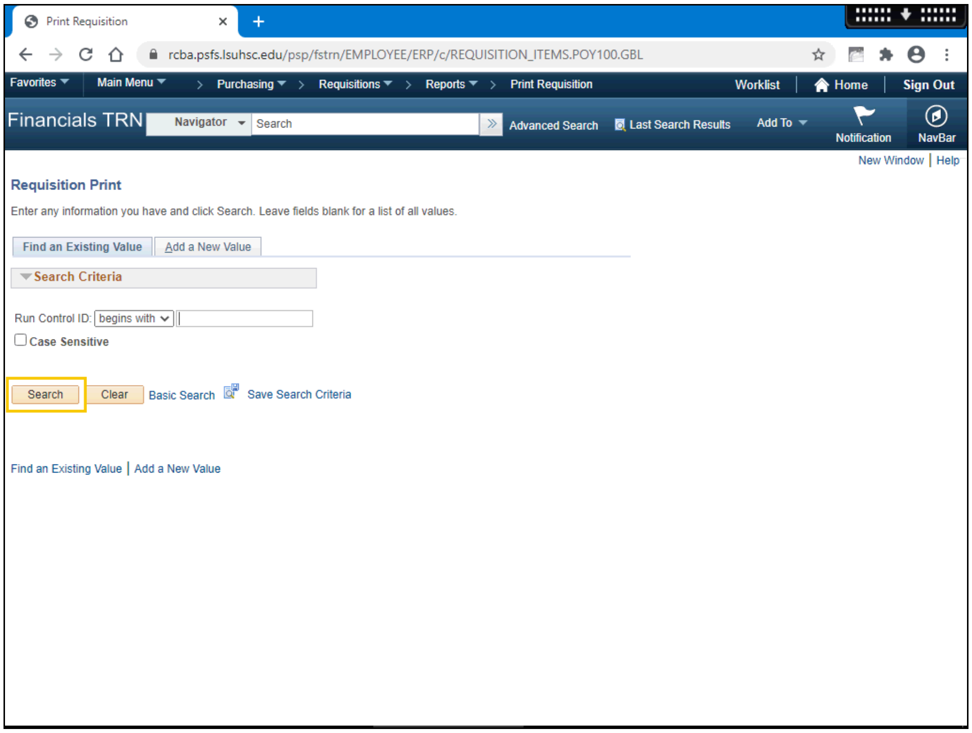
Step	Action
24.	Click the **Save** button. ***NOTE: Parameters <u>must</u> be saved in order for them to default in the future.*** 



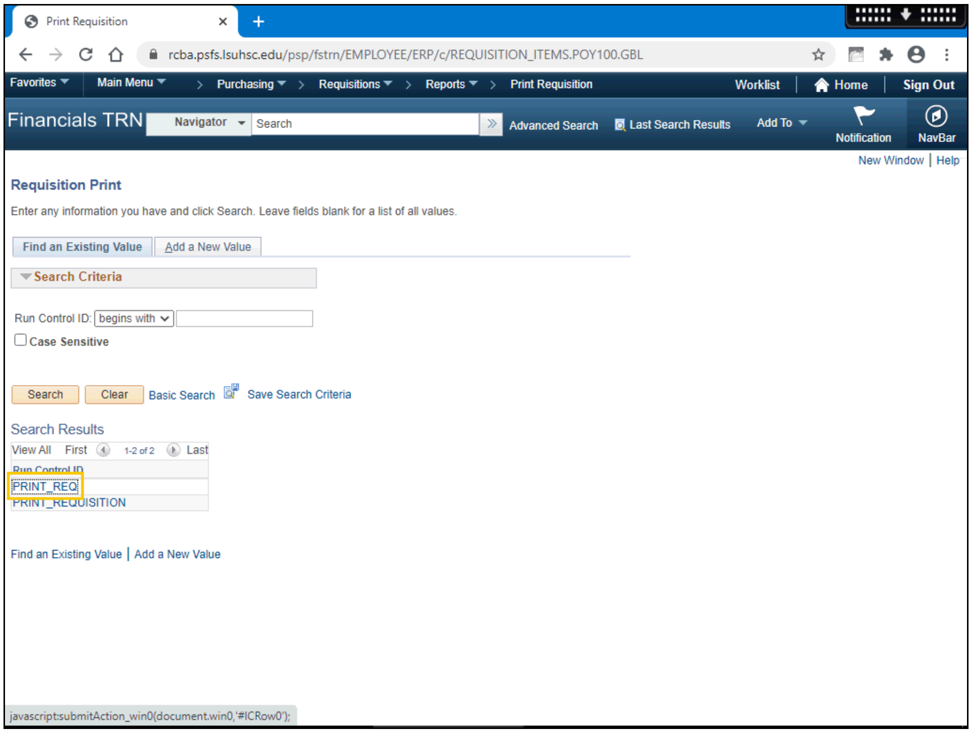
Step	Action
25.	***NOTE: After savings your parameters, you would click the Run button to begin the print process. You must access the Report Manager to view and print your report.*** ***See the Uncheck Hold From Further Processing and Print a Requisition topic for instructions on how to print a requisition.*** For **training purposes only**, click the **NavBar** button. 



Step	Action
26.	Click the **Navigator** button. 
27.	Click the **Print Requisitions** link. **Print Requisition**



Step	Action
28.	The system defaults you into the ***Find an Existing Value*** tab. Click the ***Search*** button for a list of existing ***Run Control IDs***. Click the **Search** button. 



Step	Action
29.	A list of available Run Control IDs will display. Once a Run Control is selected, the Print Requisition page displays the information from the most recent print request for that Run Control ID. ***NOTE: If you did not save your run control parameters, the Run Control ID was not saved and the run control will not display in your search results.*** Click the **PRINT_REQ** link. PRINT_REQ
30.	The most recent Print Requisition page displays.
31.	This completes ***Create/Find a Run Control ID***. **End of Procedure.**