ADDING A DEPARTMENT REQUISITION

The main thing to remember before you start entering a department requisition is that you can back yourself off of the requisition before a number is assigned and then you will have to start all over. Be sure you do not press the F2 key unless you are on an item page. If you are on the Department ship to page or the 1st page that shows the vendor name, you should not press F2. To move between these two pages you will use F10 & F11.

To Begin:
DR (ENTER)
AD (ENTER)
Then press "enter" again and this will fill in the Entry date and the Area Code.

Type the Date Needed (This should be a realistic date.)

Move your cursor to the *Account: and type in your account number and GL code.

Sample below shows what you should have typed in so far.

<table>
<thead>
<tr>
<th>Jul 16,08</th>
<th>- Add New Department Requisition -</th>
</tr>
</thead>
<tbody>
<tr>
<td>*FY,Req Nbr.:</td>
<td>*Type: RQ</td>
</tr>
<tr>
<td>*Requestor...: JERI DUPREE</td>
<td>*Account:</td>
</tr>
<tr>
<td>*Contact Name: JERI DUPREE</td>
<td>Buyer Phone:</td>
</tr>
<tr>
<td>Cntct Email.: <a href="mailto:gdupree@pilot.lsus.edu">gdupree@pilot.lsus.edu</a></td>
<td>Ext:</td>
</tr>
<tr>
<td>Contact Ph.: 318 797 5272 Ext:</td>
<td>Req Status: PI PEND ITEM</td>
</tr>
<tr>
<td>Calc Tot Amt:</td>
<td>Fin Status: PE PENDING</td>
</tr>
<tr>
<td>*Buyer ID....: TBA</td>
<td>Header Has 0 Acct(s) 0 Items</td>
</tr>
<tr>
<td>*ID./Addr.Seq:</td>
<td>Suggested Vendor---</td>
</tr>
<tr>
<td>Vendor Name...:</td>
<td>Header Has 0 Acct(s) 0 Items</td>
</tr>
<tr>
<td>Attention......:</td>
<td>Suggested Vendor---</td>
</tr>
<tr>
<td>Suite ........:</td>
<td>Header Has 0 Acct(s) 0 Items</td>
</tr>
<tr>
<td>P.O.Box .......:</td>
<td>Suggested Vendor---</td>
</tr>
<tr>
<td>Street .......:</td>
<td>Header Has 0 Acct(s) 0 Items</td>
</tr>
<tr>
<td>City, St., Zip:</td>
<td>Suggested Vendor---</td>
</tr>
<tr>
<td>Phone / Fax...:</td>
<td>Header Has 0 Acct(s) 0 Items</td>
</tr>
</tbody>
</table>

Notes: Dept: _ Buyer: _ Reject: _ Vendor: _ Attach.(Y/N): N Check: _

Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
help retrn quit Accts Add frwrd print left right main
To fill in the vendor information, do the following:

Put your cursor on the 1st space after "Suggested Vendor---*ID/Addr.Seq:"

Press F1

When the next page comes up type the vendors name on the line your cursor is blinking. Press enter and the page changes to the page that has your vendor’s information. Move your cursor anyplace on the line with your vendor’s name and press enter. The vendor information will propagate the suggested vendor on the requisition. If you do not know who the vendor will be “type” TBA on the line next to "Vendor Name:" or if your vendor is not on the list in the system, you should manually type your vendor’s name, address, telephone number & fax number in the suggested vendor section.

Sample below shows what should be filled in by now:

FIP300P1
Jul 16,08 - Add New Department Requisition - 2 more >
FY,Req Nbr..: *Type: RQ Entry Dt: 07/16/2008
*Requestor...: JERI DUPREE_____________________________ Dt.Needed: 12/31/08__
*Contact Name: JERI DUPREE_____________________________
Cntct Email.: gdupree@pilot.lsus.edu__________________ Fax Nbr: 318 ___ ___
Contact Ph..: 318 797 5272 Ext: _____ Req Status: PI PEND ITEM
Calc Tot Amt: ____________________________ Fin Status: PE PENDING
*Buyer ID....: TBA Buyer Phone: ______________________
*Account: 15784000 784700 00 64110 __ Header Has 0 Acct(s) 0 Items
Suggested Vendor--- *ID./Addr.Seq: 000000135 2___ (Optional) Addr Type: M

Vendor Name...: CORPORATE EXPRESS_______________________
Attention......: ________________________________________
Suite ........: ________________________________________
P.O.Box ......: ________________________________________
Street .......: 7150 EXCHEQUER__________________________
City, St., Zip: BATON ROUGE, LA 70809______________
Phone / Fax...: /_____________ ________________________

Orig Req: __ Prev Req: ____________________________
Notes: Dept: _ Buyer: _ Reject: _ Vendor: _ Attach.(Y/N): N Check: _
Direct Command: ____________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
help retrn quit Accts Add frwrd print left right main

After you have done the above, Press the F11 key. This will take you to page 2 of the requisition.

(continued on next page)
Type in your department's name.

Go to *Campus ID and fill in the information as shown below.

Always type "1" "1" behind Campus ID and then type your Building ID and then tab over and type your room number with three"0" in front of it.

(The next step is done on this same page, so don't leave this page yet.)

Sample below shows what this should look like.

FIP300P1  ***** FINANCIAL SYSTEMS *****  FIP300M2
< 1 more  - Add New Department Requisition -  1 more >

FY,Req Nbr.:                 Type: RQ                   Entry Dt: 07/16/2008

Delivery Dept/Name..: PURCHASING
*Campus ID..........: 1  1___
*Building ID........: AD__                            *Room: 000107

Ship To Address: *Code: CR
                    ____________________________________________
                    ____________________________________________
                    ____________________________________________
   PrePay&Add......: _                    Calc Tot Amt....:_
   Committed Bal...:

Purchasing Date.....:                      Board Date......:
Blanket Start Date..: __________           Bid Date........:
Blanket End Date....: __________           Bid Number......:
Orig Req:                  Prev Req:
Proy Num.......: __________

Direct Command:

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
   help retrn quit     Accts bkwrds frwrd print left right main

(continued on next page)
On the same page you are on, go to the space that says "*Ship To Address: *Code:"

Type in your department code in the space following this. If you do not know your department code, you can put your cursor on the blank and press F1 and a list of department codes comes up. You can move up and down this list by pressing the F8 & F7 keys. When you find your department, put your cursor on that line and press enter. This will propagate the ship to address.

Sample below of the ship to address completed

FIP300P1  ***** FINANCIAL SYSTEMS *****  FIP300M2
< 1 more - Add New Department Requisition - 1 more >

FY,Req Nbr.: 2009 00000175  Type: RQ STANDARD REQUIS  Entry Dt: 07/16/2008

Delivery Dept/Name..: PURCHASING______________
*Campus ID...........: 1  1___  L S U S
*Building ID.........: AD__     ADMINISTRATION BUILD   *Room: 000107

Ship To Address:  *Code: PU
LSU IN SHREVEPORT__________________________PrePay&Add......: 
PURCHASING______________________________Calc Tot Amt.....:
ADMIN. BLDG., ROOM 108________________________Committed Bal...:
ONE UNIVERSITY PLACE________________________
SHREVEPORT, LA 71115____________________
Purchasing Date.....:                      Board Date......:
Blanket Start Date..: __________           Bid Date.......
Blanket End Date....: __________           Bid Number.....:
Orig Req:                  Prev Req:          Proj Num.......: __________
Direct Command: ____________________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
help retrn quit Item Items Accts bkwrn frwrd print left right main
When you picked your ship to code and press enter, the screen probably (should have) changed back to page 1. Look at the top left corner (sample highlighted below) and you will see your requisition number. Write the requisition number down on a piece of paper. If you inadvertently back off of this requisition before you have finished, you can do a DR, VI and enter the requisition number and open the requisition back up to complete it.

FIP300P1  ***** FINANCIAL SYSTEMS *****  PIP300M1
Jul 16,08 - Add New Department Requisition - 2 more >
*FY,Req Nbr.: 2009 00000175 *Type: RQ STANDARD REQUIS Entry Dt: 07/16/2008
*Requestor...: JERI DUPREE________________________ Dt.Needed: 12/31/2008
*Contact Name: JERI DUPREE________________________
Cntct Email.: gdupree@pilot.lsus.edu________________ Fax Nbr: 318 ____ ___
Contact Ph..: 318 797 5272 Ext: ____ ____ Req Status: PI PEND ITEM
Calc Tot Amt: ___________________ Fin Status: PE PENDING
*Buyer ID....: TBA TO BE ANNOUNCED Buyer Phone: Ext:_____________________
*Account: 15784000 784700 00 64110 ____ Header Has 1 Acct(s) 0 Items
Suggested Vendor--- *ID./Addr.Seq: 000000135 2__ (Optional) Addr Type: M
Vendor Name...: CORPORATE EXPRESS______________
Attention......: __________________________________
Suite ..........: __________________________________
P.O.Box ......: __________________________________
Street .......: 7150 EXCHEQUER____________________
City, St., Zip: BATON ROUGE, LA 70809____________
Phone / Fax...: /________________________________
Orig Req:                  Prev Req:________________________
Notes: Dept: _ Buyer: _ Reject: _ Vendor: _ Attach.(Y/N): N Check: ___
Direct Command: __________________________________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
help retrn quit Item Items Accts Add print left right main
8024 - Dept Req Header 2009-00000175 modified successfully

After all of the above is done and a requisition number is assigned, do the following to add item(s)

(continued on next page)
Press F4

The item page will come up. Press "Enter" and your account number and unit measure will automatically propagate.

You will now manually (using your tab key or arrow key) move to the quantity, unit price and the text and fill in the appropriate information. You may also change the Unit/Measure from each to whatever unit measure you are ordering (box, case, etc). You can do this by pressing the F1 key when you are on the blank behind *U/M: and using F7 or F8 to move up or down the list. When you find the unit you want put your cursor on that selection and press enter. Look at the bottom of the page to be sure the wording "added successfully" is there. If so, you can now press F4 to add another item the same way you added the first item. Check each time before leaving the screen that it says "added successfully" or "modified successfully".

Sample of what you will fill in on the item page(s)

*Action (A,CL,D,M,N)  __  YR,Req Nbr: 2009 00000175  Item: 1__ of 1
Quantity..: 1.0000  Unit Price: 10.0000
*Account...: 15784000 784700 00 64110  *U/M: EA
Total.....: 10.00  *Discount..: 
*Commodity.: _____________  *Std Text..: _______________
Deliver Dt: __________  Status....: PE PENDING
Text Line Nbr: 1__ of 1  ------ Item Description ------------------------
1  DIVIDERS
2
3
4
5
6
7
8

Dept Notes: _  Freight: _
Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
help retrn quit Add Canc1 Accts bkwr dfwrd main

1783 - Item added successfully ,Press PF4 to 'Add' next Item

When you are through adding the items, do a F2 until you are on page 1 (The page with the vendor's name on it). Stay on that page for the last step which is sending the requisition for approval.

(continued on next page)
You are now ready to send the requisition for approval. **Note:** Be sure you are on the page with the suggested vendor on it and not on an Item page. Press F8 and a screen as shown below will appear. Type "yes" and then Enter and the requisition will be sent for approval.

FIP300P1          ***** FINANCIAL SYSTEMS *****          FIP300M1

Jul 16, 08 - Add New Department Requisition - 2 more >
*FY,Req Nbr..: 2009 00000175 *Type: RQ STANDARD REQUIS Entry Dt: 07/16/2008
*Requestor...: JERI DUPREE_________________________ Dt.Needed: 12/31/2008
*Contact--------Send Department Requisition for Approval---------
Cntct E| |
Contact| TO CONFIRM THE Send For Approval FOR ALL ITEMS |
Calc To| in Department Requisition: 2009-00000175 |
*Buyer I| |
*Account| Type in 'YES' here ==> YES |
Suggest| |
<table>
<thead>
<tr>
<th>To Cancel PRESS PF2 for 'retrn'</th>
</tr>
</thead>
</table>
P.O.Box ......: ________________________________________
Street .......: 7150 EXCHEQUER______________
City, St., Zip: BATON ROUGE, LA 70809___________________
Phone / Fax...: /_______________________________________

Orig Req:                  Prev Req:
Notes: Dept: _ Buyer: _ Reject: _ Vendor: _ Attach.(Y/N): N Check: _
Direct Command:__________________________
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
help retrn quit Item Items Accts Add SndAp print left right main
8026 - Dept Req Header 2009-00000175 displayed successfully

After you sent for approval, the statement shown below will be at the bottom of your screen.

1726 - 'Send for Approval' Successfully completed

You can't make any changes to your requisition after it is sent for approval unless the person that is to approve the requisition rejects it which will send it back to you.

A requisition will not be in purchasing until after it has been approved by all employees designated as approvers for a particular account. You can tell if purchasing has the requisition by opening your department requisition and key F11 two times. If it says **PURCH REQ** it is at purchasing.

1__ of 6 Status                          0 of 0 Purchasing Action
----Status Change History-------  ---Purchasing Activities
By User    On Date        Status
DSALTER 08/05/11 PI PEND ITEM
DSALTER 08/05/11 PE PENDING
DSALTER 08/05/11 PA PEND APPRO
JMCCREY 08/05/11 OP OPEN
JMCCREY 08/05/11 PR **PURCH REQ**