Managing eProcurement Requisitions
LSUNO Only

Version Date: September 11, 2026

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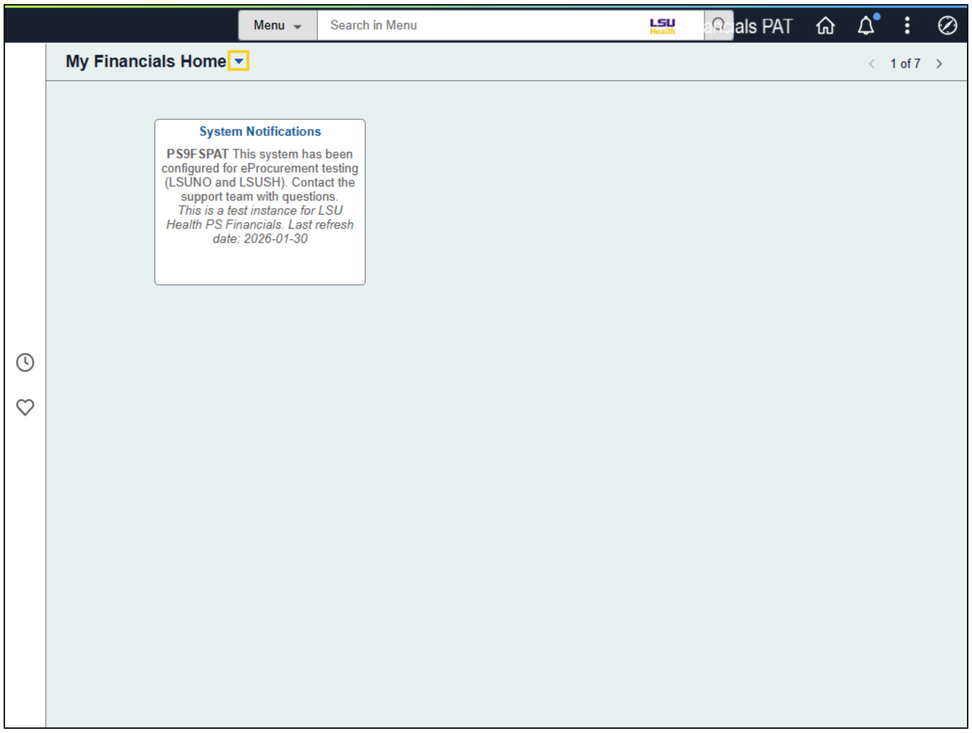
Managing eProcurement Requisitions – LSUNO Only

eProcurement Basic Navigation & information

Procedure

In this topic you will learn **eProcurement Basic Navigation and Information**.

Step	Action
1.	*******NOTICE******* For ***training purposes only***, the screen shots used in this topic were taken in the ***FIN PAT*** database. Users will *enter eProcurement information* into the **FIN PRD (Production)** database.



Step	Action
2.	**Navigation to eProcurement** The ***eProcurement*** tile is located on the **LSU Health Financials** homepage. Click the **My Financials Home** dropdown button to activate the menu.
3.	**Navigation to eProcurement** (continued) Click the **LSU Health Financials** menu. 
4.	**Create Requisition and eProcurement Tiles** Users can access the ***Create Requisition*** tile directly from the **LSU Health Financials** homepage. However, the same tile can also be accessed by selecting the **eProcurement** tile. **NOTE:** ***The Create Requisition tile is for creating new requisitions only. No other actions (e.g., edit, approve, etc.) will be performed using this tile.*** For **training purposes only**, click the **eProcurement** tile.

Step	Action
5.	**My Requisitions and Change Requests Tiles** The **My Requisitions** tile is used for *performing new tasks* on an **existing requisition.** ***Actions*** *such as edit, approve, cancel and print will be performed using* ***My Requisitions****.* The **Change Requests** tile allows users to *view, monitor, and check the approval status of requested changes on existing Purchase Orders (POs) or requisitions.* **Change Requests** can be created by the user if *specific field(s)* need to be *adjusted* - such as unit price, quantity, or shipping status.
6.	**Navigating on PeopleSoft Pages** The **Tab** key on your keyboard is *used to move from field to field* within PeopleSoft. The **Enter** key acts as a *Save button*, so it <u>cannot</u> be used to move from field to field on a page. ***NOTE: Use only the buttons and links provided <u>on</u> the PeopleSoft pages.*** ***<u>Do</u> <u>not</u> <u>use</u> the Back and Forward arrows on your browser.***
7.	**What is an eProcurement Requisition?** An **eProcurement** requisition is a request for items to be ordered from a supplier. This creates a pre-encumbrance in the PeopleSoft system which is an intent to buy a product or service. It is a commitment to a department's budget, but it is <u>not</u> final and binding with the supplier. **eProcurement** allows users to create, review, edit, approve or cancel a requisition.
8.	**Approve & Budget Check** Once the requisition is entered into the PeopleSoft system, *two (2) things* **<u>must</u> <u>occur</u>** for Purchasing to be able to ***generate a Purchase Order*** to the supplier in the PeopleSoft system: **1.** The requisition **<u>must</u>** be **approved**. **2.** The requisition **<u>must</u> <u>pass</u>** the **budget check** process. ***Budget Checking*** ensures that financial obligations and expenditures do <u>not</u> exceed budget limits. Controls are created to permit only those transactions that are applied to correct calendar periods, as well as to the correct account types and ChartString combinations. ***Budget Checking*** a requisition also verifies that the allocated funds are still available before a liability is created. In short, the **Budget Check** process verifies the ChartString entered in the requisition is valid and that the funds are available for the ChartString.

Step	Action
9.	**Elements of a Requisition** There are **four (4) basic elements** that *comprise* a *requisition*: **1.** Headers **2.** Lines **3.** Schedules **4.** Distributions ***NOTE: Each requisition can have only one (1) Supplier and one (1) header. However, the requisition can have multiple lines. Each line can have multiple schedules, and each schedule can have multiple distributions.***
10.	**Request for Quote** Louisiana State Law requires that every purchase **above $10,000 -** including freight and handling **-** ***must go out for bid***. Purchases made under the *Governor's Executive Order for Small Purchases* are the **exception** to this rule. **NOTE: See your Buyer for detailed information about the bid process (i.e., the price thresholds, required quotes from Suppliers and items that require and do not require bids, etc.) Users may also review the Executive Order for Small Purchases on the Louisiana Office of State Purchasing web site for information about the bid process.**
11.	This completes ***eProcurement Basic Navigation and Information***. **End of Procedure.**

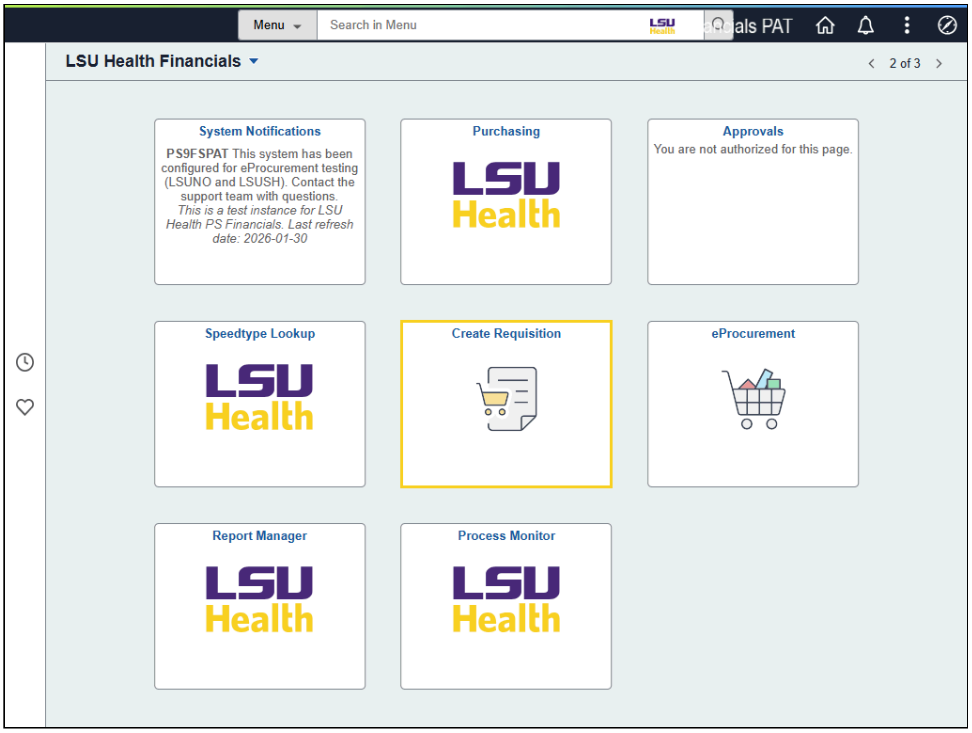
Create a Requisition

Enter Requisition Defaults for a Punchout Requisition

Procedure

In this topic you will learn how to use **Enter Requisition Defaults for a Punchout Requisition**.

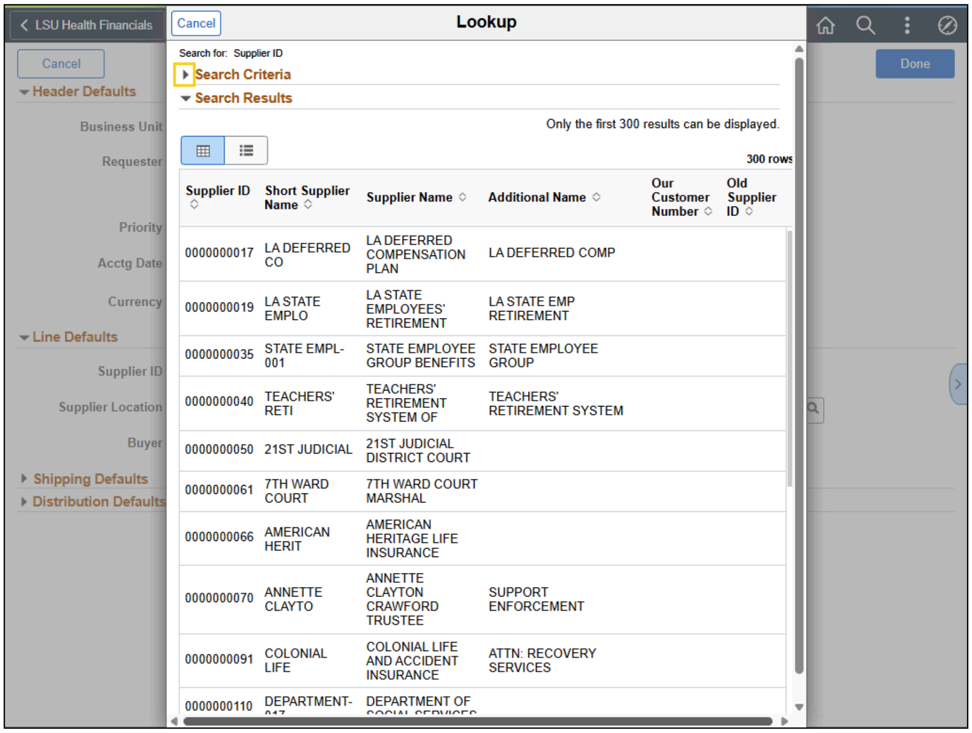
Step	Action
1.	********NOTICE******** ***The Buyer names, Suppliers, and other values being shown in this exercise are for demonstration purposes only. When working in Production, users must enter their requisition information specifically for their department.***



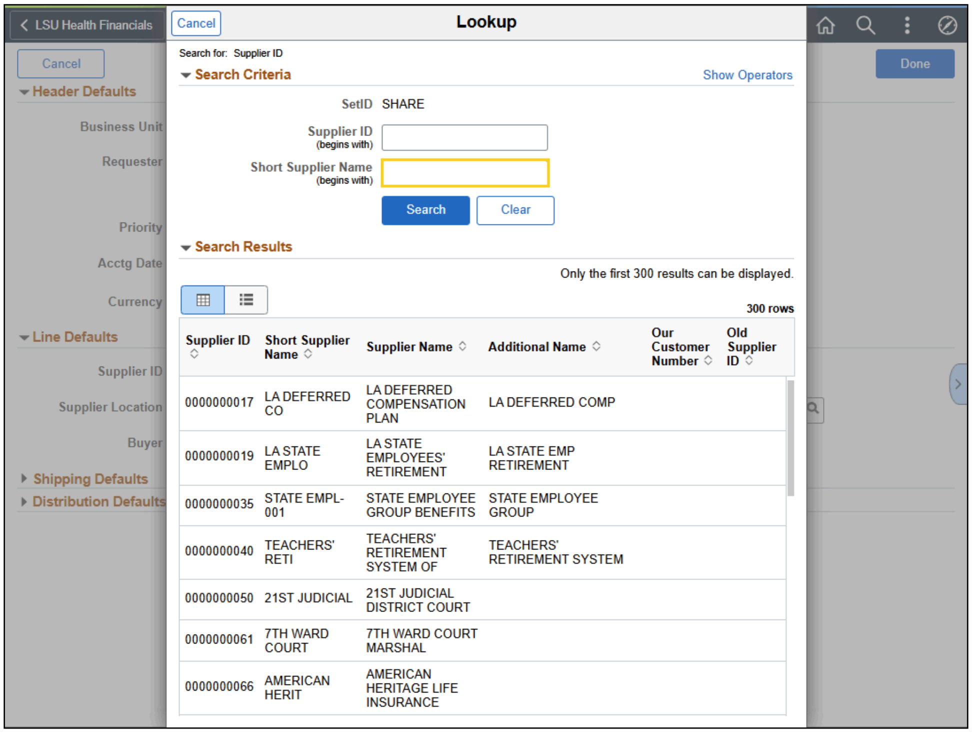
Step	Action
2.	**Create Requisition** Begin by selecting the ***Create Requisition*** tile from the **LSU Health Financials** homepage. Click the **Create Requisition** tile.
3.	**Create Requisition** *******IMPORTANT******* ***YOU <u>MUST</u> ENTER REQUISITION DEFAULTS BEFORE ENTERING LINE ITEM INFORMATION.***
4.	**Requisition Defaults for Punchout and Special Request Requisitions** The **Requisition Defaults** page is displayed. The **Requisition Defaults** page is where *initial values for the requisition* can be set. W*hichever values are entered on this page will be present in the requisition going forward.*

Step	Action
5.	**Requisition Defaults for Punchout and Special Request Requisitions** (continued) ***NOTE: There are specified fields that are considered <u>required for completing a Punchout requisition</u>. These fields are:*** • **Acctg Date -** *will only be changed if items will be charged in **new Fiscal Year*** - located in **Header Defaults** section • **Supplier ID -** located in **Line Defaults** section • **Buyer -** located in **Line Defaults** section • **Ship To -** located in **Shipping Defaults** section • **Due Date** - located in **Shipping Defaults** section • **Accounting tag / chartfields -** located in **Distribution Defaults** section • **Account -** located in **Distribution Defaults** section
6.	**Requisition Defaults for Punchout and Special Request Requisitions** (continued) ***NOTE: There are other fields that are considered <u>optional</u> - but highly recommended - for entering information. These fields are:*** • ***Requisition Name*** - located in the **Header Defaults** section • ***Attention*** - located in the **Shipping Defaults** section
7.	**Requisition Defaults for Punchout and Special Request Requisitions** (continued) ***NOTE: Category and Unit of Measure (UOM) are in the Line Defaults section. These fields will not be populated by the user for Punchout requisitions. The Category and UOM will default onto the punchout requisition based on the item(s) selected from the supplier's ePro catalog.***
8.	**Header Defaults** The ***Header Defaults*** section of the **Requisition Defaults** page contains information that will be found in the ***Header*** (top) section of the requisition when printed. *Default setting can be changed by the user if needed.* The user's ***Requester ID*** will default into the **Requester** field. If it does **<u>not</u> <u>default</u>**, do **<u>not</u> <u>continue</u>** with the requisition; c*ontact Purchasing for assistance.*
9.	**Header Defaults** (continued) It is *highly recommended* that a **Requisition Name** be entered for ***each Punchout and Special Request*** requisition created. If the **Requisition Name** field is *left blank*, the system will *auto-populate* the *requisition's id number* when it is saved / submitted. Enter the desired information into the **Requisition Name** field. Enter "**Gen dept supplies**".

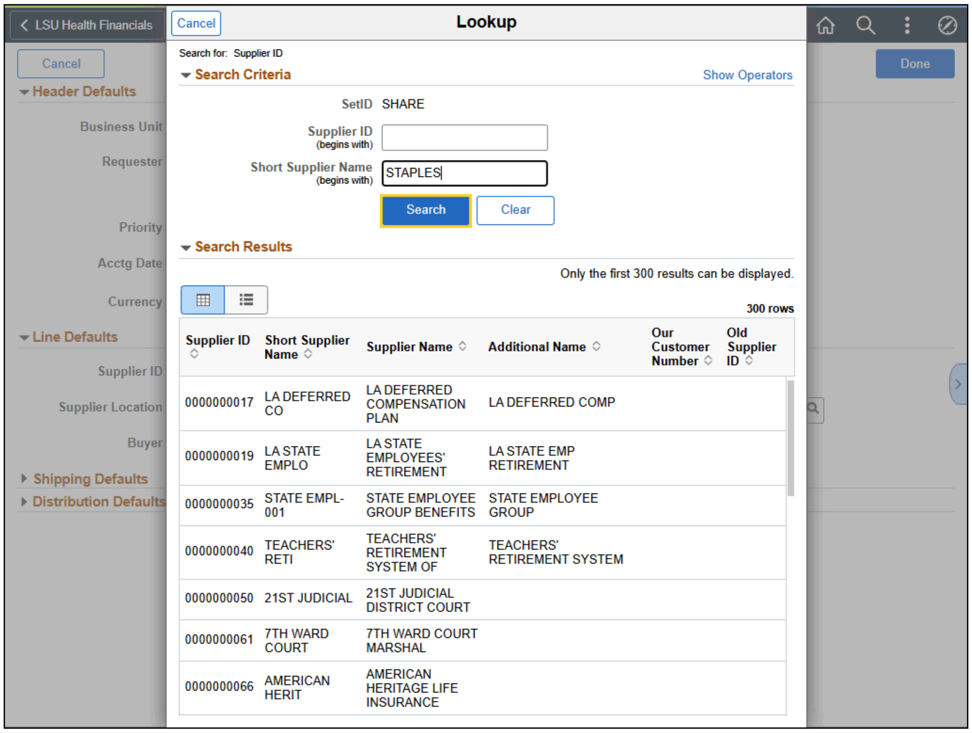
Step	Action
10.	**Header Defaults** (continued) The **Acctg (Accounting) Date** defaults to the *current* date. However, it may need to be adjusted depending on the ***time of year*** you are creating the requisition. For example, if you are entering a requisition for the ***next Fiscal Year***, the **Acctg Date** **<u>must</u>** be **<u>adjusted</u>** to ***07/01/XX or after*** to ensure the requisition is charged to the *correct budget period.* *For this exercise, the user will enter 07/01/26 as the Acctg Date.* Enter the desired information into the **Acctg Date** field. Enter "**070126**".
11.	**Line Defaults, Shipping Defaults, and Distribution Defaults** The sections for **Line Defaults, Shipping Defaults,** and **Distribution Defaults** are *set by PeopleSoft* to be **collapsed**. Select the **arrow** to the left *of each section name* to expand the section. ***NOTE: This step serves as an example for expanding a collapsed section. No other expand / collapse steps will be included in this topic or in all remaining topics.*** Click the **Line Defaults** arrow. 
12.	**Line Defaults** (continued) The **Supplier ID** and **Buyer** must be entered by the user. The ***Supplier Location*** will *default* into the field when the **Supplier ID** is entered / selected. Click the **Look up Supplier ID** button. 

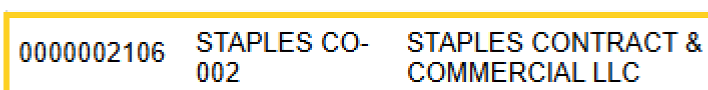


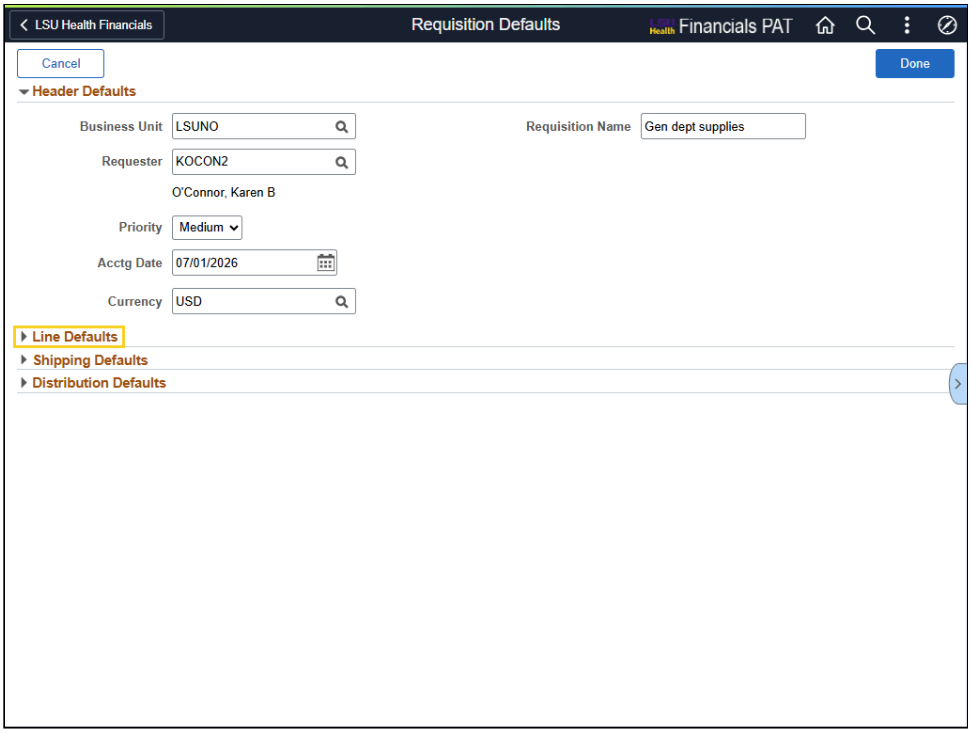
Step	Action
13.	**Search Criteria Section** ***NOTE: The Search Criteria section is <u>set by PeopleSoft</u> to be collapsed. Users must expand the section on <u>all Lookup</u> pages to utilize search options. Search options will vary based on the Lookup page being accessed.*** ***NOTE: This step serves as an example for expanding / collapsing sections. No other expand / collapse steps will be included in this topic or in all remaining topics.*** Click the **Search Criteria** arrow. 



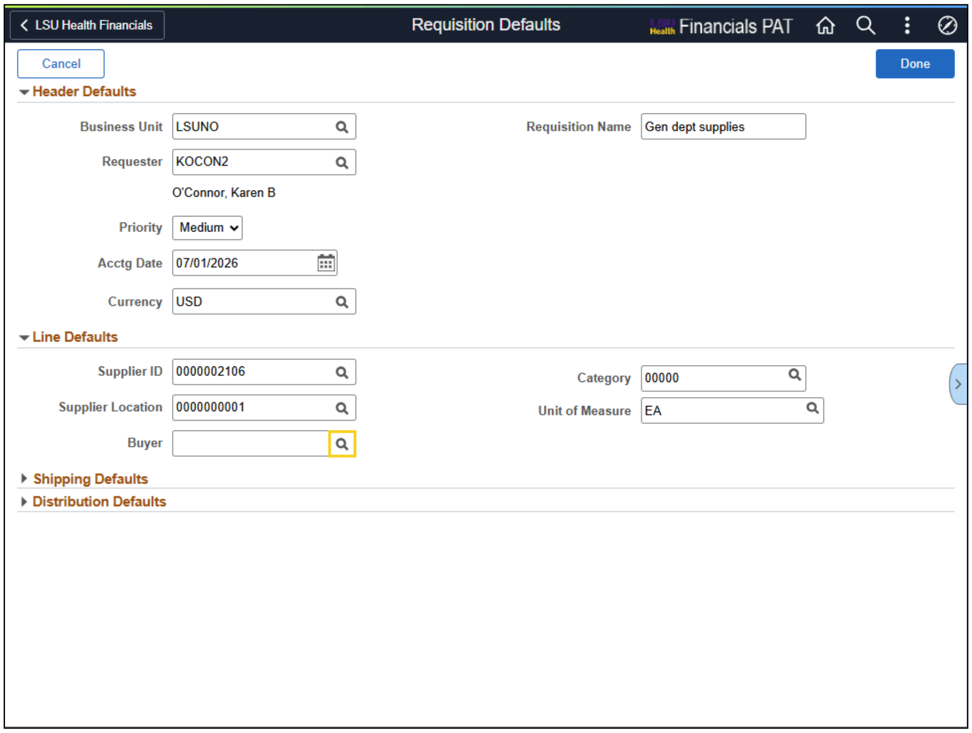
Step	Action
14.	**Search Criteria Section** (continued) *In this exercise, Staples will be used as the Supplier.* Enter the desired information into the **Short Supplier Name** field. Enter "**STAPLES**".



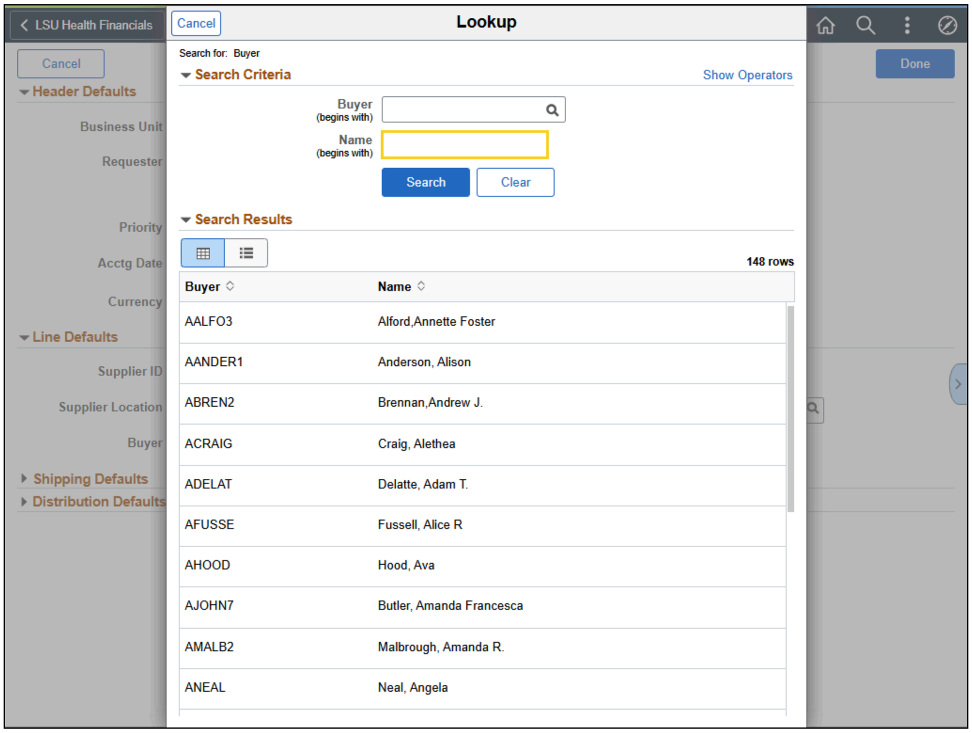
Step	Action
15.	**Search Criteria Section** (continued) Click the **Search** button. 
16.	**Search Criteria Section** (continued) ***NOTE: The 0000002106, STAPLES CO-002, STAPLES CONTRACT & COMMERCIAL LLC will be used by LSUNO when ordering items using ePro.*** Click the **0000002106 - STAPLES CO - 002** button. 



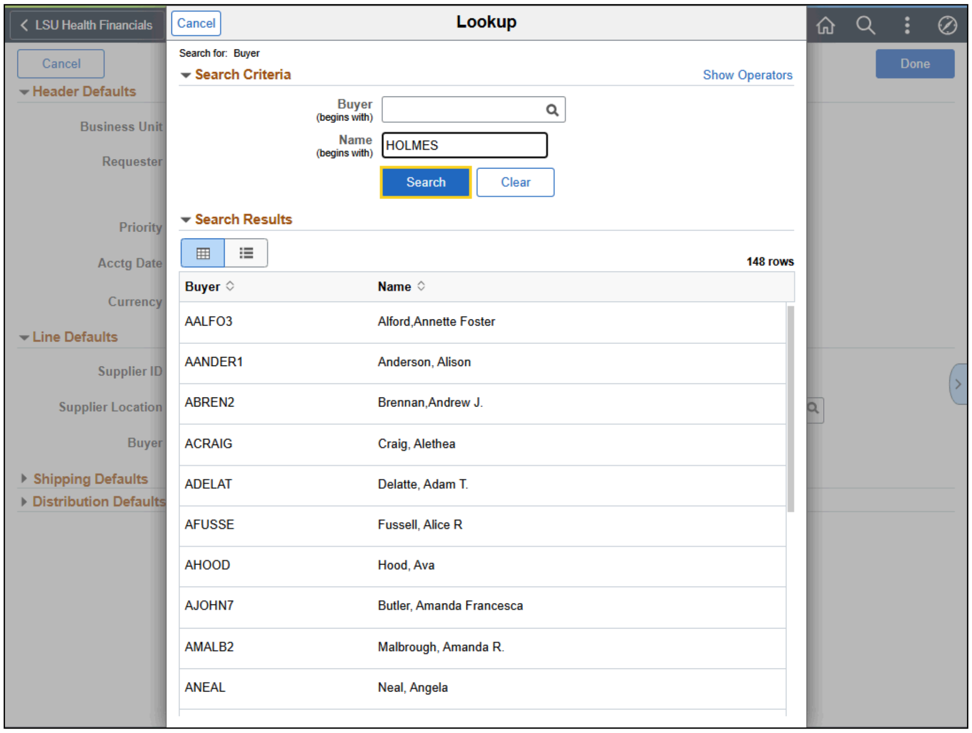
Step	Action
17.	**Line Defaults** (continued) ***NOTE: The Line Defaults section is set by PeopleSoft to be collapsed. Users will be required to re-open the Line Defaults section each time the Lookup feature is used.*** ***NOTE: This step serves as an example for expanding collapsed section. No other expand / collapse steps will be included in this topic or in all remaining topics.*** Click the **Line Defaults** arrow. 



Step	Action
18.	**Line Defaults** (continued) The **Buyer** is a required field for LSUNO. If you do <u>not</u> know who your buyer is, you can search for the ***Buyers By Department*** page using the **Search** option on the ***LSU Health New Orleans web page***. The URL is provided below. The user can *copy and paste the URL* into his/her browser. **https://www.lsuhsc.edu/administration/SupplyChain/buyers_by_department.aspx** Click the **Lookup Buyer** button to search for the Buyer's user id. 

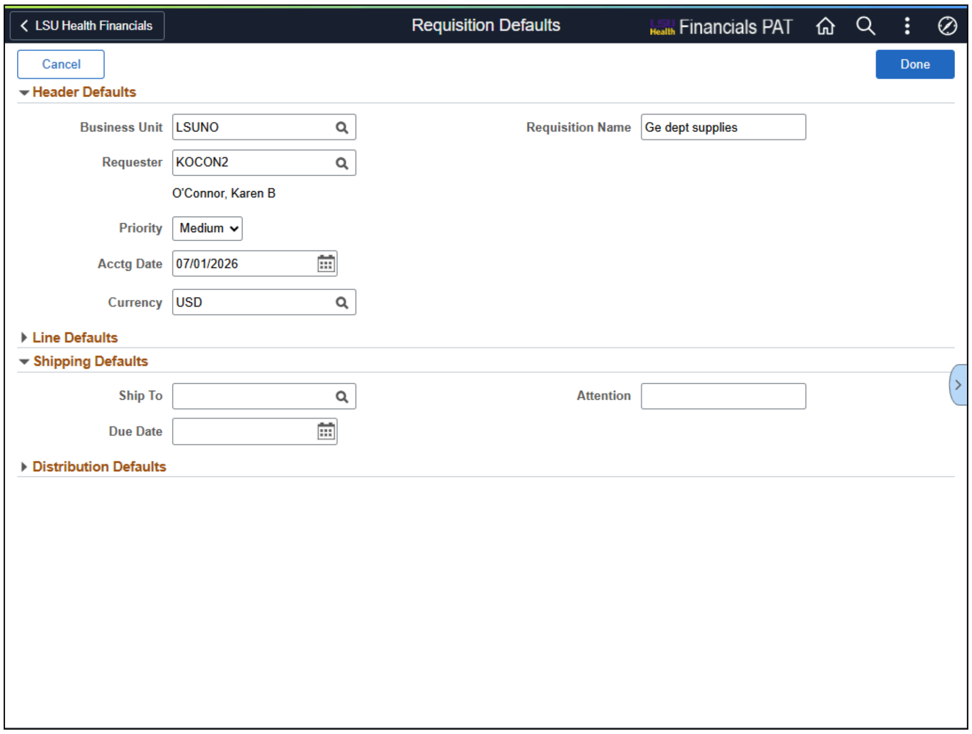


Step	Action
19.	**Search Criteria** *In this exercise, the user will search for Deborah Holmes as the Buyer.* Enter the desired information into the **Name (begins with)** field. Enter "**HOLMES**".

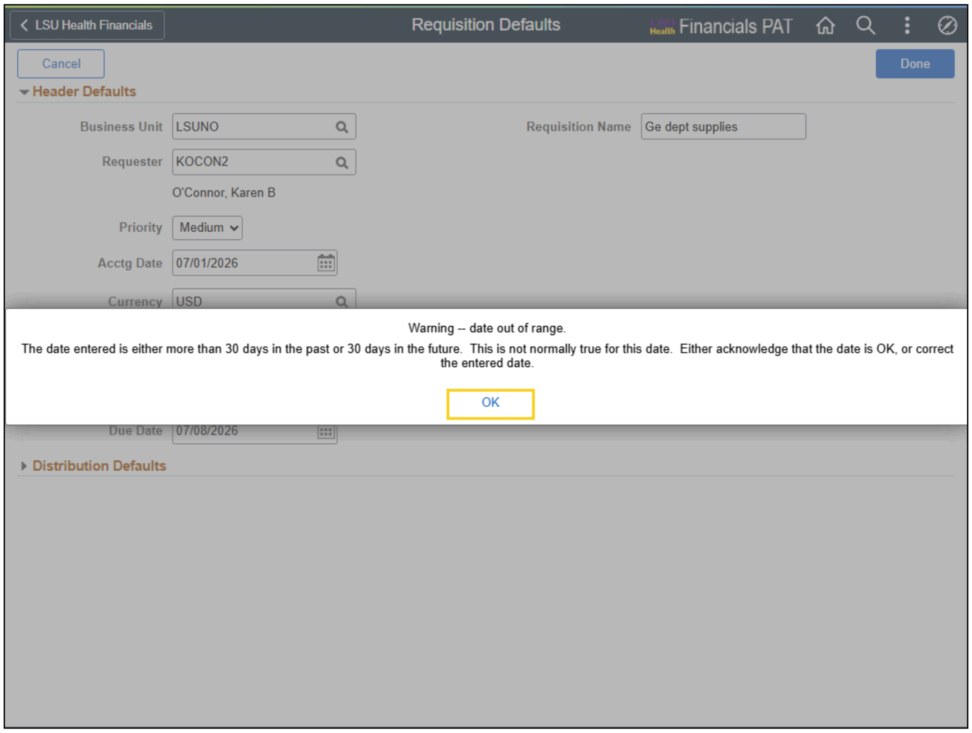


Step	Action
20.	**Search Criteria** (continued) Click the **Search** button. 
21.	**Search Criteria** (continued) Click anywhere on the line containing the Buyer's name to select the Buyer. Click the **DHOLME2 - Holmes, Deborah** button. 
22.	**Category and Unit of Measure (UOM)** ***Category*** and ***UOM*** will be left as *defaulted* on the **Punchout Requisition Defaults** page.
23.	**Line Defaults** (continued) Once all relevant fields are populated, the user may *collapse* the **Line Defaults** section. Click the **Line Defaults** arrow. 

Step	Action
24.	**Shipping Defaults** Expand the **Shipping Defaults** section. Click the **Shipping Defaults** arrow. 

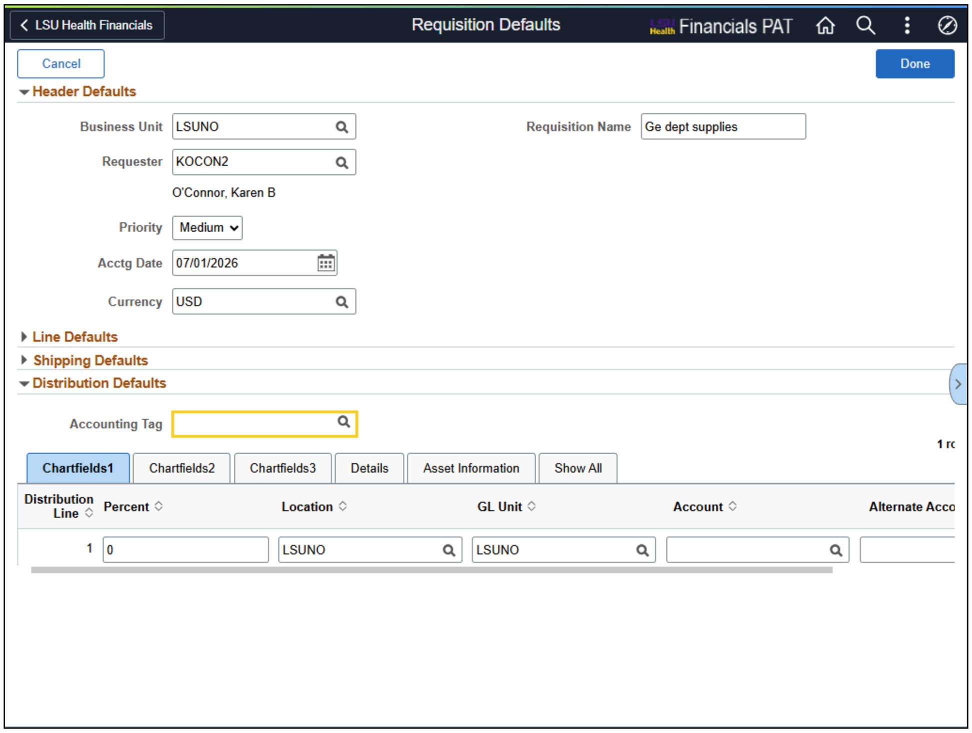


Step	Action
25.	**Shipping Defaults** (continued) Your *department number* serves as the ***Ship To location***. Enter the desired information into the **Ship To** field. Enter "**1491500**".
26.	**Shipping Defaults** (continued) The ***Due Date*** is the *date* you expect to *receive the item(s) or service(s)*. *For this exercise, the user will enter the* ***Due Date*** *of* ***7/08/26***. Enter the desired information into the **Due Date** field. Enter "**070826**".

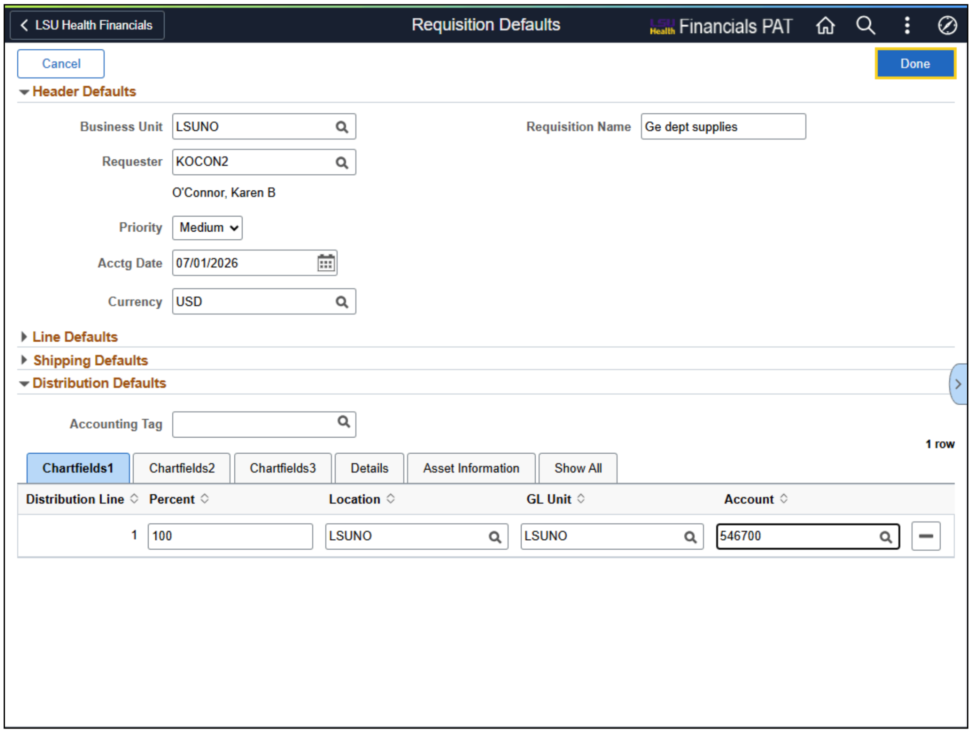


Step	Action
27.	**Shipping Defaults** (continued) When *creating a requisition* for the ***new Fiscal Year***, as is being demonstrated in this exercise, it is *usual* for the user to *receive a Warning message* for the *date being more than 30 days in the future. This message will be displayed when the user attempts to navigate away from the **Due Date** field.* *Select **OK** to clear the message.* Click the **OK** button. 
28.	**Shipping Defaults** (continued) The ***Attention*** field is an *optional field* for entering data. *It is highly recommended that an appropriate name be entered into the **Attention** field for each requisition created.* *For this exercise, Karen O'Connor will be the person to whom the item(s) will be delivered, so her name will be entered into the **Attention** field.* Enter the desired information into the **Attention** field. Enter "**KAREN O'CONNOR**".

Step	Action
29.	**Shipping Defaults** (continued) Once all relevant fields are populated, the user may *collapse* the **Line Defaults** section. Click the **Shipping Defaults** arrow.
30.	**Distribution Defaults** Expand the **Distribution Defaults** section. Click the **Distribution Defaults** arrow. 
31.	**Distribution Defaults** (continued) In the **Requisition Defaults** page and in the **Distribution** section of the **Requisition Line Details - *Schedule page***, **Accounting Tags** can be used to efficiently *enter chartfield information*. An **Accounting Tag** is a *predefined shortcut that automatically populates individual chartfield values (e.g., Account, Dept, Fund, etc.) on the **Distribution Line** located on the **Requisitions Defaults** page.* ***Chartfields** provide the basic structure to identify and categorize transactional and budget data. When entered on a requisition, the chartfield values are telling the system to what accounts and budget the item(s) on the requisition will be charged.*
32.	**Distribution Defaults** (continued) *Chartfield and budget information* can be *updated* in the ***Distributions*** section *across several tabs*. Below are the noteworthy fields and the tabs where they can be found: • **Chartfields1 Tab:** Percent, Location, GL Business Unit, and Account • **Chartfields2 Tab:** Fund, Depart, Program, and Class • **Chartfields3Tab:** PC Business Unit, Project, and Activity



Step	Action
33.	**Distribution Defaults** (continued) The user will enter the **Accounting Tag** to which *item(s) will be charged*. Enter the desired information into the **Accounting Tag** field. Enter "**0491500014**".
34.	**Distribution Defaults** (continued) Press **[Tab]** key on your keyboard to *exit* the **Accounting Tag** field. The system will *automatically populate* the *chartstring* information onto the **Distribution Line**.
35.	**Distribution Defaults** (continued) ***Account*** is a *required field*. It does **not**, however, *default* onto the **Distribution Line** *via* the ***Accounting Tag***. ***Account*** is **not** one of the *chartfields* that make up an ***Accounting Tag***. ***NOTE: To view Accounting Tag chartfield values, select the Chartfields2 tab.*** Enter the desired information into the **Account** field. Enter "**546700**".



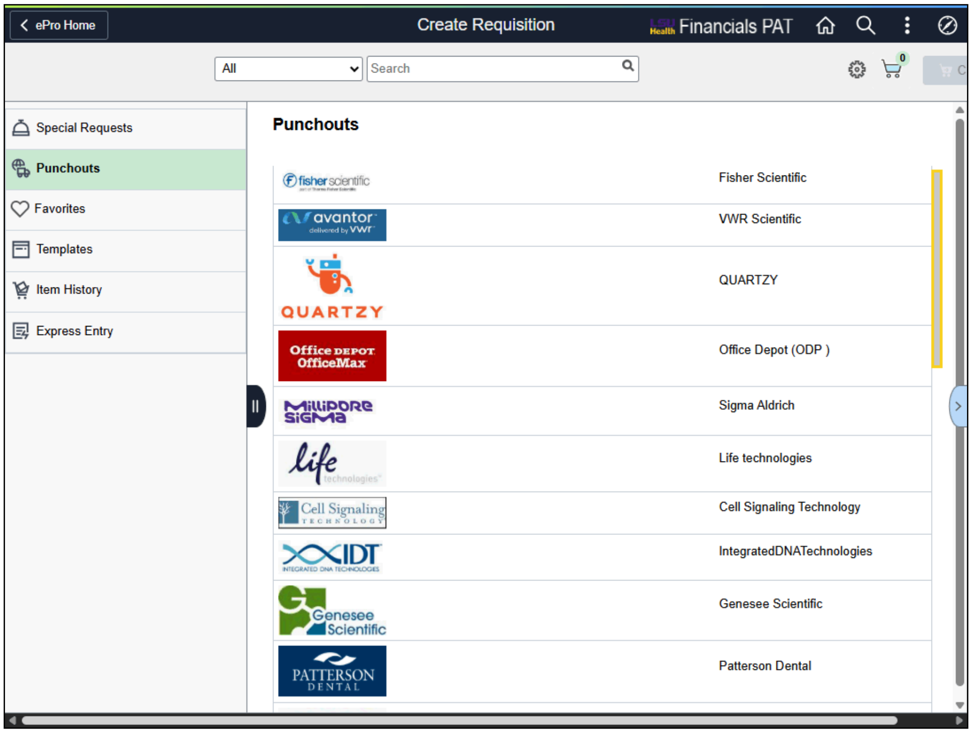
Step	Action
36.	**Requisition Defaults for Punchout Requisitions** (continued) After all information has been entered on the **Requisition Defaults** page, *select* the **Done** button to navigate to **Punchouts** *supplier catalog list*. Click the **Done** button. 
37.	This completes ***Enter Requisition Defaults for a Punchout Requisition***. **End of Procedure.**

Create a Punchout Requisitions

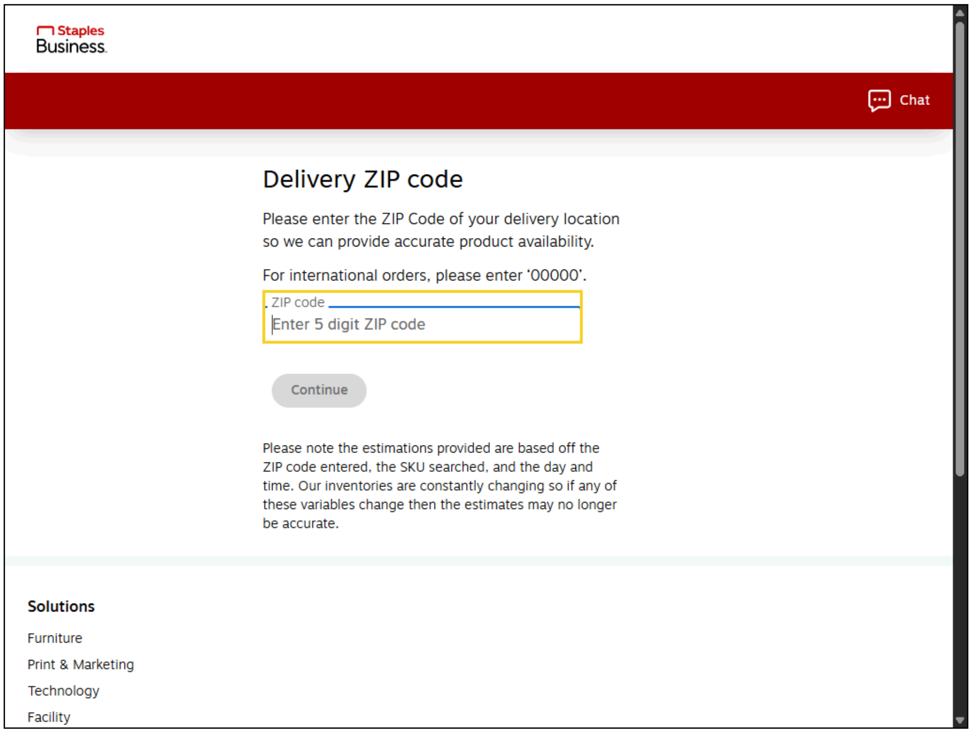
Procedure

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

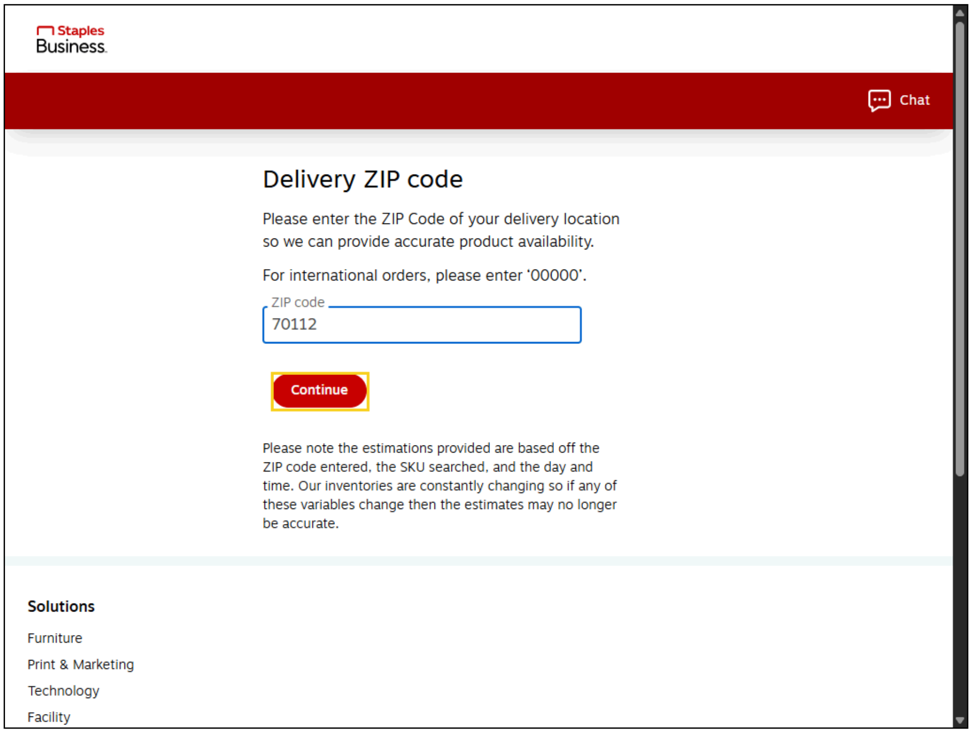
Step	Action
1.	********NOTICE******** ***The Supplier names, ordered items, and other values being shown in this exercise are for demonstration purposes only. When working in Production, users must enter their requisition information.***
2.	**Create Requisition** The **eProcurement** main page for *creating requisitions* has *three (3) sections*: • **Navigation frame** – menu options for Special Requests, Punchouts, Favorites, Templates, Item History, and Express Entry • **Main frame** – where the page chosen from the Navigation frame is displayed – by default, the Punchout page is displayed • **Cart frame** – shows what is currently in the requester's cart
3.	**Create Requisition** (continued) **Navigation Frame** • **Special Requests page** – are created for requesting all other items that are not available from, or user has chosen not to order from, punchout suppliers • **Punchouts page** – shows a list of punchout suppliers – supplier's external ordering catalog allows the requester to view and order items from the supplier catalog • **Favorites page** - allows requesters to order items that have been saved as Favorites, which can be special request and punchout items • **Templates page** – allows requesters to submit full requisitions that were saved as a template • **Item History page** – allows the requester to re-order items that have previously been requested • **Express Entry page** – is not used by **LSUNO**
4.	**Create Requisition** (continued) The requester can *close/open the Create Requisition menu by selecting the* ***Side 1 page - Requisitions*** *button* (black button on left side menu).
5.	**Create Requisition** (continued) The requester can *open/close* his/her *shopping cart* by selecting the **Open/Close Shopping Cart** button (grey button) on the *right side of the punchout page*.

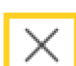


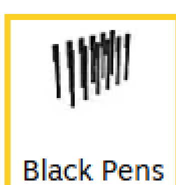
Step	Action
6.	**Punchout Requisitions** The system *defaults* you into the ***Punchouts*** option in the **Navigation frame**. A *list* of *available supplier external catalogs* is displayed in the **Main frame**. You will scroll to find the desired supplier. *In this exercise, **Staples** will be the supplier used.* Click the **Down** button of the scrollbar.
7.	**Punchout Requisitions** (continued) Click the **Staples** list item.

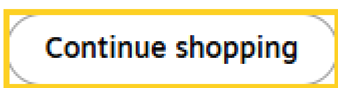
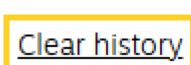


Step	Action
8.	**Punchout Requisitions** (continued) Enter the ***Zip Code*** for where the *items will be delivered*. Enter the desired information into the **Zip Code** field. Enter "**70112**".

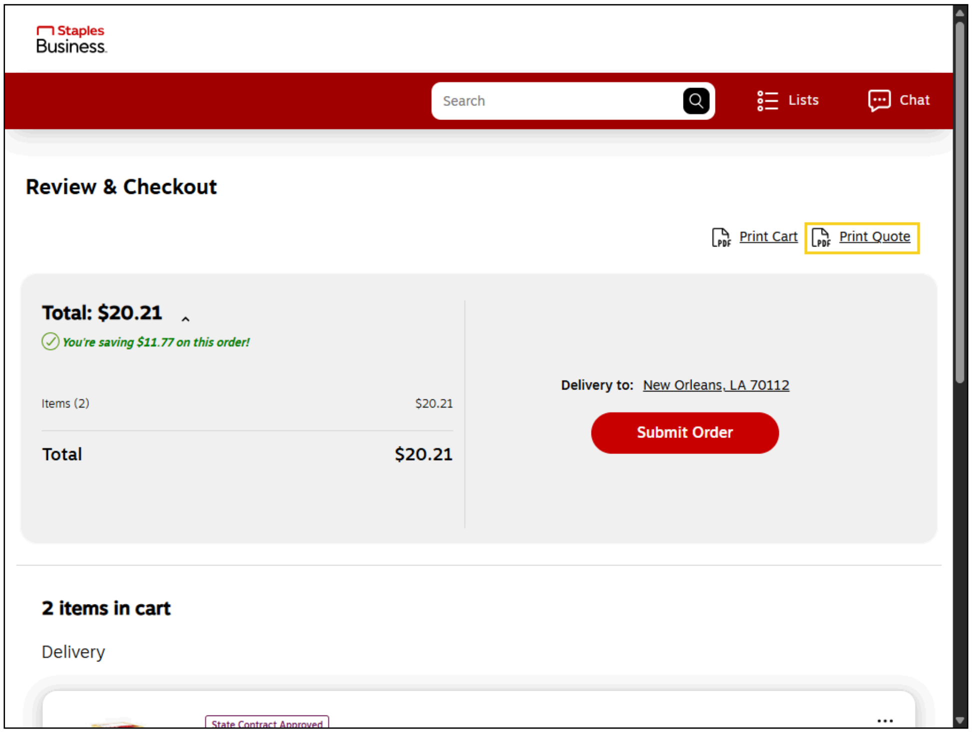


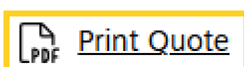
Step	Action
9.	**Punchout Requisitions** (continued) Click the **Continue** button. 
10.	**Punchout Requisitions** (continued) The ***first time*** you enter **Staple's catalog**, you will receive this ***message***. *Please read the entire message before proceeding with your requisition.* Click the **Close Message** button. 

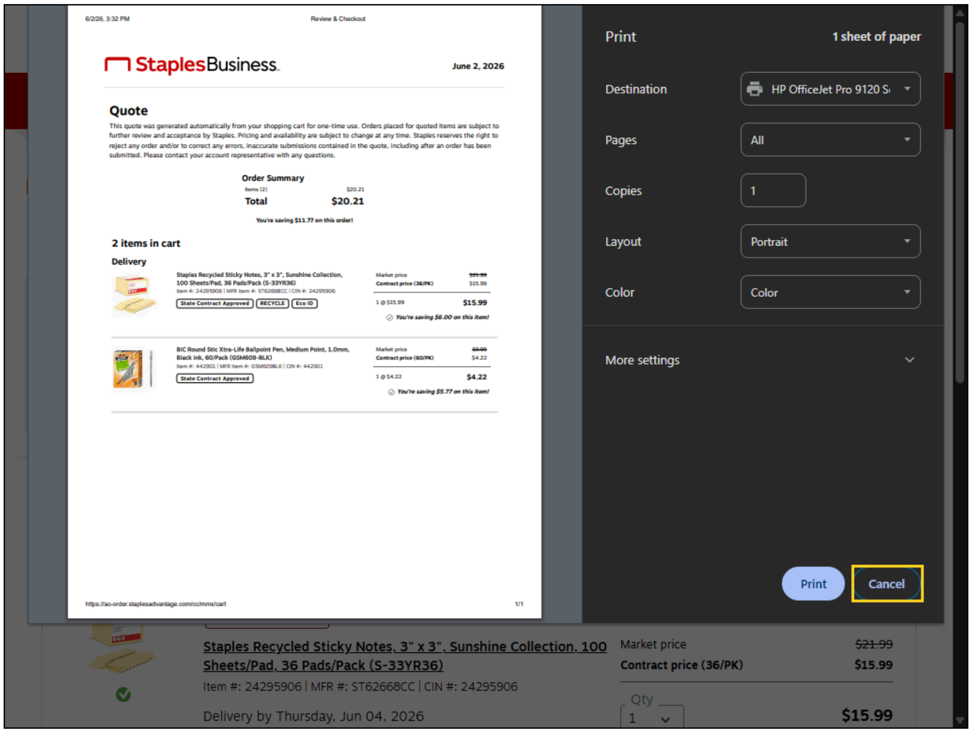
Step	Action
11.	**Punchout Requisitions** (continued) There are *three (3) options* you can use to *search for items* to purchase: • **Shop** – select Shop to view a menu of available options (e.g., Office Supplies, Paper, etc.) • **Pictorial Menu** – select from the picture icons the desired option you wish to view (e.g., Furniture, Office Supplies, etc.) – select the right arrow to view more picture options • **Search** – click into the Search box for a list of options (e.g., pens, copy paper, sticky notes, etc.) – you can also enter the name of the item you wish to view and click the magnifying glass to view options
12.	**Punchout Requisitions** (continued) *In this exercise, you will use the **Search** option to find items to purchase.* Click in the **Search** field. 
13.	**Punchout Requisitions** (continued) In this example, you will select the **pens** list option. Click the **pens** list item. 
14.	**Punchout Requisitions** (continued) A menu of picture icons is displayed at the top of the page. By selecting a picture icon, you can narrow the focus by type of pen you wish to purchase. *In this example, you will select **Black Pens**.* Click the **Black Pens** button. 

Step	Action
15.	**Punchout Requisitions** (continued) Notice all three (3) items are listed as **"State Contract Approved"** items. The **State of Louisiana** *contracts* with *suppliers* to *purchase specified items* for a *specified price* during a *specified time period*. State Contract items do **not** require *specifications or RFQ's (Request for Quote) which means orders are received faster*. Users are not required to purchase items on State Contract but are encouraged to do so.
16.	**Punchout Requisitions** (continued) *Select the **BIC Round Stic Xtra-Life Ballpoint pen, Medium Point, Back Ink, 60/pack (GSM609-BLK)**. Order **1box**.* Click the **Add** button. 
17.	**Punchout Requisitions** (continued) A panel displays showing you have ***added 1 item*** **(BIC Black Pens)** to your *cart*. The *delivery date* is also noted. *For this example, select the **Continue Shopping** option.* Click the **Continue Shopping** button. 
18.	**Punchout Requisitions** (continued) Click the "X" inside the Search field to remove "pens". Click in the **X in the Search** field. 
19.	**Punchout Requisitions** (continued) Select the **Clear History** link to view the entire list of items. Click the **Clear History** link. 

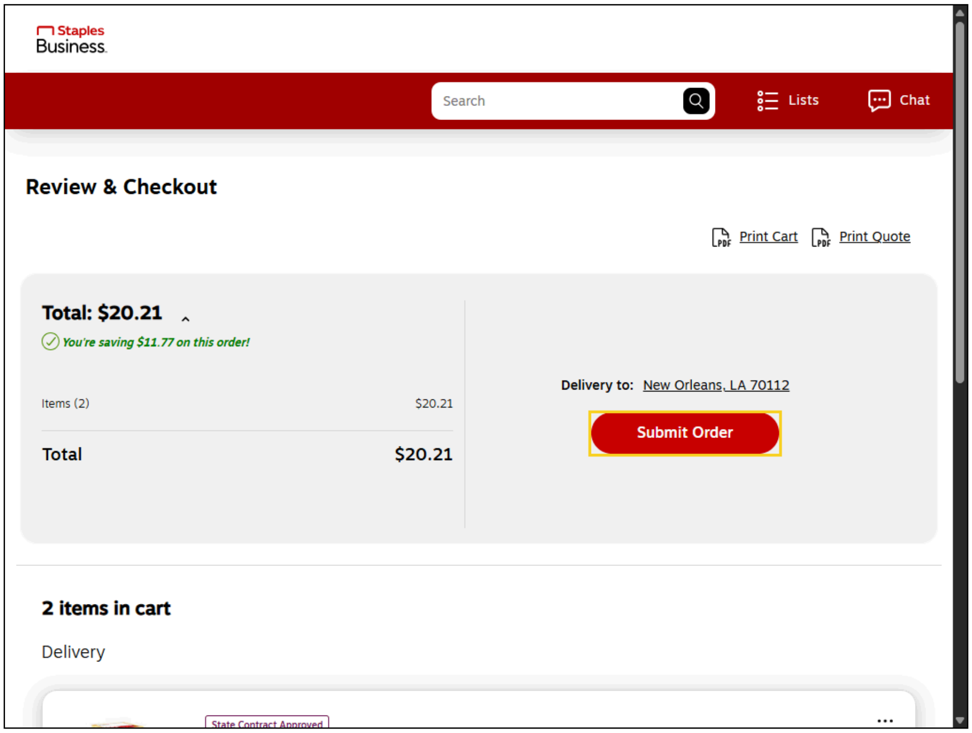
Step	Action
20.	**Punchout Requisitions** (continued) *In this example, select the **sticky notes** option.* ***NOTE: If "sticky notes" are not in your search list, enter it in the Search field and click the magnifying glass.*** Click the **sticky notes** list item. 
21.	**Punchout Requisitions** (continued) *In this example, you will select the **3 x 3** option.* Click the **3 x 3** button. 
22.	**Punchout Requisitions** (continued In this example, you will select **Staples Recycled Sticky Notes, 3 x 3, Sunshine Collection, 36 Pads/Pack (S-33YR36)**. Order **1 pack**. Click the **Add** button. 
23.	**Punchout Requisitions** (continued) A panel is displayed showing you have ***added 1 item (Staples Recycled Sticky Notes)*** to your *cart*. The *delivery date* is also noted. After entering all items, select the **Review & Checkout** option. Click the **Review & Checkout** button. 



Step	Action
24.	**Punchout Requisitions** (continued) The user can print a copy of the cart or a quote (cost of each item). *In this example, the user will **Print Quote**.* Click the **Print Quote** link. 
25.	**Punchout Requisitions** (continued) A message will be displayed stating a PDF will display the information in your cart. Select whether you wish for images of the items to be included. *In this example, the **With Images** option is selected and will remain as defaulted.* Click the **Create PDF** button. 



Step	Action
26.	**Punchout Requisitions** (continued) Select your printer parameters to print the document. For **training purposes only**, click the **Cancel** button. 



Step	Action
27.	**Punchout Requisitions** (continued) Select the **Submit** button to *return* to *PeopleSoft* so that **comments, attachments, and chartfield information** can be ***added or adjusted*** before *submitting* the requisition for *approval*. Click the **Submit Order** button. 
28.	This completes ***Create a Punchout Requisition***. **End of Procedure.**

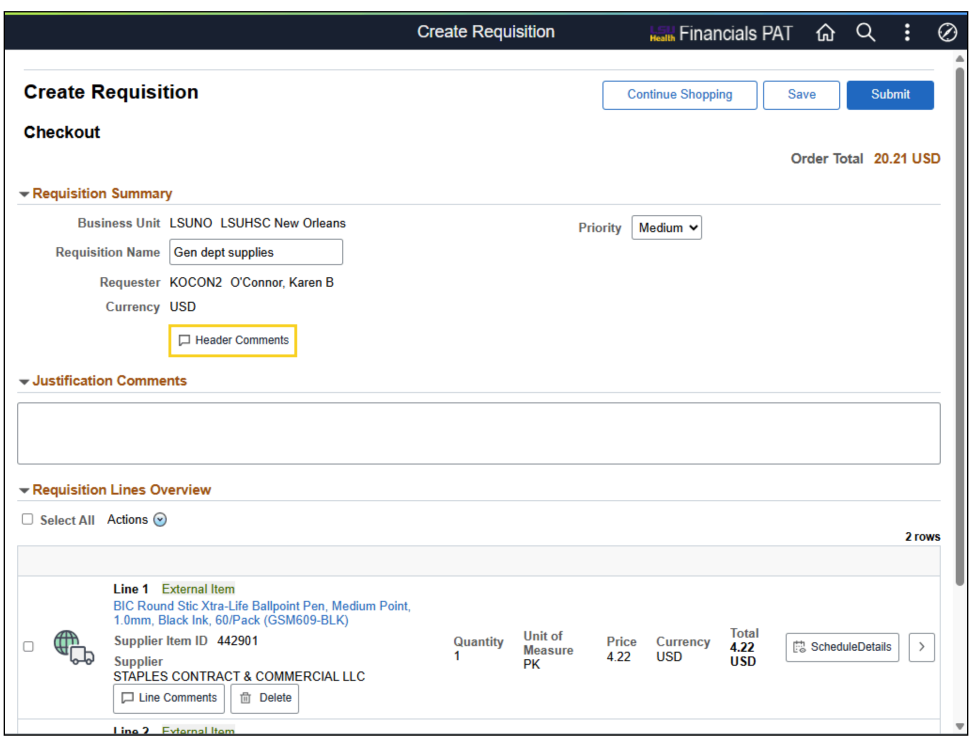
Checkout Page: Header, Justification, and Line Comments, and Attachments

Procedure

In this topic you will learn about the **Checkout Page: Header, Justification and Line Comments, and Attachments**.

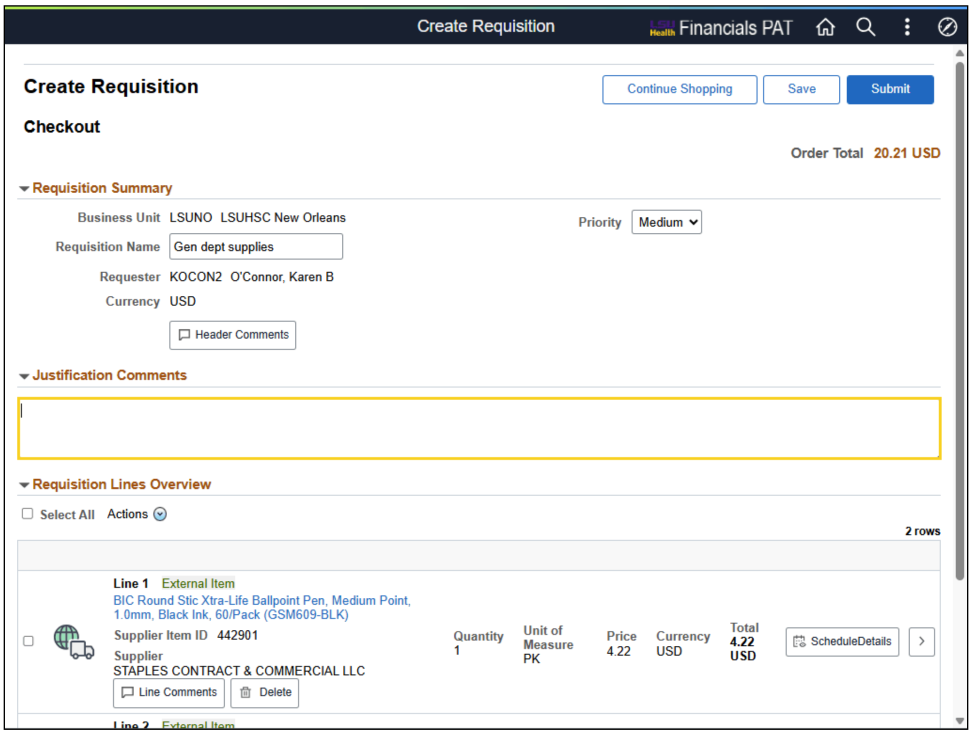
NOTE: Information related in this topic is relevant to both Punchout and Special Request requisitions. In this exercise, the Punchout requisition is used as the example.

Step	Action
1.	**Checkout** Use the **Checkout** page to *review the contents* of the requisition. ***Final adjustments*** can be made to *quantity and UOM* if the requisition is a **Special Request** requisition. The user can also *add last-minute **items*** to the requisition, as well as *edit chartfield distribution*. Selecting the ***Submit*** button *transmits* the *requisition for approval*.
2.	**Checkout** (continued) A level of ***priority*** can be *assigned* to the requisition. By default, ***all requisitions*** are *set* to "*Medium" priority*.

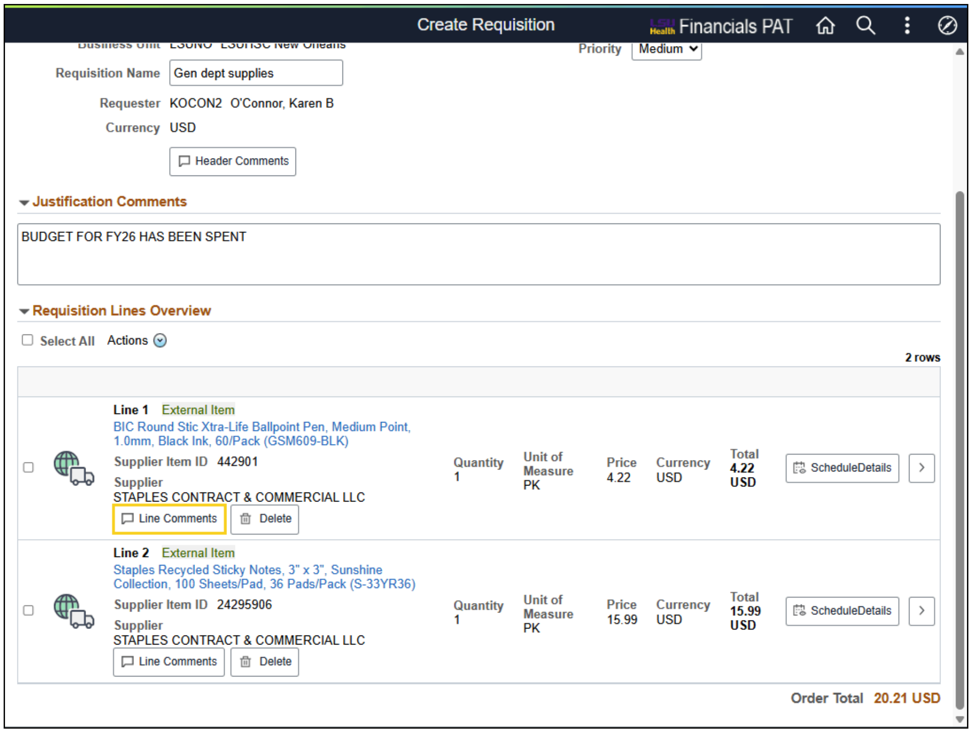


Step	Action
3.	**Header Comments** *Comments* can be added at the *Header level* by selecting the **"Header Comments"** button. ***NOTE: Comments entered at the Header level will display and print on the requisition. Please do <u>not</u> include any comments you do <u>not</u> wish to be seen or shared.*** Click the **Header Comments** button. 
4.	**Requisition Header Comments and Attachments** The ***"Use Standard Comments"*** option is **<u>not</u>** used by LSUNO.
5.	**Requisition Header Comments and Attachments** (continued) Users will only enter information in **Header Comments** that applies to the *entire requisition (e.g., specific shipping or delivery instructions applicable to <u>all</u> <u>line</u> <u>items</u>, etc.)*. A *name* for the requisition can be *entered* into the ***Comment Text*** field. If the ***Comment Text*** field is <u>left blank</u>, the system will <u>auto-populate</u> the <u>requisition id number</u> into the field when the requisition is saved or submitted. ***Comment Text*** field is a *free-text field*, and your ***Enter*** *key* on your keyboard can be *used to move between lines*. PeopleSoft is a web-based application, so data (e.g., item specifications) from the web, or other Microsoft sources, can be ***copied and pasted*** into the comment boxes. ***NOTE: It is recommended that users limit comments in each box to half a page.***
6.	**Requisition Header Comments and Attachments** (continued) The user can select if the Header Comments be shown at various levels through the process. *Select the radio button to the left of each option to change from "No" to "Yes" to indicate that Header Comments be shown.*
7.	**Requisition Header Comments and Attachments** (continued) If *comments* are *lengthy*, **documents** can be **attached** rather than *typing or copying and pasting* information. ***NOTE: Adding an attachment will be demonstrated later in this exercise.***

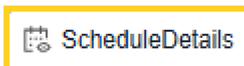
Step	Action
8.	**Header Comments** (continued) Click the **Done** button when you have completed entering comments and adding attachments. 

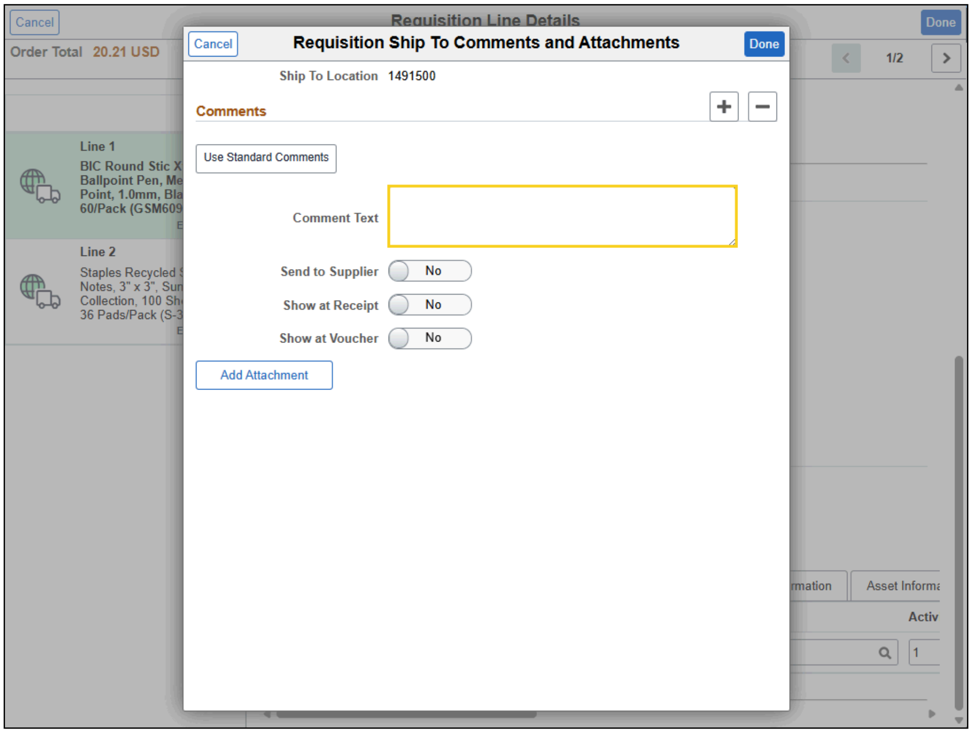


Step	Action
9.	**Justification Comments** ***Justification Comments*** for a purchase will be added by the user. The ***Justification Comments*** will be displayed on the **Requisition Approval** *page* for approver review. Enter the desired information into the **Justification Comments** field. Enter "**BUDGET FOR FY26 HAS BEEN SPENT**".
10.	**Requisition Lines Overview** *Each item* in the *cart* is *shown as a line item* in the requisition. Users can access **Line Comments, Schedule Details**, and **Line Details** *for each line item*. ***NOTE: Punchout items are marked as an "External Item" on the requisition line.***

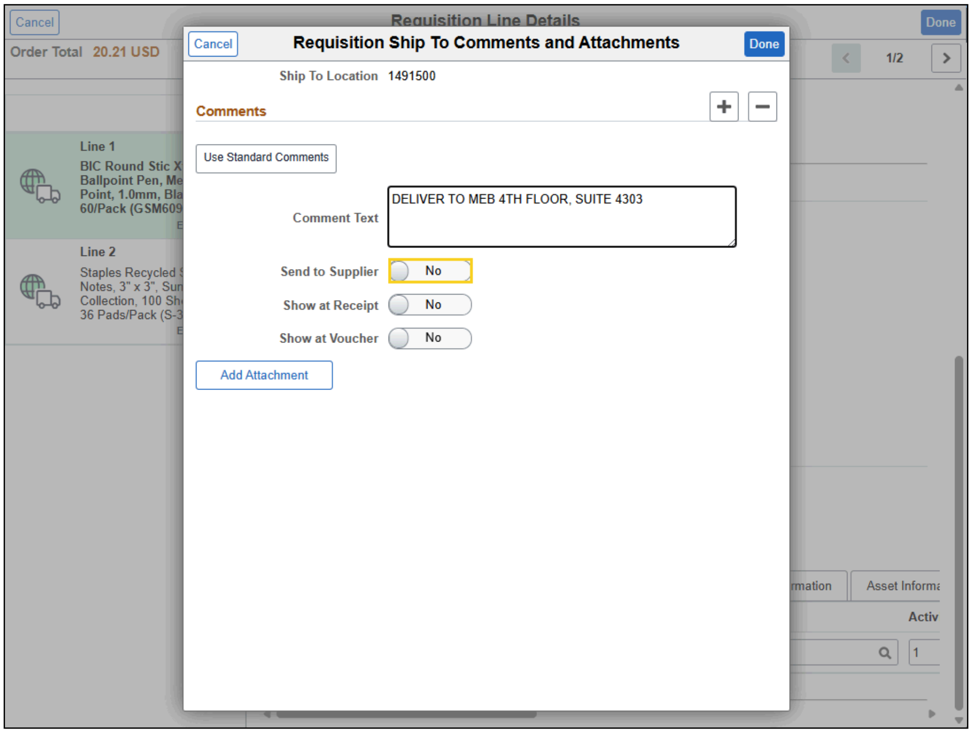


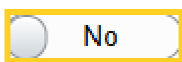
Step	Action
11.	**Line Comments** ***NOTE: Comments added to Line Comments will be displayed and printed below the corresponding line-item information on the requisition. Please do <u>not</u> include any comments you do <u>not</u> wish to be seen or shared.*** Click the **Line 1 Line Comments** button. Line Comments
12.	**Line Comments** (continued) ***Line Comments*** *will only be entered if they pertain to the specific line (e.g., item specifications).* ***Line Comments*** *have the same properties and characteristics as* ***Header Comments****, so follow the* ***same instructions*** *used to enter* ***Header Comments****.* For **<u>training purposes only</u>**, click the **Cancel** button. Cancel

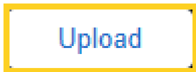
Step	Action
13.	**Schedule vs Distribution** The **schedule** defines *when and where* you want the *item(s) delivered*. The **distribution** defines *how accounts and departments are charged* for the item(s), as well as *how much of the total price* the department will pay. ***NOTE: To update more details of the item, as well as the shipping and chartfield information, select the Schedule Details button.***
14.	**Schedule Details** If the user did not enter the *required information* on the **Requisition Default** page, the information can be *added* on the ***Schedule Details*** page. Users can also *update item information*, as well as *shipping and chartfield information* on the ***Schedule Details*** page. Click the **Schedule Details** button. 
15.	**Ship To Comments** ***Ship To Comments*** can be added in ***Header Comments or Line Comments***. Ship To Comments define when and where the user wants the specified item delivered. *In this example, the user will add a Ship To Comment, select Send to Supplier, and attach a document.* Click the **Ship To Comments** button. 

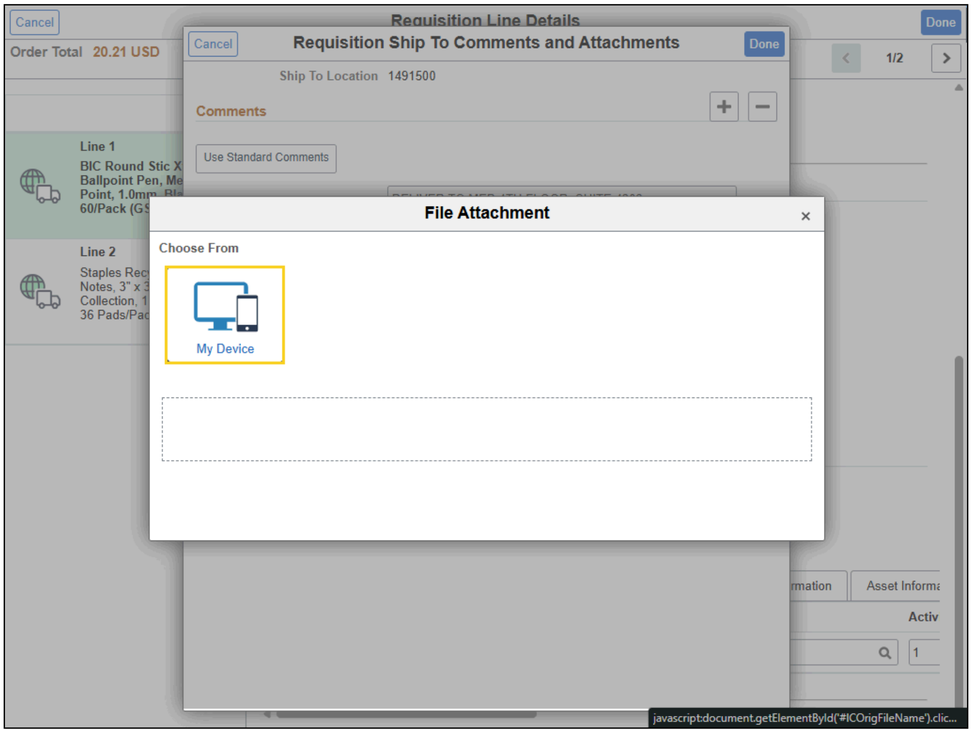


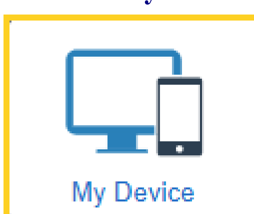
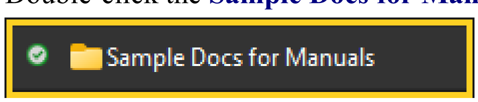
Step	Action
16.	**Ship To Comments** (continued) Enter the desired information into the **Comment Text** field. Enter "**DELIVER TO MEB 4TH FLOOR, SUITE 4303**".

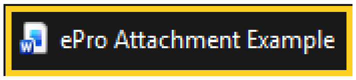


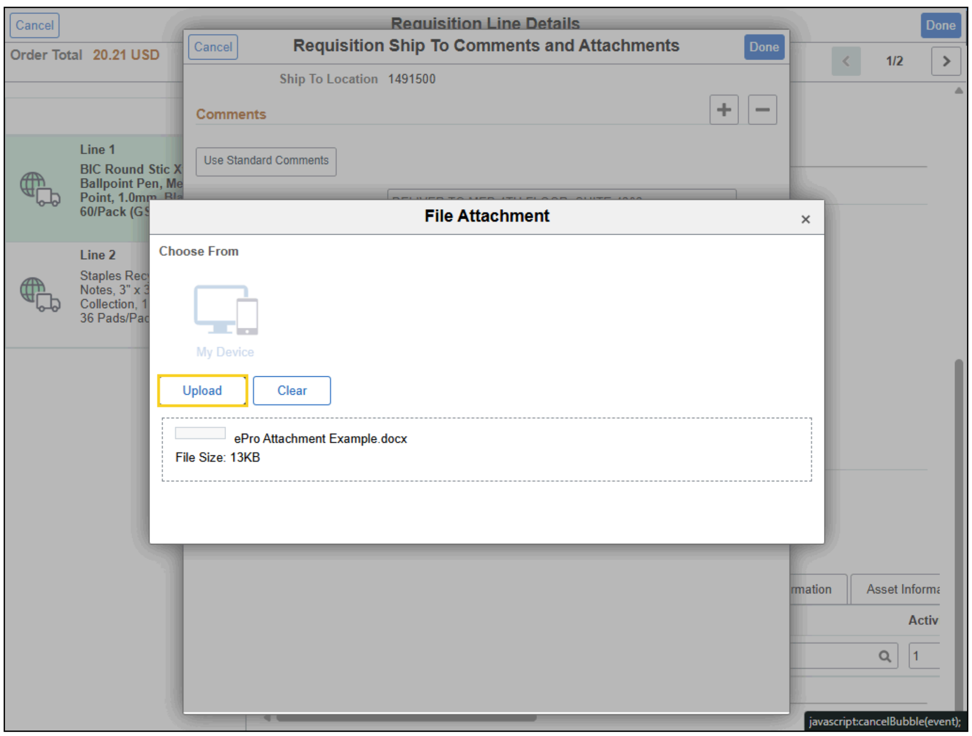
Step	Action
17.	**Ship To Comments** (continued) Click the **Send to Supplier** toggle button. 
18.	**Add Attachments** If *comments* are *lengthy*, *documents* can be ***attached*** rather than typing or copying and pasting information. Click the **Add Attachment** button. 
19.	**Drag and Drop to Add Attachments** (continued) **Attachments** can be ***"dragged-and-dropped"*** from a *separate window* into the *blank space below* the ***My Device*** button. *Up to ten (10) attachments* can be added, but <u>no</u> <u>more</u> <u>than</u> <u>3</u> can be *added at one time*.

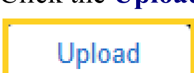
Step	Action
20.	**Drag and Drop to Add Attachments** (continued) The file name is displayed in the blank space below *My Device*. Click the **Upload** button. 
21.	**Drag and Drop to Add Attachments** (continued) Once the ***Upload*** is *complete*, select the **Done** button. Click the **Done** button. 



Step	Action
22.	**Alternative: Add Attachment using the My Device Button** (continued) Users can also *select* the **My Device** button to *search* for a *specific file*. Click the **My Device** button. 
23.	**Alternative: Add Attachment using the My Device Button** (continued) ***NOTE: The folder and file selected in this example are used for <u>training purposes</u> <u>only</u>.*** Double-click the **Sample Docs for Manuals** button. 

Step	Action
24.	**Alternative: Add Attachment using the My Device Button** (continued) Click the **ePro Attachment Example** button. 
25.	**Alternative: Add Attachment using the My Device Button** (continued) Verify that the correct file has been selected before selecting the Open option. Click the **Open** button. 



Step	Action
26.	**Alternative: Add Attachment using the My Device Button** (continued) The *file name defaults* into the *bottom section* of the ***File Attachment*** panel. Select the ***Upload*** button to *complete uploading* the file. Click the **Upload** button. 

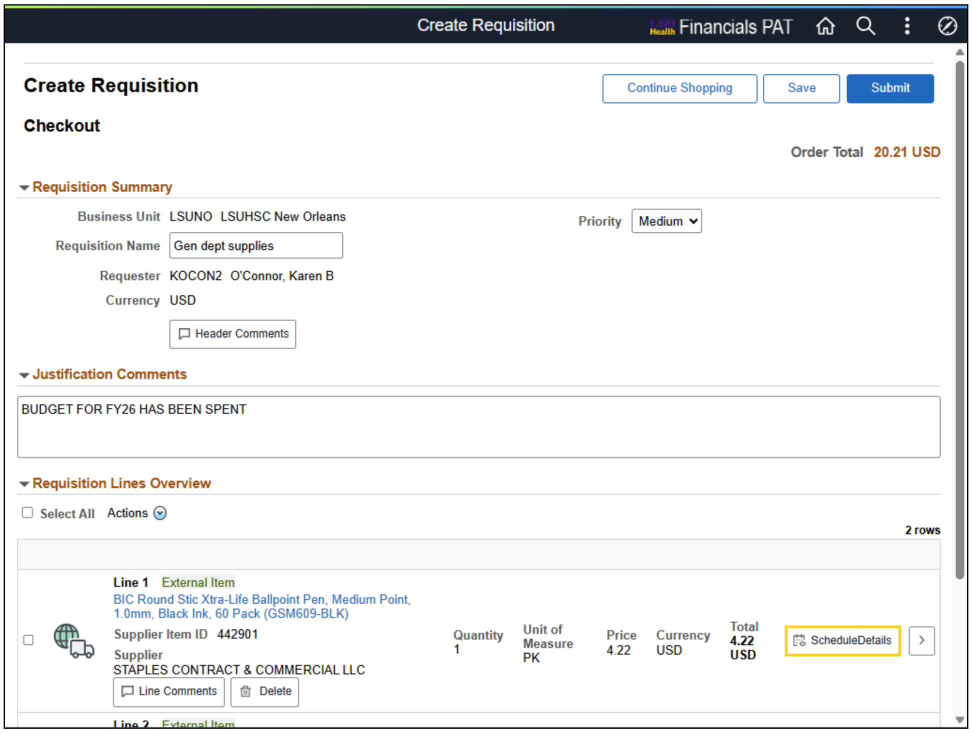
Step	Action
27.	**Alternative: Add Attachment using the My Device Button** (continued) The ***Word*** icon indicates the *file is uploaded* and you can *complete attaching* the file by selecting the **Done** button. Click the **Done** button. 
28.	**Alternative: Add Attachment using the My Device Button** (continued) The *file is displayed* in the **Attachments** section. The user can select if the file will be sent to the supplier, or one of the other selections, by clicking the ***Send to Supplier*** toggle button. Click the **Done** button to exit the ***Requisition Ship To Comments and Attachments*** page. 
29.	This completes ***Checkout Page: Header, Justification and Line Comments, and Attachments***. **End of Procedure.**

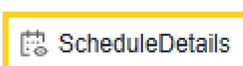
Checkout Page: Distributions, Schedule and Line Details, and Save

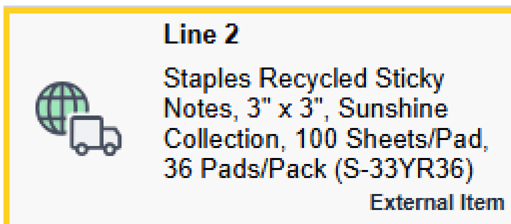
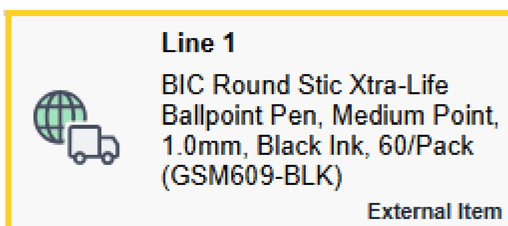
Procedure

In this topic, you will learn how to use the **Checkout Page: Distributions, Schedule and Line Details, and Save**.

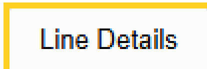
NOTE: Information presented in this topic is relevant to both Punchout and Special Request requisitions. In this topic the Punchout requisition is used as the example.



Step	Action
1.	Click the **Schedule Details** button. 

Step	Action
2.	**Line 1 and Left-Side Menu** The system **defaults** you to **Line 1** - the first line item of the requisition, highlighted in green - in **both tabs**. In this exercise, there are *two-line items* that are displayed in the **Left-Side Menu** for *ease of navigation*. The user can ***toggle between Line 1 and Line 2*** item information simply by *selecting* the **Line 2** option in the ***left-side menu***. Click the **Left-Side Menu Line 2** button. 
3.	**Left-Side Menu** (continued) Line 2 details are displayed. Click the **Left-Side Menu Line 1** button. 
4.	**Schedule Details and Line Details Tabs** On the **Requisition Line Details** page there are two (2) tabs: *one (1) tab* for ***Schedule Details*** and *one (1) tab* for ***Line Details***. The **Schedule Details tab** consists of three (3) sections: ***Item Summary***, ***Attributes***, and ***Schedule 1***. The ***Schedule 1*** section allows the user to *add or adjust the *Ship To, Attention To, Due Date, and Ship To Comments fields.* Also included in ***Schedule 1*** is the ***Distributions*** *section.* The user can *add or adjust chartstring information in the Distributions section.* The **Line Details tab** contains two (2) sections: ***Item Summary*** and ***Attributes***. The ***Item Summary*** section allows the user to *confirm requisition checkout information for line-specific fields. Buyer information can be added or adjusted in this section as well.* In the Attributes section, *five (5) collapsed lines are displayed:* ***Item Additional Information***, ***Contract Information***, ***Supplier Information***, ***Manufacturer Information***, *and* ***Sourcing Controls***. More information will be provided later in this exercise for **Line Details**.

Step	Action
5.	**Schedule Details - Item Summary and Attributes** The ***Item Summary*** *section which includes the Item Description, Supplier, Buyer Quantity, Price and Total Amount. Information in the Item Summary cannot be added or changed.* The **Attributes** section only displays that the *item* is an ***External Item***.
6.	**Schedule Details - Schedule 1** *The* ***Schedule 1*** *section provides the *Ship To, Attention To, Due Date, and Ship To Comments options. Information for these* ***Schedule 1*** *fields can be* ***added or adjusted*** *as needed on the tab.* ***NOTE: The Price Adjustments button is not used by LSUNO.***
7.	**Schedule Details - Schedule 1 - Distributions** The Distributions section is used to specify how a requested item or service will be charged internally. It defines how departments, projects, and general ledger accounts will pay for the purchase. *(Oracle Help Center)*
8.	**Schedule Details - Schedule 1 - Distributions** (continued) The ***distribution method*** can be *changed* in the **Distributions** section for a *specific line item*. *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; **<u>or</u>** **2.** An item(s) is a product or a service. Most blanket Purchase Orders are distributed by Amount. Select the *drop-down arrow* for the ***Distribute By** field to *change* the *distribution method*. ***NOTE: The Accounting Tag option will be discussed in another topic. See the "Using Accounting Tags" topic for additional information.***
9.	**Schedule Details - Schedule 1 - Distributions** (continued) *Chartfield* and *budget information* can be *added / updated* in the **Distributions section** across several tabs. Below are the *noteworthy fields* and the *tabs* where they can be *found*: • **Chartfields1 Tab** – Location, Quantity, Percent, GL Business Unit • **Chartfields2 Tab** – Account, Fund, Department, Program Code, Class • **Chartfields3 Tab** – PC Business Unit, Project, Activity • **Budget Information Tab** – Budget status, Pre-encumbrance Balance

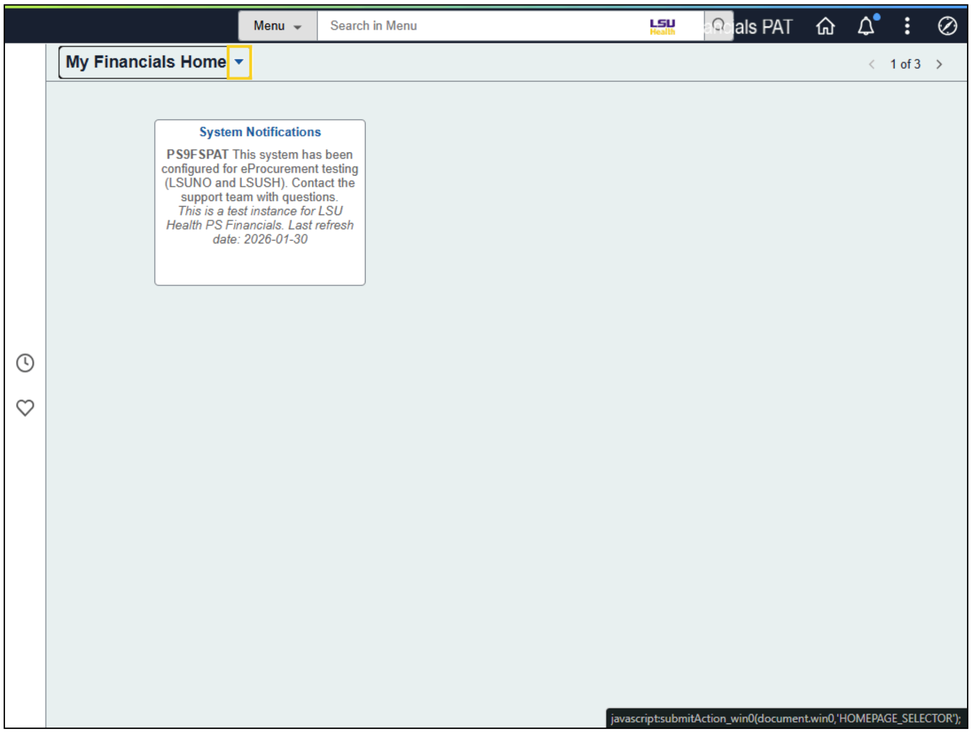
Step	Action
10.	**Line Details** The **Line Details** tab will now be discussed. Click the **Line Details** tab. 
11.	**Line Details** (continued) In the **Item Summary section**, the ***Physical Nature*** *and* ***Buyer*** *fields can be updated / added. The other fields in this section* ***cannot*** *be updated. However, the user can confirm the information provided.* ***NOTE: The Show Configuration button is not used by LSUNO.***
12.	**Line Details** (continued) *The* ***Physical Nature*** *field displays whether the requisition is for Goods or Services based on the type of requisition you created.*
13.	**Line Details** (continued) The *five (5) collapsed lines,* in the ***Attributes section*** at the bottom page, *represent* the *key components and functionalities* within the **Line Details tab**. In the ***Item Additional Information*** section, the user can *select* if an i*tem requires a RFQ (Request For Quote)*. In the ***Supplier Information*** section, the user can *add / update supplier or item information*. Use the ***Expand All*** and ***Collapse All*** buttons to *open and close all lines* at the same time.
14.	**Line Details** *Once all information has been updated / confirmed*, *select* the **Done** button to return the **Requisition Line Details** page. Click the **Done** button. 

Step	Action
15.	**Punchout Requisitions** (continued) The user can ***Save*** the requisition, *without submitting it*, and *come back* to it *later*. ***Saving*** the requisition will *generate* a *requisition id number*. ***See the Find and Update a Saved Requisition topic for instructions on finding saved requisitions.*** Click the **Save** button. 
16.	**Punchout Requisitions** (continued) Click the **Home** button. 
17.	The completes ***Checkout Page: Distributions, Schedule and Line Details, and Save***. **End of Procedure.**

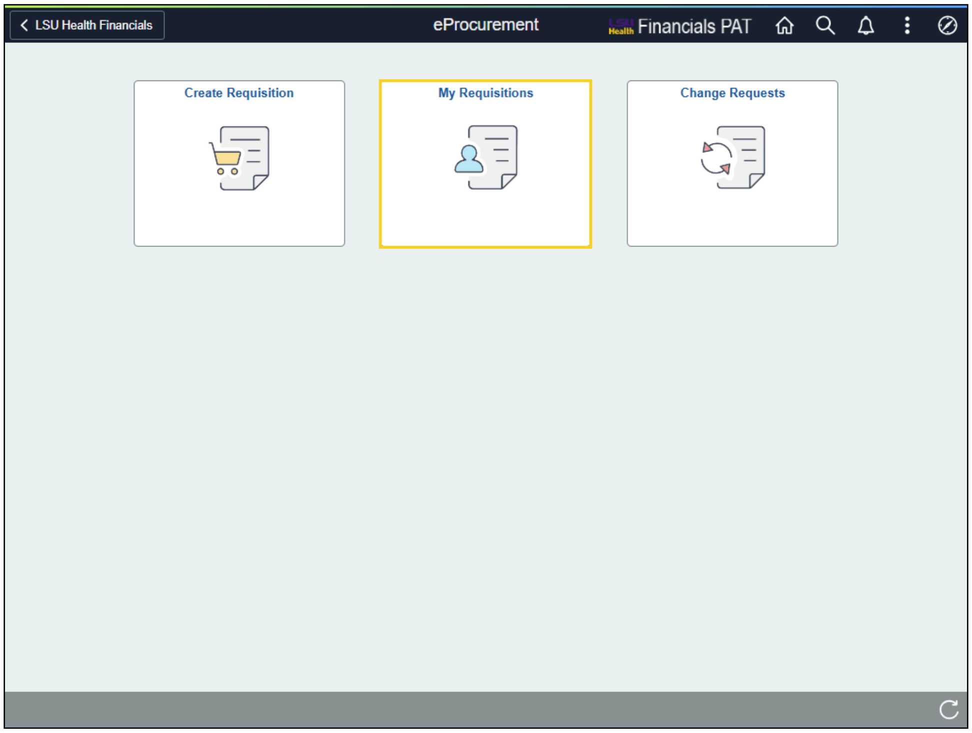
Find and Update a Saved Requisition

Procedure

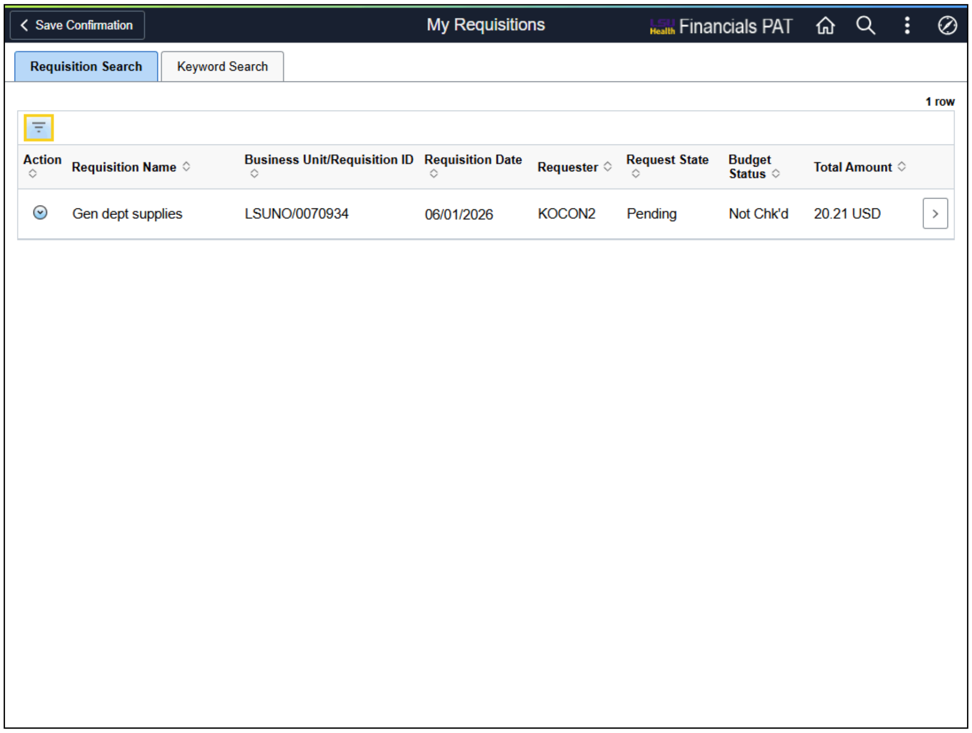
In this topic you will learn how to **Find and Update a Saved Requisition**.



Step	Action
1.	**Navigation to Find a Requisition** Click the **My Financials** dropdown button to activate the menu. 
2.	**Navigation to Find a Requisition** (continued) Click the **LSU Health Financials** menu. 
3.	**Navigation to Find a Requisition** (continued) Click the **eProcurement** tile.

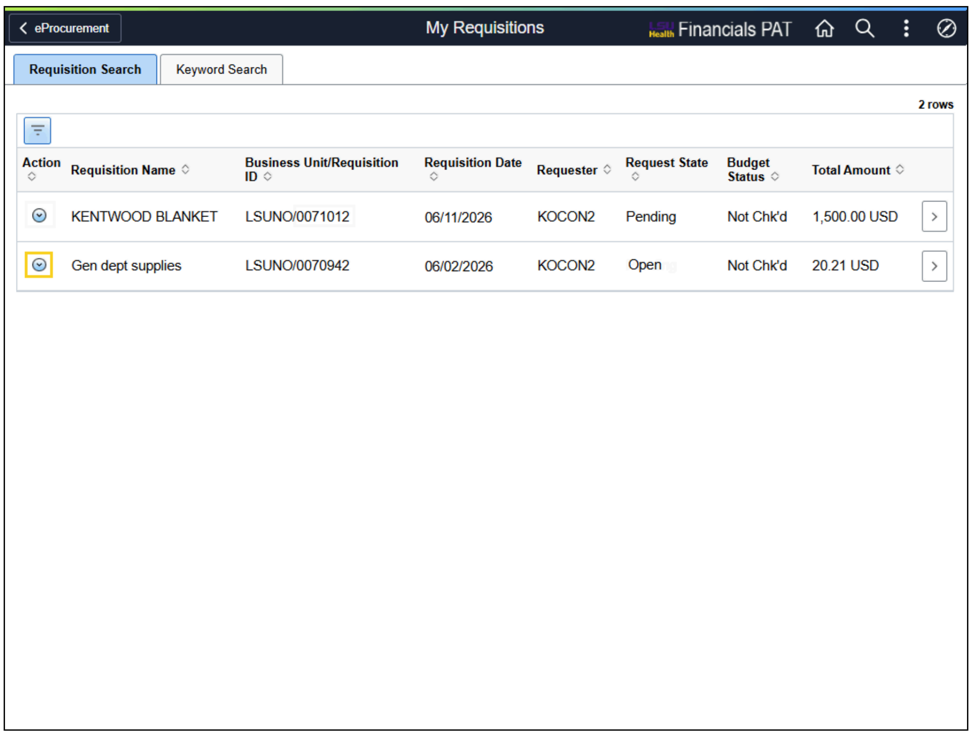


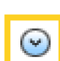
Step	Action
4.	**Navigation to Find a Requisition - My Requisitions** The user will select the **My Requisitions** tile to find his/her ***existing requisition***. Click the **My Requisitions** tile.



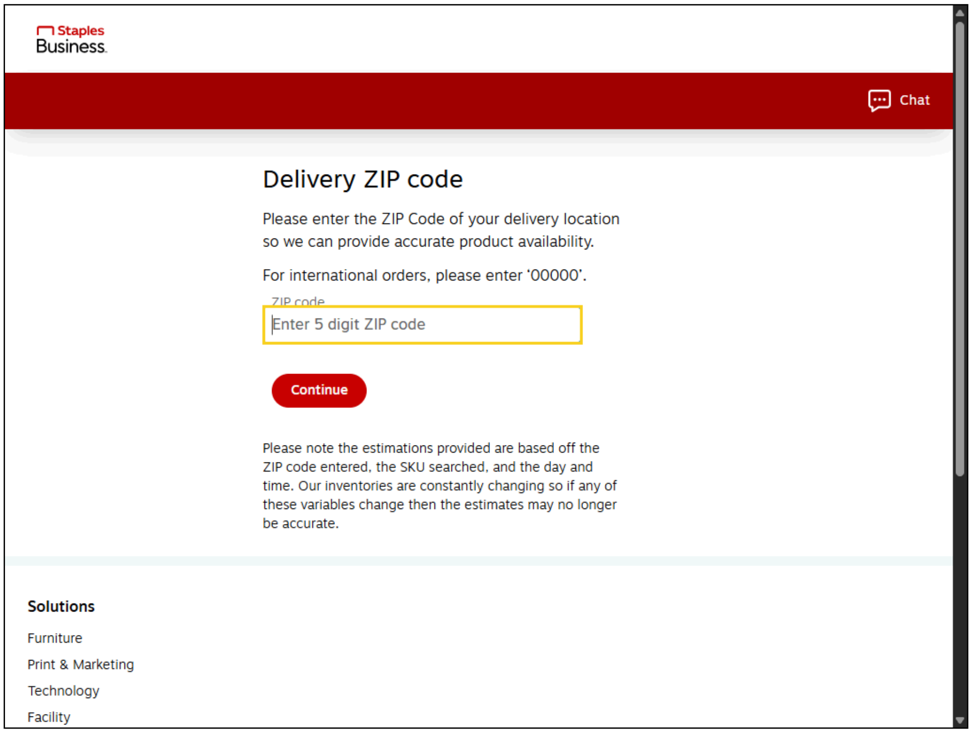
Step	Action
5.	**My Requisitions** (continued) By default, the **My Requisitions** page will ***display requisitions created by you on the current date (today)***. To *filter for more or fewer requisitions*, select the ***Filter*** button directly below the **Requisition Search** tab. Click the **Filter** button. 
6.	**Filters** The **Filters** page is displayed. **Delete** the **date** in the **From Date field** to view **<u>all</u>** your requisitions. **<u>Or</u>** *enter a time span* in the **From Date and To Date** to view requisitions from a *specific date range*. ***NOTE: If you have access to edit requisitions for other people, delete the value in the Requester field.*** Highlight the **From Date** and press **[Delete]** on your keyboard.

Step	Action
7.	**Filters** (continued) Click the **Done** button. 
8.	**My Requisitions** (continued) *Any requisition(s) you have* ***created*** on the *date specified* on the **Filters** page will be *displayed*. If you leave the ***From Date*** *blank*, **all** requisitions will be *displayed*.

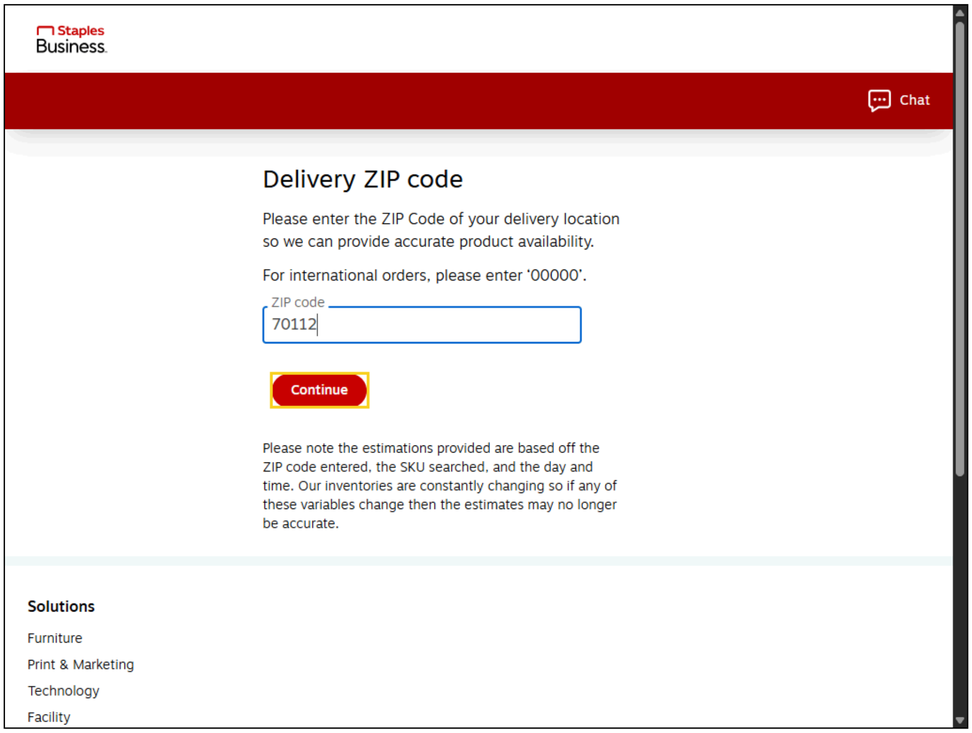


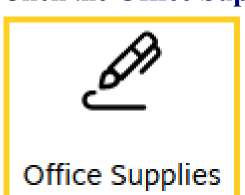
Step	Action
9.	**My Requisitions** (continued) Requisition *0070942* is a **Punchout** requisition. A **Punchout** requisition can *only be edited* if its **Request State = Open**. If the **Request State** is not "Open", then the requisition **cannot** be **edited**. Click the **Related Actions** button for requisition id **0070942**. 

Step	Action
10.	**My Requisitions** (continued) The **Actions** menu is displayed. *Depending on* the *status* the requisition is in, depends on which of these *options the user can access*.
11.	**My Requisitions** (continued) To add items or complete checkout, select the ***Edit*** option from the **Actions** list. Click the **Edit** link. 
12.	**Edit Requisition** (continued) The **Edit Shopping Cart** page is displayed. The existing requisition items are displayed at the bottom of the page.
13.	**Edit Requisition** (continued) On the **Edit Shopping Cart** page, a **Delete** button is *displayed* on *each line item*. ***However, a requisition will never be Deleted.*** <u>Individual line items</u> *can be* <u>*cancelled*</u>*, or the* <u>*entire requisition*</u> *can be* <u>*cancelled*</u>.
14.	**Edit Requisition** (continued) *If additional items need to be added to the requisition, the user will select the **Continue Shopping** button. Otherwise, the user will select the **Checkout** option.* *In this example, the user will select **Continue Shopping**.* Click the **Continue Shopping** button. 
15.	**Edit Requisition** (continued) Click the **Open Cart** button. 
16.	**Edit Requisition** (continued) The *cart displays* the *existing items* already added to the requisition. Also notice, the *cart picture* at the top of the page shows a *"2"*, depicting that there are *two items* in the *cart*.
17.	**Edit Requisition** (continued) Click the **Staples** button.



Step	Action
18.	**Edit Requisition** (continued) Enter the desired information into the **Zip Code** field. Enter "**70112**".



Step	Action
19.	**Edit Requisition** (continued) Click the **Continue** button. 
20.	**Edit Requisition** (continued) *In this example, you will search Office Supplies option for Liner Stick Highlighters.* Click the **Office Supplies** button. 
21.	**Edit Requisition** (continued) Click the **Scroll** arrow. 

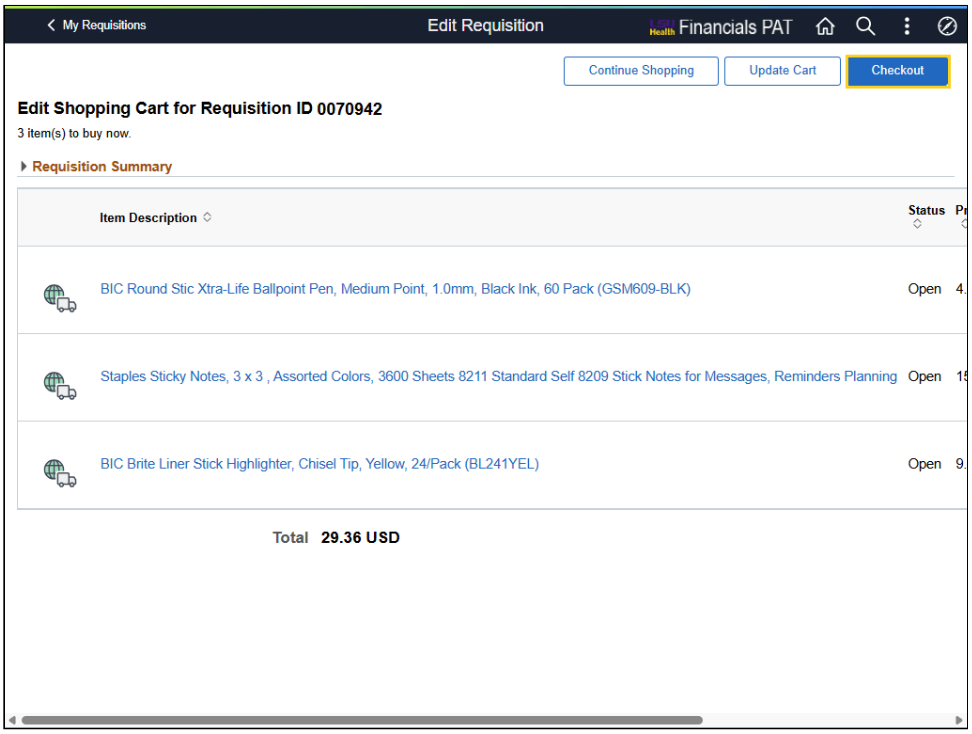
Step	Action
22.	**Edit Requisition** (continued) Click the **Highlighters** button. 
23.	**Edit Requisition** (continued) Scroll down until you find the following item: **BIC Brite Line Stick Highlighter, Chisel Tip, Yellow, 24/Pack (BL241YEL)**
24.	**Edit Requisition** (continued) Click the **Add** button. 
25.	**Review and Checkout** A panel is displayed showing that *1 pack* of *Liner Stick Highlighters* have been *added* to the cart. *No more items will be added to this requisition. The user can proceed to **Checkout**.* Click the **Review & Checkout** button. 
26.	**Review and Checkout** (continued) Verify that the correct item has been selected. Click the **Submit Order** button. 
27.	**Edit Requisition** (continued) The **Edit Shopping Cart** page is *displayed*. No additional items will be selected, so the user will *proceed* to **Checkout**. ***See the Checkout, Submit, and Print a Requisition for instructions regarding the Checkout process.***
28.	The completes ***Find and Update a Requisition***. **End of Procedure.**

Checkout, Submit, and Print a Requisition

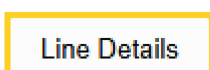
Procedure

In this topic you will learn how to **Checkout, Submit, and Print a Requisition**.

NOTE: Information related to this topic is relevant to both Punchout and Special Request requisitions.

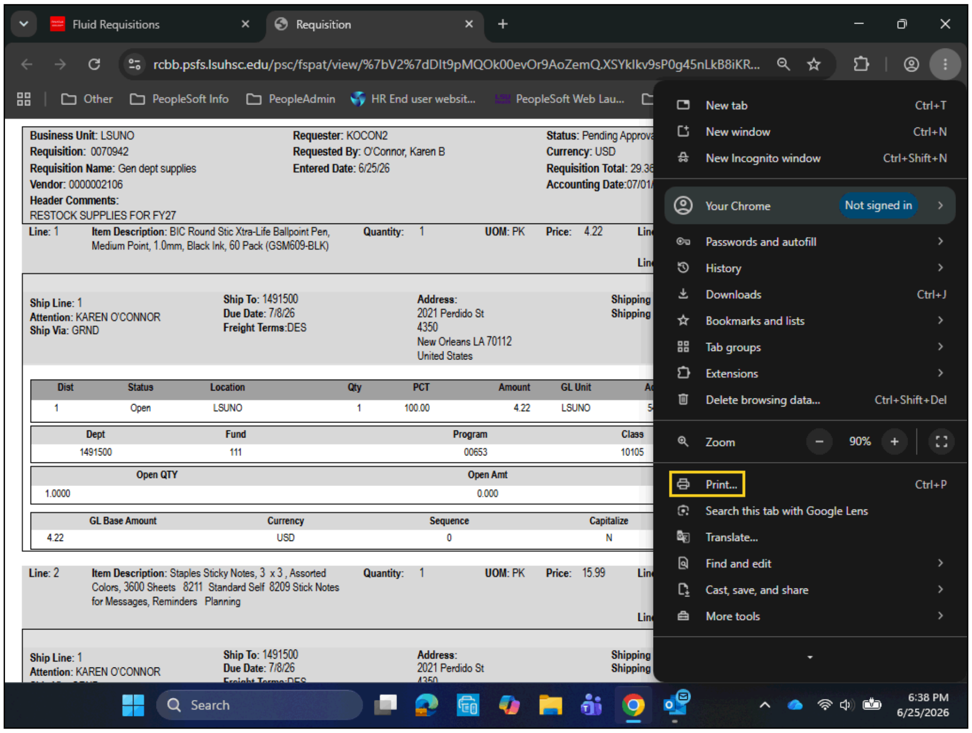


Step	Action
1.	**Edit Requisition** (continued) After selecting the **Submit Order** button, the ***Edit Shopping Cart*** page is displayed. All *three (3)* of the *line items* are also shown at the bottom of the page. The user will now *initiate* the **Checkout** *process*. Click the **Checkout** button. 

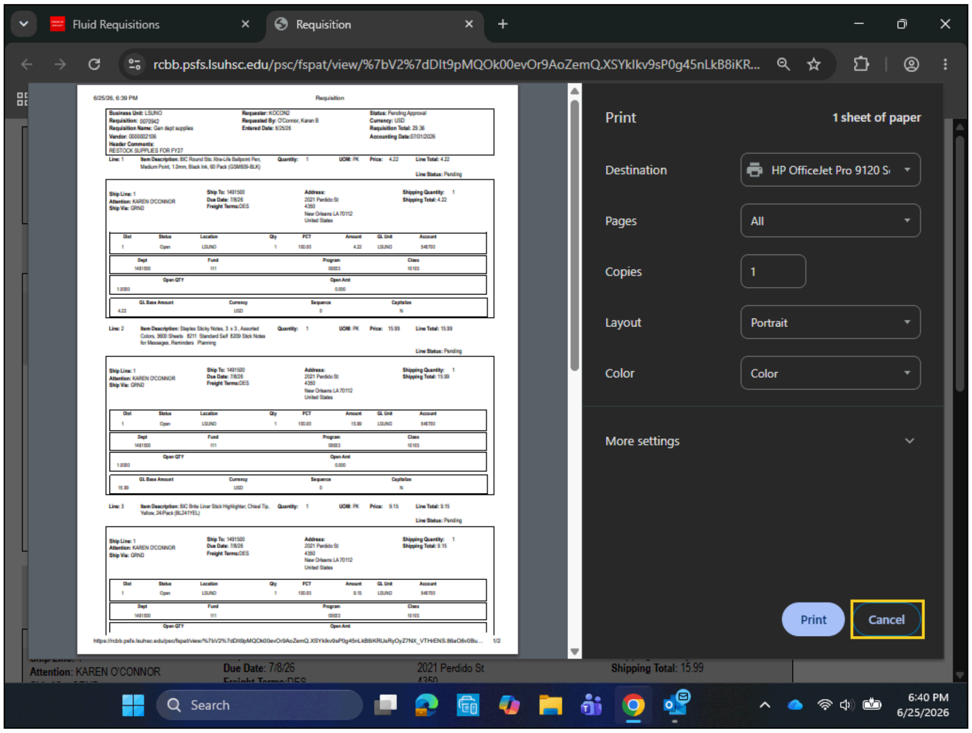
Step	Action
2.	**Checkout - Actions** After *selecting* the ***Checkout*** button, notice the ***Preview Approvals*** link. The ***Preview Approvals*** produces a list of who needs to ***review and approve*** the requisition. ***NOTE: If the user is <u>not</u> his/her own approver, the Check Budget <u>cannot</u> be performed until the requisition is approved.*** If the user is his/her <u>own</u> <u>approver</u>, the system will <u>*auto-approve*</u> the requisition, and the user *can* **Check Budget** before navigating away from the page.
3.	**Checkout - Actions** (continued) The **Check Budget** option is used to *perform* a *budget check* on the requisition. However, this <u>cannot</u> be *run* until the *requisition* has been *approved*.
4.	**Checkout** (continued) The user can select the **Schedule Details** <u>or</u> the **Line Details** button to *view and / or confirm shipping, chartstring, and line-item information*.
5.	**Schedule Details** On the **Schedule Details** tab, **Schedule 1** section, the user can *make changes* to the following fields: **Ship To*, *Attention To*, *Due Date*, and / or *ShipTo Comments*.
6.	**Schedule Details** (continued) In the **Schedule 1, Distributions** section, the **Distribute By, Quantity, and chartstring information* can be *changed*.
7.	**Schedule Details** (continued) Click the **Line Details** tab. 
8.	**Line Details** On the **Line Details** tab, **Item Summary** section, the user can change the ***Physical Nature*** (e.g., Goods or Services), as well as the ***Buyer***. The user can also *confirm line-item details* such as ***Category***, ***Price***, ***Quantity*** and ***Total Amount***.

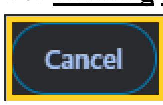
Step	Action
9.	**Line Details** (continued) In the **Attributes** section, the user can *turn on RFQ Required* in ***Item Additional Information***, and /or *change* Supplier data in the ***Supplier Information*** section. Click the **Submit** button. 
10.	*******NOTICE******* ***Once the Submit button is selected and the requisition is Pending Approval, the Punchout requisition line item(s) cannot be edited. No changes can be made to remove an item, change the quantity, add a different item, etc. after submission.***
11.	**Edit Requisition** (continued) If all *default, chartstring, and item information* have been *added* to the requisition, the user can **Submit** the requisition. Click the **Submit** button. 
12.	**Checkout Confirmation** A confirmation page is displayed showing the requisition ***Status = Pending Approval***. Select the **View Approval Chain** button to *view who* can *approve* the requisition. This will *open* a *new window*. Click the **View Approval Chain** button. 
13.	**Checkout Confirmation** (continued) The user can print the completed requisition by selecting the **Print Preview** button. Click the **Multiple Approvers** link. 

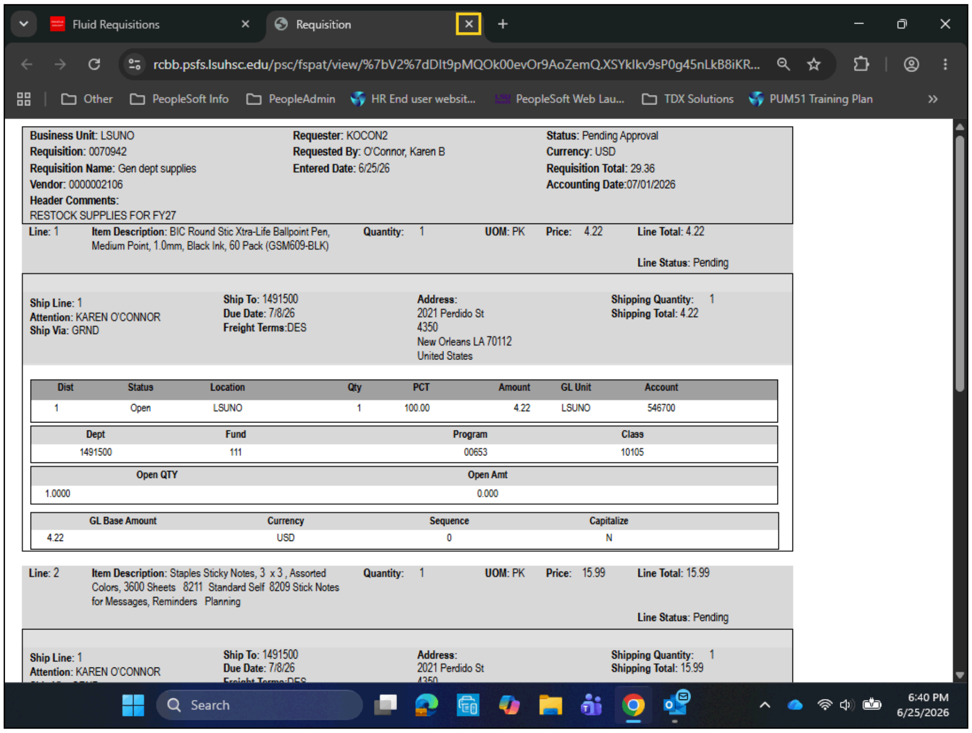
Step	Action
14.	**Checkout Confirmation** (continued) Click the **Open Approver Information** arrow. 
15.	**Checkout Confirmation** (continued) The Approver's email address is displayed. Click the **Close Approver Information** button. 
16.	**Checkout Confirmation** (continued) Click the **Close Approval Flow** button. 
17.	**Checkout Confirmation** (continued) The user can print the completed requisition by selecting the **Print Preview** button. Click the **Print Preview** button. 
18.	**Checkout Confirmation** (continued) The user can select whether s/he wishes to print the requisition distribution details (e.g., due date, supplier id, chartstring information, etc.) by selecting the **"Yes"** button. Click the **Yes** button. 
19.	**Print Requisition** (continued) The user can select the ***Ellipses (3 dots)*** in the upper right corner of the **Requisition** tab to print the requisition. Click the **Ellipses** button. 



Step	Action
20.	**Print Requisition** (continued) Click the **Print** button. 



Step	Action
21.	**Print Requisition** (continued) The user will select his/her ***print parameters*** and select the **Print** button. For **training purposes only**, click the **Cancel** button. 



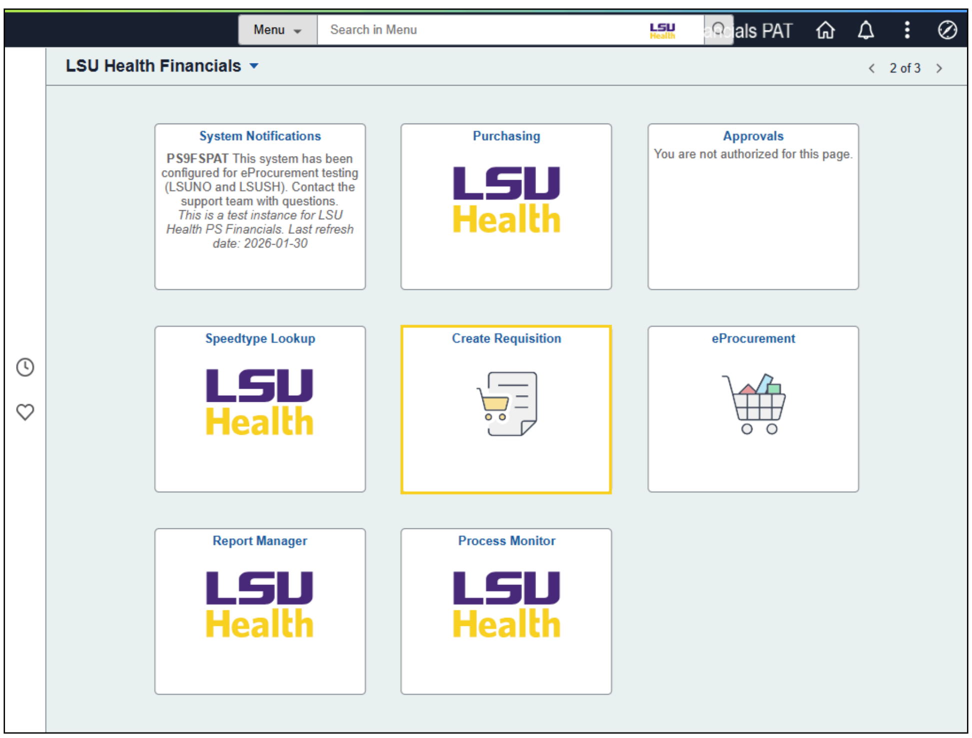
Step	Action
22.	**Print Requisition** (continued) Click the **Close Requisition** tab. 
23.	**Next Steps** The ***Next Steps*** section contains links to other **actions** available on this page. • **Edit this Requisition** – make changes to the requisition • **My Requisitions** – navigates you to the page where other existing requisitions can be accessed • **Create Requisition** – navigates you to the eProcurement Main Page for creating a new requisition
24.	This completes ***Checkout, Submit, and Print a Requisition***. **End of Procedure.**

Create a Special Request Requisition

Procedure

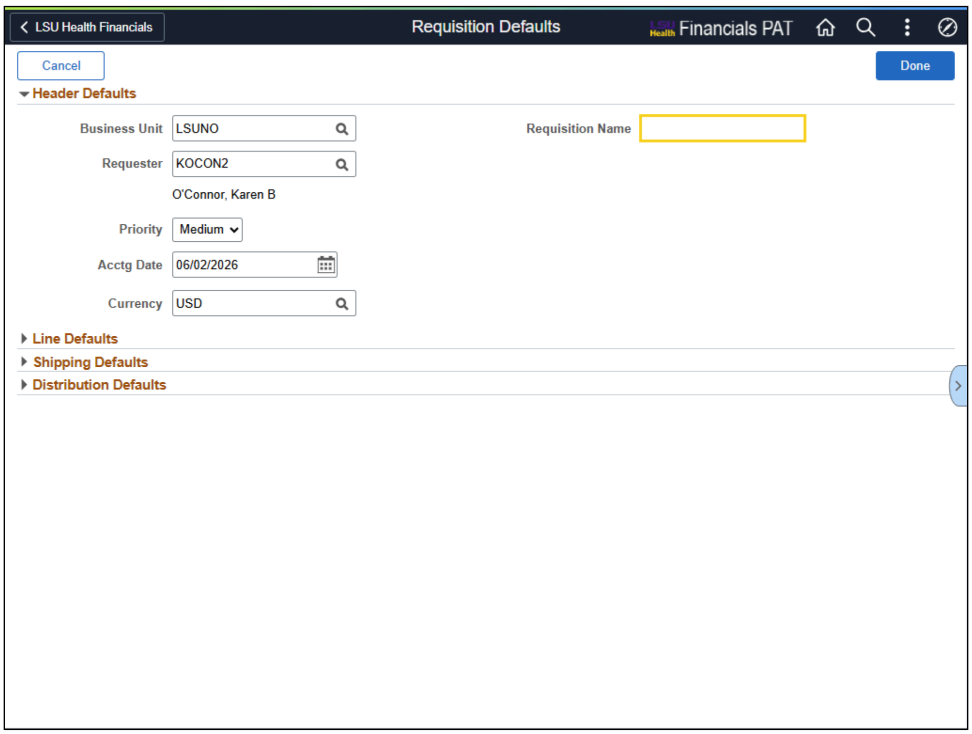
In this topic you will learn how to **Create a Special Request Requisition**.

Step	Action
1.	**Create a Special Request Requisition** A **Special Request Requisition** is used to *manually create* requisitions for *goods and services (e.g., blanket requisitions)* that are **not** *available* through *Punchout requisitions*. It serves as a *custom order form* and allows users to define items by entering their own descriptions, prices, and quantities. *(Oracle Help Center)*



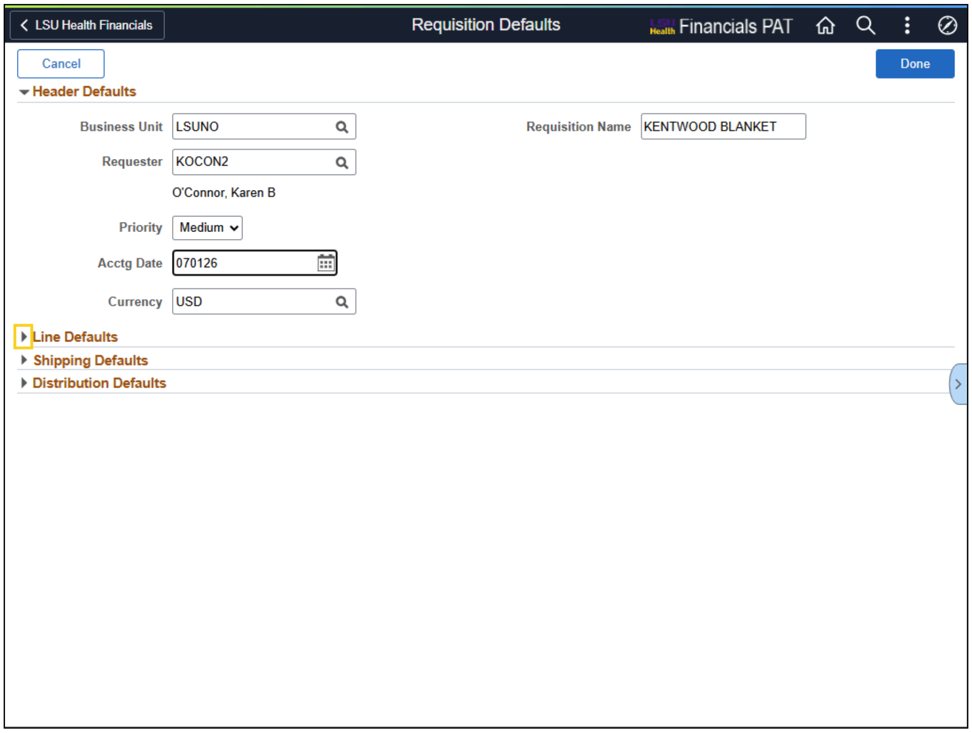
Step	Action
2.	**Create a Special Request Requisition** From the **LSU Health Financials** homepage, click the **Create a Requisition** tile.

Step	Action
3.	**Header Defaults** The user will follow the ***same steps*** for entering **Requisition Defaults** for a Special Request requisition as s/he did when entering ***Punchout Requisition Defaults***. ***NOTE: In this exercise, <u>only</u> the* steps *will be demonstrated for <u>Requisition Defaults</u>. Please refer to the Requisition Defaults topic for explanation information.***

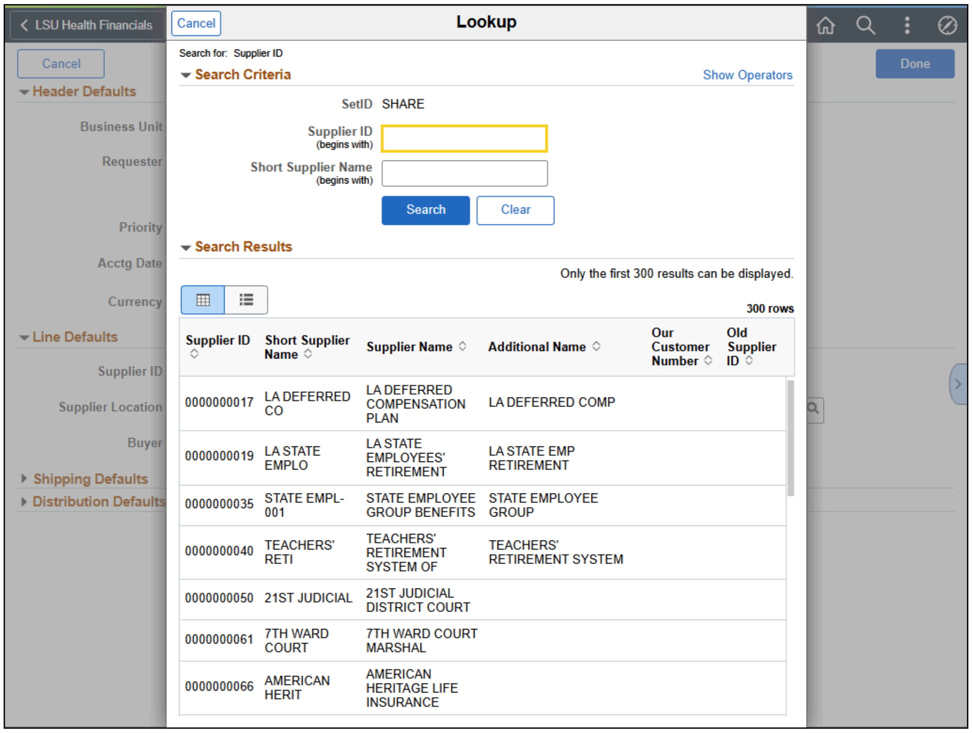


Step	Action
4.	**Header Defaults** (continued) It is *highly recommended* that a **Requisition Name** be entered. If the **Requisition Name** field is *left blank*, the system will *auto-populate* the *requisition's id number* when it saved / submitted. Enter the desired information into the **Requisition Name** field. Enter "**KENTWOOD BLANKET**".

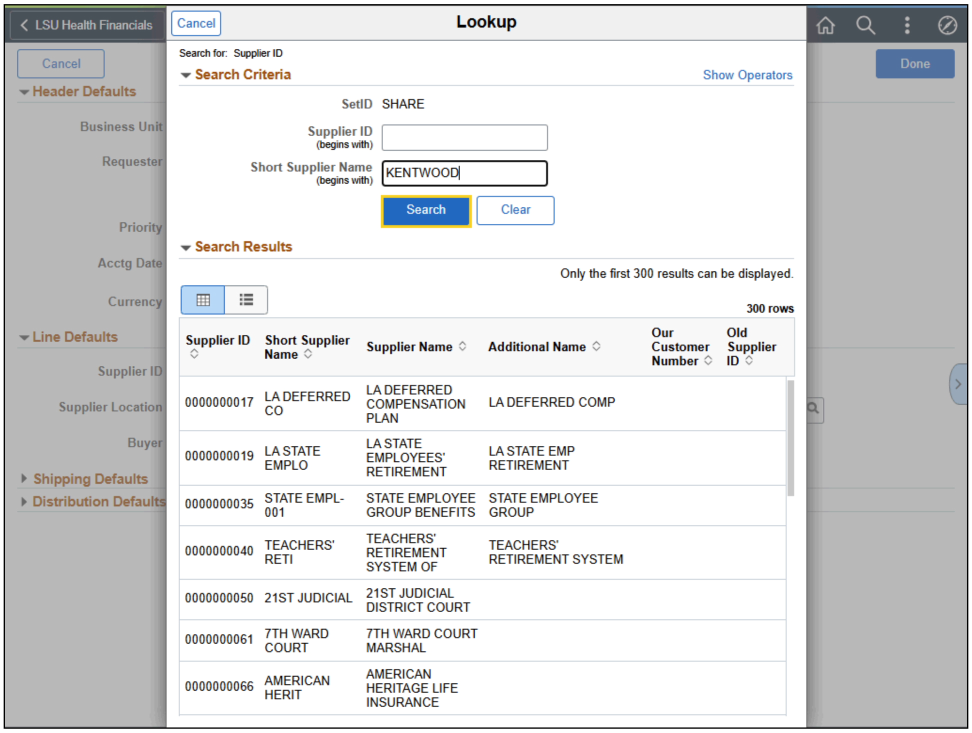
Step	Action
5.	**Header Defaults** (continued) *For this exercise, the user will enter 07/01/26 as the Acctg Date.* Enter the desired information into the **Acctg Date** field. Enter "**070126**".

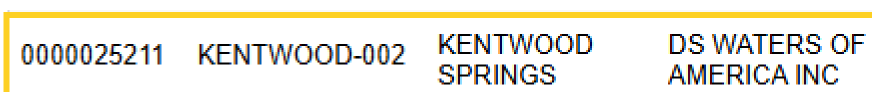


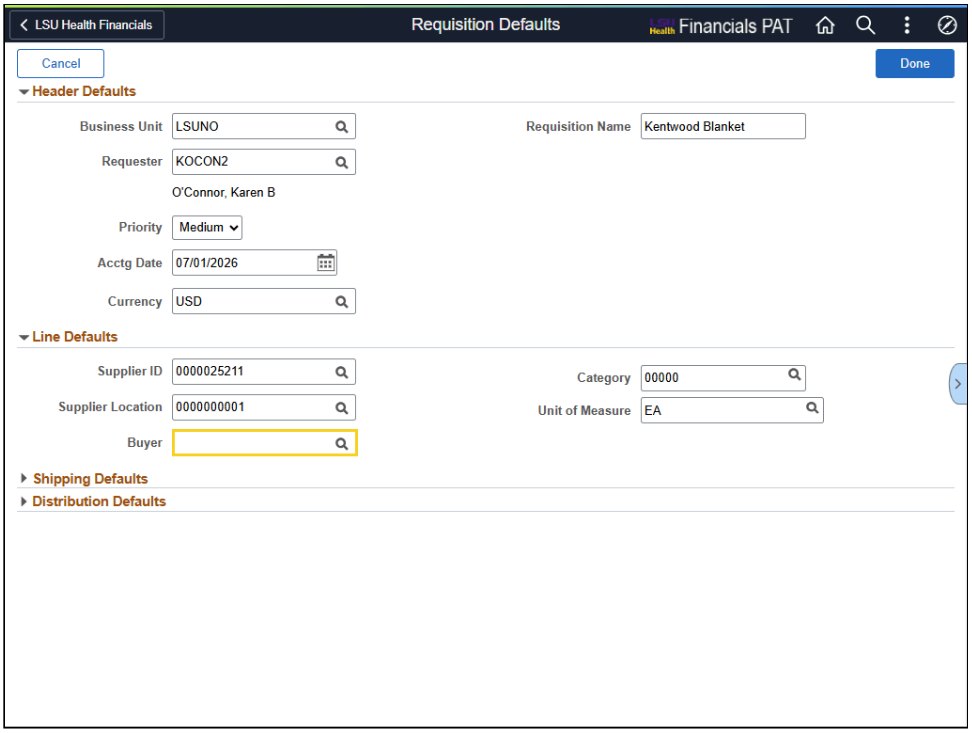
Step	Action
6.	**Line Defaults** Click the **Line Defaults** arrow. 
7.	**Line Defaults** (continued) Click the **Lookup Supplier ID** button. 
8.	**Lookup / Search** Click the **Search Criteria** arrow. 



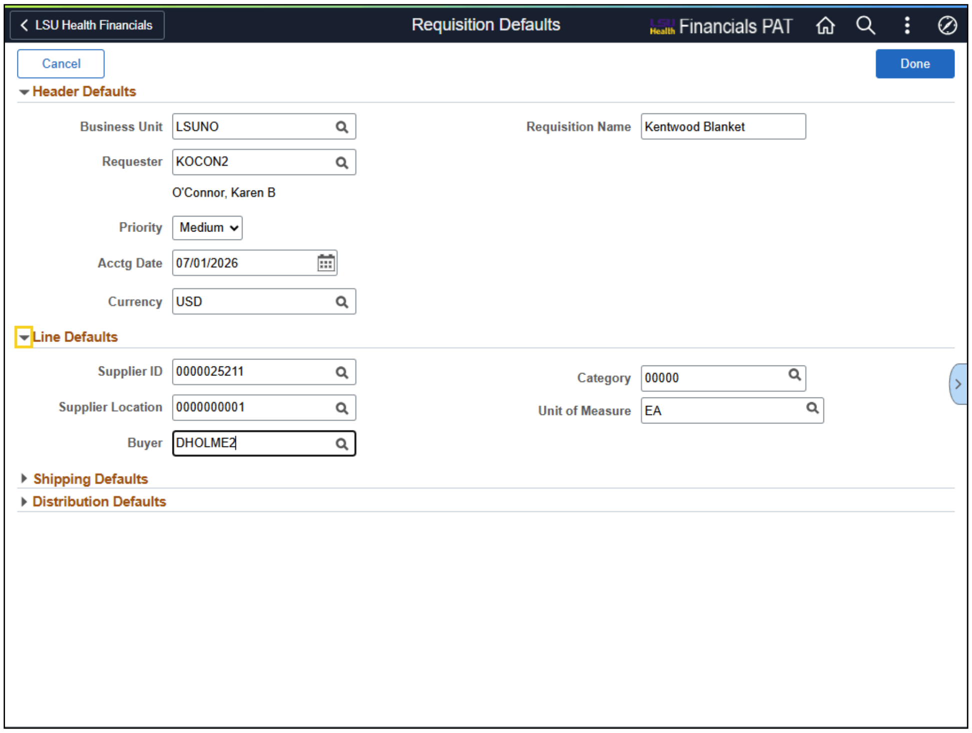
Step	Action
9.	**Lookup / Search** (continued) Enter the desired information into the **Supplier ID** field. Enter "**KENTWOOD**".



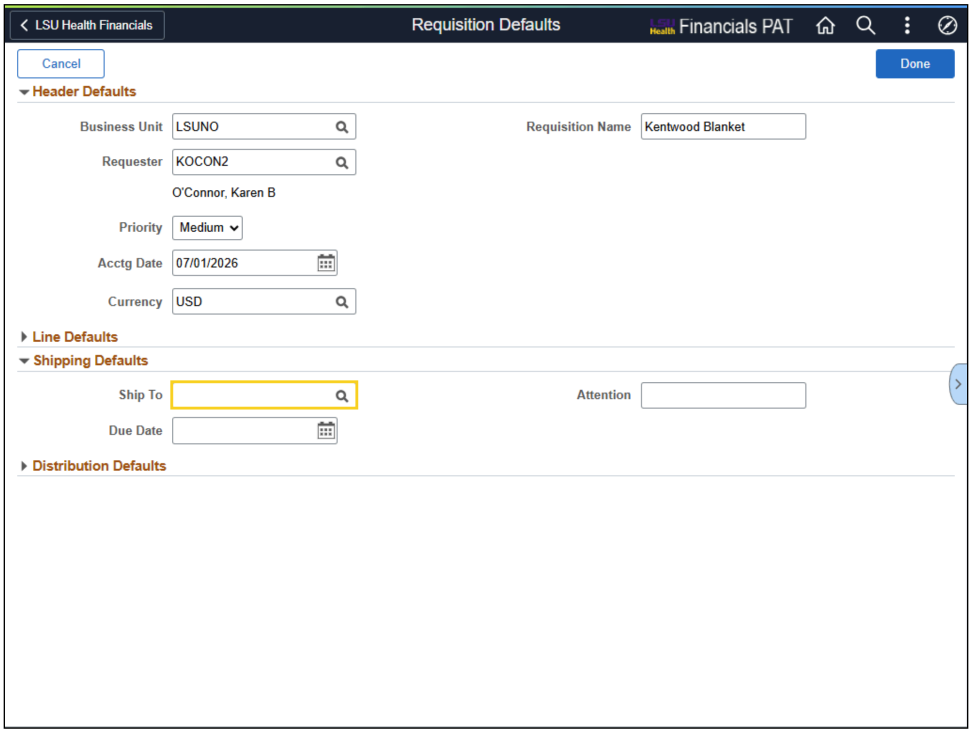
Step	Action
10.	**Lookup / Search** (continued) Click the **Search** button. 
11.	**Lookup / Search** (continued) Click the **KENTWOOD SPRINGS** button. 
12.	**Line Defaults** (continued) Click the **Line Defaults** arrow. 



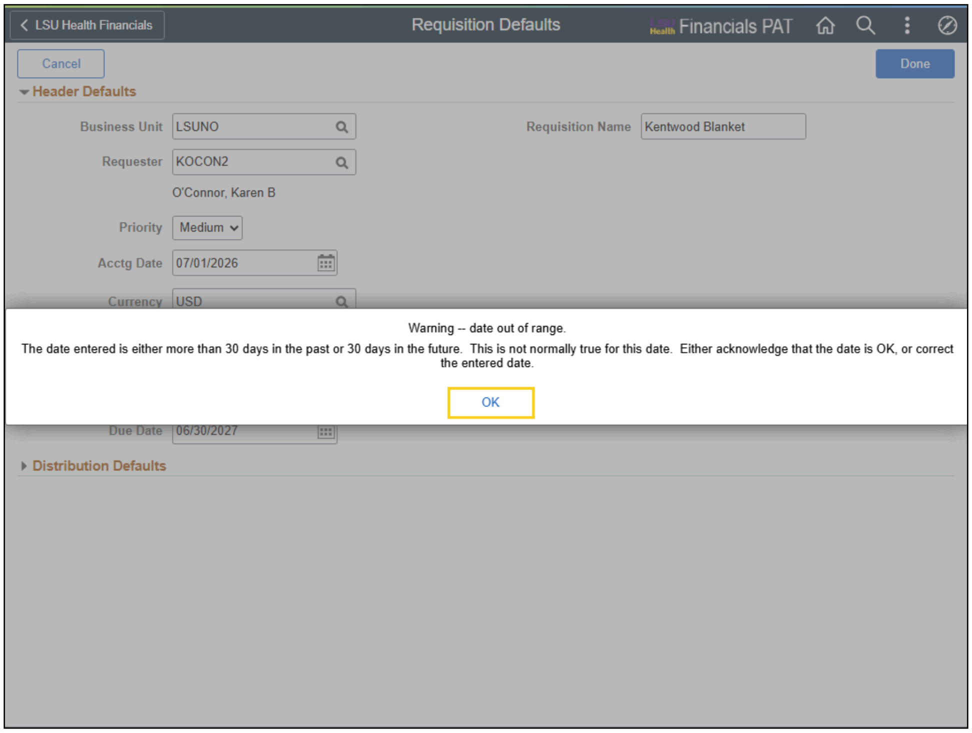
Step	Action
13.	**Line Defaults** (continued) Enter the desired information into the **Buyer** field. Enter "**DHOLME2**".



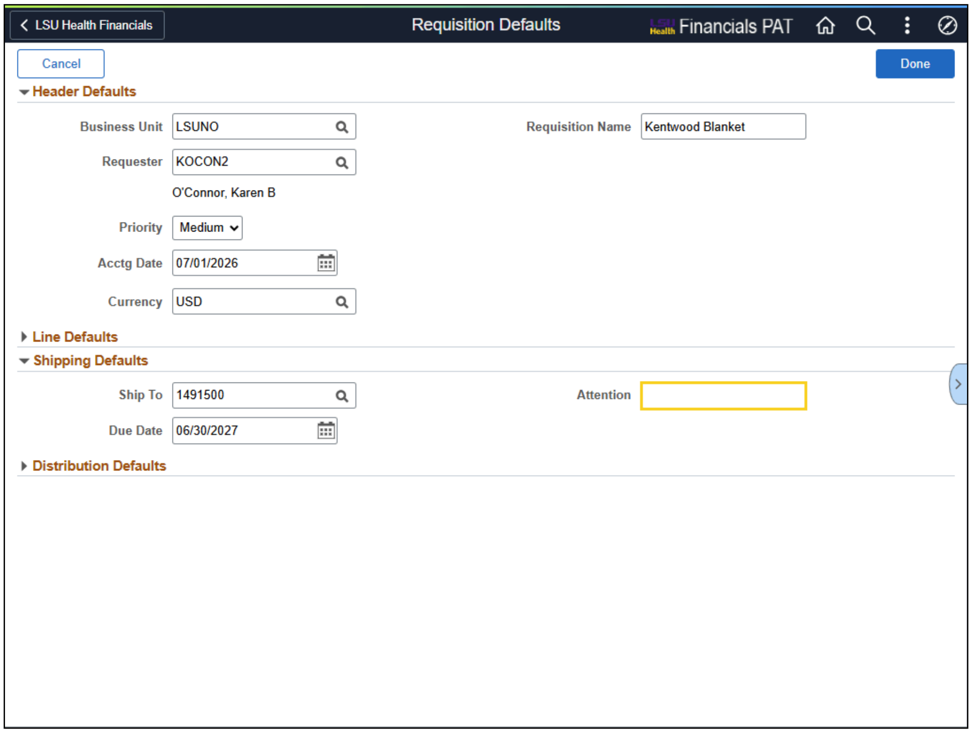
Step	Action
14.	**Line Defaults** (continued) Click the **Line Defaults** arrow.
15.	**Shipping Defaults** Click the **Shipping Defaults** arrow. 



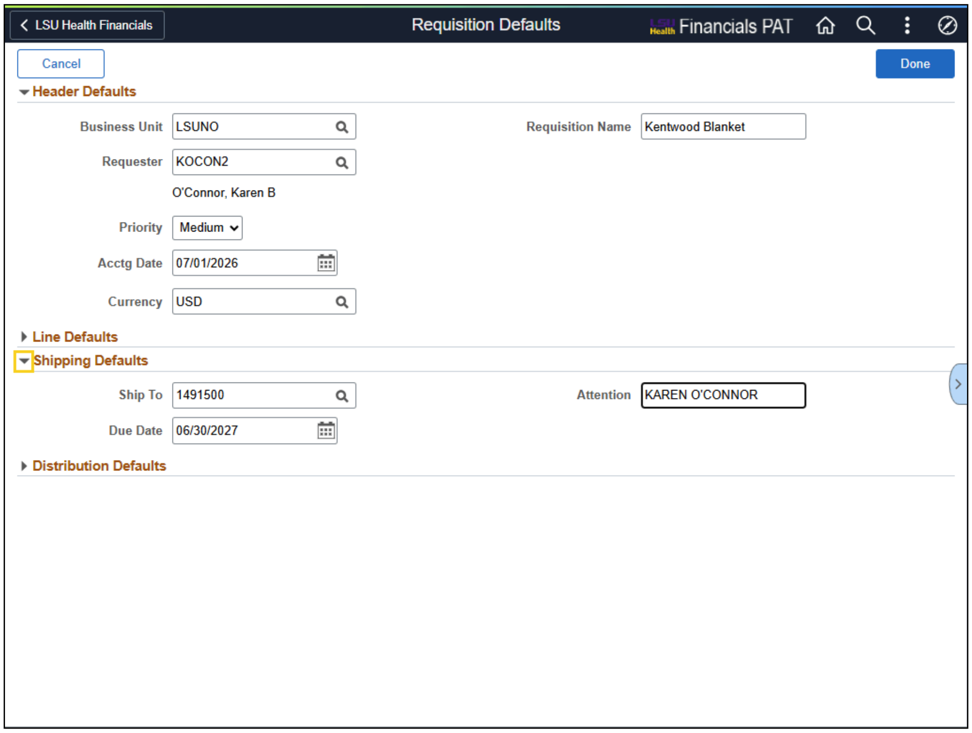
Step	Action
16.	**Shipping Defaults** (continued) Enter the desired information into the **Ship To** field. Enter "**1491500**".
17.	**Shipping Defaults** (continued) Enter the desired information into the **Due Date** field. Enter "**063027**".



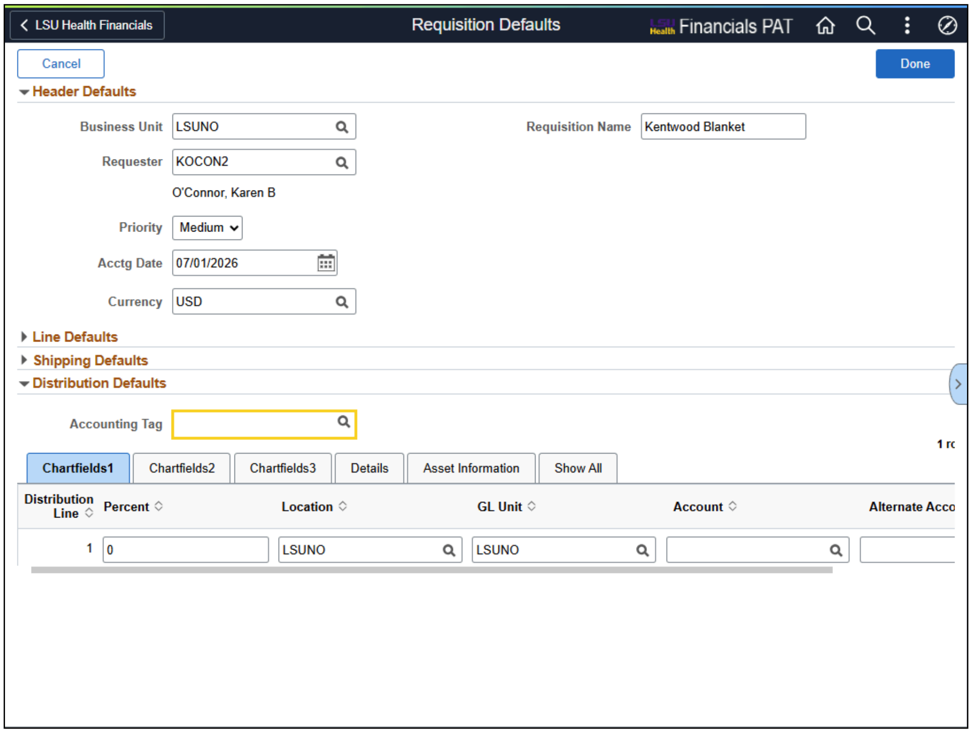
Step	Action
18.	**Shipping Defaults** (continued) Click the **OK** button. 



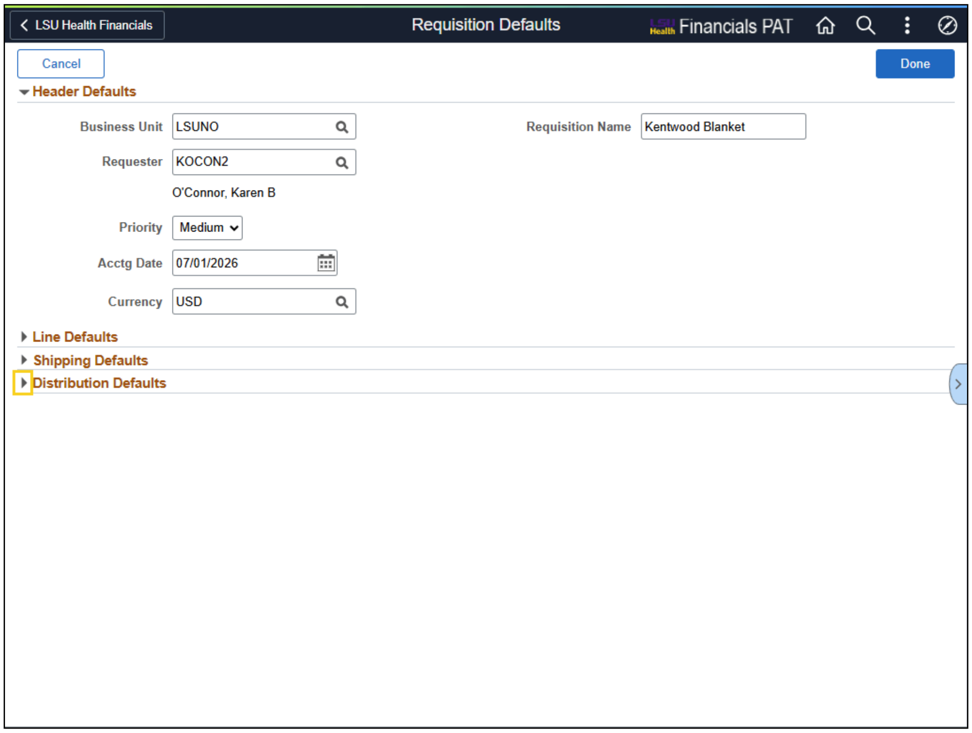
Step	Action
19.	**Shipping Defaults** (continued) Enter the desired information into the **Attention** field. Enter "**KAREN O'CONNOR**".



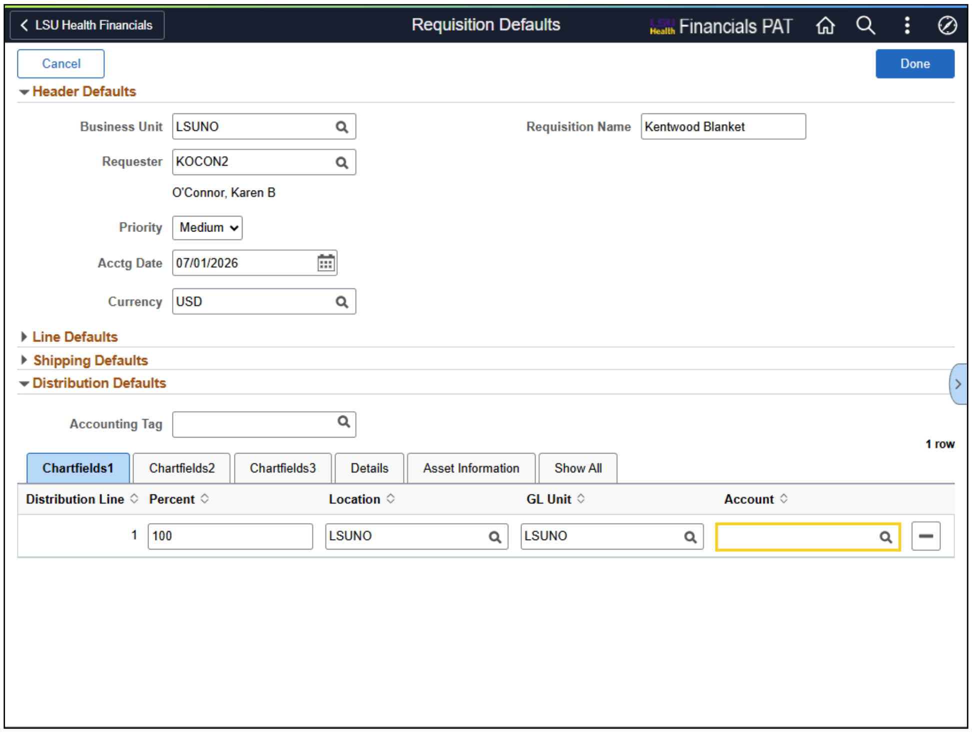
Step	Action
20.	**Shipping Defaults** (continued) Click the **Shipping Defaults** arrow.
21.	**Distribution Default** Click the **Distribution Defaults** arrow. 



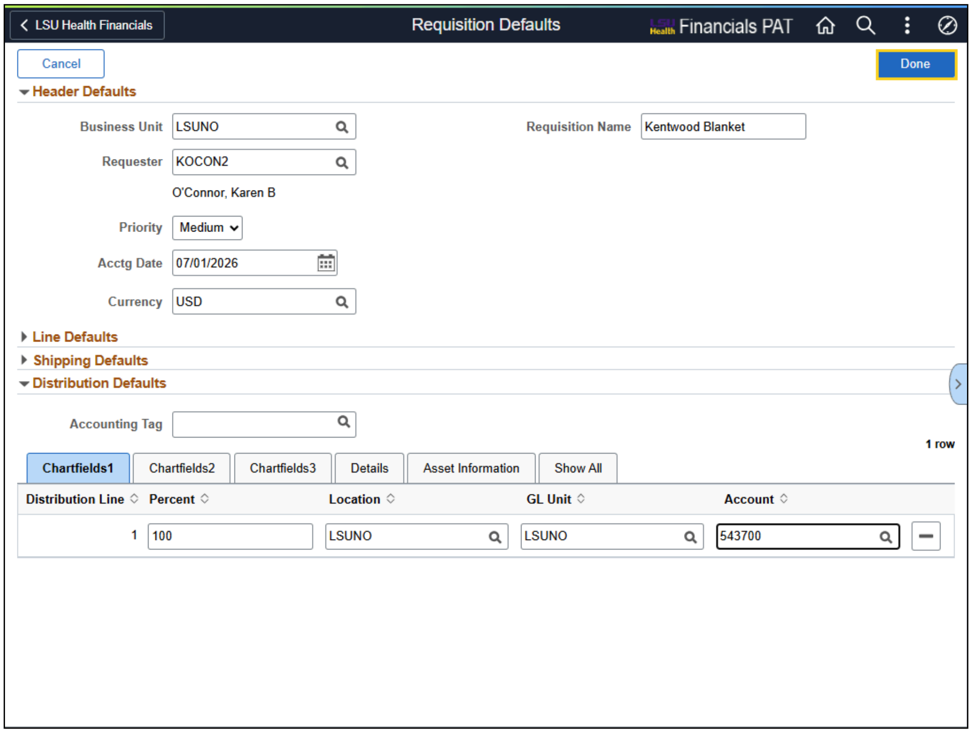
Step	Action
22.	**Distribution Default** (continued) Enter the desired information into the **Accounting Tag** field. Enter "**0491500014**".
23.	**Distribution Default** (continued) Press **[Tab]** button on your keyboard.

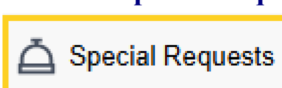


Step	Action
24.	**Distribution Default** (continued) Click the **Distribution Defaults** arrow. 

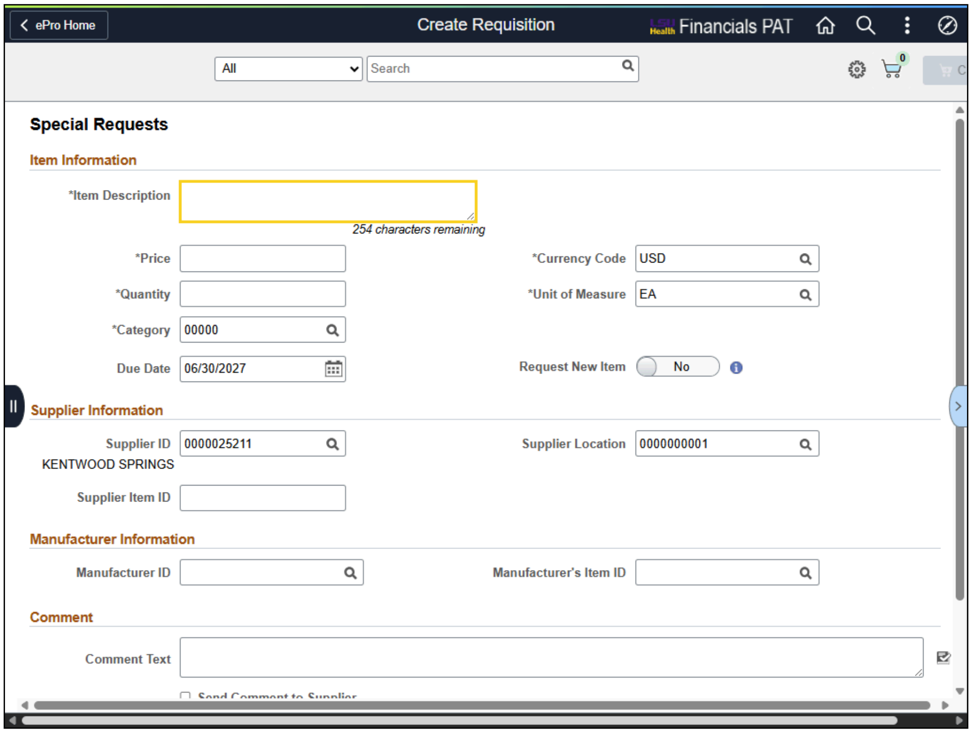


Step	Action
25.	**Distribution Default** (continued) Enter the desired information into the **Account** field. Enter "**543700**".



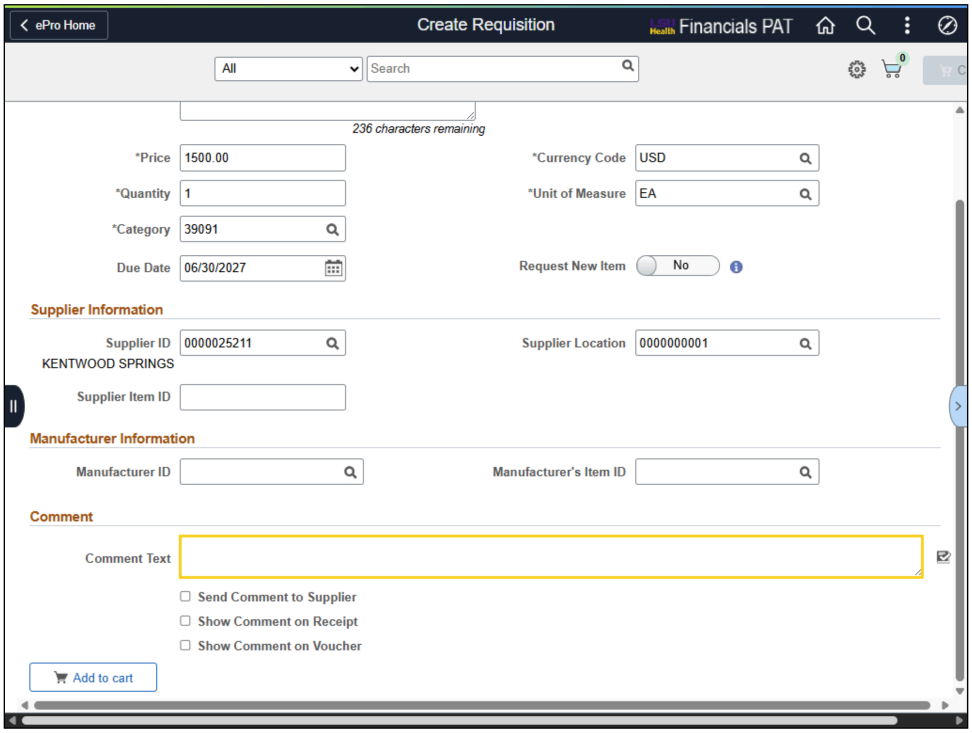
Step	Action
26.	**Requisition Defaults** Click the **Done** button. 
27.	**Create a Special Request Requisition** Click the **Special Requests** menu. 
28.	**Create a Special Request Requisition** (continued) Click the **Close Menu** button. 
29.	**Create a Special Request Requisition - PeopleSoft Required Fields** All fields that have an asterisk (*) before the field name are PeopleSoft required fields. This means you must enter a value into the field; it cannot be left blank.

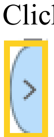
Step	Action
30.	**Create a Special Request Requisition - LSUNO Required Fields** LSUNO has ***designated specific fields*** as ***required*** as well. These fields do not have an asterisk before the field name. However, you are ***required to enter a value*** into the fields listed below for LSUNO purposes: **1. Due Date** - this value will default over from Requisition Defaults **2. Supplier ID** - this value will default over from Requisition Defaults **3. Supplier Location** - this value will default over from Requisition Defaults **4. Comment Text -** used to communicate additional information such as quotes, urgency, contact information, etc. to the **Purchasing** team
31.	**Item Information** The **Item Information** section allows the user to include *specific details* regarding the *requested item* to ensure the *exact goods or services are being ordered*. Some field information is *automatically displayed* based on *information entered* by the user in the **Requisition Defaults** page.
32.	***Item Description** The **Item Description** field is a required PeopleSoft field, so a description must be entered in ALL CAPS for *each line item*. The field is a free-text edit field. This means any type of character can be entered into the field (e.g., letters, numbers, special characters, etc.). The box is limited to 254 characters, which includes spaces. The system will allow you to enter more than 254 characters, but the system will truncate the number of characters entered down to 254.



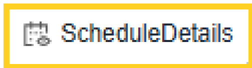
Step	Action
33.	***Item Description** (continued) ***NOTE: Please ensure the description provides Purchasing with the needed detail without being overly verbose.*** Enter the desired information into the ***Item Description** field. Enter "**WATER SERVICE FY27**".
34.	***Price** The **Price** will be the *unit price, contracted price,* and / or *yearly cost* of the item or service being requested. When *entering the cost* of an item into the **Price** field, users **must** enter the *decimal point to indicate cents* (e.g., 12.95). Enter the desired information into the ***Price** field. Enter "**1500**".
35.	***Quantity** The **Quantity** must be entered in ***whole numbers*** (e.g., 10 or 11 rather than 10.5). This is the *physical number of items* being requested. *When entering a fiscal year blanket requisition, the Quantity will be "1".* Enter the desired information into the ***Quantity** field. Enter "**1**".

Step	Action
36.	***Unit of Measure** The **Unit of Measure** (UOM) defaults to ***"EA"*** (Each). The ***UOM*** can be *changed as needed* based on the *item or service being requested*. The user may *enter* the UOM *directly into the field*, or *search* for it by clicking the ***Look up UOM*** button to the *right of the field*.
37.	**Category** The **Category** is a value from the *Inventory Tables of the State Commodity Code*. The **Category** code will vary by business unit. **LSUNO** users will *enter or search* for the appropriate **Category** code. If the appropriate code **cannot** be found, *contact Purchasing for assistance*. Enter the desired information into the ***Category** field. Enter "**39091**".



Step	Action
38.	**Comment Text** Use the **Comment Text** field to enter any *additional information* ***Purchasing*** may need regarding the *item / service being requested*. Enter the desired information into the **Comment Text** field. Enter "**WATER SERVICE FY27 BLANKET**".
39.	**Cart** Click the **Add to cart** button. 
40.	**Cart** (continued) The user can *view* the *items* in his / her cart, by selecting the blue ***Open Cart*** button on the *right side of the page*. Click the **Open Cart** button. 

Step	Action
41.	**Checkout** The *item(s) in the cart* are displayed in the **Cart** column. If *all items* have been *added* to the *cart*, select the **Checkout** button. Click the **Checkout** button. 
42.	**Checkout** (continued) On the **Checkout** page, the user can *enter Header, Justification, and Line Comments, adjust Quantity or UOM,* and *access* the *Schedule and Line Details* pages.
43.	**Header and Line Comments** The *same method* is used for *entering* **Header** and **Line Comments**. ***Comments*** can be added in **Header Comments**, or in **Line Comments** located in the ***Requisition Lines Overview*** section. The *method* used is the same for *entering* both **Header** and **Line Comments**. Comments that will apply to *all lines of the requisition* will be entered into **Header Comments**, such as *specific shipping instructions, supplier information* if the supplier is not listed in the database, etc. Comments pertaining to a *specific line item* will be entered at the **Line Comments**. *File **attachments** can also be added in **Header** and **Line Comments**.*
44.	**Header and Line Comments** ***NOTE: Entering Header and Line Comments will not be demonstrated in this example.*** ***See the Checkout Page: Header, Justification, and Line Comments, and Attachments topic for instructions on entering Header and Line Comments.***
45.	**Justification Comments** **Justification Comments** are used to *explain why* a *specific purchase* is *needed* - *the purpose of the request* - and the *urgency* of the request. ***NOTE: Entering Justification Comments will not be demonstrated in this example.*** ***See the Checkout Page: Header, Justification, and Line Comments, and Attachments topic for instructions on entering Header and Line Comments.***

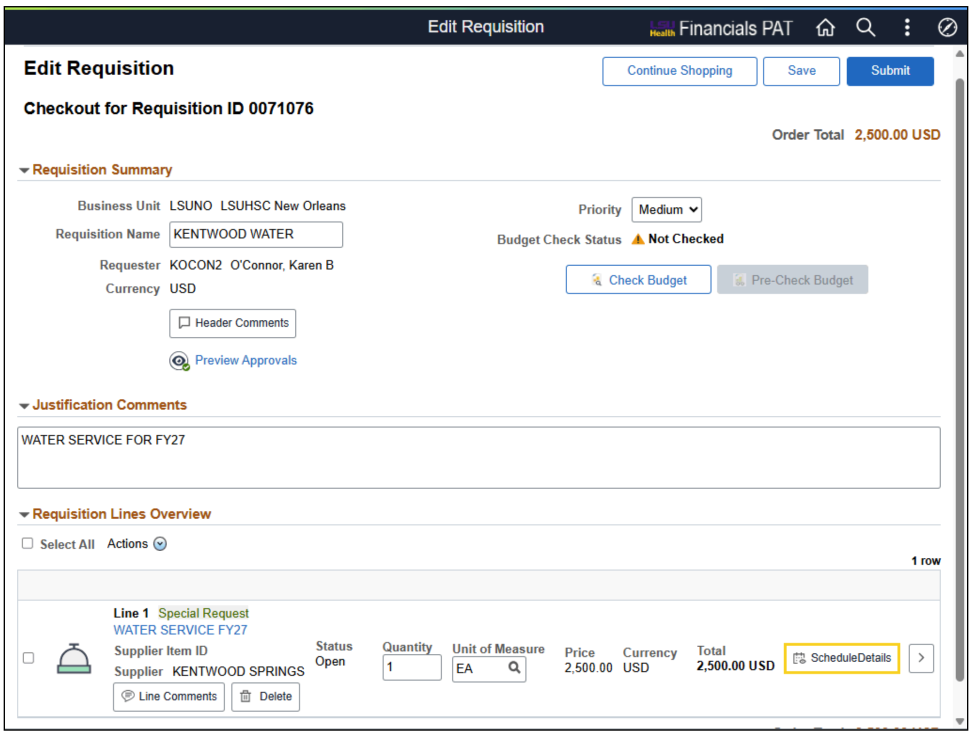
Step	Action
46.	Schedule Details Click the **Schedule Details** button. 
47.	**Schedule and Line Details** ***NOTE: Reviewing, adding, or adjusting Ship To, Due Date, Quantity, chartstrings, Buyer and / or Supplier will not be demonstrated in this example.*** ***See the Checkout Page: Distributions, Schedule and Line Details, and Save topic for instructions on using Schedule and Line Details.***
48.	**Checkout** (continued) *After all comments, attachments, and adjustments have been made, you can **Submit** the requisition for approval.* Click the **Submit** button. 
49.	**Checkout Confirmation** The **Checkout Confirmation** page is displayed, and the **Requisition ID** number is *assigned*. **Budget Check cannot** be *completed* until the requisition is *approved*. *Select* the **View Approval Chain** to view the *approval sequence*. *Select* the **Print Preview** to *print* the requisition. *Notice the Next Steps section where you can Edit the Requisition, find existing requisitions, and begin a new requisition.*
50.	This completes ***Create a Special Request Requisition***. **End of Procedure.**

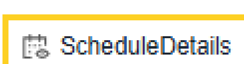
Change a Chartstring using the Accounting Tag Link

Procedure

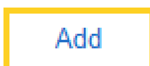
In this topic you will learn how to **Change a Chartstring using the Accounting Tag Link**.

Step	Action
1.	***NOTE: The steps discussed in this topic may be used to change a chartstring on Punchout and / or Special Request requisitions.***

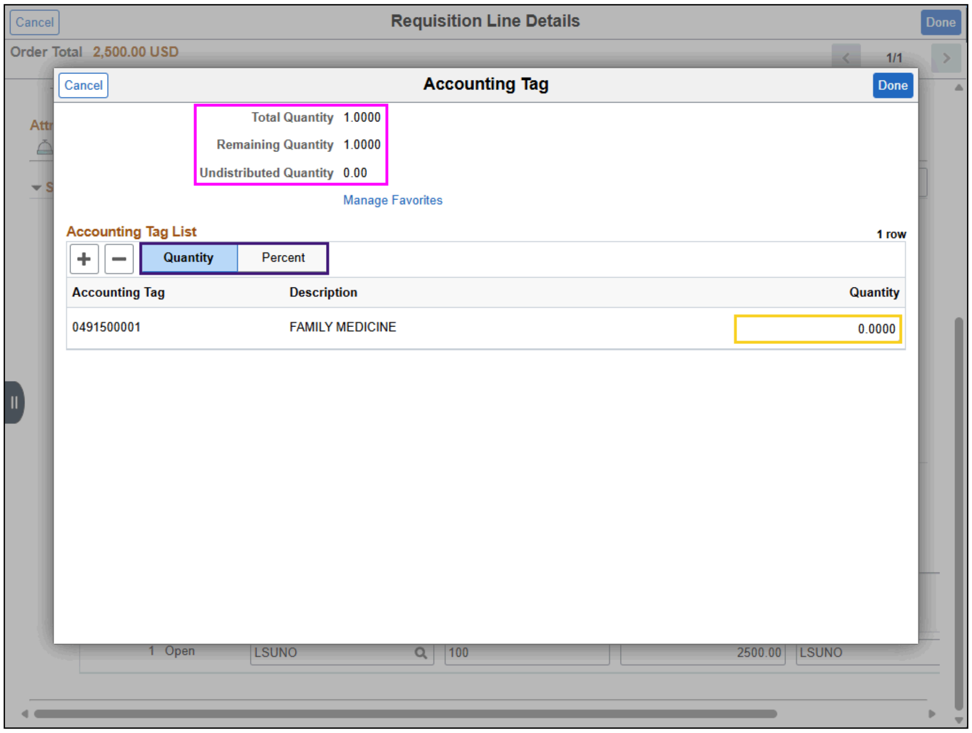


Step	Action
2.	**Edit Requisition - Schedule Details** *In this exercise, you will change the requisition chartstring using an **Accounting Tag**. Select **Schedule Details** to access the accounting tag link.* Click the **Schedule Details** button. 

Step	Action
3.	**Edit Requisition - Schedule Details** (continued) Click the **Close Navigation Control Panel** button. 
4.	**Edit Requisition - Schedule Details** (continued) Click the **Down** button of the scrollbar.
5.	**Distributions** You can review the current chartstring information by selecting the Chartfields2 tab. Click the **Chartfields2** tab. 
6.	**Distributions** (continued) Review the **Fund Code**, **Program Code**, and **Class Field** information.
7.	**Distributions** (continued) Click the **Chartfields3** tab. 
8.	**Distributions** (continued) The **PC Business Unit** (e.g., LSUNO) must be *entered* if the **Project ID** needs to be added. A **Project ID** cannot be *entered* if the **PC Business Unit** field is *unpopulated*. *In this example, the PC Busines Unit and Project ID will remain blank.* Click the **Chartfields1** tab. 

Step	Action
9.	**Change Chartstring using Accounting Tag** The **Accounting Tag** link is located either *directly under or* to the *right* of the ***Distribute By** field (depends on whether left-side menu is open or closed). A *new pop-up window* will be displayed after opening the link. Click the **Accounting Tag** link. 
10.	**Change Chartstring using Accounting Tag** (continued) Two (2) interacting elements - **Manage Favorites** and **Add** button - are displayed on the Accounting Tag panel. *For this exercise, <u>only</u> the **Add** button will be utilized to change the chartstring on the requisition.* Click the **Add** button. 
11.	**Change Chartstring using Accounting Tag** (continued) A listing of <u>**all**</u> *accounting tags* is displayed. Select the **Filter** button to *search* for the *new accounting tag*. Click the **Filter** button. 
12.	**Change Chartstring using Accounting Tag** (continued) To begin your search, *set* the **List** field to **"All"** if it does <u>not</u> default. The user can enter the *accounting tag number directly into the Accounting Tag field* if it is known. If it is <u>not</u> known, select the **Look up Accounting Tag** (magnifying glass) to *search* for it. Users can also *search by entering text* into the **Description** field. *In this example, the text "FAMILY" will be entered in the Description field to search for an accounting tag.* Enter the desired information into the **Description** field. Enter "**FAMILY**".

Step	Action
13.	**Change Chartstring using Accounting Tag** (continued) Click the **Done** button. 
14.	**Change Chartstring using Accounting Tag** (continued) A *list* of *accounting tags containing* the word **"FAMILY"** in the **Description** appears. Select the **checkbox** to the *left* of the *appropriate accounting tag*. Click the **Select Checkbox** option. 
15.	**Change Chartstring using Accounting Tag** (continued) Make sure the appropriate *accounting tag* is ***checked*** *before selecting* the **Done** button. Click the **Done** button. 



Step	Action
16.	**Change Chartstring using Accounting Tag** (continued) This panel allows the *user* to ***set the Quantity or Percentage*** to be *allocated to the accounting tag*. ***<u>For single-distribution accounting tags, allocate the entire quantity or percentage (100%).</u>*** ***NOTE: The number entered in the Quantity field must match the Total Quantity. In this example the Total Quantity is "1", so the user will enter "1" in the Quantity field.*** Enter the desired information into the **Quantity** field. Enter "**1**".
17.	**Change Chartstring using Accounting Tag** (continued) Click the **Done** button. 

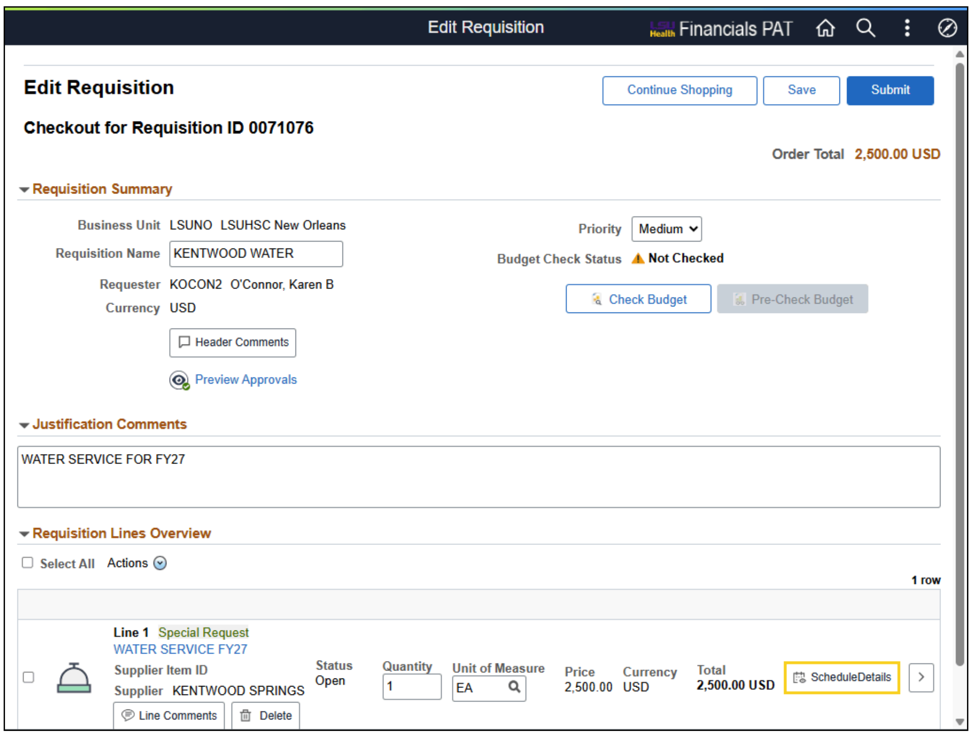
Step	Action
18.	**Change Chartstring using Accounting Tag** (continued) The system will automatically *copy* the *new chartstring* into the ***Chartfield tabs*** on the **Schedule Details** panel. Select **Chartfields2** tab to view *updated chartstring* information. Click the **Chartfields2** tab. 
19.	**Change Chartstring using Accounting Tag** (continued) After reviewing the new chartstring information, *select* the **Done** button to *return* to the **Checkout** page. Click the **Done** button. 
20.	this complete ***Change a Chartstring using the Accounting Tag Link***. **End of Procedure.**

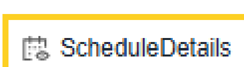
Change a Chartstring by Adding Accounting Tag to Favorites

Procedure

In this topic, you will learn how to **Change Chartstring by Adding Accounting Tag to Favorites**.

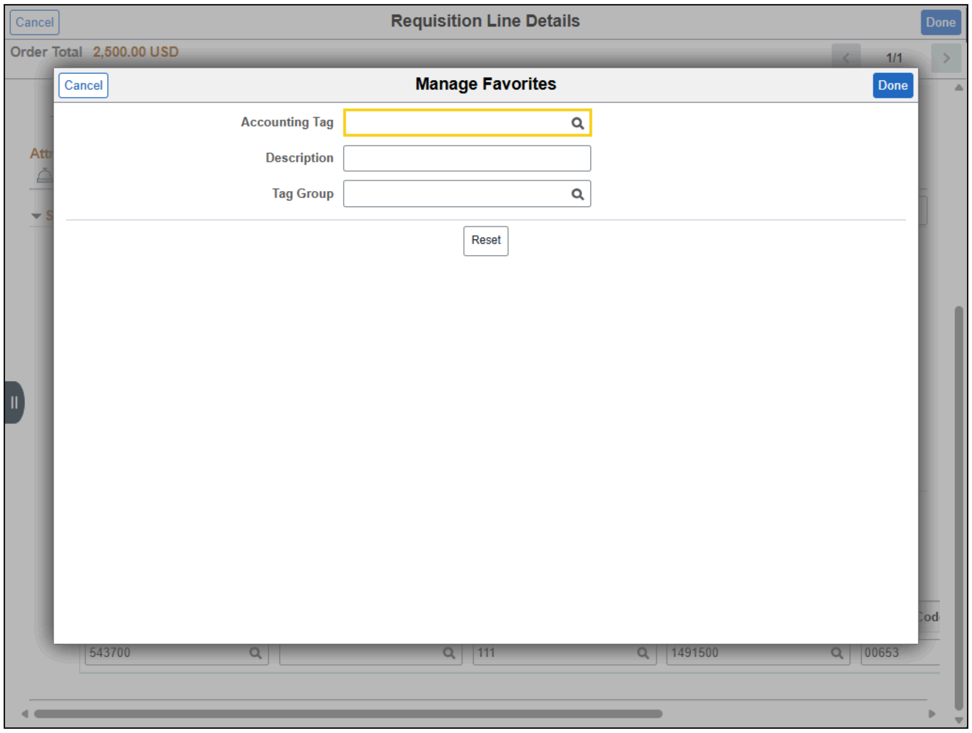
Step	Action
1.	***NOTE: The steps discussed in this topic may be used to change a chartstring in Punchout and / or Special Request requisitions.***



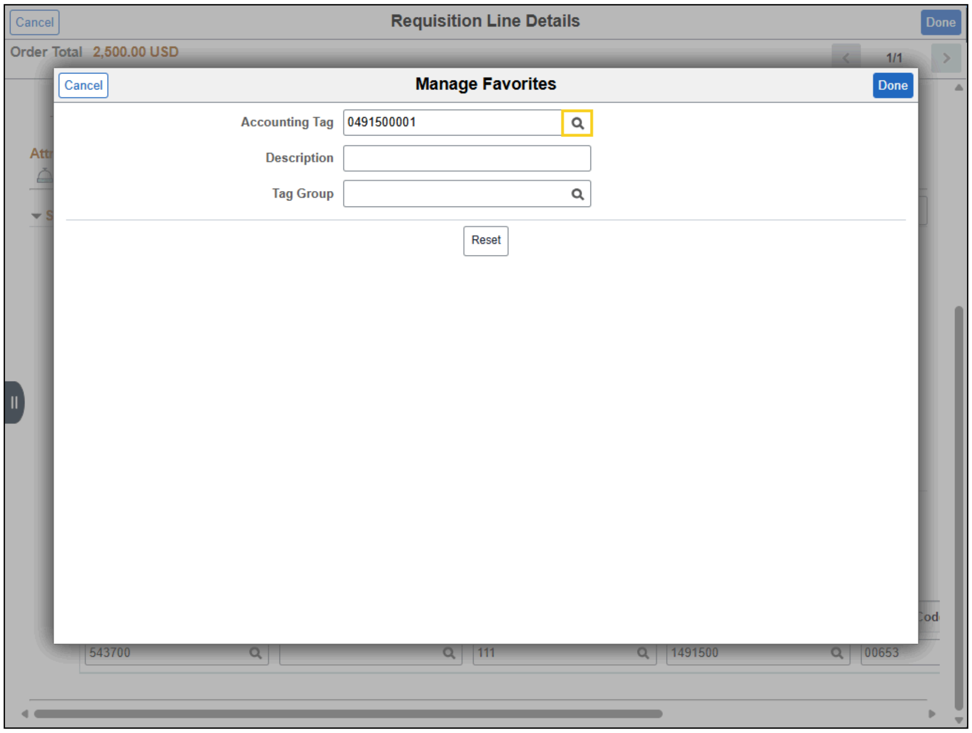
Step	Action
2.	**Edit Requisition - Schedule Details** You can change the chartstring on a requisition using the Accounting Tag link on the line-item Schedule Details page. Click the **Schedule Details** button. 

Step	Action
3.	**Edit Requisition - Schedule Details** Scroll down to the **Schedule 1 Distributions** section. Click the **Down** button of the scrollbar.
4.	**Edit Requisition - Schedule Details** Click the **Close Navigation Control Panel** button. 
5.	**Distributions** You can review the current chartstring information by selecting the Chartfields2 tab. Click the **Chartfields2** tab. 
6.	**Distributions** (continued) Review the **Fund Code**, **Program Code**, and **Class Field** information.
7.	**Distributions** (continued) Click the **Chartfields3** tab. 
8.	**Distributions** (continued) The **PC Business Unit** (e.g., LSUNO) must be *entered* if the **Project ID** needs to be added. A **Project ID** cannot be *entered* if the **PC Business Unit** field is *unpopulated*. *In this example, the PC Busines Unit and Project ID will remain blank.* Click the **Chartfields1** tab. 

Step	Action
9.	**Add Accounting Tag to Favorites** The **Accounting Tag** link is located either *directly under or* to the *right* of the ***Distribute By** field (depends on whether left-side menu is open or closed). A *new pop-up window* will be displayed after opening the link. Click the **Accounting Tag** link. 
10.	**Add Accounting Tag to Favorites** (continued) Two (2) interacting elements - **Manage Favorites** and **Add** button - will be shown. You will select the **Manage Favorites** link *first* to find and add favorite accounting tags. Click the **Manage Favorites** link. 
11.	**Add Accounting Tag to Favorites** (continued) The **Filter** icon <u>must</u> be selected to *find* an *accounting tag*. Selecting the **Filter** icon will *open a new window*. Click the **Filter** button. 

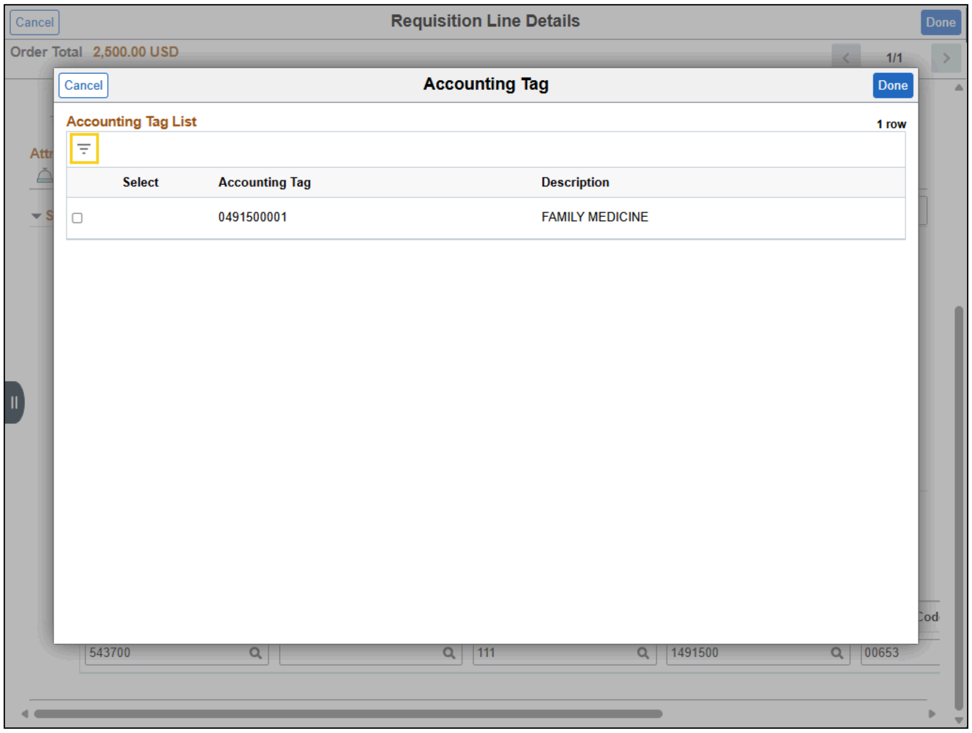


Step	Action
12.	**Add Accounting Tag to Favorites** (continued) You can *enter* the *accounting tag* number *directly* into the **Accounting Tag** field, **or** you can *search* for it *using* the **Look up Accounting Tag** (magnifying glass) feature. *In this example, you will enter accounting tag "0491500001" directly into the field.* Enter the desired information into the **Accounting Tag** field. Enter "**0491500001**".

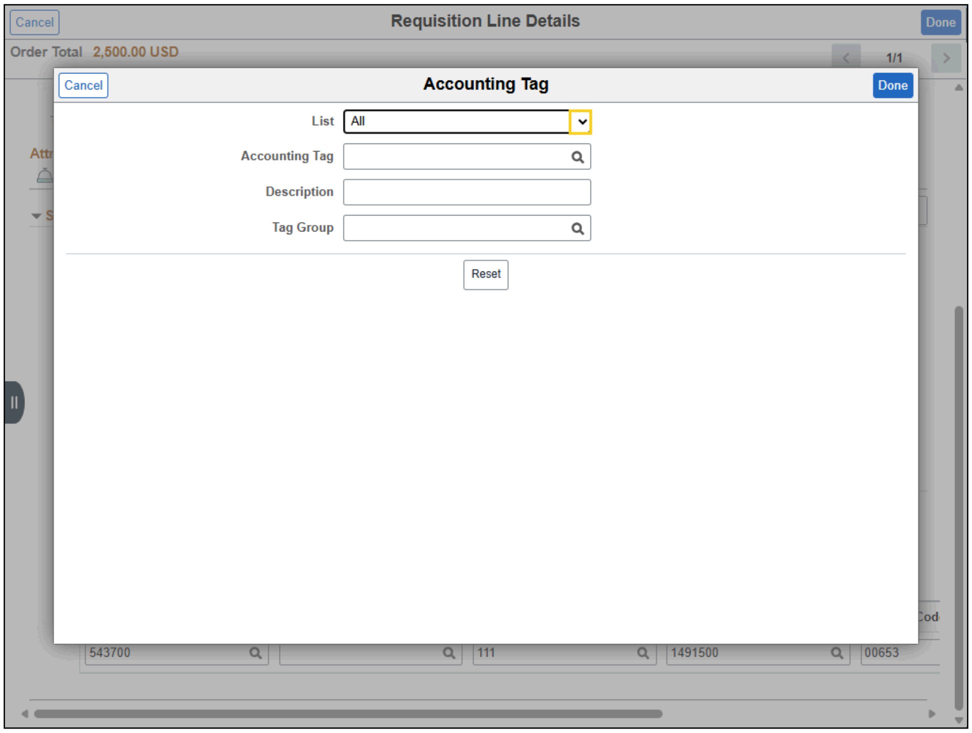


Step	Action
13.	**Add Accounting Tag to Favorites** (continued) Use the **Look up Accounting Tag** feature to *verify* the number you entered is correct. Click the **Look up Accounting Tag** button. 
14.	**Add Accounting Tag to Favorites** (continued) Click anywhere on the **Accounting Tag** line to select it.
15.	**Add Accounting Tag to Favorites** (continued) Selecting the **Done** button will *add* the accounting tag as a *Favorite*. However, *adding* it as a *Favorite* **does not** select it for **use** in the requisition as yet. Click the **Done** button. 

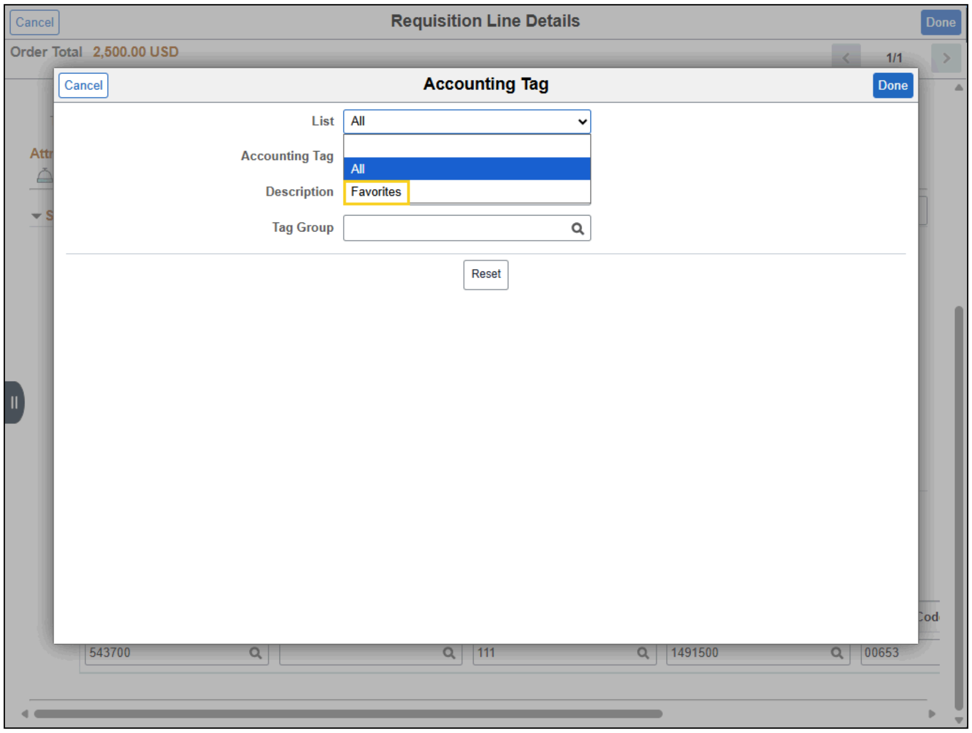
Step	Action
16.	**Add Accounting Tag to Favorites** (continued) You <u>must</u> select the ***checkbox*** to the left of the **Accounting Tag** number to ***Save*** the accounting tag as a *Favorite*. ***NOTE: The Accounting Tag will not Save if the checkbox is not checked.*** Click the **Favorites Checkbox** option. 
17.	**Add Accounting Tag to Favorites** (continued) Click the **Save** button. 
18.	**Add Accounting Tag to Favorites** (continued) To *add* the **Accounting Tag *to the requisition***, select the **Add** button. Click the **Add** button. 



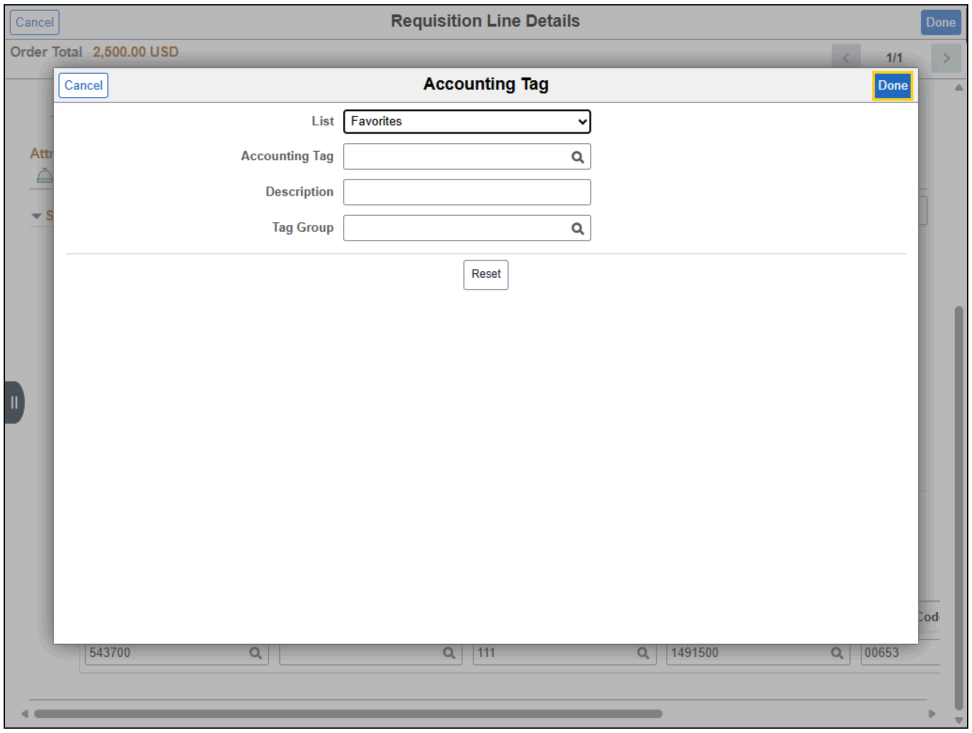
Step	Action
19.	**Add Accounting Tag to Favorites** (continued) Click the **Filter** button. 



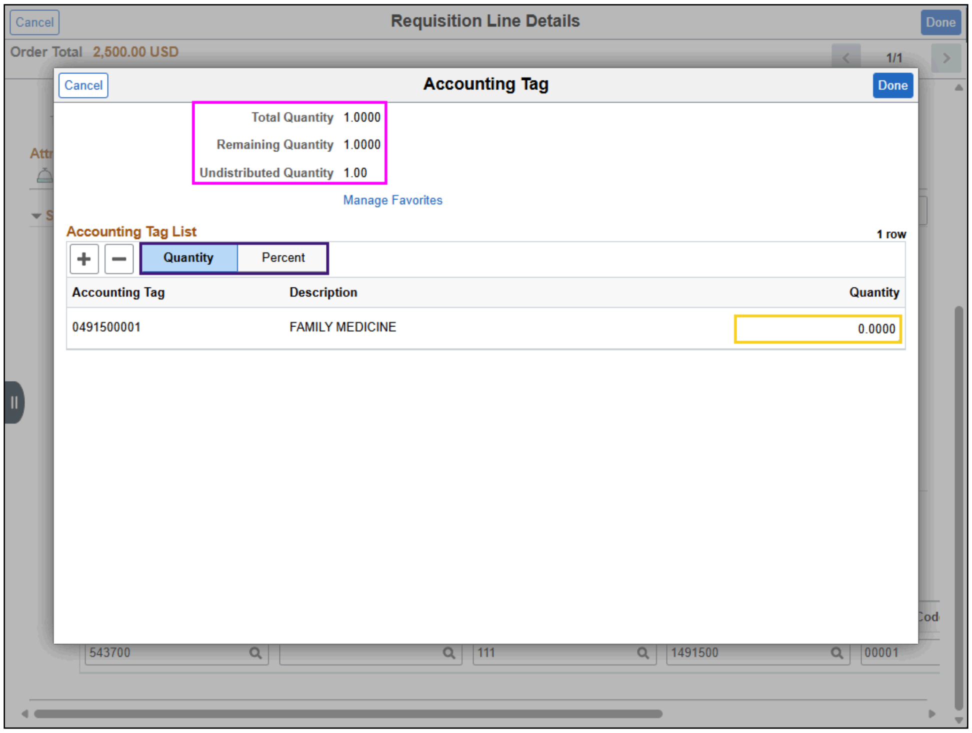
Step	Action
20.	**Add Accounting Tag to Favorites** (continued) An **Accounting Tag** can be *searched individually*, or a **Favorite Accounting Tag** can be *selected* by choosing the ***"Favorite"*** option from the *drop-down list*. Click the button to the right of the **List** field. 



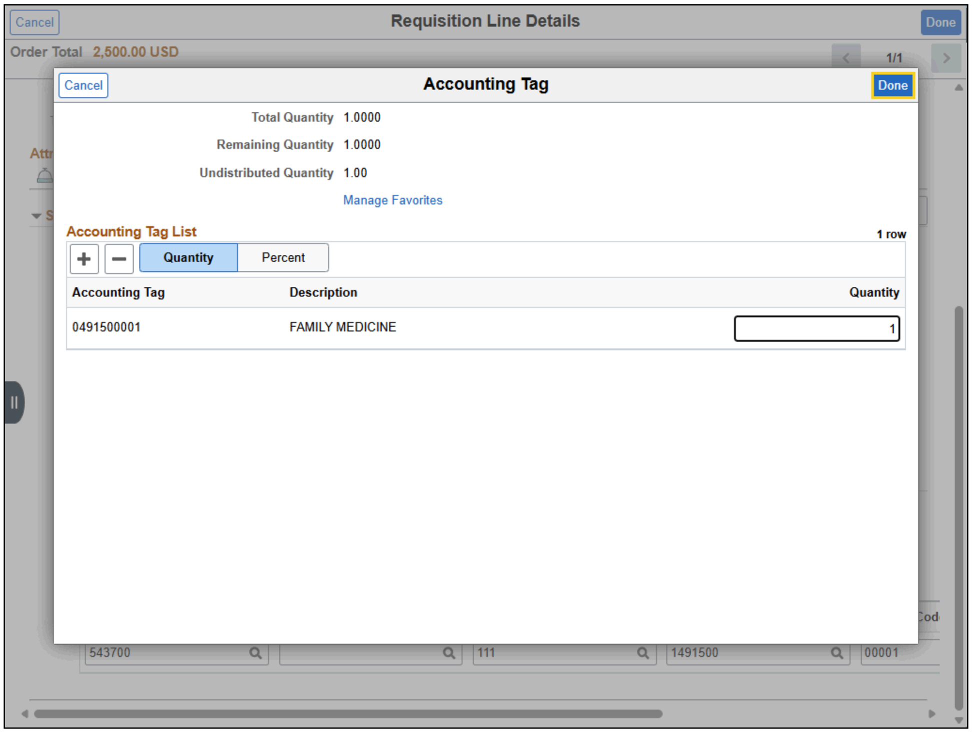
Step	Action
21.	**Add Accounting Tag to Favorites** (continued) Click the **Favorites** list item. 



Step	Action
22.	**Add Accounting Tag to Favorites** (continued) Click the **Done** button. 
23.	**Add Accounting Tag to Favorites** (continued) A list of all saved favorite accounting tags is displayed. Click the **Select Checkbox** option. 
24.	**Add Accounting Tag to Favorites** (continued) Click the **Done** button. 



Step	Action
25.	**Add Accounting Tag to Favorites** (continued) This panel allows the user to *set the Quantity or Percentage* to be *allocated to the accounting tag*. ***For single-distribution accounting tags, allocate the entire quantity or percentage (100%).*** ***NOTE: The number entered in the Quantity field must match the Total Quantity. In this example the Total Quantity is "1", so the user will enter "1" in the Quantity field.*** Enter the desired information into the **Quantity** field. Enter "**1**".



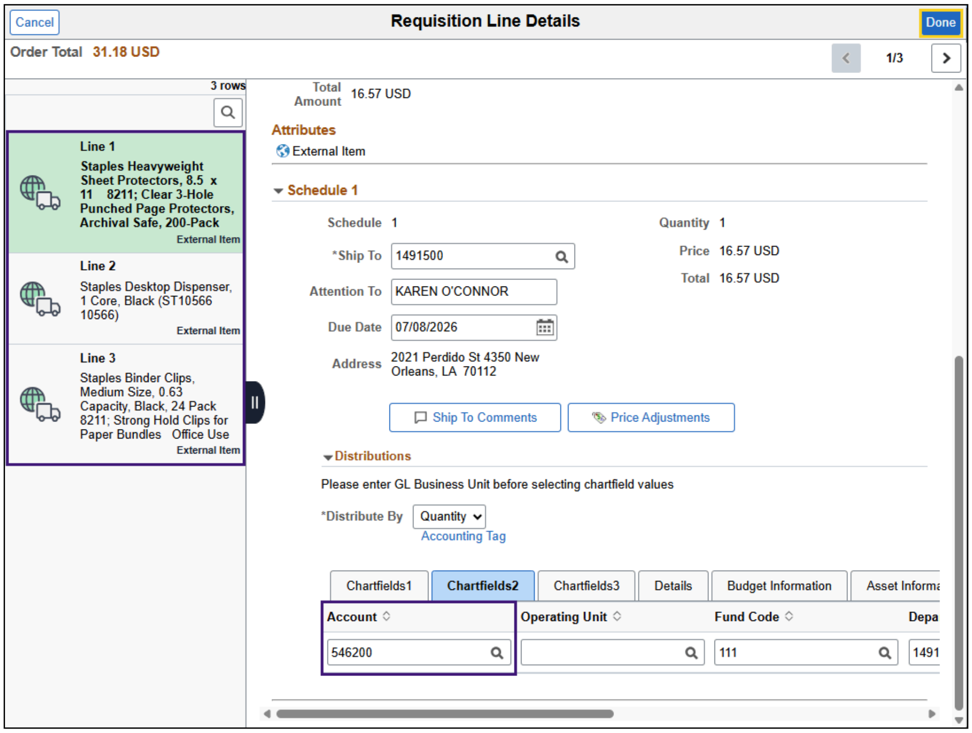
Step	Action
26.	**Add Accounting Tag to Favorites** (continued) Click the **Done** button. 
27.	**Schedule Details** (continued) The system will automatically *copy* the *new chartstring* into the ***Chartfield tabs*** on the **Schedule Details** panel. Select **Chartfields2** tab to view *updated chartstring* information. Click the **Chartfields2** tab. 
28.	**Schedule Details** (continued) Review new chartstring information. Select **Done** to return to the **Checkout** page. Click the **Done** button. 
29.	This completes ***Change Chartstring by Adding Accounting Tag to Favorites***. **End of Procedure.**

Update Requisition Lines using Mass Change Action

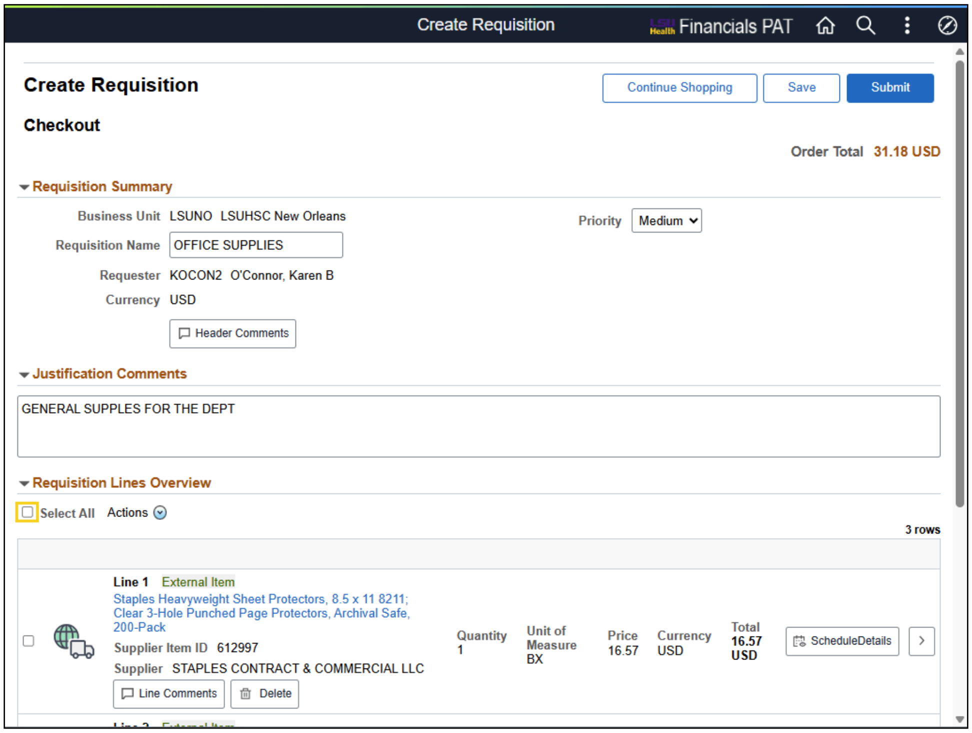
Procedure

In this topic you will learn how to **Update Requisition Lines using Mass Change Action**.

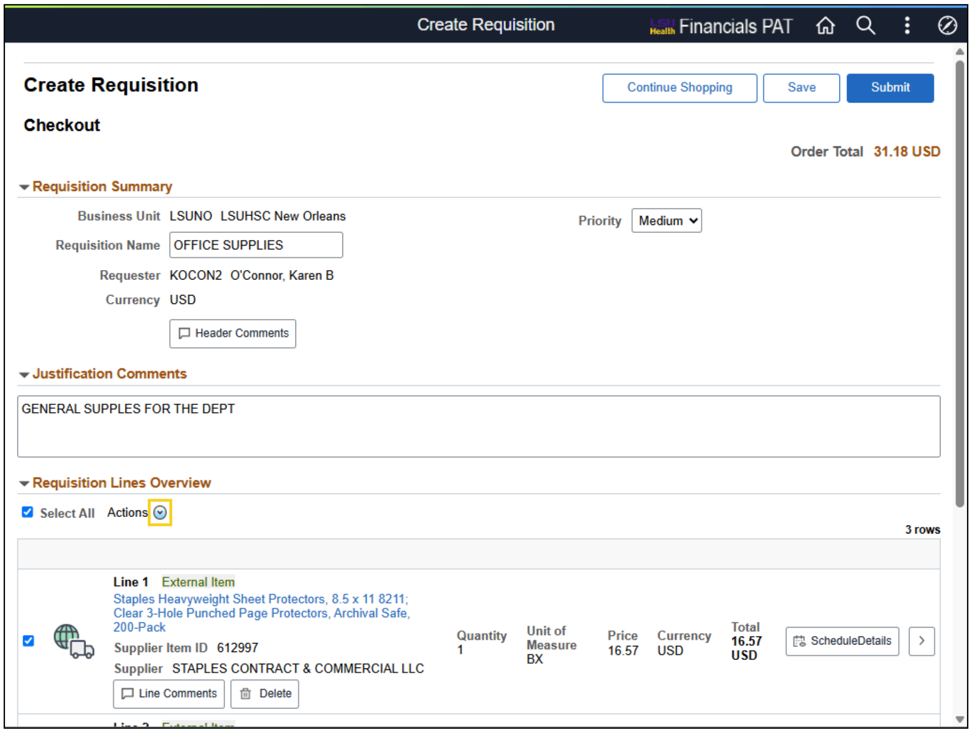
Step	Action
1.	**Using Mass Change Action** Requisition lines can be *updated individually* using all the pages and features previously discussed in this manual. However, to ***make changes to multiple requisition lines and their distributions*** (i.e., account, department, fund, program, class, and project id) ***at one time***, the **Mass Change action** is ***required***. ***NOTE: Changes to the entire requisition must be made with either the Mass Change action or done on individual requisition lines.***



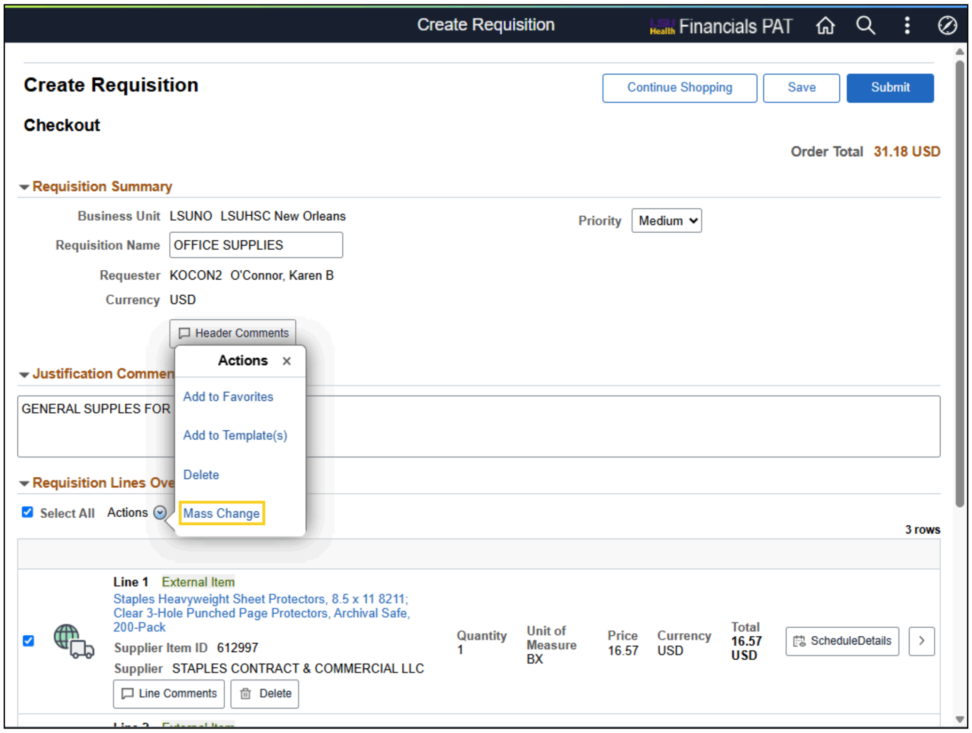
Step	Action
2.	**Using Mass Change Action - Scenario** In this example, the left-side menu shows the items selected for this requisition. Upon reviewing the **Line 1 Schedule Details**, it is discovered the ***Account*** number used is incorrect. The *current **Account** number, 546200, is for Non-Automotive Equip Supplies*. The cart shows office supply items, so the **Account** number *546700 should be used*. Click the **Done** button. 



Step	Action
3.	**Using Mass Change Action** (continued) *In this example, you will use the* ***Mass Change Action*** *to change the* ***Account*** *on all line items at once from 546200 to 546700.* Click the **Select All** option. 

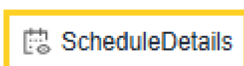
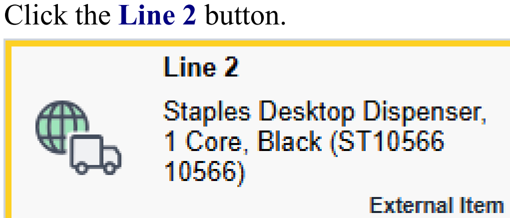


Step	Action
4.	**Using Mass Change Action** (continued) *Open* the **Actions** *menu* to access the ***Mass Change*** link. Click the button to the right of the **Actions** field. 



Step	Action
5.	**Using Mass Change Action** (continued) Click the **Mass Change** link. Mass Change
6.	**Using Mass Change Action** (continued) *No chartfield values* will be displayed at first on the **Mass Change** page. The **Load Values From Defaults** button must be selected to view chartfield information. Click the **Load Values From Defaults** button. Load Values From Defaults
7.	**Using Mass Change Action** (continued) *Chartfield information*, *including* **Account** number, is displayed. The **Account** field is not *grayed out*, so you are able to adjust it. Enter the desired information into the **Account** field. Enter "**546700**".

Step	Action
8.	**Apply Distribution Changes for Mass Change Action** After entering updated chartfield value(s), select which *type of distribution change* is r*equired* in the ***Apply Distribution Changes** menu. There are three (3) types of Distribution changes. Each will be discussed individually. Click the button to the right of the ***Apply Distribution Changes** field. 
9.	**Apply Distribution Changes for Mass Change Action** (continued) **1. All Distribution Lines** is the default for this scenario. ***Use this option if only one (1) distribution should be applied to all line distributions.*** This includes if a r*equisition line contains multiple distributions*. In this option, <u>only</u> the *chartfield(s)* that have been *updated* will be *changed* in the *existing distributions*. For example, if <u>only</u> the *department* is *changed*, <u>only</u> the *department* on the *requisition line distributions* will be *changed*. *All other existing values* in the requisition line distributions will *remain the same*.
10.	**Apply Distribution Changes for Mass Change Action** (continued) **2. Matching Distribution Lines -** *Use* this option if you want to *update existing line distributions* with a *new one and delete unwanted lines*. For example, if a req line *distribution contains two (2) lines* and the *mass change updates only one (1) line*, **"req line 1 / distribution 1"** will be **updated** and ***"req line 1 / distribution 2"*** will be ***deleted***. ***<u>NOTE: LSUNO will not use this option.</u>***
11.	**Apply Distribution Changes for Mass Change Action** (continued) **3. Replace Distribution Lines -** *Use* this option if a **new distribution split** has been applied to *existing lines*. This is the ***default choice*** when using an **accounting tag**. • Existing distributions will be completely replaced, regardless of the number of distribution lines for the line item. • If requisition line 1 has only one (1) distribution line and the mass change contains two distribution lines, requisition line 1's distribution will then have two distribution lines after mass change. • If only one (1) chartfield was entered (i.e., department) and all other chartfields were left blank, then the requisition line distribution will be changed to have only the department chartfield value, and all others will be empty.

Step	Action
12.	**Using Mass Change Action** (continued) Click the **All Distribution Lines** list item. 
13.	**Using Mass Change Action** (continued) Click the **Done** button. 
14.	**Using Mass Change Action** (continued) A *message* is *displayed* stating the system will *modify field changes to existing requisition line items / schedules*. Select **OK**. Scroll the **OK** button with the mouse wheel.
15.	**Using Mass Change Action** (continued) *Verify* that the **Account** *change* has been *made* to all lines. You can **view** the **Account** on the **Schedule Details** page. Select the **Line 1 Schedule Details** button. Click the **Schedule Details** button. 
16.	**Using Mass Change Action** (continued) Scroll the **Down** scrollbar with the mouse wheel.
17.	**Using Mass Change Action** (continued) Click the **Chartfields2** tab. 
18.	**Using Mass Change Action** (continued) The **Account** was successfully *changed* on *Line 1*. Click the **Line 2** button. 

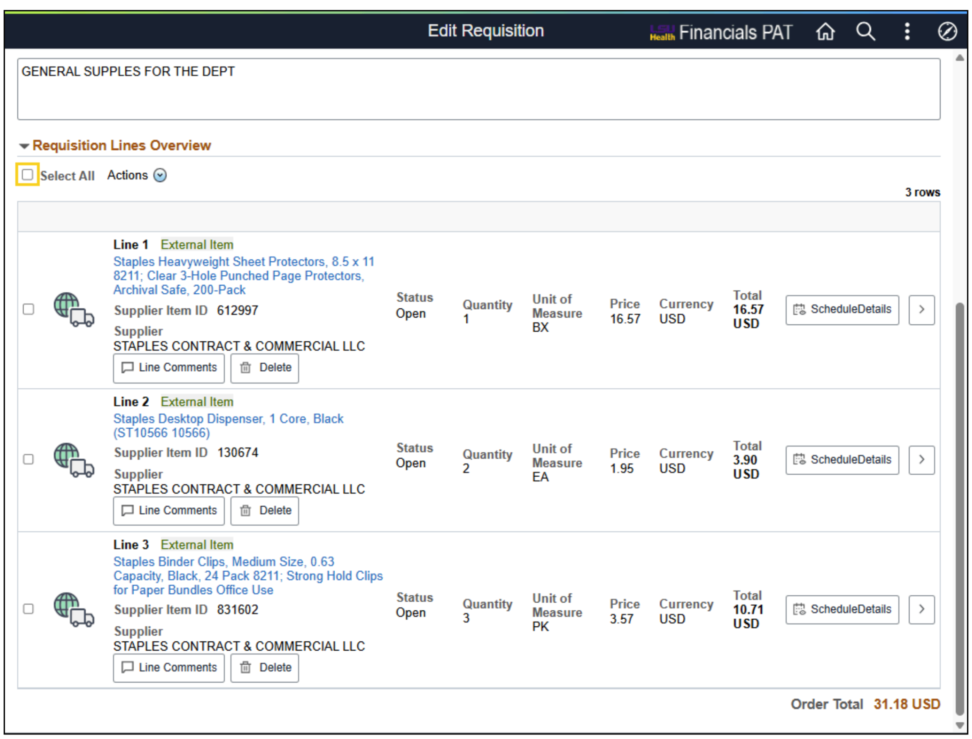
Step	Action
19.	**Using Mass Change Action** (continued) The **Account** was successfully *changed* on *Line 2*. Click the **Line 3** button.
20.	**Using Mass Change Action** (continued) The **Account** was successfully *changed* on *Line 3*. Click the **Done** button. 
21.	This completes ***Update Requisition Lines using Mass Change Action***. **End of Procedure.**

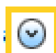
Update Requisition Lines using Mass Change Action and Accounting Tag

Procedure

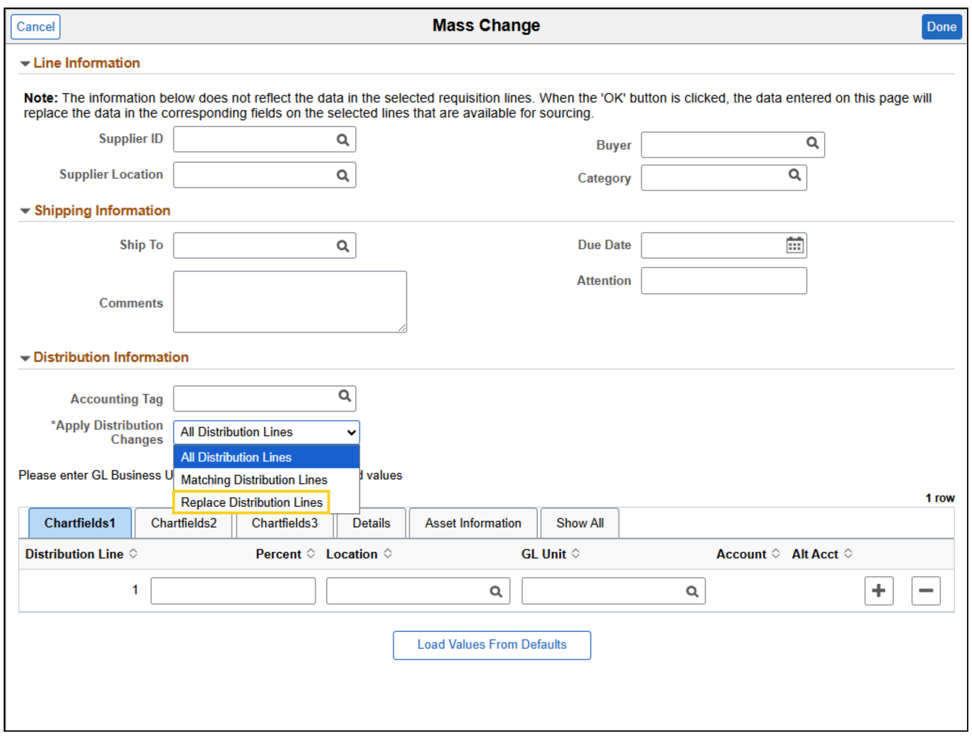
In this topic, you will learn how to **Update Requisition Lines using Mass Change Action and Accounting Tag**.

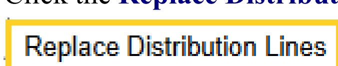
Step	Action
1.	**Using an Accounting Tag in Mass Change** An **Accounting Tag** can be used to *update* requisition line *distributions in Mass Change*. *****WARNING** - The values of the Accounting Tag will replace whatever is on the requisition line distribution. If the selected Accounting Tag has only one (1) distribution but your existing requisition line has two (2) distribution lines, then the two (2) distributions will be replaced by the one (1) distribution found in the accounting tag.*** ***Only an accounting tag with multiple distributions can update requisition lines with multiple distributions. In general, it is not recommended to use an accounting tag when updating requisition lines with multiple distributions.***

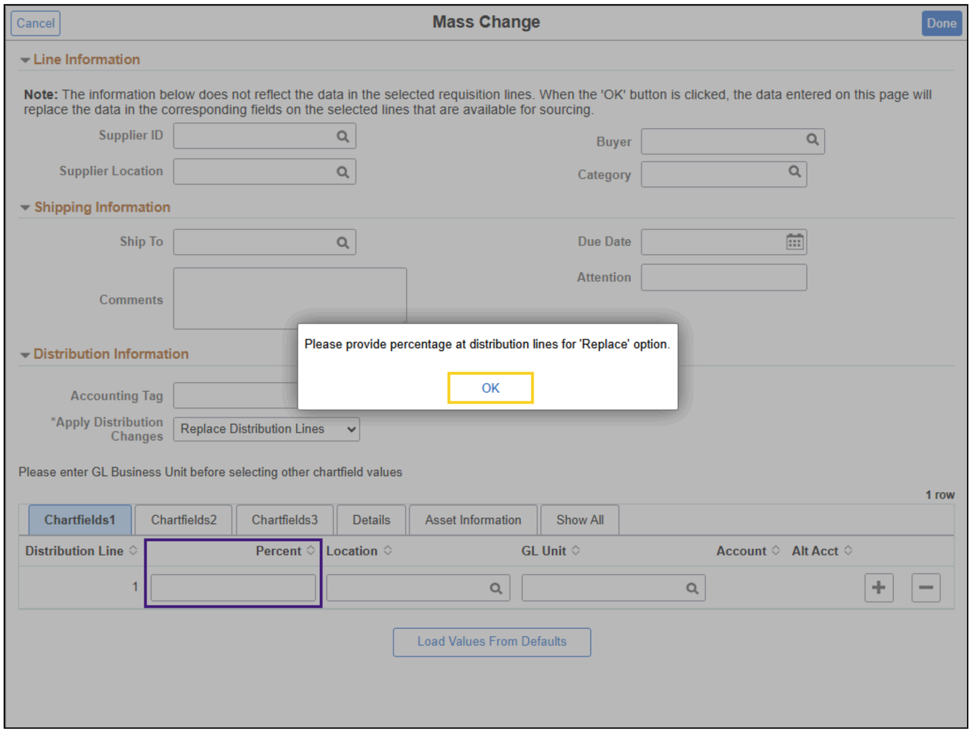


Step	Action
2.	**Using Mass Change Action** (continued) *In this example, you will use the **Mass Change Action** to change the **chartstring** for all line items at once using Accounting Tag: 0491500001.* Click the **Select All** option. 
3.	**Using Mass Change Action** (continued) *Open* the **Actions** *menu* to access the ***Mass Change*** link. Click the **Actions** button. 
4.	Click the **Mass Change** link. 
5.	Click the button to the right of the ***Apply Distribution Changes** field. 
6.	**Apply Distribution Changes for Mass Change Action** (continued) **1. All Distribution Lines** is the default for this scenario. ***Use this option if only one (1) distribution should be applied to all line distributions.*** This includes if a r*equisition line contains multiple distributions*. In this option, <u>only</u> the *chartfield(s)* that have been *updated* will be *changed* in the *existing distributions*. For example, if <u>only</u> the *department* is *changed*, <u>only</u> the *department* on the *requisition line distributions* will be *changed*. *All other existing values* in the requisition line distributions will *remain the same*.
7.	**Apply Distribution Changes for Mass Change Action** (continued) **2. Matching Distribution Lines -** *Use* this option if you want to *update existing line distributions* with a *new one and delete unwanted lines*. For example, if a req line *distribution contains two (2) lines* and the *mass change updates only one (1) line*, **"req line 1 / distribution 1"** will be **updated** and ***"req line 1 / distribution 2"*** will be ***deleted***. ***<u>NOTE: LSUNO will not use this option.</u>***

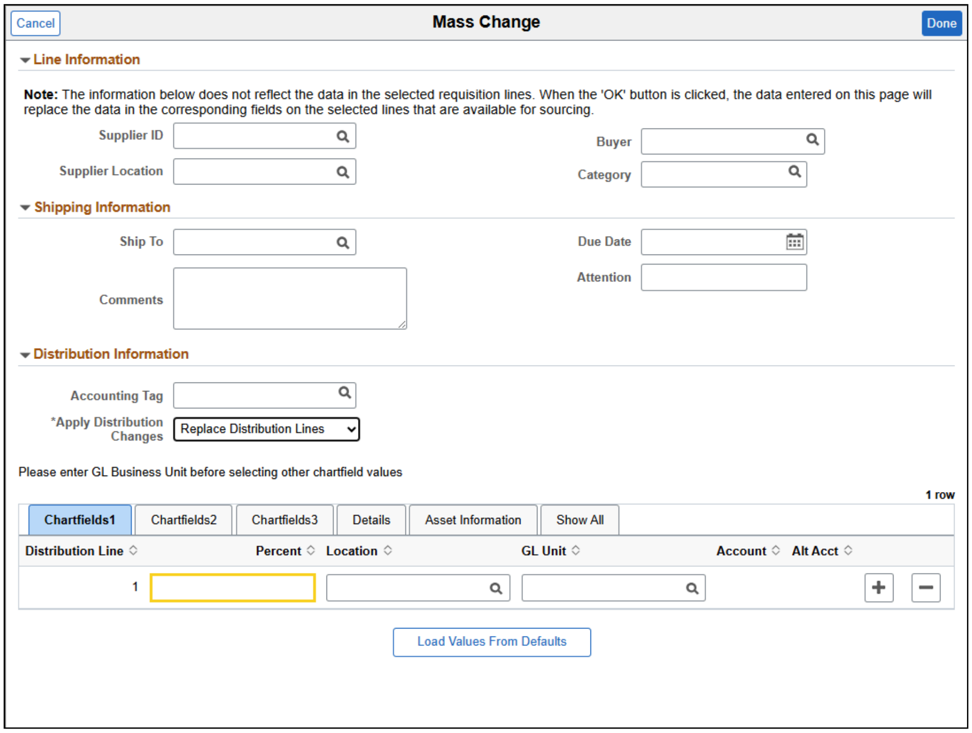
Step	Action
8.	**Apply Distribution Changes for Mass Change Action** (continued) **3. Replace Distribution Lines -** *Use* this option if a **new distribution split** has been applied to *existing lines*. This is the ***default choice*** when using an **accounting tag**. • Existing distributions will be completely replaced, regardless of the number of distribution lines for the line item. • If requisition line 1 has only one (1) distribution line and the mass change contains two distribution lines, requisition line 1's distribution will then have two distribution lines after mass change. • If only one (1) chartfield was entered (i.e., department) and all other chartfields were left blank, then the requisition line distribution will be changed to have only the department chartfield value, and all others will be empty.



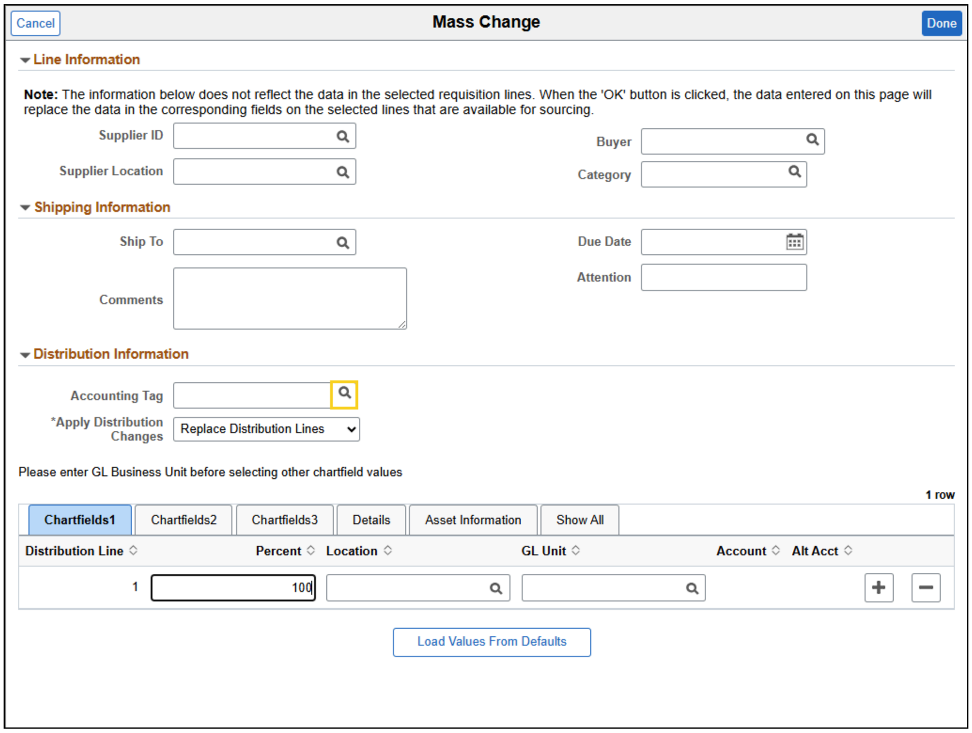
Step	Action
9.	**Apply Distribution Changes for Mass Change Action** (continued) Click the **Replace Distribution Lines** list item. 



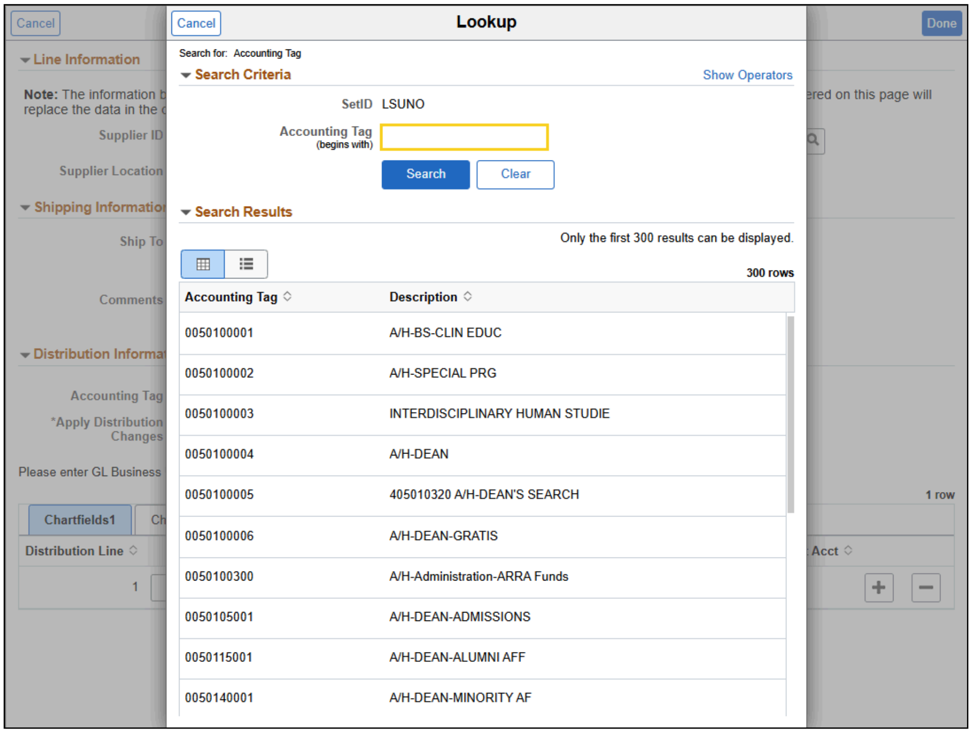
Step	Action
10.	**Apply Distribution Changes for Mass Change Action** (continued) A message is displayed asking you to enter the percentage for '**Replace**' option in the distribution line. Click the **OK** button. 



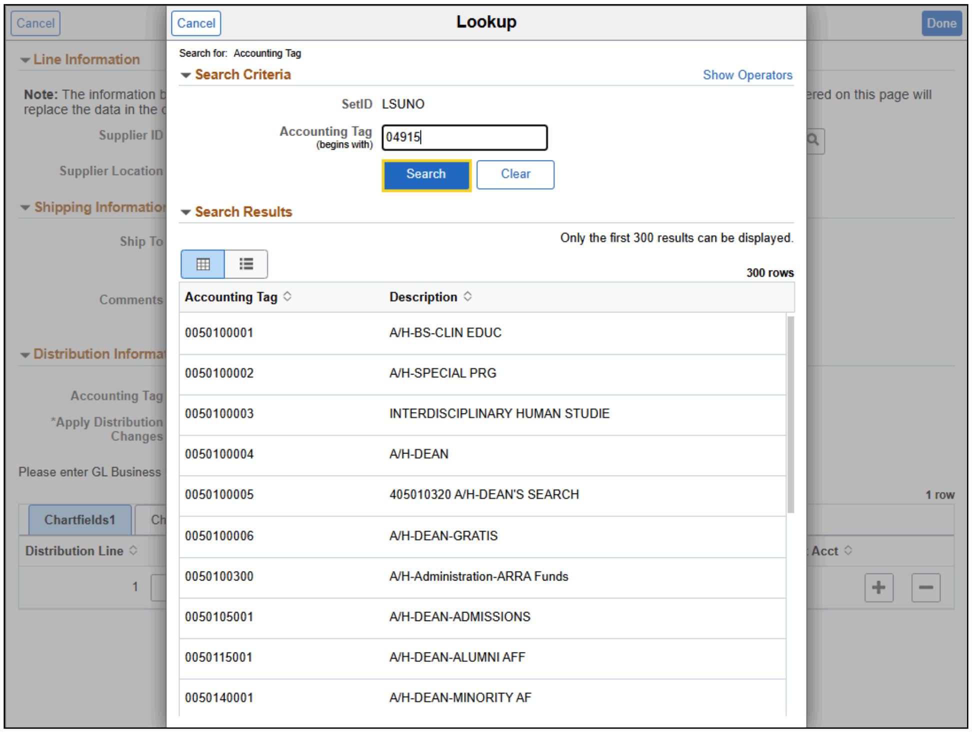
Step	Action
11.	**Apply Distribution Changes for Mass Change Action** (continued) Enter the desired information into the **Percent** field. Enter "**100**".



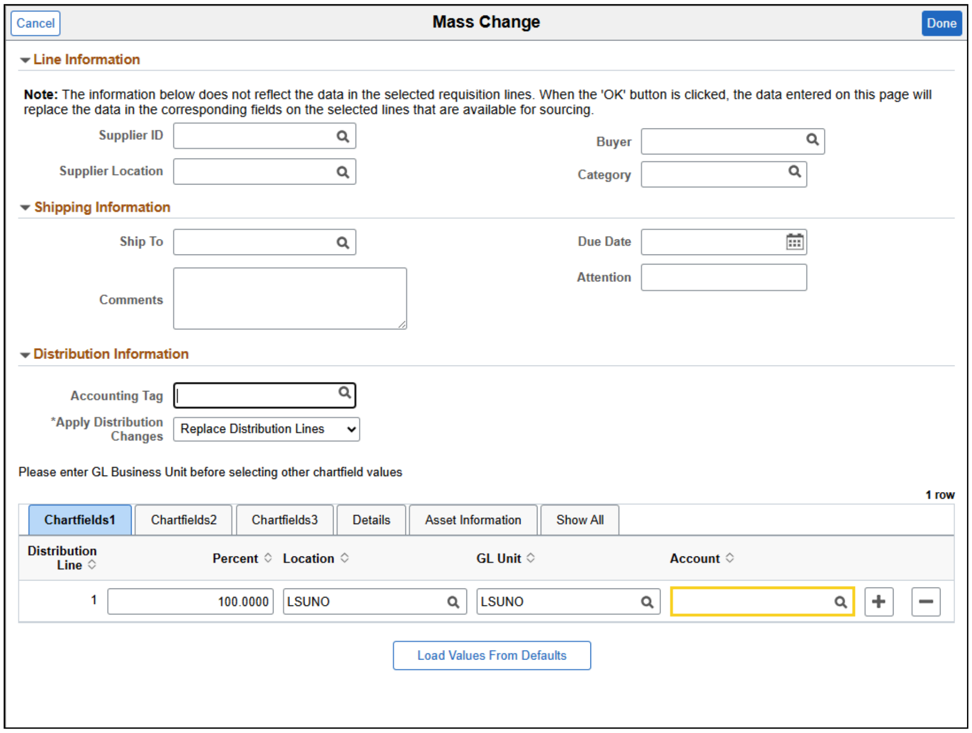
Step	Action
12.	**Add Accounting Tag** You will search for the Accounting Tag to use to default chartfield information into the Distribution fields. Click the **Lookup Accounting Tag** button. 
13.	**Add Accounting Tag** (continued) Click the **Search Criteria** arrow. 



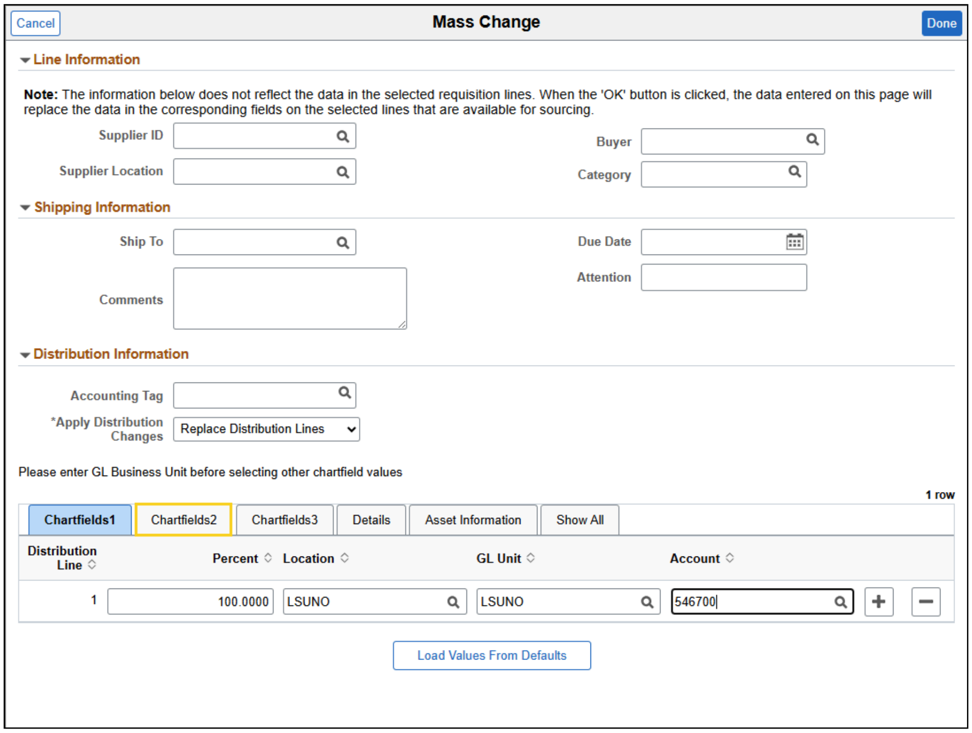
Step	Action
14.	**Add Accounting Tag** (continued) Enter the desired information into the **Accounting Tag (beings with)** field. Enter "**04915**".

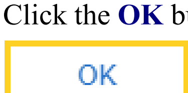


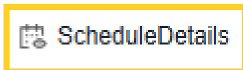
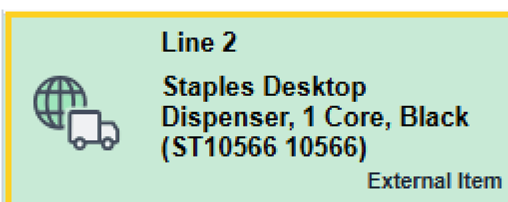
Step	Action
15.	**Add Accounting Tag** (continued) Click the **Search** button. 
16.	**Add Accounting Tag** (continued) Click the **0491500001 - FAMILY MEDICINE** button. 



Step	Action
17.	**Add Accounting Tag** (continued) The **Account** is not *included* in the ***Accounting Tag*** *chartstring* information. In this example, use the *Office Supplies* **Account** number. Enter the desired information into the **Account** field. Enter "**546700**".



Step	Action
18.	**Add Accounting Tag** (continued) *Verify* on the *Chartfields2 tab* that the *correct chartstring information* has defaulted. Click the **Chartfields2** tab. 
19.	**Add Accounting Tag** (continued) If chartfield information is correct, select the **Done** button. Click the **Done** button. 
20.	**Add Accounting Tag** (continued) A message is displayed asking if you want to *retrofit (default)* the *field changes (chartstring information)* to *all existing requisition lines*. Click the **OK** button. 

Step	Action
21.	**Verify Each Line Item Contains New Accounting Tag Information** *You can verify that the Accounting Tag chartfield information has correctly defaulted to each line item using Schedule Details.* Click the **Schedule Details** button. 
22.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) New charstring information can be *viewed* on the *Chartfields2 tab*. Click the **Chartfields2** tab. 
23.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) View Account and Fund for Line 1.
24.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) View Department, Program Code, and Class Field for Line 1. Click the **Line 2** button. 
25.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) View Account and Fund for Line 2.
26.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) View Department, Program Code, and Class Field for Line 2. Click the **Line 3** button.

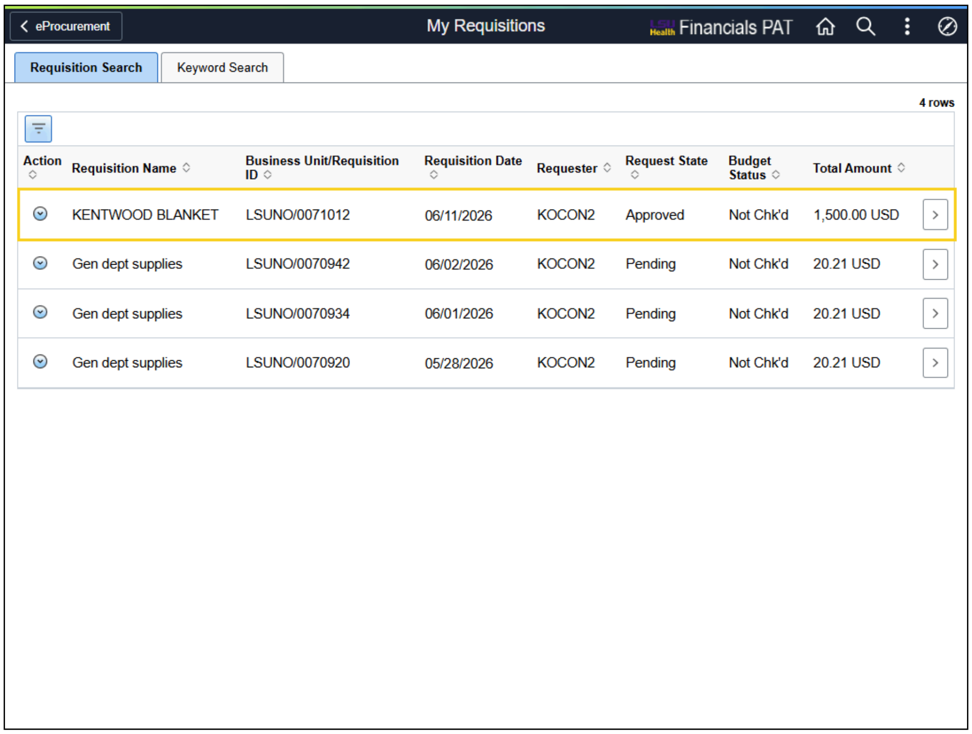
Step	Action
27.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) View Account and Fund for Line 3.
28.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) View Department, Program Code, and Class Field for Line 3. Click the **Chartfields3** tab. 
29.	**Verify Each Line Item Contains New Accounting Tag Information** (continued) The **PC Business Unit** (e.g., LSUNO) must be *entered* if the **Project ID** needs to be added. A **Project ID** cannot be *entered* if the **PC Business Unit** field is *unpopulated*. *In this example, The PC Business Unit and Project fields will remain blank.* Click the **Done** button. 
30.	**Save the Requisition** Click the **Save** button. 
31.	This completes ***Update Requisition Lines using Mass Change Action and Accounting Tag***. **End of Procedure.**

Managing Requisitions

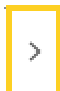
View Requisition Details and Lifeline

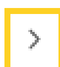
Procedure

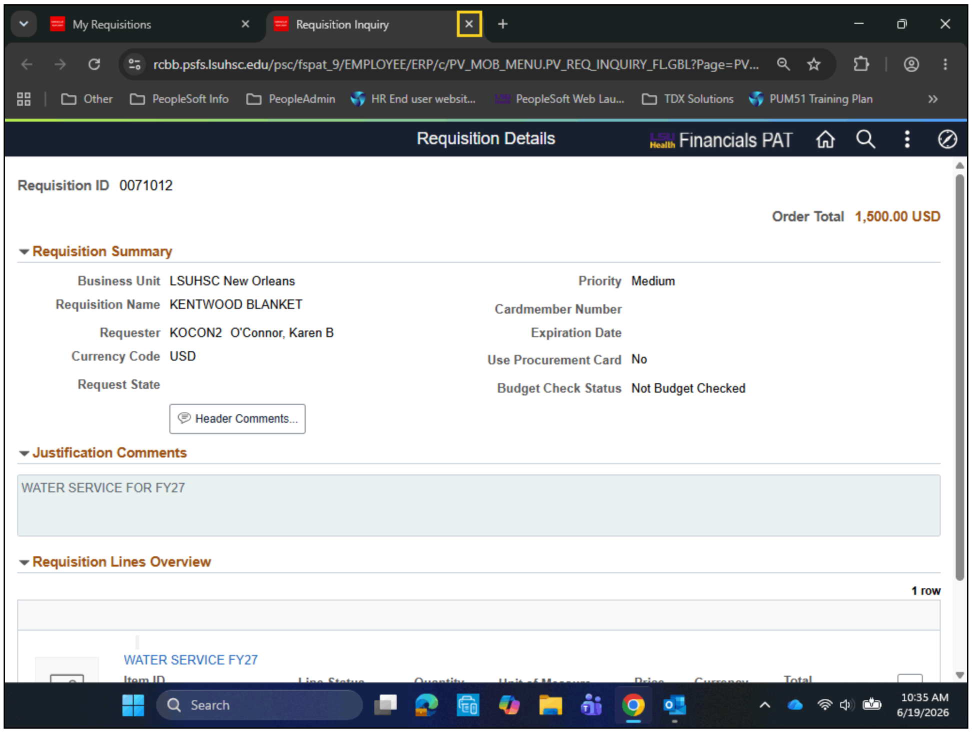
In this topic you will learn how to **View Requisition Details and Lifeline**.



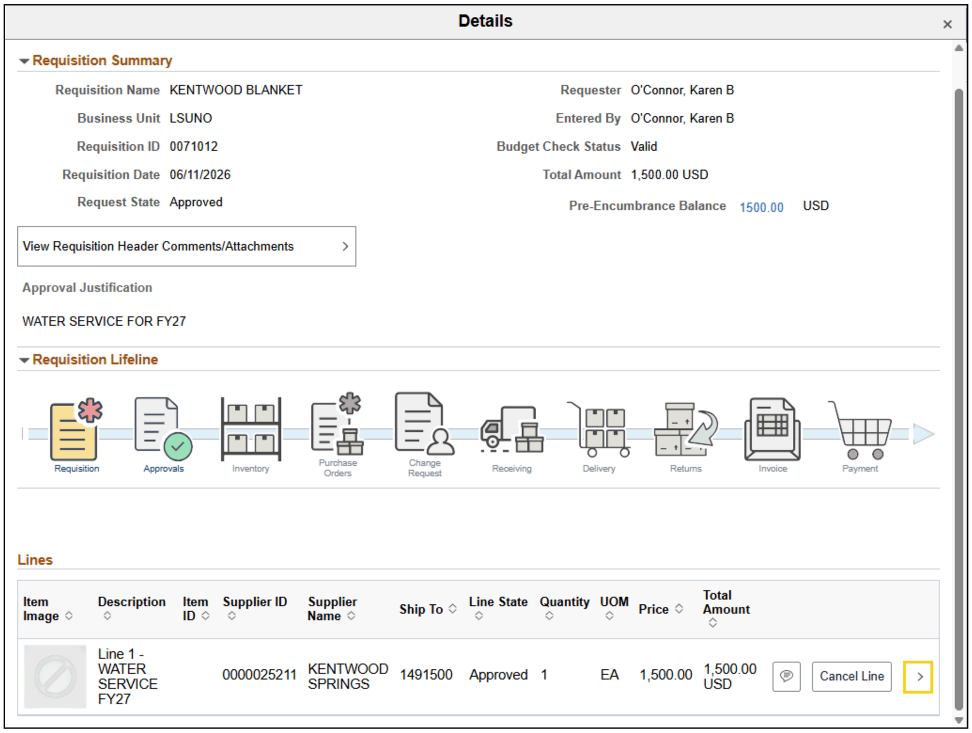
Step	Action
1.	**My Requisitions** The user can click anywhere on a requisition line to view the **Details** page for that line. Click the **KENTWOOD BLANKET** button.
2.	**Details Page** The **Details** page allows the user to *view and confirm information* relevant to the requisition. The page is divided into *three (3) sections*: **Requisition Summary**, **Requisition Lifeline**, and **Lines**.
3.	**Details Page** (continued) Directly above the Requisition Summary section is the Cancel Requisition button. ***Selecting this button will cancel the entire requisition.*** ***NOTE: A user must speak with Purchasing before canceling a requisition.***

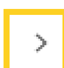
Step	Action
4.	**Requisition Summary** (continued) The **Requisition Summary** section *contains information specific to the requisition* such as ***Requisition Name***, ***Requisition ID***, ***Request State***, ***Budget Check Status***, ***Total Amount*** and ***Approval Justification***. Also *included* in this section is the ***View Requisition Header Comments / Attachments*** button. ***NOTE: If the requisition has a "Valid" Budget Status, then the requisition's Total Amount and the Remaining Pre-Encumbrance balance will be displayed below the Budget Check Status.*** Click the **View Requisition Header Comments / Attachments** arrow. 
5.	**Requisition Header Comments and Attachments** View Comment 1. Click the **Close** button. 
6.	**Requisition Lifeline** (continued) The Requisition Lifeline is a visual tracking tool used to identify where a purchasing request is in the procure-to-pay lifecycle. Active icons are colored and the titles are a blue hyperlink. In this example, the *Requisition has been created and approved*.
7.	**Requisition Lifeline** (continued) The user can select any colored icon to view relevant information. In this example, the user will select the Approvals icon. Click the **Requisitions** button. 

Step	Action
8.	**Requisition Lifeline** (continued) ***Header Comments*** have been previously discussed, so skip down to **Line Comments**. Click the **Line Comments** button. 
9.	**Requisition Line Comments and Attachments** View the **Line Comments** page. Click the **Close** button. 
10.	**Requisition Lifeline** (continued) Click the **View Details** button. 
11.	**Requisition Line Details** The ***Schedule and Line Details*** tabs are displayed. ***See the Checkout Page: Distributions, Schedule and Line Details, and Save topic for information regarding the Schedule and Line Details tabs.*** Click the **Close** button. 



Step	Action
12.	**Requisition Inquiry** Click the **Requisition Inquiry Close** tab. 
13.	**Details** (continued) The third section of the **Details** page is the **Lines** section. This section provides *specific information about the line item(s)* on the requisition.
14.	**Lines** (continued) The user can select the ***View Comments and Attachments*** button to view **<u>line</u>** comments and attachments. ***Line comments*** are *specific to the line item*.
15.	**Cancel Line** The **Cancel Line** button can be used to *cancel a specific line* on the requisition. ***NOTE: A user <u>must</u> speak with Purchasing <u>before</u> <u>canceling</u> a line on the requisition.***



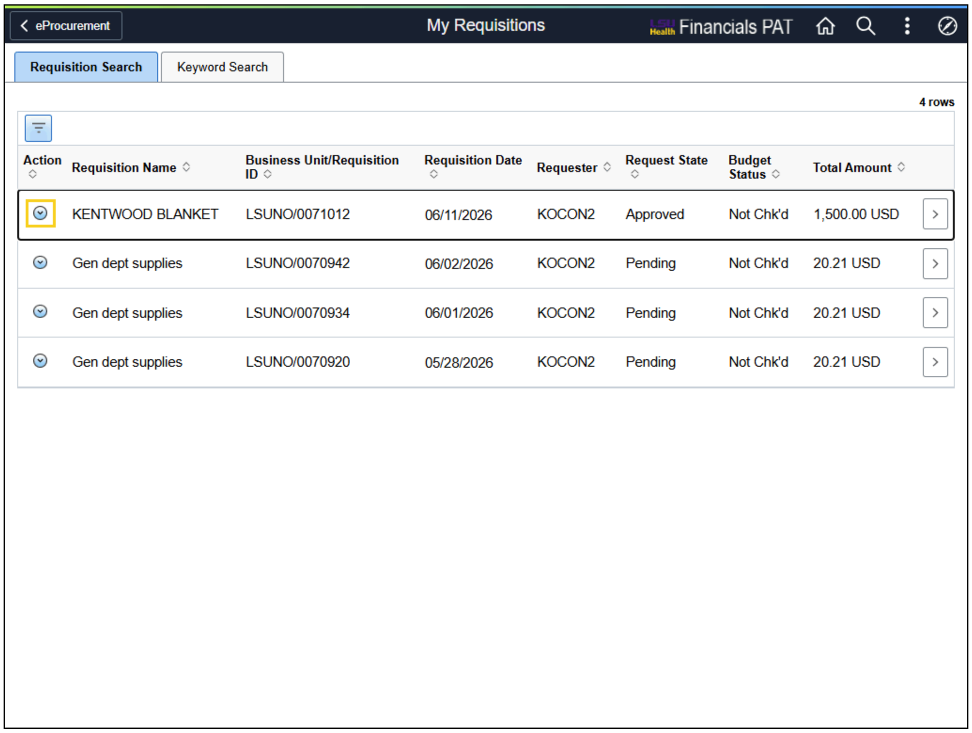
Step	Action
16.	**Lines** (continued) Click the **Schedule Details** button. 
17.	**Schedule Details** (continued) The ***Line Details*** and ***Shipping Details*** are *displayed* on the **Schedule Details** page. If the price has been adjusted, the user can select the ***Price Adjustment*** button to view the price change.
18.	**Schedule Details** (continued) Click the **Distributions** button. 

Step	Action
19.	**Distribution Details** *Chartfield* and *budget information* can be *viewed on* the **Distributions section** across several tabs. Below are the *noteworthy fields* and the *tabs* where they can be *found*: • **Chartfields1 Tab** – Location, Quantity, Percent, GL Business Unit • **Chartfields2 Tab** – Account, Fund, Department, Program Code, Class • **Chartfields3 Tab** – PC Business Unit, Project, Activity • **Budget Information Tab** – Budget status, Pre-encumbrance Balance Click the **Distribution Details Close** button. 
20.	**Schedule Details** (continued) Click the **Schedule Details Close** button. 
21.	**Details** (continued) Click the **Details Close** button. 
22.	This completes ***View Requisition Details and Lifeline***. **End of Procedure.**

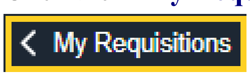
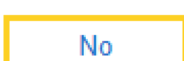
Using the Requisition Actions Menu

Procedure

In this topic you will learn about **Using the Requisition Actions Menu**.



Step	Action
1.	**My Requisitions** Users can *access* the ***Actions*** menu on the **My Requisitions** page. Simply select the ***Related Actions*** *button* to view the menu. ***NOTE: For training purposes only, selecting the Related Actions button will only be shown on this page. The user will need to select the Related Actions button each time s/he wishes to access the Actions menu.*** Click the **Related Actions** button. 
2.	**Actions Menu** The **Actions** menu is displayed. Users can *access other options* on the menu *depending on the state* of the requisition.

Step	Action
3.	**Actions Menu** The ***Details, View Approvals,*** and ***Inquiry*** options are discussed in the **"View Requisition Details and Lifecycle"** topic. The ***Edit*** option is discussed in the **"Find and Update a Saved Requisition"** topic. The **V*iew Print*** option is discussed in the **"Checkout, Submit, and Print a Requisition"** topic. ***These five (5) options will <u>not</u> be discussed in this topic.***
4.	**Actions Menu - Copy** Click the **Copy** link. 
5.	**Actions Menu - Copy** (continued) *Copying a requisition* brings up the **Edit Shopping Cart** page where *items can be removed* from the *cart*. *Selecting* the ***Checkout*** button brings up the **Checkout page**, where *comments and attachments* can be *added and line details / chartfields* can be *edited*. Click the **< My Requisitions** button. 
6.	**Actions Menu - Cancel** Click the **Cancel** link. 
7.	**Actions Menu - Cancel** (continued) Selecting **Cancel** will cancel the **<u>entire</u> <u>requisition</u>**. *Depending on the filter parameters*, the *canceled requisition will still display* on the **My Requisitions** page and there will be a **<u>new</u> <u>action</u>** to *undo cancel*. ***NOTE: A user must speak with Purchasing before canceling a requisition.*** Click the **No** button. 

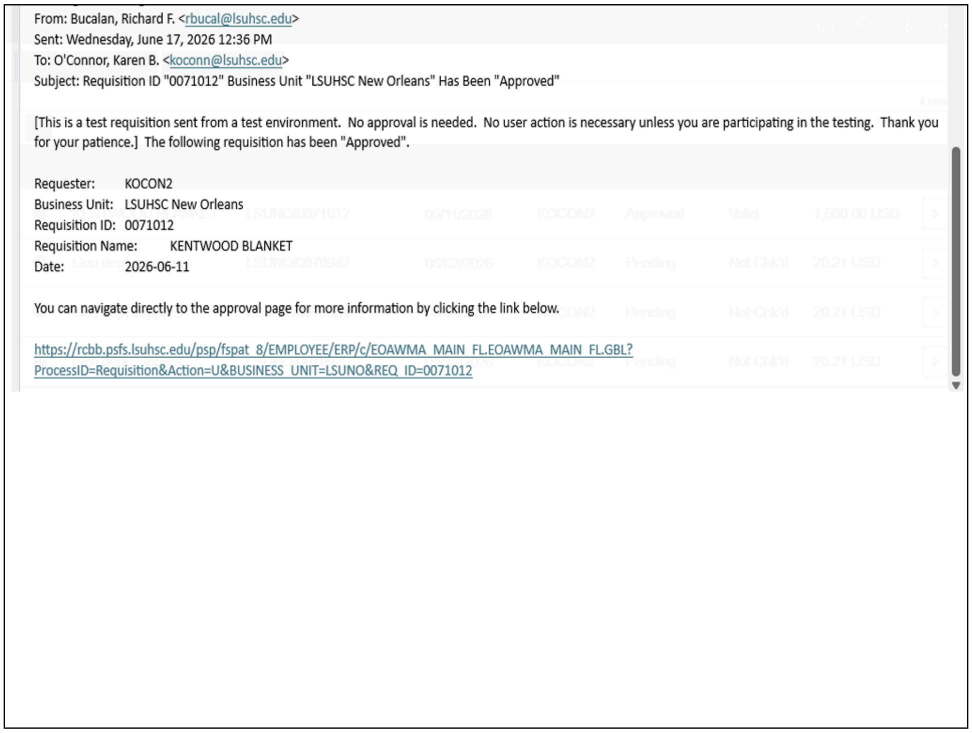
Step	Action
8.	**Actions Menu - Pre-Budget Check** To see if the requisition will *pass budget check without committing to do so*, select ***PreBudget Check***. Click the **PreBudget Check** link. 
9.	**Actions Menu - Pre-Budget Check** (continued) A message is displayed informing you that the process will take a few minutes and asking if you wish to continue. Click the **Yes** button. 
10.	**Actions Menu - Pre-Budget Check** (continued) If successful, the *budget status* will *update* to ***Prov Valid***, for *provisionally valid*, in the **Budget Status** column.
11.	The completes ***Using the Requisition Actions Menu***. **End of Procedure.**

Budget Check a ePro Requisition

Procedure

In this topic you will learn how to **Budget Check an ePro Requisition**.

Step	Action
1.	**Budget Check an ePro Requisition** A requisition creates a *pre-encumbrance* in the PeopleSoft system. The **Budget Check** process is run to *verify that funds are available* in the budget to purchase the items on the requisition. A **"Valid" budget check** then *creates* a *pre-encumbrance hold* on the *funds* so that the *funds cannot* be *spent* on something else. *Prior to running the budget check*, the requisition **Status** will be **"Approved",** and the **Budget Status** will be "Not Chk'd".



From: Bucalan, Richard F. <rbucal@lsuhsc.edu>
Sent: Wednesday, June 17, 2026 12:36 PM
To: O'Connor, Karen B. <koconn@lsuhsc.edu>
Subject: Requisition ID "0071012" Business Unit "LSUHSC New Orleans" Has Been "Approved"

[This is a test requisition sent from a test environment. No approval is needed. No user action is necessary unless you are participating in the testing. Thank you for your patience.] The following requisition has been "Approved".

Requester: KOCON2
Business Unit: LSUHSC New Orleans
Requisition ID: 0071012
Requisition Name: KENTWOOD BLANKET
Date: 2026-06-11

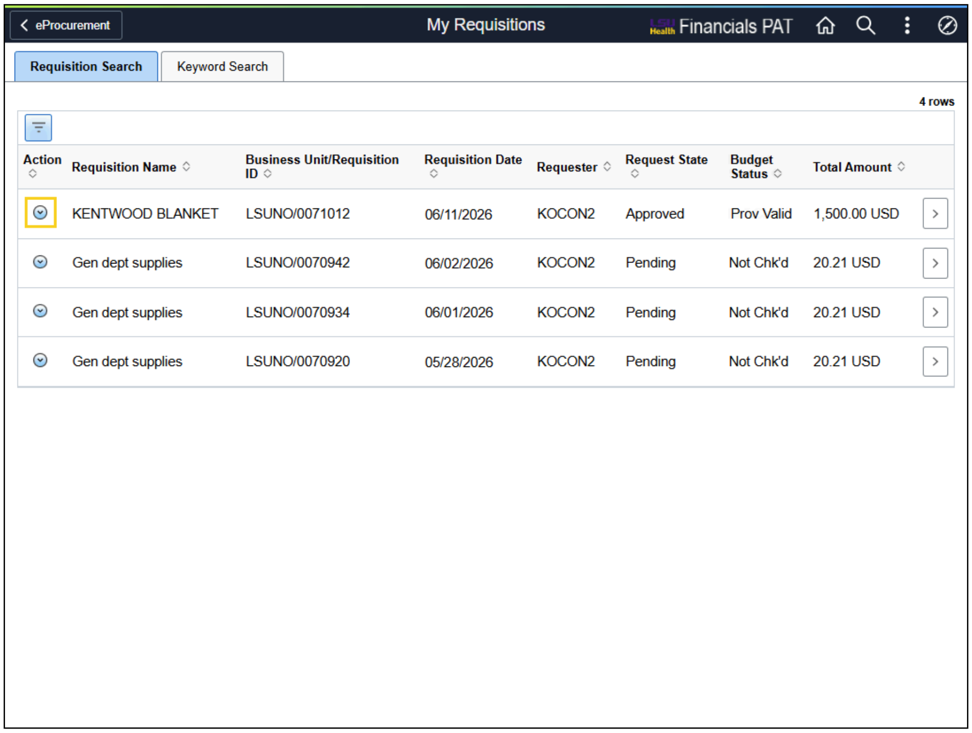
You can navigate directly to the approval page for more information by clicking the link below.

https://rcbb.psfs.lsuhsc.edu/psp/fspat_8/EMPLOYEE/ERP/c/EOAWMA_MAIN_FL.EOAWMA_MAIN_FL.GBL?ProcessID=Requisition&Action=U&BUSINESS_UNIT=LSUNO&REQ_ID=0071012

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2.</td><td>Budget Check an ePro Requisition

The Requester is responsible for Budget Checking the requisition. The Budget Check process cannot be completed until the requisition is approved. The Requester will receive an email, like the one pictured here, to inform him / her that the requisition has been approved. The Requester can navigate to eProcurement > My Requisitions > Related Actions to begin the Budget Check process.

NOTE: The link provided will take the user to the Requisition Approval page, <u>not</u> the Budget Check page.</td></tr>
</table>



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3.</td><td>Budget Check an ePro Requisition (continued)

Click the Related Actions button for the appropriate requisition.
</td></tr>
<tr><td>4.</td><td>Budget Check an ePro Requisition (continued)

Selecting the Budget Check option will initiate the process.

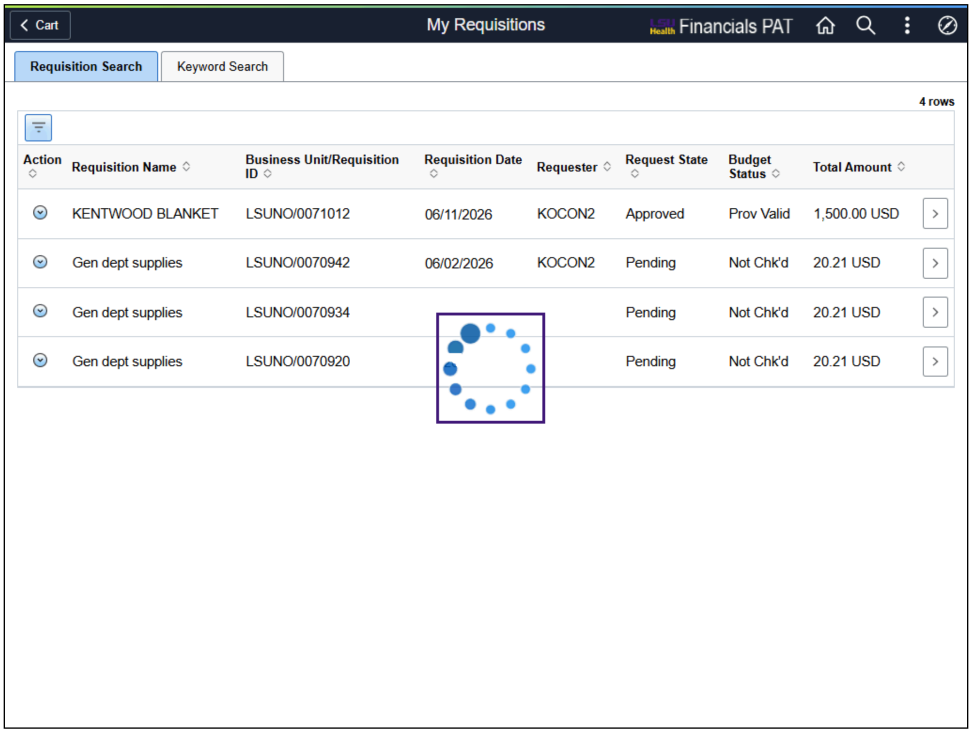
Click the Budget Check link.

</td></tr>
<tr><td>5.</td><td>Budget Check an ePro Requisition (continued)

A message is displayed stating the Budget Check process may take several minutes to complete.

Click the Yes button.

</td></tr>
</table>



Step	Action
6.	**Budget Check an ePro Requisition** (continued) *The dotted circle, shown here, indicates the budget check process is running.*
7.	**Budget Check an ePro Requisition** (continued) When the budget check process completes, the new Budget Status will be displayed on the appropriate line. ***NOTE: If you get a Budget Status other than Valid (e.g., Error or Warning), please contact your Buyer for assistance.***
8.	This completes ***Budget Check an ePro Requisition***. **End of Procedure.**

Addendum

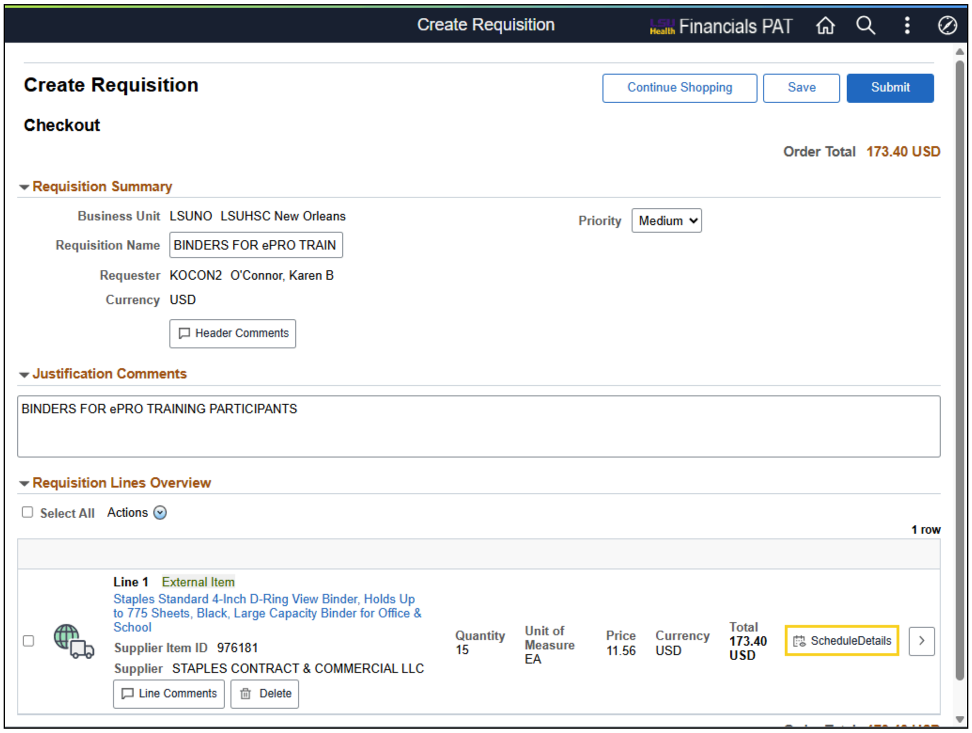
Split a Distribution Line

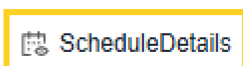
Split the Distribution for a Single Requisition Line

Procedure

In this topic, you will learn how to **Split the Distribution for a Single Requisition Line**.

Step	Action
1.	**Split a Distribution Line** Users can *split a distribution line* on the **Schedule Details** page and / or *using the **Mass Change** option*. If the requisition has **three (3) or less line items**, the distribution will be *split* on the **Schedule Details** page. If the requisition has ***more than three (3) line items***, **<u>or</u>** the *distribution* is being ***split three (3) or more ways***, the *distribution* will be *split using the **Mass Change*** option. In this exercise, the requisition has *three (3) line items,* but you will only be *splitting* the *distribution line two (2) ways*. Thus, the user will *split* the *distribution line* on the **Schedule Details** page. ***NOTE: Accounting Tags will <u>not</u> be used with multiple distributions unless it is known that the <u>accounting</u> <u>tag</u> itself <u>contains</u> <u>multiple</u> <u>distributions</u>.***



Step	Action
2.	**Split the Distribution for a Single Requisition Line** Click the **Schedule Details** button. 
3.	**Split the Distribution for a Single Requisition Line** (continued) Click the **Close Navigation Panel Control** button. 
4.	**Split the Distribution for a Single Requisition Line** (continued) You *add a second line* to split the distribution. Click the **Right** button of the scrollbar. 

Step	Action
5.	**Split the Distribution for a Single Requisition Line** (continued) In the **Distributions** *section* of the ***Schedule Details*** page, select the *add a new row (+)* button. Click the **Add a new row at row 1** button. 
6.	**Split the Distribution for a Single Requisition Line** (continued) In this example, the ***Distribute By** is *set* to ***Quantity*** because *goods* have been *ordered*. Notice the *Quantity field is active on both lines, thus allowing* the user to *adjust* the ***Quantity*** for *each line*. Also notice that the ***Percent*** *field* is *active* for *Line 2*, but **not** for *Line 1*. Even if the user were to *change* the ***Distribute By** to ***Amount***, the *Line 1* ***Percent*** field will **not** *activate*. In this example, this *precludes* the user from being able to *adjust* the *distribution based* on ***Percent***.
7.	**Split the Distribution for a Single Requisition Line** (continued) In this example, the Quantity will be nine (9) and six (6), respectively, for Line 1 and 2. Enter the desired information into the **Line 2 - Quantity** field. Enter "**6**".
8.	**Split the Distribution for a Single Requisition Line** (continued) Enter the desired information into the **Line 1 - Quantity** field. Enter "**9**".
9.	**Split the Distribution for a Single Requisition Line** (continued) The user **must** *adjust one or more fields* on Chartfields2 & 3 tabs to *differentiate* line 2 from line 1. Click the **Chartfields2** tab. 
10.	**Split the Distribution for a Single Requisition Line** (continued) In this example, the user will *change* the **Program Code** for ***line 2*** from *53000* to ***53002***. Enter the desired information into the **Program Code** field. Enter "**53002**".

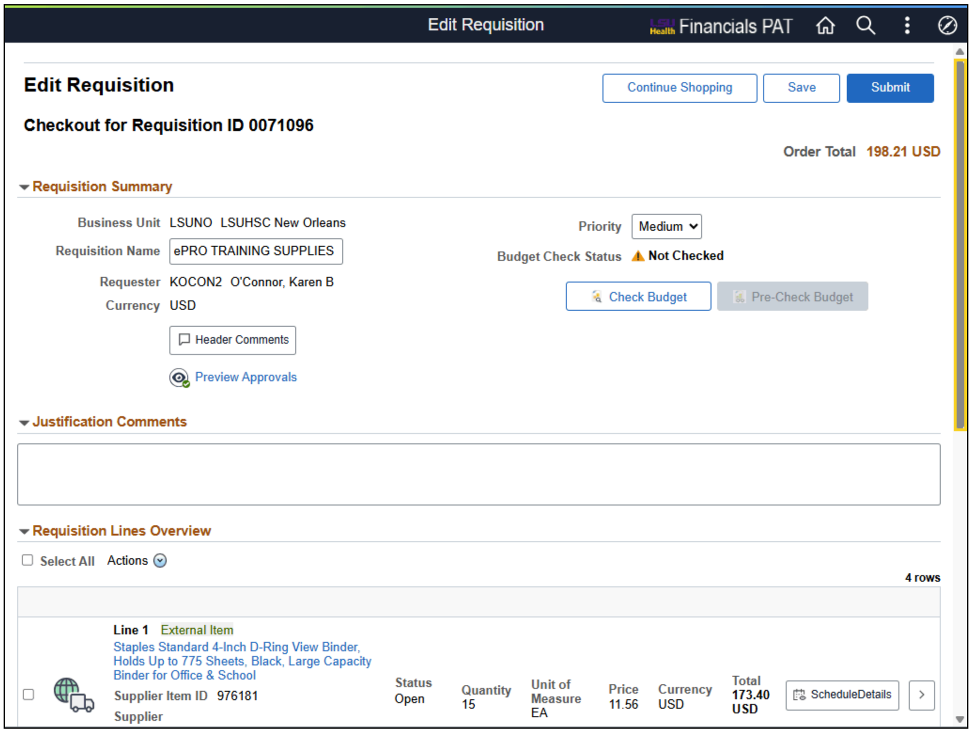
Step	Action
11.	**Split the Distribution for a Single Requisition Line** (continued) ***NOTE: If your chartstring contains a Project ID, make sure you select the Chartfields3 tab to verify the PC Business Unit and Project fields are populated correctly.***
12.	**Split the Distribution for a Single Requisition Line** (continued) After all adjustments have been made to the requisition, select the **Done** button at the top right of the page. Click the **Done** button. 
13.	**Split the Distribution for a Single Requisition Line** (continued) If the requisition is *complete*, select the **Submit** button. Click the **Submit** button. 
14.	This completes ***Split the Distribution for a Single Requisition Line***. **End of Procedure.**

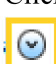
Split the Distribution Line for Multiple Distribution Lines

Procedure

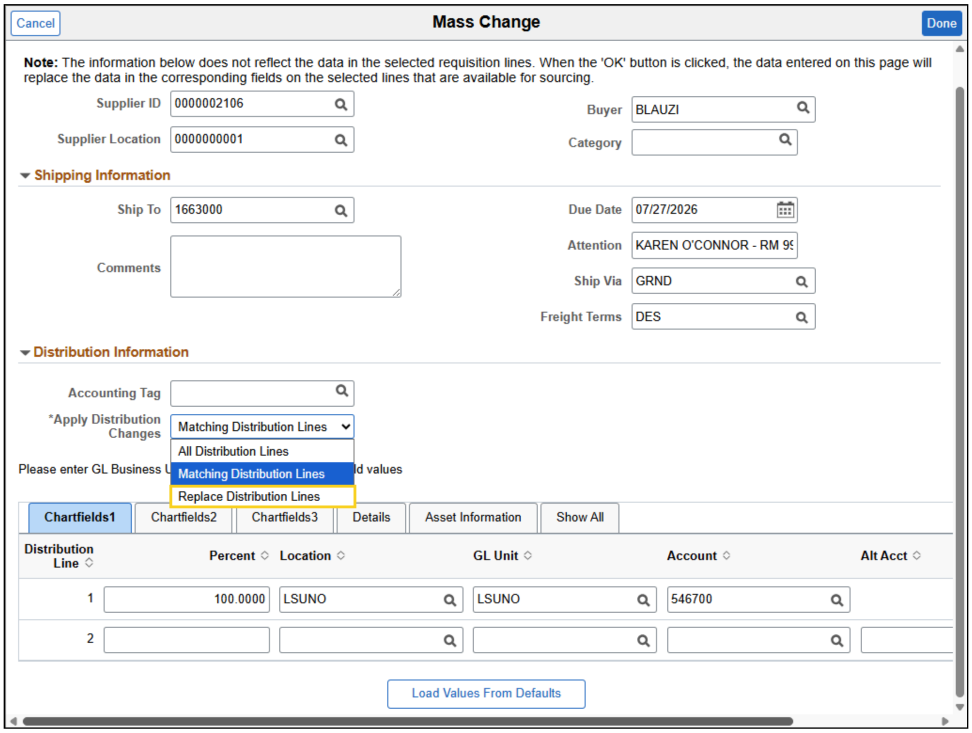
In this topic you will learn how to **Split the Distribution for Multiple Lines Using Mass Change**.

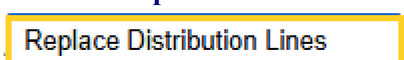
Step	Action
1.	**Split a Distribution Line on Multiple Distribution Lines** Users can *split a distribution line* on the **Schedule Details** page and / or *using the **Mass Change** option*. If the requisition has **three (3) or less line items**, the distribution will be *split* on the **Schedule Details** page. If the requisition has ***more than three (3) line items***, **<u>or</u>** the *distribution* is being ***split three (3) or more ways***, the *distribution* will be *split using the **Mass Change*** option. In this exercise, the requisition has *four (4) line items* but will only be *splitting* the *distribution line two (2) ways*. Thus, the user will *split* the *distribution line* on the **Mass Change** page. ***NOTE: Accounting Tags will <u>not</u> be used with multiple distributions unless it is known that the <u>accounting</u> <u>tag</u> itself <u>contains</u> <u>multiple</u> <u>distributions</u>.***

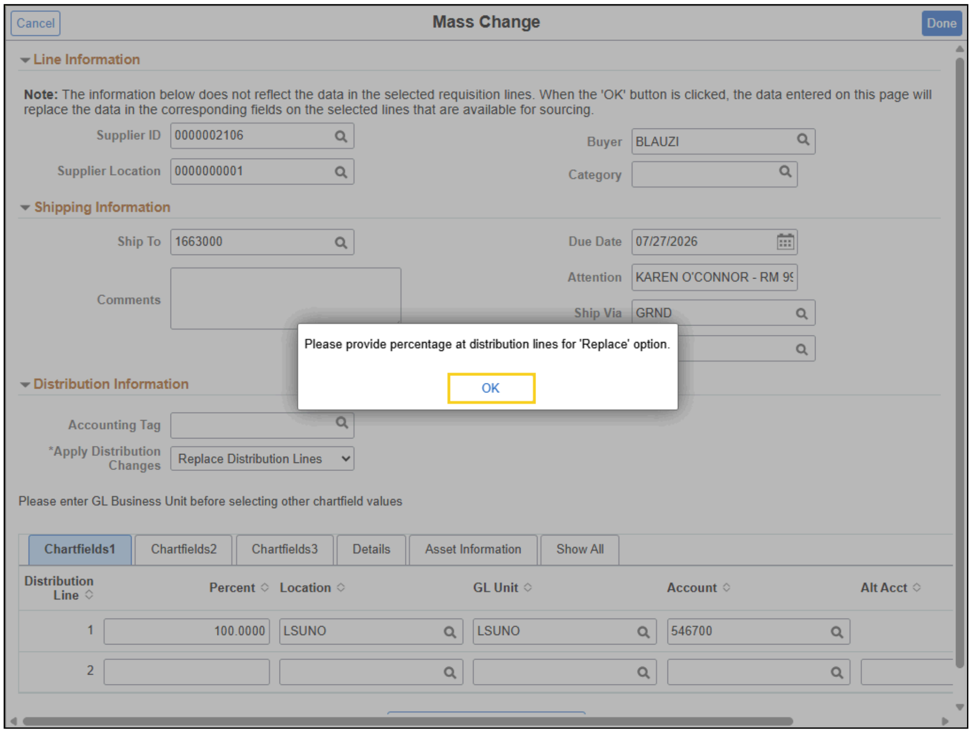


Step	Action
2.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Press the left mouse button over the scrollbar and drag the mouse to the desired location.
3.	**Split a Distribution Line for Multiple Distribution Lines** (continued) *All line items* must be *selected* to split the distribution for multiple line items. Click the **Select All** button. 
4.	**Split a Distribution Line for Multiple Distribution Lines** (continued) The ***Mass Change*** option is located on the **Actions** menu. Click the **Actions** dropdown button to activate the menu. 
5.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Mass Change** link. Mass Change

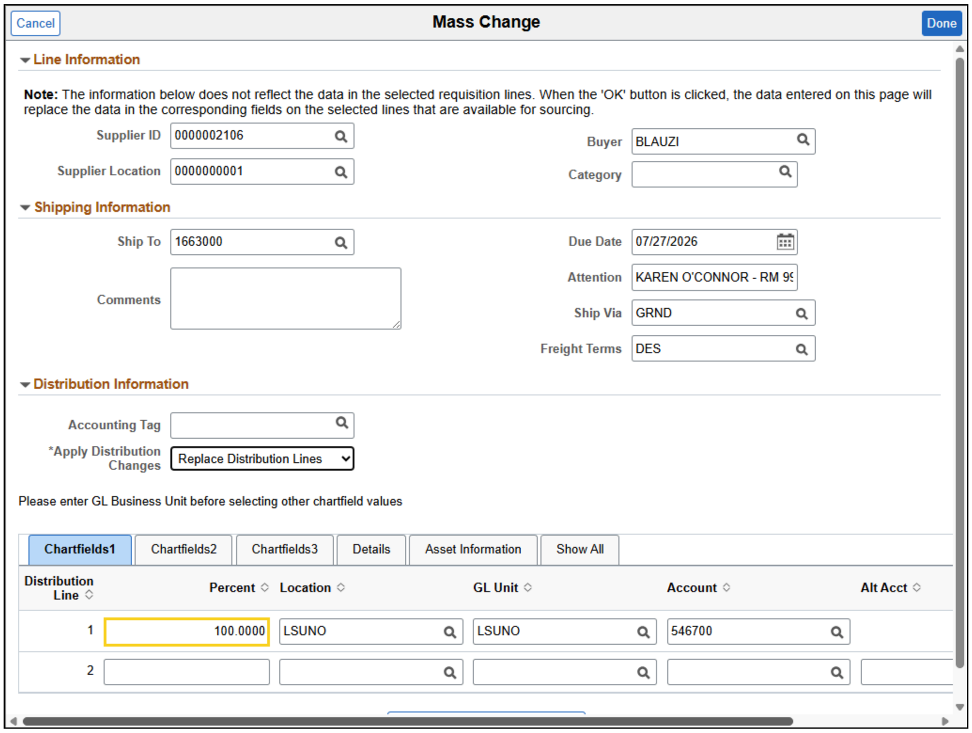
Step	Action
6.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Select the **Load Values From Defaults** options so that the values initially entered in **Requisition Defaults** page are displayed. Click the **Load Values From Defaults** button. 
7.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Next, *add* the new distribution *line*. Click the **Add anew row at row 1** button. 
8.	**Split a Distribution Line for Multiple Distribution Lines** (continued) *****IMPORTANT***** After adding a new distribution line, *set* the ***Apply Distribution Changes** option to ***Replace Distribution Lines***. Click the button to the right of the ***Apply Distribution Changes** field. 



Step	Action
9.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Replace Distribution Lines** list item. 

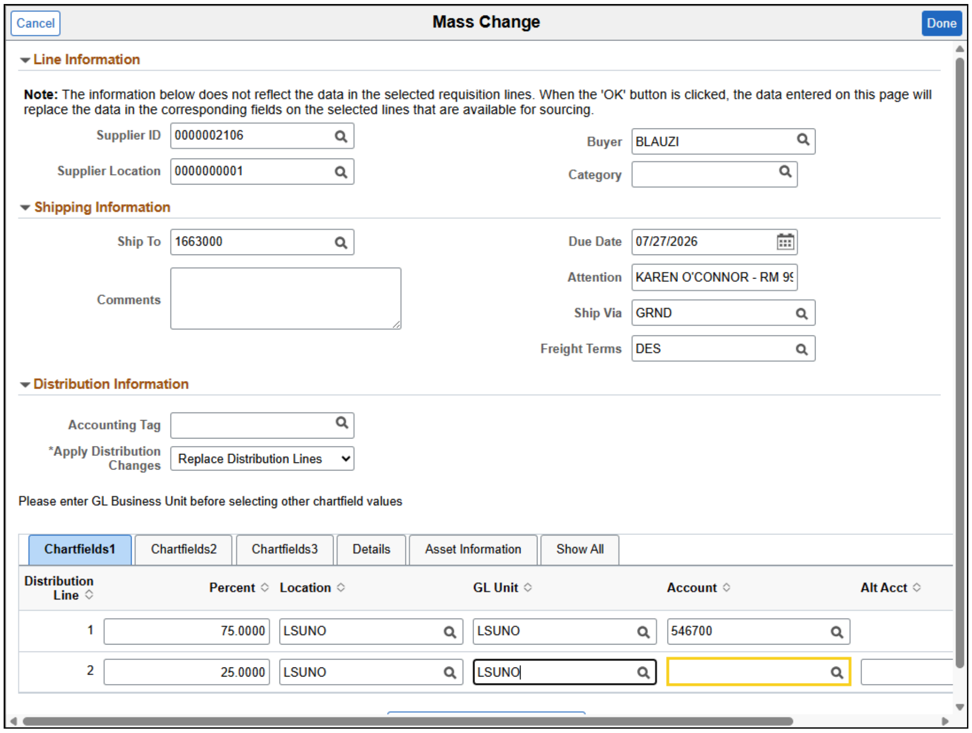


Step	Action
10.	**Split a Distribution Line for Multiple Distribution Lines** (continued) You are *prompted* to provide a ***percentage*** for the *distribution lines*. In this example, **Line 1's** percentage will be **75** and **Line 2's** will be **25**. ***The Percentage distribution must equal 100%.*** Click the **OK** button. 

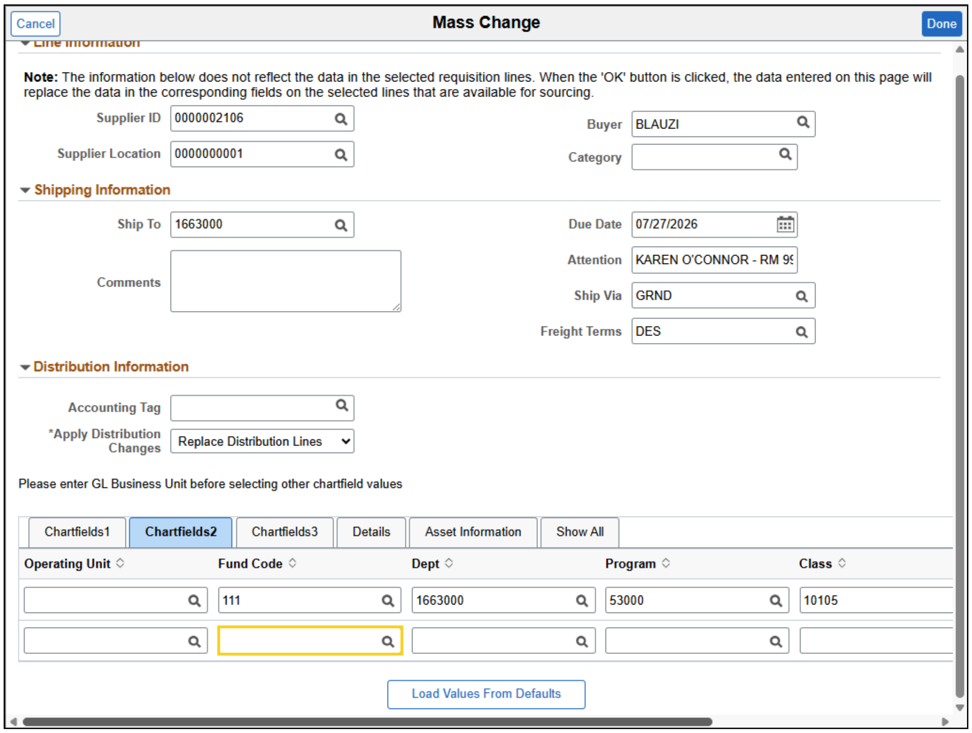


Step	Action
11.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **Line 1 Percent** field. Enter "**75**".
12.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **Line 2 Percent** field. Enter "**25**".
13.	**Split a Distribution Line for Multiple Distribution Lines** (continued) ***NOTE: You must complete all requisition line information for Line 2 across Chartfields1, 2, and 3 tabs.*** Enter **Chartfields1** tab information: • **Location** = LSUNO • **GL Unit** = LSUNO • **Account** = 546700 ***NOTE: Accounting Tags cannot be used to populate fields.***
14.	**Split a Distribution Line for Multiple Distribution Lines** (continued) ***NOTE: The values entered in the Location, GL Unit, and Account fields are used for training purposes only. You will enter values appropriate for your requisition in the Production database.*** Enter the desired information into the **Location** field. Enter "**LSUNO**".

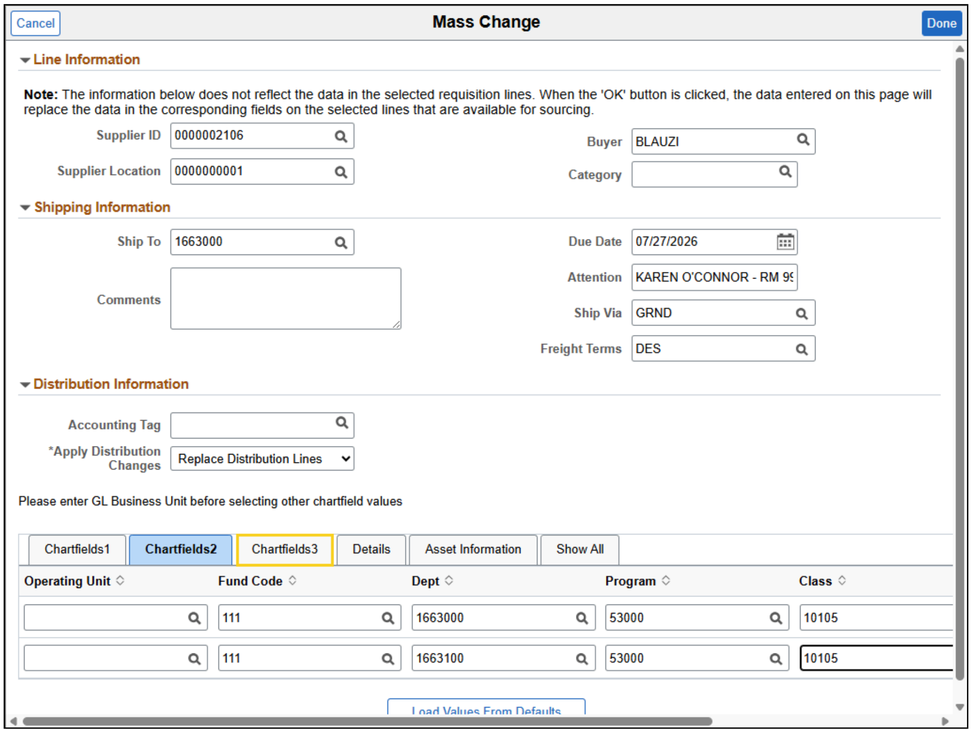
Step	Action
15.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **GL Unit** field. Enter "**LSUNO**".



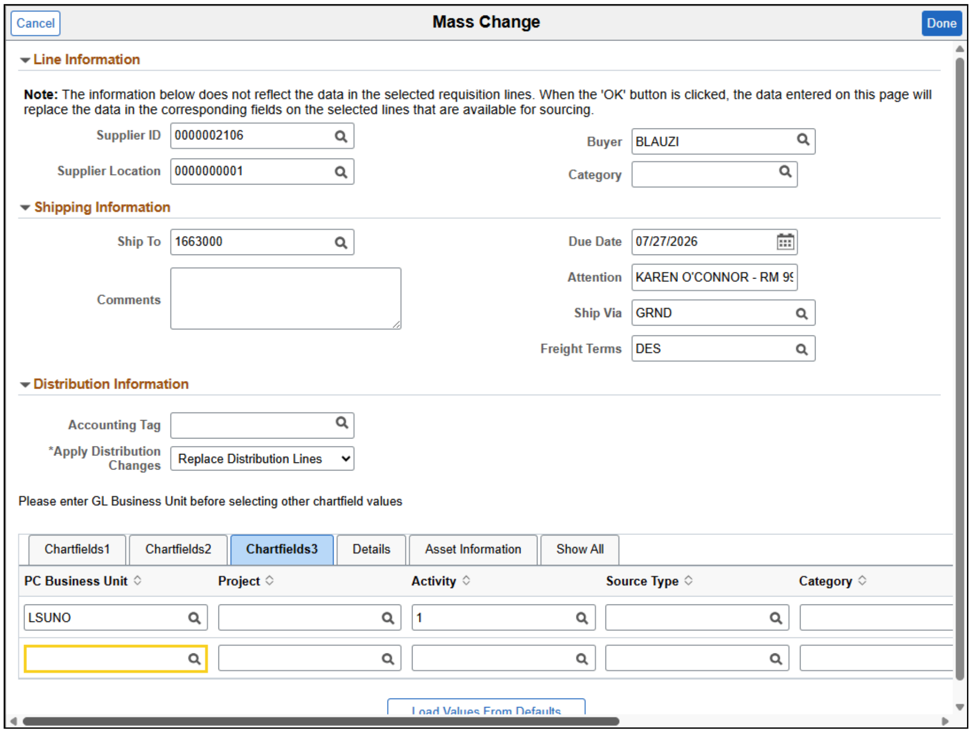
Step	Action
16.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **Account** field. Enter "**546700**".
17.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Chartfields2** tab. 
18.	**Split a Distribution Line for Multiple Distribution Lines** (continued) ***NOTE: Accounting Tags <u>cannot</u> be used to populate chartstring fields.*** Enter **Chartfields2** tab information: • **Fund Code** = 111 • **Dept** = 1663001 • **Program** = 53000 • **Class** = 10105



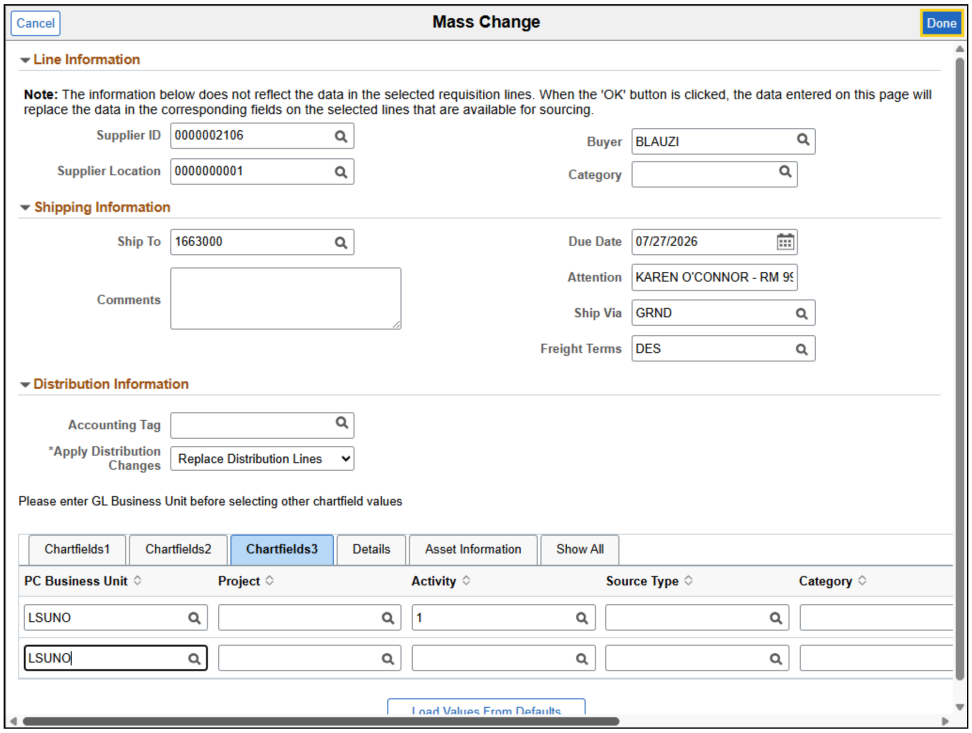
Step	Action
19.	**Split a Distribution Line for Multiple Distribution Lines** (continued) ***NOTE: The values entered in the Fund, Dept, Program, and Class fields are used for training purposes only. You will enter values appropriate for your requisition in the Production database.*** Enter the desired information into the **Fund Code** field. Enter "**111**".
20.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **Dept** field. Enter "**1663100**".
21.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **Program** field. Enter "**53000**".
22.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Enter the desired information into the **Class** field. Enter "**10105**".

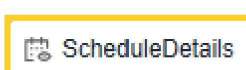


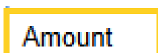
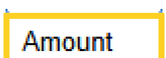
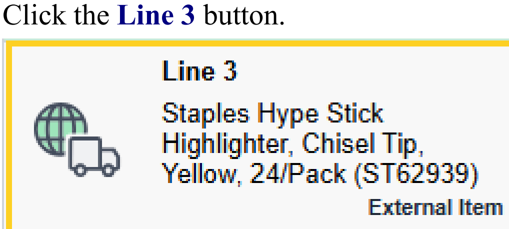
Step	Action
23.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Chartfields3** tab. 
24.	**Split a Distribution Line for Multiple Distribution Lines** (continued) ***NOTE: Accounting Tags <u>cannot</u> be used to populate chartstring fields.*** Enter **Chartfields3** tab information: • **PS Business Unit** = LSUNO

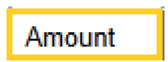
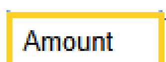


Step	Action
25.	**Split a Distribution Line for Multiple Distribution Lines** (continued) ***NOTE: The PC Business Unit must be populated if the chartstring includes a Project ID. The Project ID cannot be entered isf the PC Business unit is blank.*** Enter the desired information into the **PC Business Unit** field. Enter "**LSUNO**".



Step	Action
26.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Once all values have been entered, select the **Done** at the top-right corner of the **Mass Change** page. Click the **Done** button. 
27.	**Split a Distribution Line for Multiple Distribution Lines** (continued) *A message is displayed asking if you wish to retrofit (replace) field values on existing lines with the new distribution.* Click the **OK** button. 
28.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Schedule Details** button. 

Step	Action
29.	**Split a Distribution Line for Multiple Distribution Lines** (continued) The ***Distribute By** is set to ***Quantity***. However, you used a ***percentage*** for your *distribution. Quantities must be entered in whole numbers, so Line 1 cannot have 11.25 binders.* You will need to *change* your ***Distribute By** to ***Amount*** if *using a percentage for physical items*. ***You will need to change the *Distribute By on each line item.*** Click the button to the right of the ***Distribute By** field. 
30.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Amount** list item. 
31.	**Split a Distribution Line for Multiple Distribution Lines** (continued) The **Quantity** field has ***changed*** to **Merchandise Amount** and *displays* the **cost** to be *charged* to *each department for Line 1 items*. Click the **Line 2** button.
32.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the button to the right of the ***Distribute By** field. 
33.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Amount** list item. 
34.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Line 3** button. 

Step	Action
35.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the button to the right of the ***Distribute By** field. 
36.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Amount** list item. 
37.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Line 4** button.
38.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the button to the right of the ***Distribute By** field. 
39.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Click the **Amount** list item. 
40.	**Split a Distribution Line for Multiple Distribution Lines** (continued) Once all line items have been updated, select the **Done** button at the top-right corner of the page. Click the **Done** button. 
41.	**Split the Distribution Line for Multiple Distribution Lines** (continued) You can either **Save or Submit** the requisition.
42.	This completes ***Split the Distribution for Multiple Distribution Lines***. **End of Procedure.**

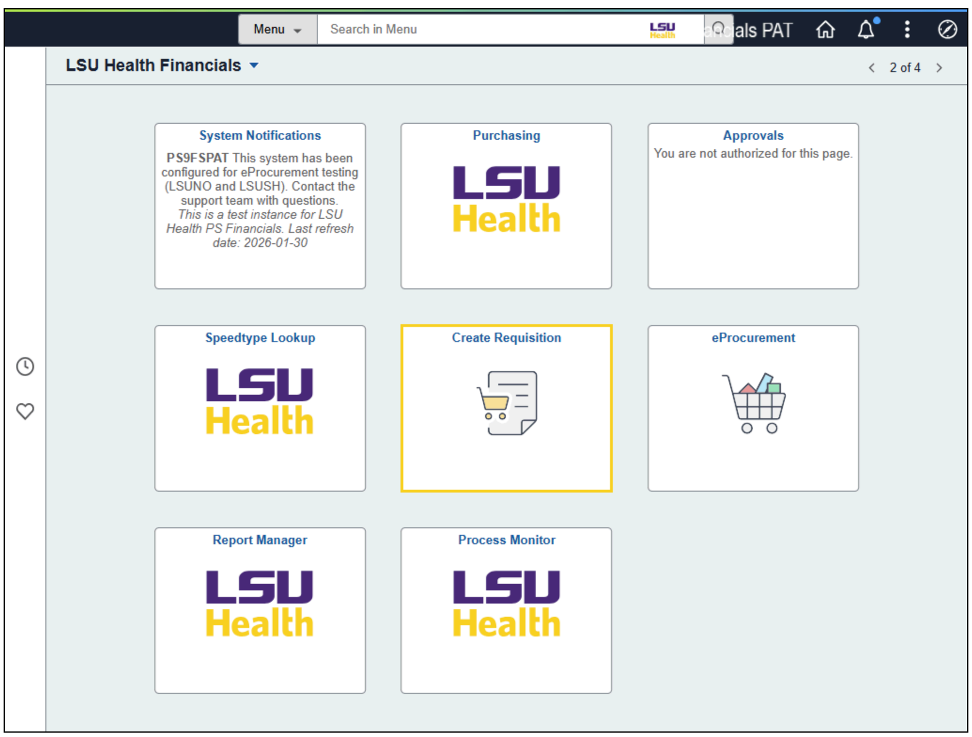
Create a Requisition for Next Fiscal Year

Create a Requisition for Next Fiscal Year

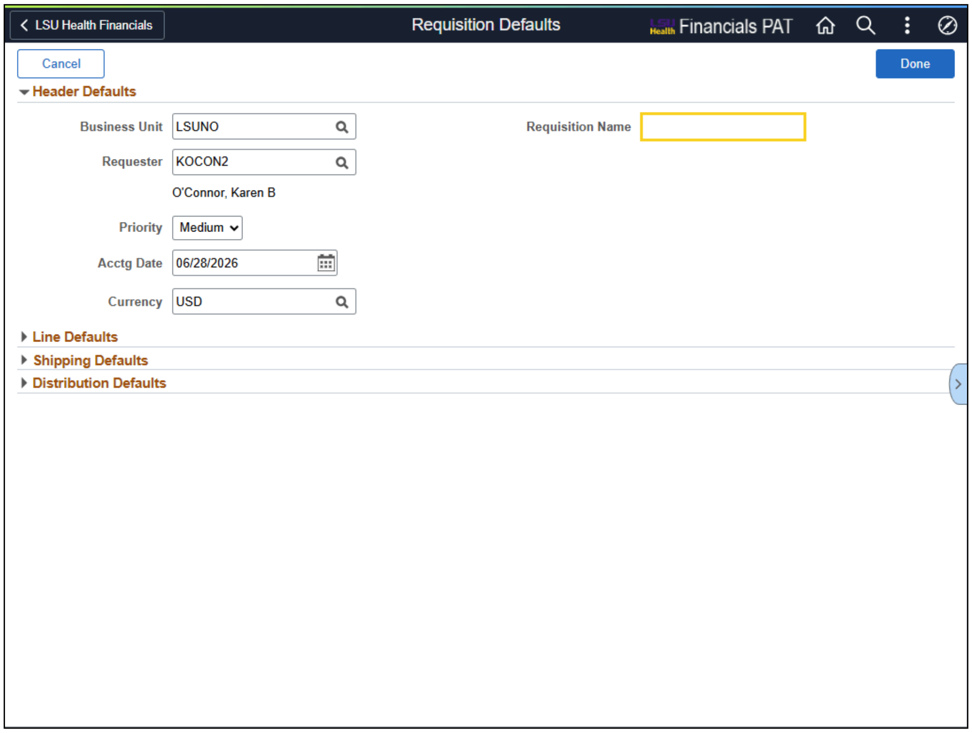
Procedure

In this topic you will learn how to **Create a Requisition for Next Fiscal Year**.

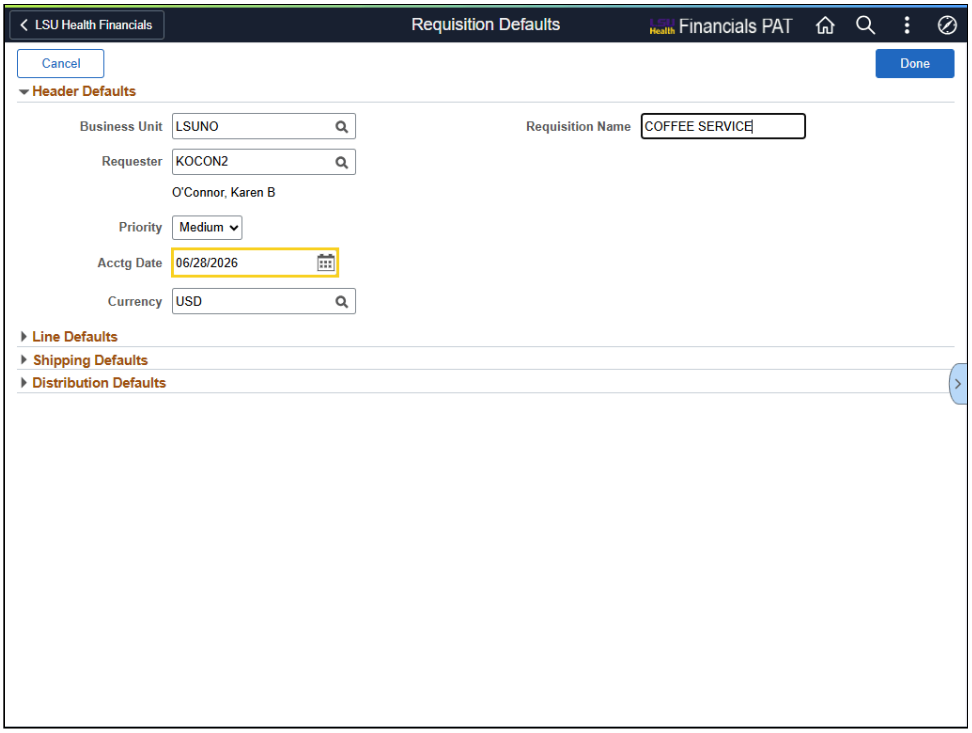
Step	Action
1.	**Create a Requisition for the Next Fiscal Year** When creating a requisition for the next fiscal year, it is **required** to set the **Accounting (Acctg) Date** to ***July 1*** to ensure that the requisition is *charged in the correct period*.



Step	Action
2.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Create Requisition** tile.

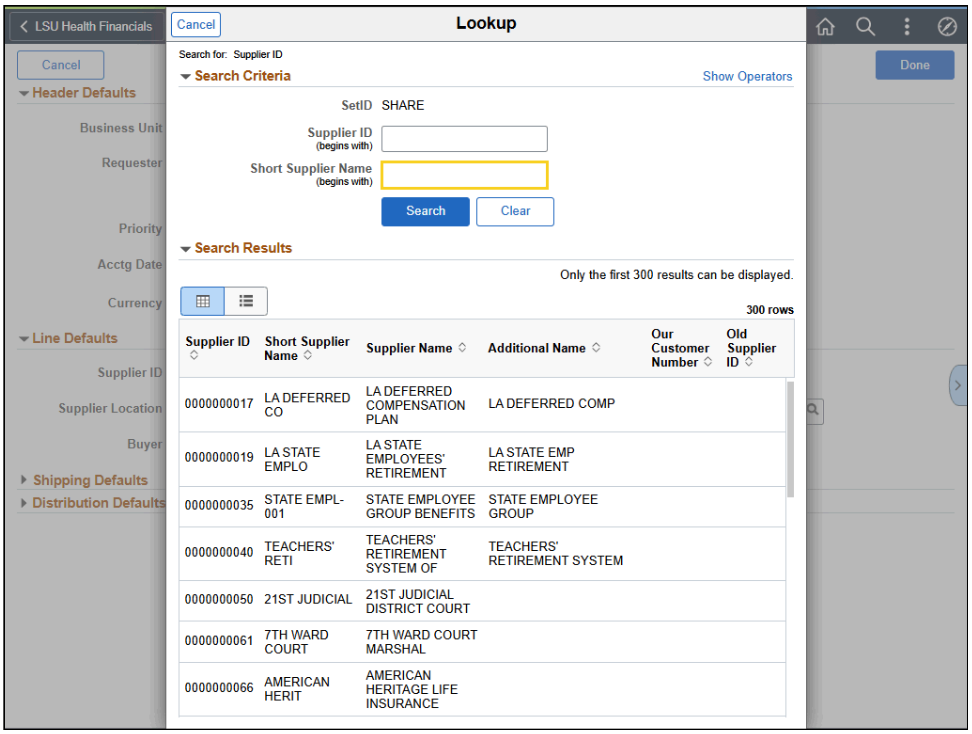


Step	Action
3.	**Create a Requisition for the Next Fiscal Year** (continued) Enter the desired information into the **Requisition Name** field. Enter "**COFFEE SERVICE**".

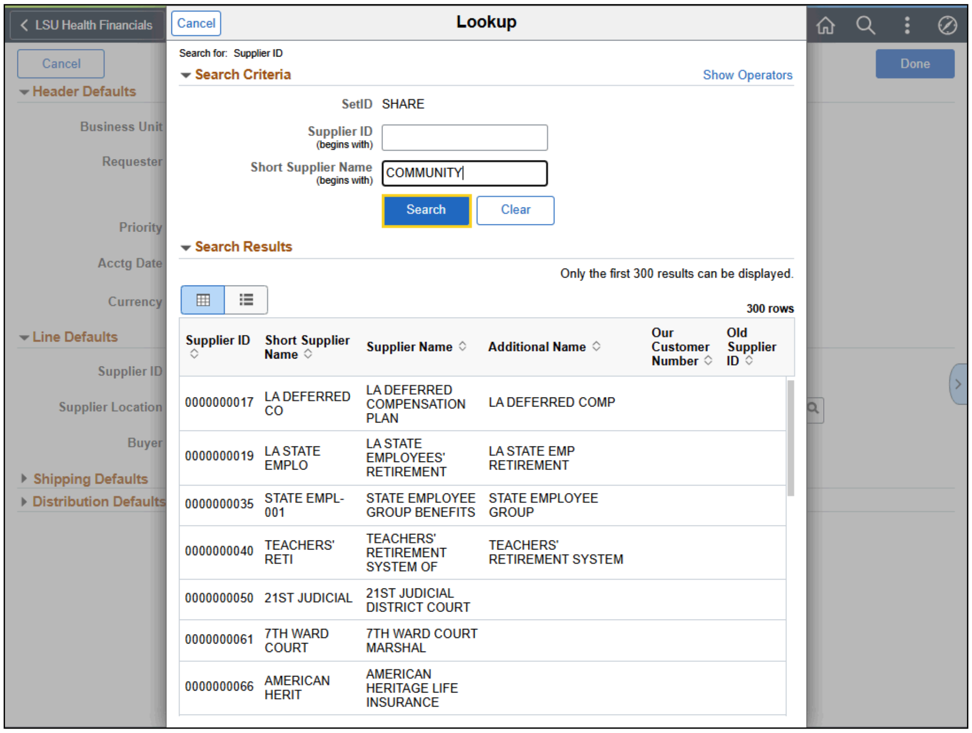


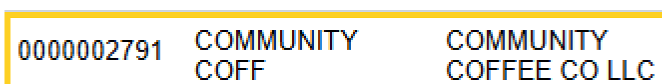
Step	Action
4.	**Create a Requisition for the Next Fiscal Year** (continued) In the **Requisition Defaults** page, *change* the **Acctg Date** to ***07/01*** of the ***next fiscal year***. For example, for *Fiscal Year 2027*, the date *07/01/2026* is *entered*. ***NOTE: Changing the Acctg Date to an older than today's date is not allowed.*** Enter the desired information into the **Acctg Date** field. Enter "**070126**".
5.	**Create a Requisition for the Next Fiscal Year** (continued) ***NOTE: You must enter Requisition Defaults before entering line-item information.*** Click the **Line Defaults** arrow. 
6.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Lookup Supplier ID** button. 

Step	Action
7.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Search Criteria** arrow. 

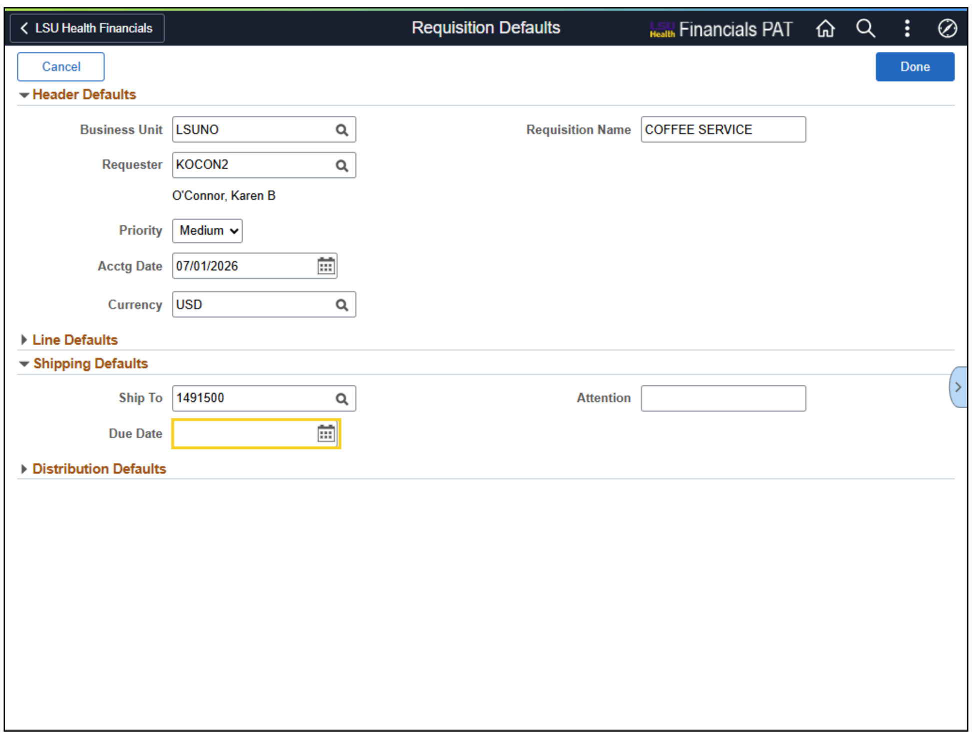


Step	Action
8.	**Create a Requisition for the Next Fiscal Year** (continued) Enter the desired information into the **Short Supplier Name** field. Enter "**COMMUNITY**".

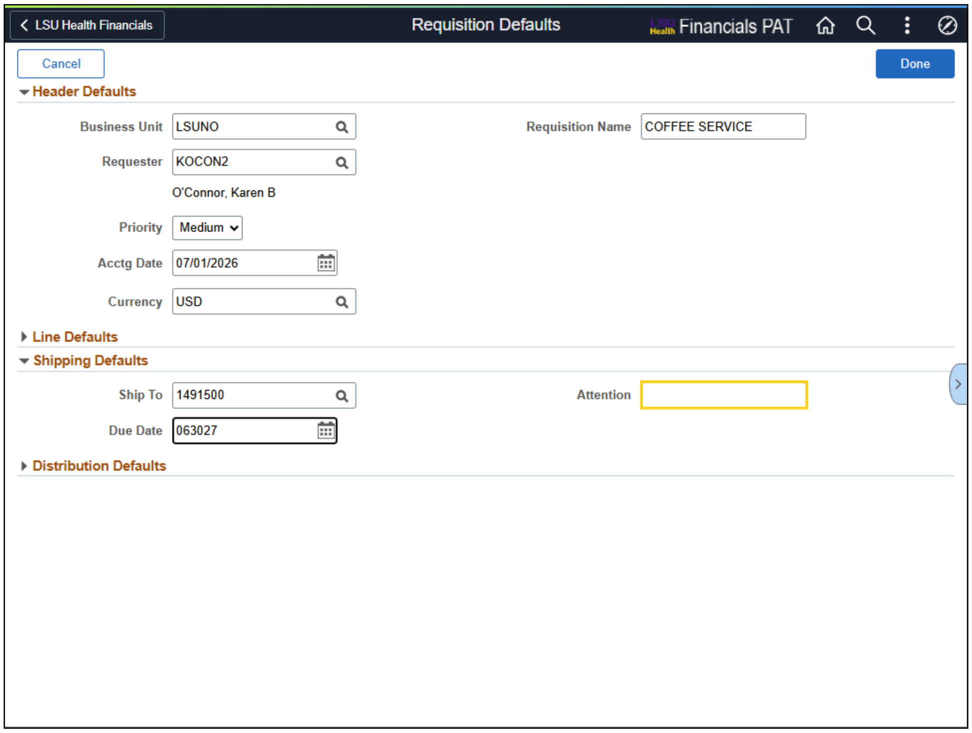


Step	Action
9.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Search** button. 
10.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **0000002791 - COMMUNITY COFFEE LLC** button. 
11.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Line Defaults** arrow. 
12.	**Create a Requisition for the Next Fiscal Year** (continued) Enter the desired information into the **Buyer** field. Enter "**DHOLME2**".

Step	Action
13.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Line Defaults** arrow.
14.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Shipping Defaults** arrow. 
15.	**Create a Requisition for the Next Fiscal Year** (continued) Enter the desired information into the **Ship To** field. Enter "**1491500**".

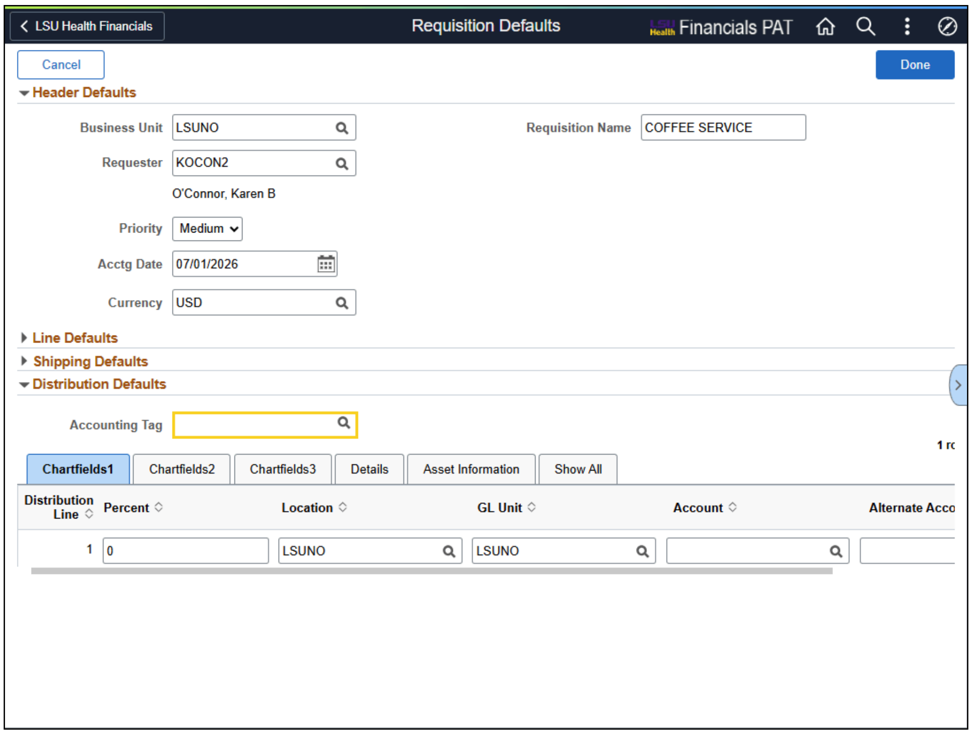


Step	Action
16.	**Create a Requisition for the Next Fiscal Year** (continued) The **Due Date** will be the *last day of the new fiscal year*. For example, for *Fiscal Year 2027*, the date will be ***06/30/2027***. Enter the desired information into the **Due Date** field. Enter "**063027**".

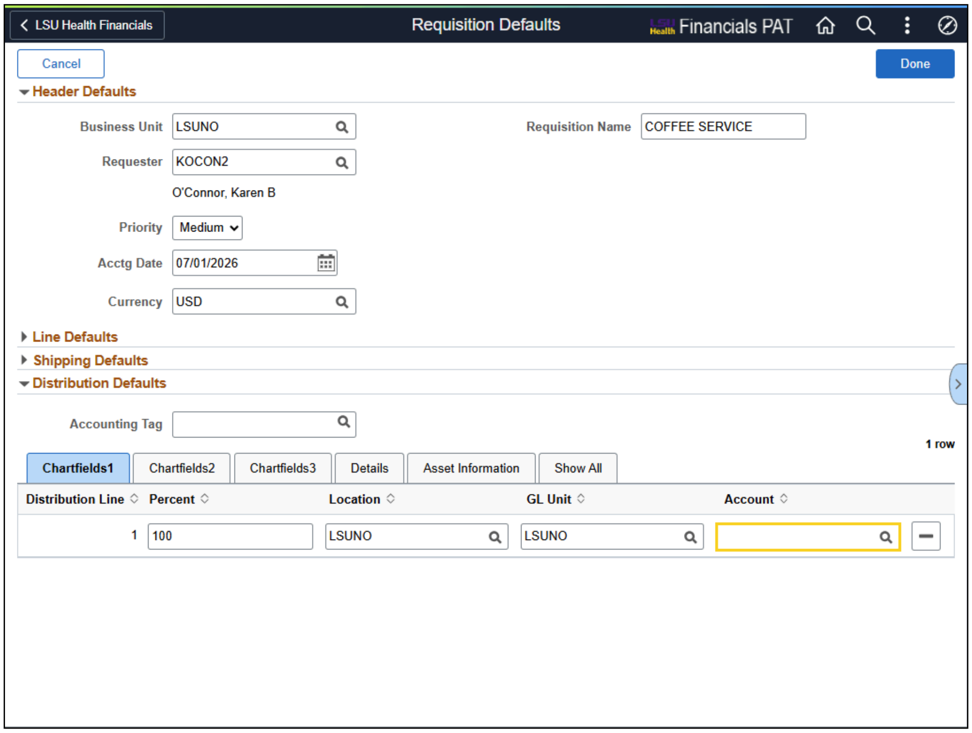


Step	Action
17.	**Create a Requisition for the Next Fiscal Year** (continued) ***NOTE: The name for the Attention field is used for training purposes only. Enter your department person who will receive the items.*** Enter the desired information into the **Attention** field. Enter "**KAREN O'CONNOR**".
18.	**Create a Requisition for the Next Fiscal Year** (continued) A message is displayed stating the **Due Date** is *more than 30 days in the future*. Click the **OK** button. 
19.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Shipping Defaults** arrow.

Step	Action
20.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Distribution Defaults** arrow. 



Step	Action
21.	**Create a Requisition for the Next Fiscal Year** (continued) ***NOTE: The Accounting Tag used in this example is for <u>training purposes only</u>. When in Production, use an appropriate Accounting Tag for your department.*** Enter the desired information into the **Accounting Tag** field. Enter "**0491500001**".
22.	**Create a Requisition for the Next Fiscal Year** (continued) Press **[Tab]** to populate chartstring information into the tabs.



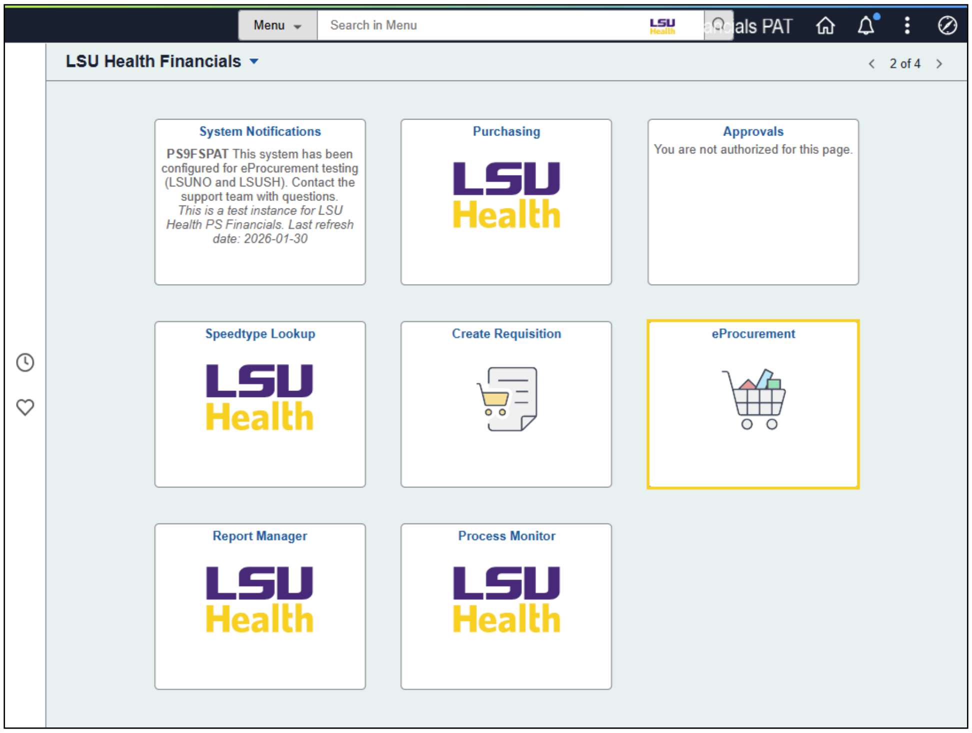
Step	Action
23.	**Create a Requisition for the Next Fiscal Year** (continued) Enter the desired information into the **Account** field. Enter "**543700**".
24.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Done** button. 
25.	**Create a Requisition for the Next Fiscal Year** (continued) If you are *past* the initial **Requisitions Defaults** page, the page can be *accessed* again by *selecting* the **Gear** icon at the *top-right corner* of **Create Requisition** page. Click the **Gear** button. 
26.	**Create a Requisition for the Next Fiscal Year** (continued) Click the **Defaults** link. 

Step	Action
27.	**Create a Requisition for the Next Fiscal Year** (continued) You are returned to the ***Defaults*** page. Verify the **Acctg Date** is *07/01/XX*, and the **Due Date**, on the ***Shipping Defaults*** panel, is *06/30/XX*. Click the **Done** button. 
28.	**Create a Requisition for the Next Fiscal Year** (continued) You can now continue with your requisition by selecting either **Special Requests** or a **Punchout supplier**.
29.	This completes ***Create a Requisition for Next Fiscal Year***. **End of Procedure.**

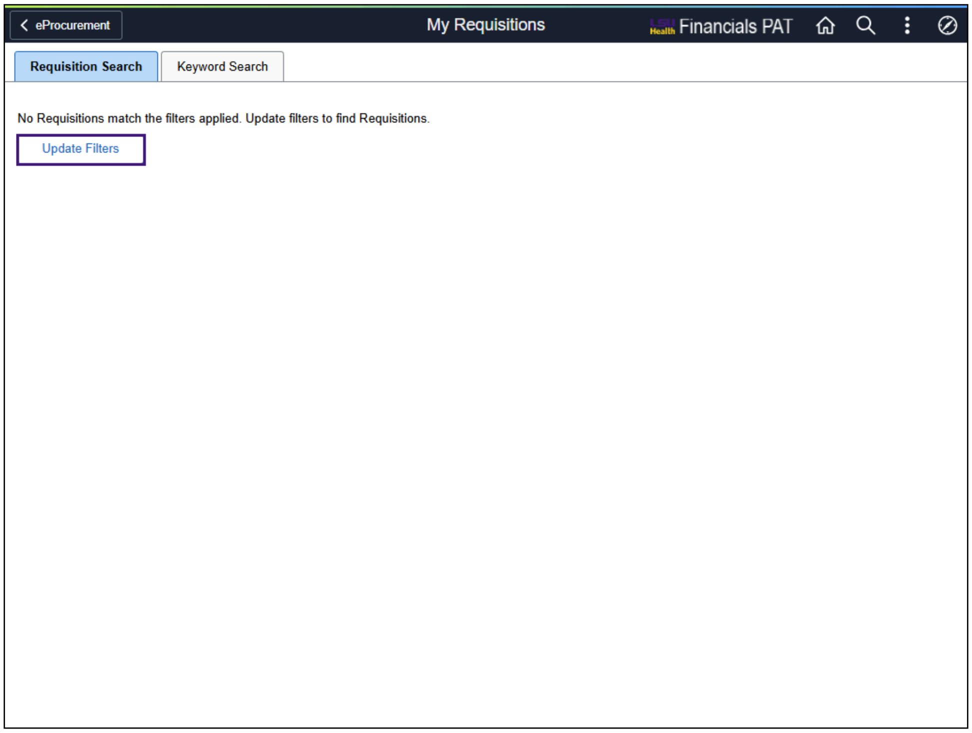
Copy an Existing Requisition for Next Fiscal Year

Procedure

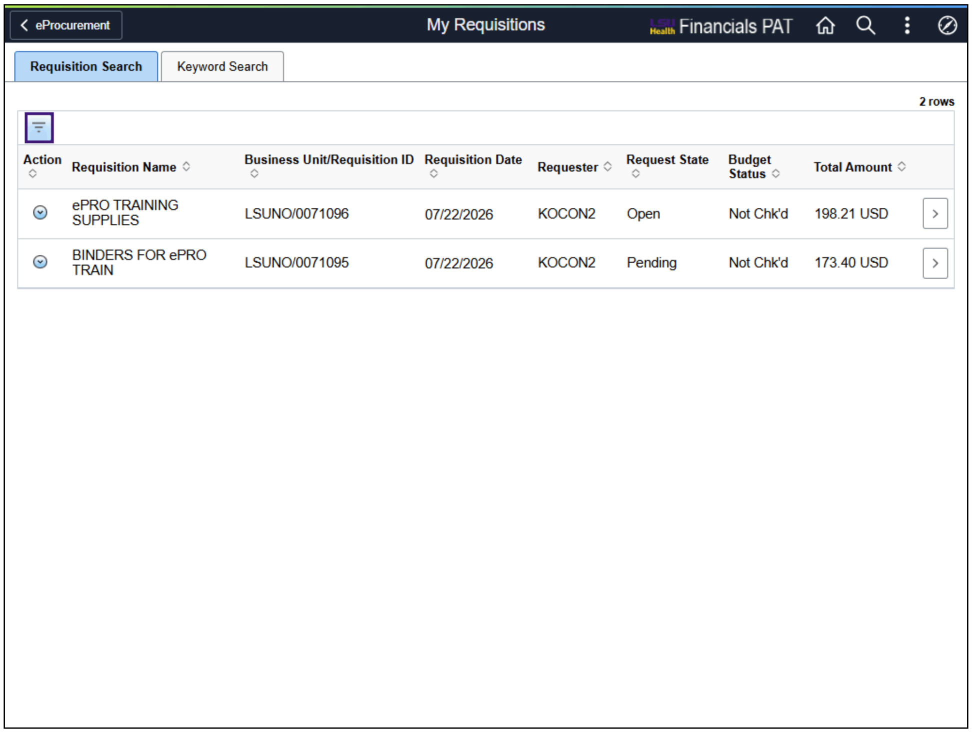
In this topic, you will learn how to **Copy an Existing Requisition for Next Fiscal Year**.



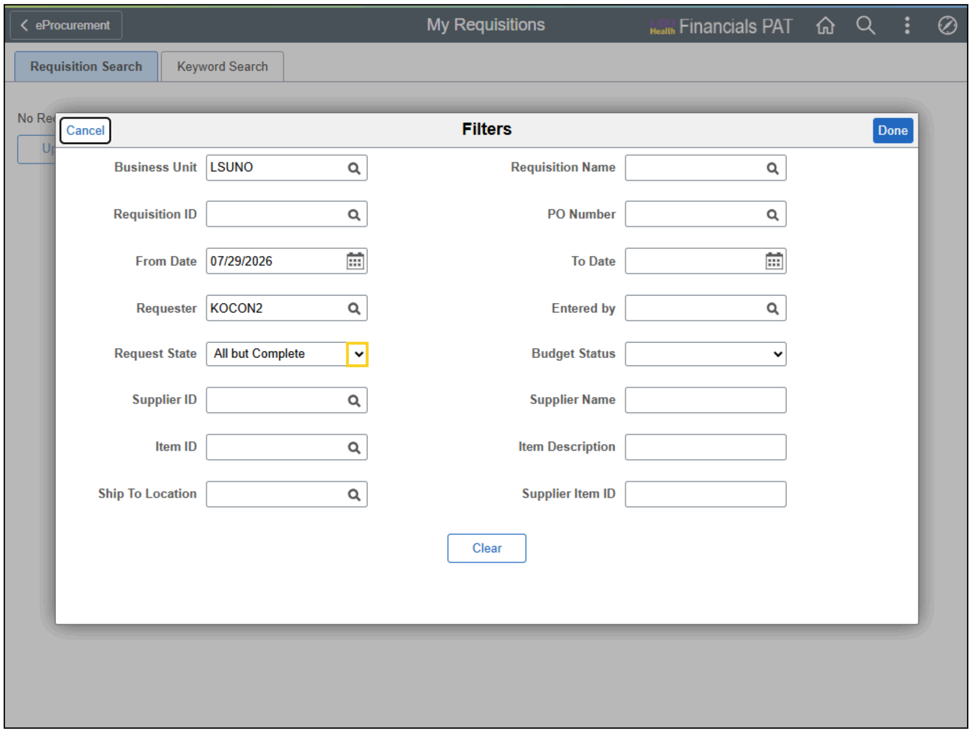
Step	Action
1.	**Copy a Requisition for Next Fiscal Year** eProcurement and non-ePro requisitions can be copied for the next fiscal year. Click the **eProcurement** tile.
2.	**Copy a Requisition for Next Fiscal Year** (continued) Click the **My Requisitions** tile.



Step	Action
3.	**Copy a Requisition for Next Fiscal Year** (continued) The **filter** button *acts* as a *search option* to find *requisitions* using specific criteria such as Business Unit, Requisition ID, From and To Date, and Requester. The filter button will display differently on the page if My Requisitions displays *current date requisitions or not*. *This example shows what the filter button looks like with **no** requisitions displayed.*

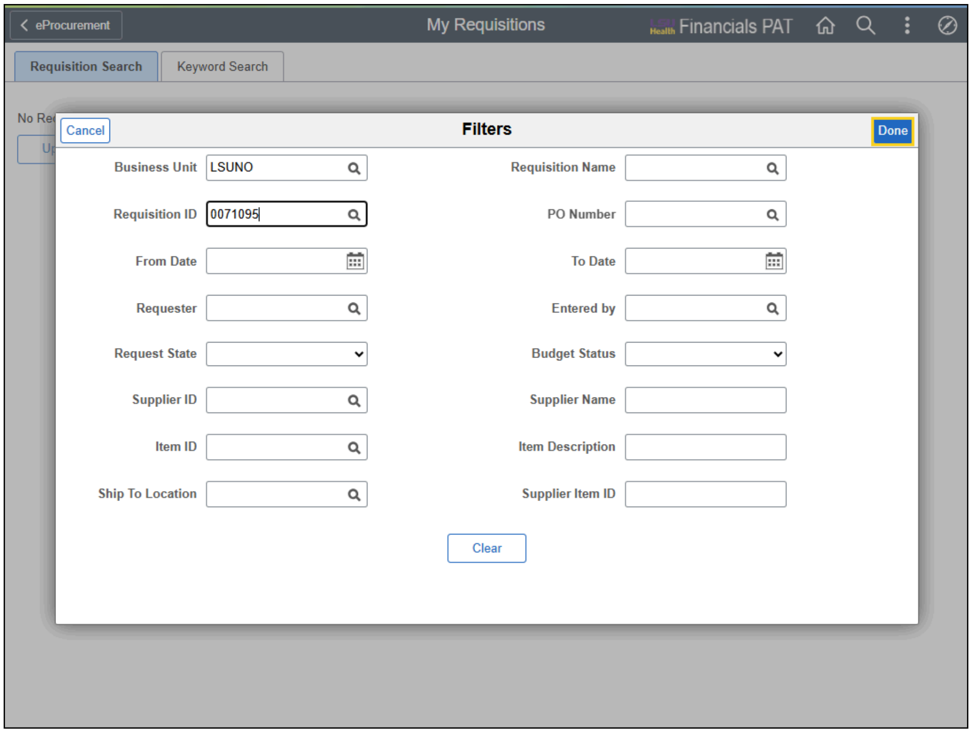


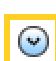
Step	Action
4.	**Copy a Requisition for Next Fiscal Year** (continued) *This example shows what the filter button will look like when* ***current date requisitions*** *are displayed on My Requisitions.* The *filter options* are the *same* regardless of which option is used.
5.	**Copy a Requisition for Next Fiscal Year** (continued) The **Update Filters** option will be used to search for a requisition. Click the **Update Filters** button. 



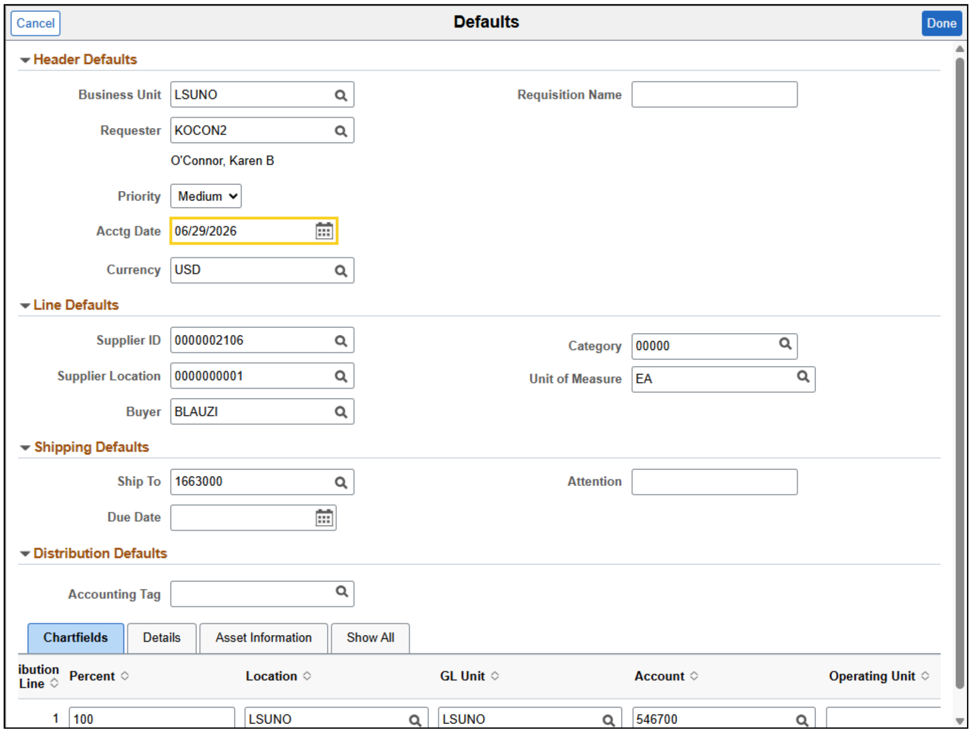
Step	Action
6.	**Copy a Requisition for Next Fiscal Year** (continued) You will use **Business Unit** and **Requisition ID** as your *main filter options*. You can *also use* **From and To Date**, as well as **Requester**. *It is not recommended to use any of the other options.* *In this example, you will select the blank option for Requester state, delete Requester, and delete From Date. You will enter the Requisition ID as 0071095.* Click the button to the right of the **Request State** field. 
7.	**Copy a Requisition for Next Fiscal Year** (continued) Click the **Blank** list item.
8.	**Copy a Requisition for Next Fiscal Year** (continued) Highlight the **Requester ID** and press **[Delete]**.
9.	**Copy a Requisition for Next Fiscal Year** (continued) Highlight the **From Date** and press **[Delete]**.

Step	Action
10.	**Copy a Requisition for Next Fiscal Year** (continued) Enter the desired information into the **Requisition ID** field. Enter "**0071095**".

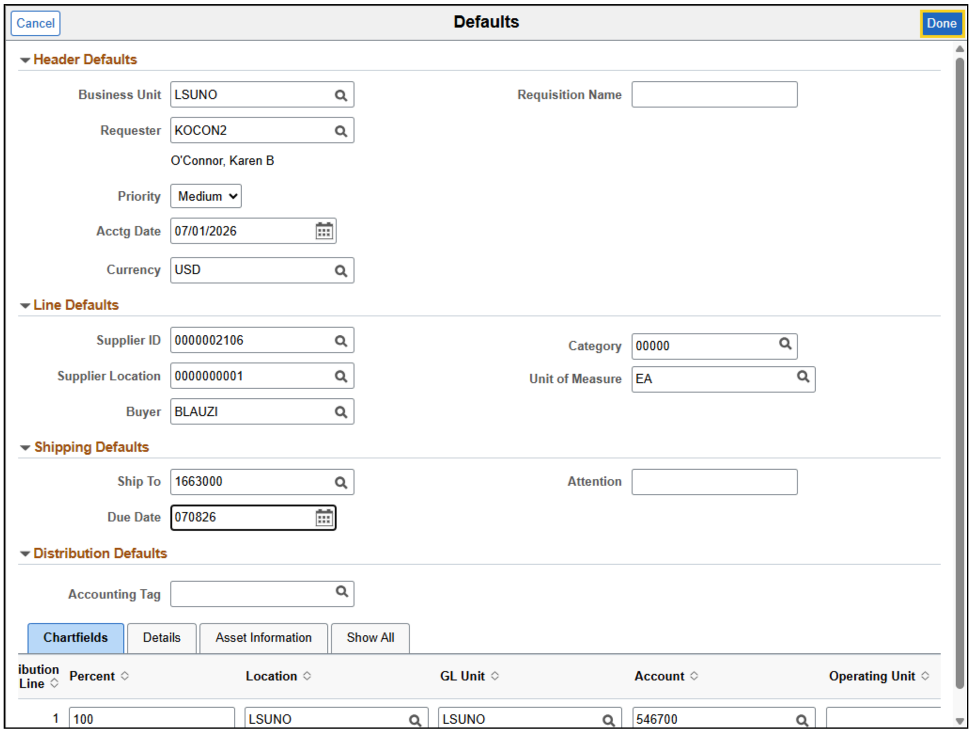


Step	Action
11.	**Copy a Requisition for Next Fiscal Year** (continued) Click the **Done** button. 
12.	**Copy a Requisition for Next Fiscal Year** (continued) The requisition information is displayed. Use the **Actions** menu to select the **Copy** link. Click the **Actions** button. 

Step	Action
13.	**Copy a Requisition for Next Fiscal Year** (continued) Selecting the **Copy** option will copy the requisition and bring up the **Edit Shopping Cart** screen. Click the **Copy** link. 
14.	**Copy a Requisition for Next Fiscal Year** (continued) *To update the accounting date, select* **Continue Shopping**. Click the **Continue Shopping** button. 
15.	**Copy a Requisition for Next Fiscal Year** (continued) The main page for **Create Requisition** is displayed, along with the *item from* the *copied requisition* in a *cart* on the right-hand side. Select the **Gear icon** and then **Defaults** to bring up the **Requisition Defaults** page. Click the **Gear** button. 
16.	**Copy a Requisition for Next Fiscal Year** (continued) Click the **Defaults** link. 



Step	Action
17.	**Copy a Requisition for Next Fiscal Year** (continued) *Change* the **Acctg Date** to the *new fiscal year*. For example, for *Fiscal Year 2027*, the date will be *07/01/2026*. Enter the desired information into the **Acctg Date** field. Enter "**070126**".
18.	**Copy a Requisition for Next Fiscal Year** (continued) **Due Date** is a *required field*, so you must *enter* the *appropriate date*. **Requisition Name** and **Attention** are *highly recommended fields*, so consider entering information into those fields as well. *Verify* the **chartstring data**. Enter the desired information into the **Due Date** field. Enter "**070826**".



Step	Action
19.	**Copy a Requisition for Next Fiscal Year** (continued) Click the **Done** button. 
20.	**Copy a Requisition for Next Fiscal Year** (continued) Click the **Checkout** button. 
21.	**Copy a Requisition for Next Fiscal Year** (continued) Review your requisition, make any necessary changes to the requisition, and then select the **Submit** button when ready. Click the **Submit** button. 

Step	Action
22.	**Copy a Requisition for Next Fiscal Year** (continued) Your **Checkout Confirmation** page is displayed. The **Print Preview** option is shown at the top-right of the page. Select the **View Approval Chain** to view who *needs to approve* the requisition. If you are your *own Approver*, you may select the **Check Budget** button to budget check your requisition. On the l*ower left side*, **Next Steps** are displayed. The user can select any or all these options as needed.
23.	This completes ***Copy an Existing Requisition for Next Fiscal Year***. **End of Procedure.**