



**Managing Requisitions
Fluid
LSUNO/HCSO/LAKMC**

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Training Guide
Managing Requisitions Fluid
LSUNO/HCSO/LAKMC

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Managing Requisitions Fluid – LSUNO/HCSD/LAKMC

Managing Requisitions 9.2 for LSUNO/HCSD/LAKMC

Welcome to the **PeopleSoft 9.2 Managing Requisitions for LSUNO** module! This module contains the tools needed to learn many of the concepts and procedures associated with Requisitioning items.

GOAL

Our goal is for users to have the skills and knowledge necessary to enter and inquire on a requisition.

Participants will learn:

1. The three required and five optional steps of Add/Update a Requisition, and
2. How to Review Requisition Documents and Process Status.

NOTE: The functions in this manual must be performed in the PeopleSoft Production Database. Any data entered into a non-production database (i.e., Reports (PS9FSRPT) or Sandbox (PS9FSSND)) will be lost.

Contact for Assistance

The following will be your contacts for Managing Requisitions:

1. For **technical assistance** with PeopleSoft (i.e., problems accessing PeopleSoft, assistance with changing passwords, etc.), contact the Help Desk as follows:

Long Distance: 1-800-303-3290;

Local Calls: 1-504-568-HELP (4357); or

Email: helpdesk@lsuhsc.edu (<mailto:helpdesk@lsuhsc.edu>)

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

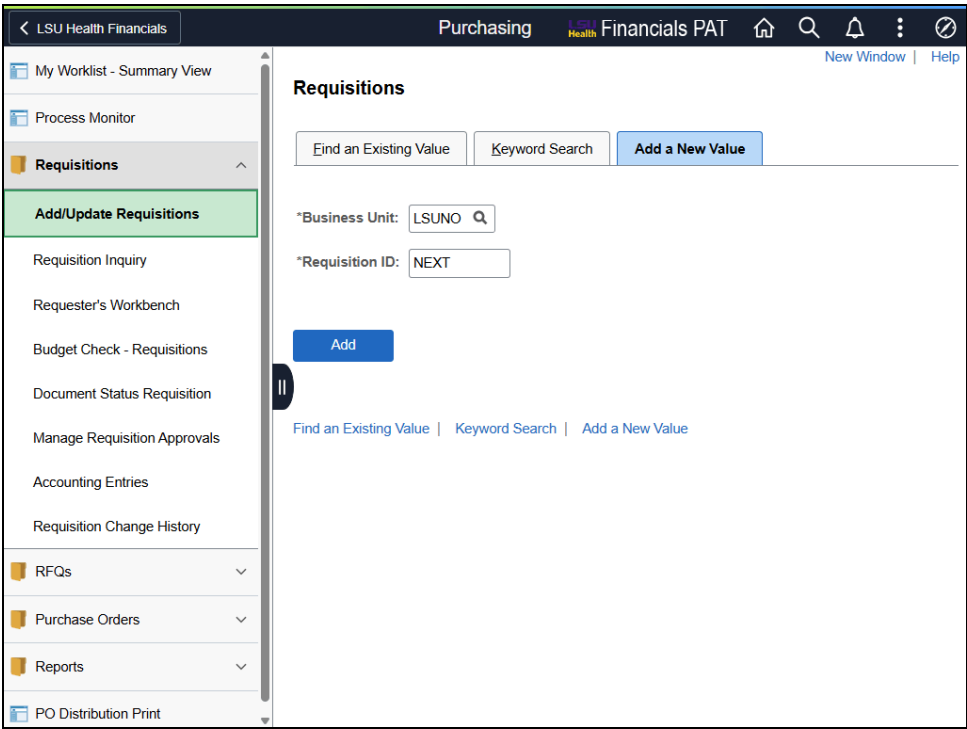
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Add/Update Requisitions

Requisition Essentials

Procedure

In this topic you will learn about **Requisition Essentials**.



Step	Action
1.	<p>What is a Requisition?</p> <p>A requisition is a request for items to be ordered from a supplier. This creates a pre-encumbrance in the PeopleSoft system which is an intent to buy a product or service. It is a commitment to a department's budget, but it is <u>not</u> final and binding with the supplier. Requisitions allow users to create, review, edit, approve or cancel a requisition.</p>

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Step	Action
2.	<p>Once the requisition is entered into the PeopleSoft system, two things must occur for Purchasing to be able to generate a Purchase Order to the supplier in the PeopleSoft system:</p> <ol style="list-style-type: none"> 1. The requisition <u>must</u> be approved. 2. The requisition <u>must</u> pass the budget check process. <p>Budget checking ensures that financial obligations and expenditures do not exceed budget limits. Controls are created to permit only those transactions that are applied to correct calendar periods, as well as to the correct account types and ChartString combinations. Budget Checking a requisition also verifies that the allocated funds are still available before a liability is created. In short, the Budget Check process verifies the ChartString entered into the requisition is valid and that the funds are available for the ChartString.</p>

The screenshot displays the PeopleSoft Requisitions interface. On the left, a navigation sidebar lists various options, with 'Requisitions' expanded and 'Add/Update Requisitions' selected. The main content area is titled 'Requisitions' and contains search filters: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. Below these, there are input fields for 'Business Unit' (set to LSUNO) and 'Requisition ID' (set to NEXT), followed by an 'Add' button. At the bottom of the main area, there are links for 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.

Step	Action
3.	<p>Anytime you see a star (*) to the left of a field name, this indicates the field is a required field. Information must be entered into required fields to save the requisition and ultimately generate a Purchase Order. There are some fields not required by PeopleSoft but are required by LSUNO/HCSD/LAKMC. These fields will be identified and discussed in the topics in this manual.</p>

Step	Action
4.	<p>Add a New Value</p> <p>The system defaults you into the "Add a New Value" tab.</p> <p>The appropriate Business Unit will be displayed in the Business Unit field. when working in Production. If the Business Unit does <u>not</u> default correctly, enter it or select it by clicking the magnifying glass (Look up Business Unit) to the right of the Business Unit field. It is recommended that you do <u>not</u> attempt to continue with the requisition, as save errors are likely to occur. Contact the Purchasing so that the defaults can be set appropriately.</p>
5.	<p>Requisition ID</p> <p>The Requisition ID will default as NEXT. This allows the system to auto-assign the next available requisition number for the business unit the first time the requisition is saved. <i>The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned by Purchasing once the PO is generated.</i></p> <p>NOTE: Blanket or Standing Orders will be entered in PeopleSoft one time to cover the entire fiscal year, thereafter, the Purchase Order number will be used to place additional orders during the year. See your Buyer or Purchasing for more information about blanket or standing orders.</p>
6.	<p>Users can access an existing requisition by clicking the "Find an Existing Value" tab.</p> <p><i>See the Review a Requisition topic for instructions on how to find an existing requisition in PeopleSoft.</i></p>
7.	<p>There are four (4) basic elements that comprise a requisition:</p> <ol style="list-style-type: none"> 1. Headers 2. Lines 3. Schedules 4. Distributions <p>Each requisition has one header, which can have multiple lines. Each line can have multiple schedules, and each schedule can have multiple distributions.</p>
8.	<p>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 should pay.</p>

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LSU Health Financials PAT

Maintain Requisitions

Requisition

Business Unit: LSUNO Status: Pending
 Requisition ID: NEXT Budget Status: Not Chk'd

Requisition Name: [] Copy From: [] ☐ Hold From Further P

▼ Header ?

*Requester: KOCONN O'Connor, Karen
 *Requisition Date: 11/07/2025 Requester Info
 Origin: ONL On-Line Entry
 *Currency Code: USD US Dollar
 Accounting Date: 11/07/2025

Amount Summary ?
 Total Amount: 0.00

Requisition Defaults
 Requisition Activities
 Add Comments

Add Items From ?
 Purchasing Kit Item Search
 Catalog Requester Items

Line ?

Details Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Co

Line	Item	Description	Quantity	*UOM
------	------	-------------	----------	------

Step	Action
9.	<p>When entering a new requisition, the following four (4) fields must default as follows on the Maintain Requisitions page to enter a new requisition:</p> <ol style="list-style-type: none"> 1. Business Unit = LSUNO 2. Requisition ID = NEXT 3. Status = Pending 4. Budget Status = Not Chk'd
10.	<p>The Business Unit and Requisition ID default from the Add a New Value page.</p> <p>The Status will default as Pending. If the Status does <u>not</u> default as Pending, contact Purchasing so that default information can be set up appropriately.</p> <p>The Budget Status indicates whether the budget check process has been run, so will default to Not Chk'd. The budget check can only be performed <u>after</u> a requisition is approved, but <u>prior</u> to Purchasing generating a Purchase Order or RFQ (Request for Quote).</p> <p>It is recommended you do <u>not</u> attempt to continue with the requisition, as save errors are likely to occur if any of these fields default incorrectly.</p>

Step	Action
11.	<p>Steps for Entering a Requisition</p> <p>There are three (3) required steps and five (5) optional steps for entering a requisition. <i>It is important to enter the requisition in step order. Changing the order of the steps may cause save errors and result in the user having to re-enter the requisition.</i></p>
12.	<p>Steps for Entering a Requisition (continued)</p> <ul style="list-style-type: none"> 1. Check Hold from Further Processing (optional) 2. Enter Requisition Name (optional) 3. Enter Requisition Defaults (required) 4. Enter Item(s) and Save the requisition (required) 5. Adjust Chartstring Information (required) 6. Enter Comments and Attach Documents (optional) 7. View Approvals, and Print the requisition (optional) 8. View and Copy an existing requisition (optional) <p>Each step, whether required or optional, will be discussed in detail in the topics included in this manual.</p>

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Requisition Defaults

Business Unit LSUNO Requisition Date 11/07/2025
 Requisition ID NEXT Status Pending

Default Options ?

☐ Default
 If you select this option, the default values entered on this page are treated as part of the defaulting logic and applied if no other default values are found for each field. If default values already exist in the hierarchy, then the values on this page are not used.

☒ Override
 If you select this option, all default values entered on this page override the default values found in the default hierarchy. Only non-blank values are assigned.

Line

Buyer
 Supplier
 Category
 Unit of Measure
 Supplier Location
[Supplier Lookup](#)

Schedule

Ship To LSUSH
 Due Date
 Ultimate Use Code
 Attention To
[One Time Address](#)

Distribution

Accounting Tag

*Distribute By Quantity
 Ship Via GRND
 Freight Terms DES

Line	Item	Description	Quantity	*UOM
------	------	-------------	----------	------

Step	Action
13.	<p>Step 3: Enter Requisition Defaults (required)</p> <p>You must first enter data on the Requisition Defaults page for two reasons:</p> <ol style="list-style-type: none"> To properly Save the requisition. If defaults are not entered before entering item(s) information, the requisition will not be saved and will have to be re-entered by the requester. For the chartstring(s) to default to all line items. The chartstring values can be changed on any line item on the Distribution page. However, by entering the information on the Requisitions Defaults page, the system will automatically default the chartstring information to each line item on the requisition.

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Step	Action
14.	<p>Entering Supplier Information</p> <p>A requisition can have only <u>one</u> supplier. Although the Supplier field is <u>not</u> a required field, the requester <u>must</u> provide information about the supplier to Purchasing. The Supplier ID is used to designate the Supplier for the requisition. The Supplier ID is always a <i>10-digit</i> number in PeopleSoft. Users can enter the Supplier ID directly into the Supplier field or can utilize the Look up Supplier to search for it.</p>
15.	<p>Entering Supplier Information (continued)</p> <p>If the <i>Supplier ID</i> is unknown, the requester should attempt to locate it in the PS database. If the supplier does <u>not</u> appear in the list of suppliers in the PS system, the Supplier may be left <i>blank</i>. However, supplier information <u>must</u> then be entered in the <i>Header Comments</i> page and include as much of the following information as is known: the supplier's name, contact person, street address, city, state, zip code, telephone number, fax number and Tax ID number.</p>
16.	<p>Navigating on PeopleSoft Pages</p> <p>The Tab key on your keyboard is used to move from field to field within PeopleSoft. The Enter key acts as a Save button, so it cannot be used to move from field to field on a page.</p> <p>Use only the <i>buttons and links</i> provided <u>on</u> the PeopleSoft pages. <u>Do not use</u> the <i>Back</i> and <i>Forward</i> arrows on your browser.</p>

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Step	Action
17.	<p>Request for Quote</p> <p>Louisiana State Law requires that every purchase above \$10,000 - including freight and handling - must go out for bid. Purchases made under the Governor's Executive Order for Small Purchases is the exception to this rule.</p> <p><i>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.</i></p>
18.	<p>This completes <i>Requisition Essentials</i>.</p> <p>End of Procedure.</p>

Look up SpeedChart/Acctg Tag

Procedure

In this topic you will learn how to **Look up Speedchart**.

Step	Action
1.	A SpeedChart/Acctg Tag is a shortcut users can enter to automatically populate individual chartfield values on the distribution line located on the Requisitions Defaults page. The use of SpeedCharts/Acctg Tags can greatly increase data entry efficiency by reducing the number of keystrokes required to enter frequently used combinations of chartfield values and by reducing keystroke errors.
2.	<i>NOTE: SpeedType, SpeedChart and Accounting Tag (Acctg Tag) are used interchangeably for LSU Health.</i>

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Step	Action
3.	<p>ChartString Values</p> <p>The ChartString is comprised of the following values:</p> <ol style="list-style-type: none"> 1. Account Code 2. Dept 3. Location 4. Fund 5. Program 6. Class 7. Project 8. PC Bus Unit
4.	<p>Account Code</p> <p>The Account Code is a transaction code for the item(s) being ordered (e.g., office supplies, medical supplies, dental supplies, etc.). The <u>correct</u> Account Code <u>must</u> be entered for each line item. The Account Code can be entered on the Requisition Defaults page when <i>entering a single line requisition</i>, or <i>when entering multiple lines items using the same Account Code</i> (e.g., office supplies, dental supplies, etc.).</p> <p>If, however, a user is ordering multiple line items, and each line has a <i>different</i> Account Code, the Account Code will be left blank on the <i>Requisitions Defaults</i> page. The user <u>must</u> then enter the appropriate Account Code on the <i>Distribution</i> page for each line item.</p> <p>Contact your Finance/Accounting group for a list of Account Codes.</p>
5.	<p>Dept and Location</p> <p>The Dept is the cost center paying for the item(s). The Dept is always a 7-digit department number.</p> <p>The Location is a business unit designation. It is recommended that LSUNO be used as the <i>Location</i> code for <u>all requisitions</u>.</p>
6.	<p>Fund, Program and Class</p> <p>The Fund Code identifies the <i>funding source</i> for the item(s) being ordered. If the item(s) involves a <i>Project/Grant</i>, enter the <i>Fund Code</i> associated with the specified Project/Grant (e.g., 113,115,116, etc.).</p> <p>The Program Code classifies the and reports expenses according to the type of activity for which the expenses were incurred.</p> <p>The Class Code indicates the accounting class for a sub ledger journal line (e.g., Receivables, Revenue, Expenditure, etc.)</p>

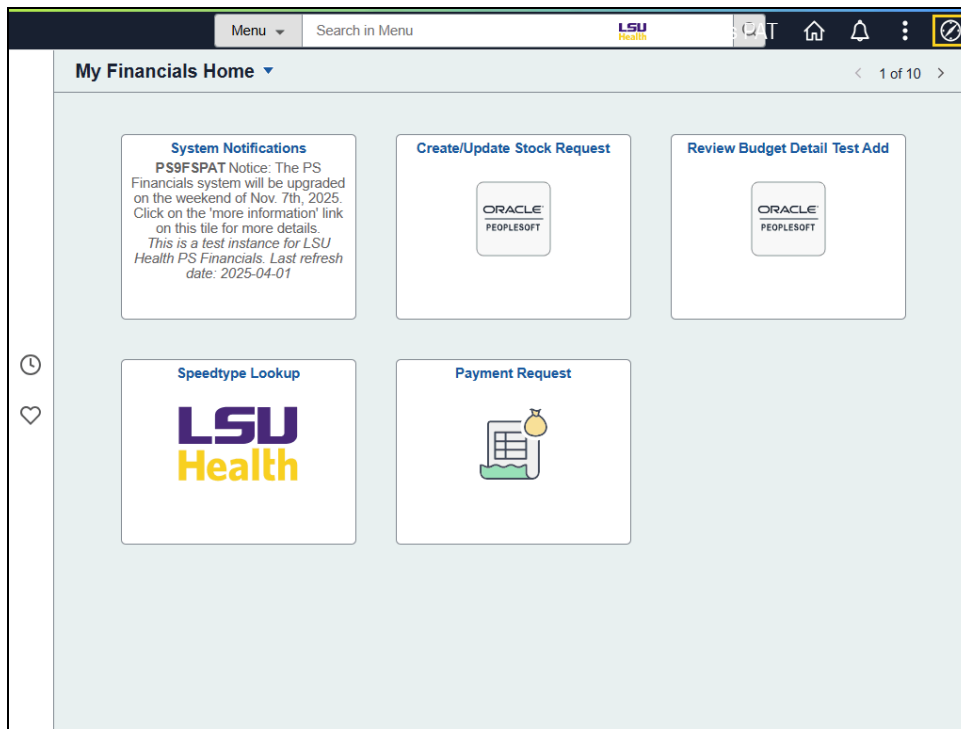
Step	Action
7.	<p>Project and PC Bus Unit</p> <p>The Project/Grant number <u>must</u> be entered if the item(s) being ordered are associated with a specific Project or Grant. The Project/Grant will only be entered on the <i>Requisitions Default</i> page if all items on the requisition will be charged to the project/grant. Otherwise, the Project/Grant number will be entered on the <i>Distribution</i> page for the <i>specific line item</i>.</p> <p>The PC Bus Unit <u>must</u> contain a value. The user's <i>business unit</i> designation will default into the field. If it does <u>not</u> default, the user <u>must</u> <i>enter it</i> or select it using the <i>Look up</i> feature.</p>


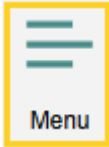

Step	Action
8.	<ul style="list-style-type: none"> • Single Accounting Tag/SpeedCharts can be utilized on the <i>Requisition Defaults</i> page and the line-item <i>Distribution</i> page. • Multiple Accounting Tag/SpeedCharts are utilized on the line-item <i>Distribution</i> page only.





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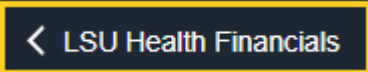
Step	Action
9.	<p><i>SpeedChart</i> information can be found in the Navigator menu under LSU Processes > LSU SpeedType Lookup.</p> <p>Click the NavBar button.</p> 
10.	<p>Click the Navigator Menu button.</p> 
11.	<p>Click the Down scrollbar.</p> <p><i>NOTE: This step serves as an example for scrolling up and down the menu. Users may also scroll left/right using the scroll buttons at the bottom of the page. No other scrolling steps will be included in this topic.</i></p>
12.	<p>Click the LSU Processes button.</p> 

Step	Action
13.	Click the LSU Speedtype/Acctg Tag Lookup button. 
14.	Scenario In this exercise, you will search for <i>two Speedtype/Acctg Tags</i> using the following Search criteria: SetID: LSUNO Department: 1492450 SpeedType Key: 149245131A SpeedType Key: 0492000034
15.	Enter the desired information into the SetID: field. Enter " LSUNO ".
16.	Enter the desired information into the Department: field. Enter " 1492450 ".
17.	Click the Search button. 
18.	Click the View All link. 
19.	You are searching for SpeedType Key/Acctg Tag: 149245131A. Click the Down button of the scrollbar. <i>NOTE: This step serves as an example for scrolling up and down the menu. Users may also scroll left/right using the scroll buttons at the bottom of the page. No other scrolling steps will be included in this topic.</i> 
20.	Click the SpeedType/Acctg Tag - 149245131A link.

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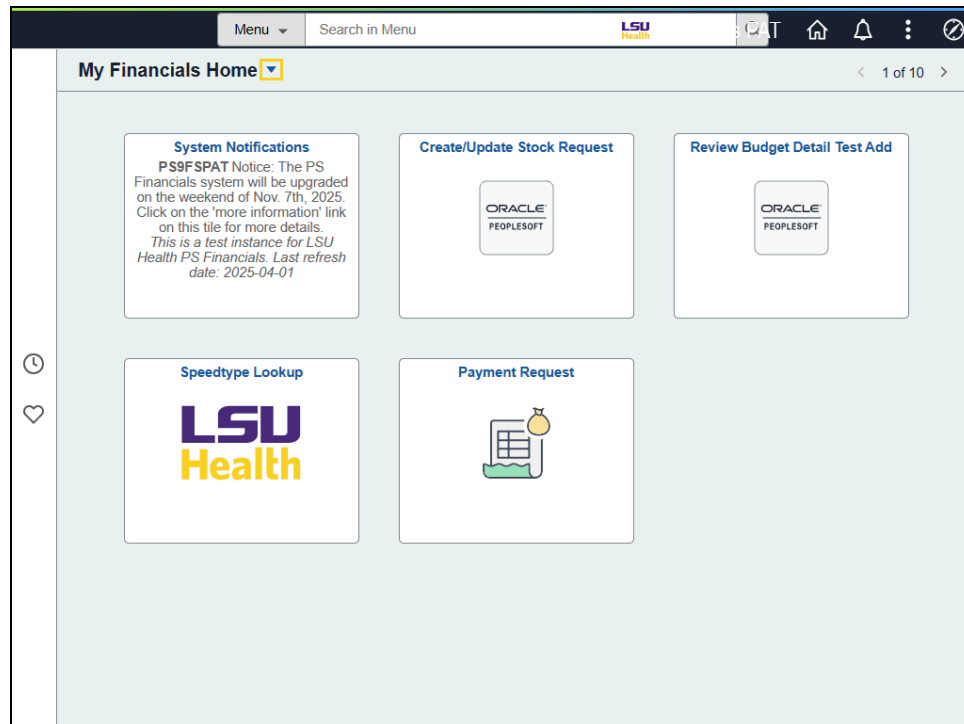
LSUNO/HCSO/LAKMC





Step	Action
21.	<p>The Chartfield information displays. Verify that the chartfield information (e.g., Fund Code, Program Code, Class Field, etc.) can be used for your requisition. You will need to make a <i>note</i> of the SpeedType/Acctg Tag so that you can later enter it on your requisition.</p> <p>NOTE: Only SpeedCharts/Acctg Tags with a numeric value can be used when creating a requisition. SpeedCharts that begin with a "G" or a "R" cannot be used.</p> <p>Click the Return to Search button.</p> 
22.	<p>Information about a <i>second Accounting Tag</i> is required. <i>Search</i> for Accounting Tag 0492000034.</p> <p>Click the SpeedType/Acctg Tag - 0492000034 link.</p>
23.	<p>The SpeedChart information displays. Verify that the chartfield information (e.g., Fund Code, Program Code, Class Field, etc.) can be used for your requisition. You will need to make a <i>note</i> of the SpeedType/Acctg Tag so that you can later enter it on your requisition.</p> <p>NOTE: Only SpeedCharts with numeric values can be used when creating a requisition. SpeedCharts that begin with a "G" or a "R" cannot be used.</p> <p>Click the My Financials Home button.</p> 
24.	<p>This completes Lookup SpeedChart.</p> <p>End of Procedure.</p>

Maintain Requisitions Navigation and Overview

Procedure

In this topic you will learn about **Maintain Requisitions Navigation and Overview**.





Step	Action
1.	Navigate to Maintain Requisitions page. Click the button to the right of the My Financials Home field. 
2.	Click the LSU Health Financials link. 
3.	Click the Purchasing button.
4.	Click the button to the right of the Requisitions field. 
5.	Click the Add/Update Requisitions button. 

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Step	Action
6.	<p>Click the Hide Navigation Area button.</p>  A dark blue button with a white icon consisting of two vertical bars and a semi-circle, representing a sidebar toggle.
7.	<p>Add a New Value</p> <p>A new requisition is being entered. Verify the Business Unit and Requisition ID default correctly.</p> <p>Click the Add button to begin the Enter a Requisition process.</p>  A blue rectangular button with the word "Add" in white text.

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Maintain Requisitions

Requisition

Business Unit: LSUNO
 Requisition ID: NEXT
 Requisition Name: [Copy From](#)

Status: Pending
 Budget Status: Not Chk'd
☐ Hold From Further Processing

Header

*Requester: KOCONN (O'Connor, Karen)
 *Requisition Date: 11/18/2025
 Origin: ONL (On-Line Entry)
 *Currency Code: USD (US Dollar)
 Accounting Date: 11/18/2025

Amount Summary

Total Amount: 0.00

Add Items From

Purchasing Kit
 Catalog
 Requester Items

Line

Details | Ship To/Due Date | Status | Supplier Information | Item Information | Attributes | Contract | Sourcing

Line	Item	Description	Quantity	*UOM
------	------	-------------	----------	------

Step	Action
8.	<p>The Maintain Requisitions page displays.</p> <p>The Business Unit and Requisition ID that have defaulted from the <i>Add a New Value</i> page display on the top left of the page.</p> <p>The "Requisition Name" field can display a <i>note or description of the item(s)</i> being ordered if desired. PeopleSoft does not like blank fields, so if <u>no</u> note or description is written, the requisition id will be defaulted into the field when the requisition is first saved.</p> <p>The "Copy From" link allows the user to copy a previously entered requisition. Users can copy their own requisitions, or another user's requisition depending on his/her security access.</p>
9.	<p>The Status will default as "Pending" and the Budget Status as "Not Chk'd."</p> <p>The "Hold From Further Processing" allows the user to <i>control</i> the requisition. By selecting the "Hold From Further Processing" option, the user determines when the requisition will <i>move forward</i> in the Purchasing process. If "Hold From Further Processing" is <u>not</u> selected, the requisition will move to the <u>Approver's worklist</u> the first time the requisition is <u>saved</u>.</p>

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LSU Health Financials PAT

Maintain Requisitions

Requisition

Business Unit: LSUNO
 Requisition ID: NEXT
 Requisition Name: [Copy From](#)

Status: Pending
 Budget Status: Not Chk'd
☐ Hold From Further P

Header

*Requester: KOCONN [Requester Info](#)
 *Requisition Date: 11/18/2025
 Origin: ONL [On-Line Entry](#)
 *Currency Code: USD [US Dollar](#)
 Accounting Date: 11/18/2025
[Requisition Defaults](#)
[Requisition Activities](#)
[Add Comments](#)

Amount Summary

Total Amount: 0.00

Add Items From

[Purchasing Kit Item Search](#)
[Catalog Requester Items](#)

Line

[Details](#) [Ship To/Due Date](#) [Status](#) [Supplier Information](#) [Item Information](#) [Attributes](#) [Contract](#) [Sourcing Co](#)

Line	Item	Description	Quantity	*UOM
------	------	-------------	----------	------

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

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Step	Action
11.	<p>The Requester field is a required field and should default with your User ID. Your name will display to the right of the field as well. If your User ID does <u>not</u> default into the Requester field, contact Purchasing so that default parameters can be set for entering future requisitions.</p> <p><i>NOTE: You will not be able to save the requisition if your User ID does not default.</i></p>
12.	<p>Requisition Date vs. Accounting Date</p> <p>The Requisition Date defaults to the current date and may <i>remain</i> as defaulted.</p> <p>The Accounting Date also defaults to the <i>current date</i>. However, it may need to be <i>adjusted</i> depending on the time of year you are creating the requisition. For example, if you enter a blanket requisition for the next Fiscal Year, the Accounting Date would need to be adjusted to 07/01/XX or after to ensure the requisition is charged to the correct budget period.</p>

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Step	Action
13.	<p>The Requisition Defaults page is an optional feature that <i>automatically populates</i> each line item with the <i>information entered</i> on the Requisition Defaults page. The information you enter on the Requisitions Defaults screen will be used by all lines, schedules and distributions on the requisition. This minimizes data entry when creating a new requisition.</p> <p>Click the Requisition Defaults link.</p> 
14.	<p>The Requisitions Defaults page allows users to enter buyer, supplier, shipping, distribution, chartstring, etc., information on one page rather than for each line item. <i>Only information that will apply to all lines of the requisition should be entered on the Requisition Defaults page.</i></p> <p>Click the Close button.</p> 
15.	<p>Add Comments</p> <p>Comments can be added at the Header level or the line level. <i>Only comments that will apply to all lines of the requisition should be entered at the Header level.</i> Comments pertaining to a specific line item will be entered at the line level.</p> <p>Comments added to the Header can be <i>specific shipping instructions, supplier information</i> if the supplier is not listed in look up supplier on the requisition defaults page, etc. Files can be attached.</p>
16.	<p>Add Items From</p> <p>None of the links associated with Add Items From are used by LSUNO for creating a requisition.</p>
17.	<p>Line</p> <p>The Line section contains all the line items on a requisition and shows the goods or services being requested. Information such as item description, quantity, price, etc., is entered for each line item. Comments pertaining to a specific line item can be added as needed. Files can be attached providing additional specifications or approvals for a line item.</p> <p>Each line item has its own schedule and distribution row. The Schedule defines when and where you want the items delivered. A line item can have one or multiple Schedule rows. The Distribution defines how accounts and departments are charged for the purchase and how much of the total price a department should pay. Each line item can have one or multiple distribution rows.</p>
18.	<p>This completes <i>Maintain Requisitions Navigation and Overview.</i></p> <p>End of Procedure.</p>

Enter Requisition Header and Default Information

Procedure

In this topic you will learn how to **Enter Requisition Header and Default Information**.

Step	Action
1.	<i>NOTE: The Buyers names, chartstrings, and other values being shown in this exercise are for <u>demonstration purposes only</u>. When working in Production, users must enter their requisition information.</i>

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LSUNO Financials PAT Purchasing

Requisitions

Business Unit: LSUNO Status: Pending
 Requisition ID: NEXT Budget Status: Not Chk'd
 Requisition Name: Copy From ☐ Hold From Further Processing

*Requester: KOCONN O'Connor, Karen
 Requisition Date: 11/18/2025 Requester Info
 Origin: ONL On-Line Entry
 Agency Code: USD US Dollar
 Counting Date: 11/18/2025

Amount Summary
 Total Amount: 0.00 USD

Requisition Defaults
 Requisition Activities

Purchasing Kit
 Item Search

Catalog
 Requester Items

Ship To/Due Date Status Supplier Information Item Information Attributes Contract Sourcing Controls

Item Description Quantity *UOM Category

Step	Action
2.	<p>Step 1: Check Hold From Further Processing (optional)</p> <p>Although this is an optional step, it is <u>highly recommended</u> that you check the Hold From Further Processing box before proceeding further with entering your requisition. Having this box checked prevents the requisition from moving forward in the Purchasing process, thus allowing the user to save the requisition as often as desired, exit PeopleSoft and come back to the requisition later to complete it, etc.</p> <p>Click the Hold From Further Processing option.</p> <p><input type="checkbox"/></p>
3.	<p>Step 2: Enter Requisition Name (optional)</p> <p>"Requisition Name" can have a note or description of item(s) requested entered in the field. Again, this is an optional field, so entering a note or description is optional. If the field is left <u>blank</u>, the system will automatically populate it with the <i>Requisition ID</i> number the first time you save the requisition.</p> <p>Enter the desired information into the Requisition Name field. Enter "Clinic Supplies".</p>

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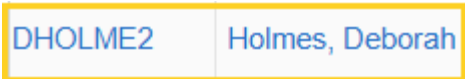


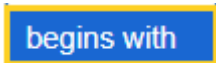
LSUNO/HCSO/LAKMC

Step	Action
4.	Verify that the Requester ID has defaulted into the Requester field. The user's name should also default to the right of the Requester field. If the Requester ID does <u>not</u> default, contact <i>Purchasing</i> so that default parameters can be set up. Do <u>not</u> attempt to <i>continue</i> with the requisition, as <i>save errors</i> are likely to occur.
5.	<p>Requisition Date vs. Accounting Date</p> <p>The Requisition Date defaults to the current date and may <i>remain</i> as defaulted.</p> <p>The Accounting Date also defaults to the <i>current date</i>. In this example, the Accounting Date does <u>not</u> need adjustment since you want the item(s) charged to the current fiscal year budget.</p> <p>NOTE: Requisition Date is a required field, but Accounting Date is not. However, for LSUNO/HCSO/LAKMC, Accounting Date <u>is</u> a required field.</p>
6.	<p>Step 3: Enter Requisition Defaults (required)</p> <p>"Requisition Defaults" information copies onto each line item of the requisition.</p> <p>Click the Requisition Defaults link.</p> <p>Requisition Defaults</p>
7.	<p>Default Options</p> <p>The system auto selects the Override option, and it will remain as defaulted.</p>
8.	<p>Scenario</p> <p>In this exercise, users will enter the following requisition default information:</p> <ol style="list-style-type: none"> 1. Buyer - Deborah Holmes 2. Supplier - Henry Schein Inc 3. Ship To - 1492450 (Medicine/Pulmonary) 4. Due Date - December 1, 2025 5. Distribute By - Quantity 6. Ship Via - 1492450 7. Freight Terms - As Defaulted 8. SpeedChart - 149245131A 0492000034 9. Account Code - 545720

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Step	Action
9.	<p>Buyer</p> <p>The Buyer is a required field for <i>LSUNO</i>. If you do <u>not</u> know who your buyer is, you can <i>search</i> for the Buyers By Department page using the Search option on the LSU Health New Orleans web page. The URL displays below.</p> <p>https://www.lsuhs.edu/administration/SupplyChain/buyers_by_department.aspx</p>
10.	<p>If you know your Buyer, you can search for his/her user id using the Look up Buyer option.</p> <p>Click the Look up Buyer button.</p> 
11.	<p>In this example, the Buyer is Deborah Holmes.</p> <p>Enter the desired information into the Name: field. Enter "HO".</p>
12.	<p>Click the Search button.</p> 
13.	<p>Click in the DHOLME2 field.</p> 
14.	<p>In this example, the Supplier will be Office Depot. Use the Look up Supplier feature to search for the 10-digit Supplier ID number.</p> <p>Click the Look up Supplier button.</p> 
15.	<p>Click the button to the right of the Short Supplier Name begins with field.</p> 
16.	<p>A list of available operands displays. Often users will select another operand such as "contains" to use when searching for field information.</p> <p>Use the "begins with" operand for this example.</p> <p>Click the begins with list item.</p> 

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Step	Action
17.	Enter the desired information into the Short Supplier Name: field. Enter "HENRY" .
18.	Click the Search button. 
19.	Eleven (11) results are returned using the Short Supplier Name "HENRY." Click the 0000000624 - HENRY SCHEIN INC link.
20.	When the Supplier field contains a value, the <i>Supplier Name</i> will display to the right of the Supplier field. The <i>Supplier Location</i> will also default into the page. The <i>Supplier Location will remain as defaulted.</i>
21.	Category and Unit of Measure <i>NOTE: A user may only enter the Category and Unit of Measure on the Requisition Defaults page if the requisition is a single line-item requisition. If the requisition has multiple line items, the user <u>must</u> enter the Category and Unit of Measure on the Maintain Requisitions page for each line item.</i>
22.	Your department's number is the Ship To designation, and it identifies the delivery destination for requisition items. Click the Look up Ship To button. 
23.	The <i>Medicine/Pulmonary</i> department is the Ship To Location for this example. Enter the desired information into the Ship To Location: field. Enter "Medicine/Pulmonary" .
24.	Click the Search button. 
25.	Click the 1492450 link. 
26.	The Due Date is the date you expect to receive requested item(s). In this example, the <i>due date</i> will be 12/01/25 . <i>NOTE: Users do not need to put the slashes on when entering the Due Date but will use the following format entering it: MMDDYY.</i> Enter the desired information into the Calendar Due Date field. Enter "120125" .

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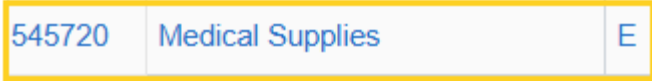

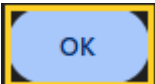
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Step	Action
27.	<p>LSUNO/HCSO/LAKMC do not use the Ultimate Use Code field.</p> <p>Enter Attention To to designate a specific contact person or room for item delivery.</p> <p>LSUNO/HCSO/LAKMC the One Time Address link.</p>
28.	<p>Distribute By</p> <p>Funds are distributed either by Quantity or Amount. The distribution method is important when:</p> <ol style="list-style-type: none"> 1. An item(s) is being charged to more than one account or department; or 2. An item(s) is a product or a service. Most <i>blanket</i> Purchase Orders are distributed by <i>Amount</i>.
29.	<p>Distribute By (continued)</p> <p>The Distribute By is <i>designated</i> on the <i>Requisition Defaults</i> page. However, the distribution method can be <i>changed</i> on the <i>Distribution</i> page for a specific line item.</p> <p>In this example, the Distribute By will be "Quantity", so it will remain as defaulted.</p> <p><i>See the Adjust ChartString Information topic for distributing funds by Amount.</i></p>
30.	<p>The Ship Via and Freight Terms will remain as defaulted unless instructed otherwise by Purchasing.</p>
31.	<p>As previously stated, Accounting Tag, Speedchart and SpeedType are used interchangeably within PeopleSoft. An Accounting Tag is a shortcut users can enter to automatically populate individual chartfield values on the Distributions line. In this example, users will enter the first SpeedChart/Acctg Tag from the "Lookup SpeedChart" exercise: 149245131A.</p> <p>Enter the desired information into the SpeedChart field. Enter "149245131A".</p>
32.	<p>Click the Refresh button.</p> <p>NOTE: The Account Code will not populate. Users must manually enter the Account Code on the Distributions line.</p>
33.	<p>The chartstring displays.</p> <p>Click the Look up Account button.</p> 
34.	<p>In this example, users will search for the Account Code for "Medical Supplies."</p> <p>Enter the desired information into the Description: field. Enter "Medical".</p>

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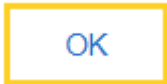
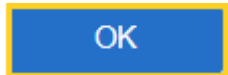
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Step	Action
35.	Click the Search button. 
36.	Click the 546720 - Medical Supplies link. 
37.	Project If the Accounting Tag is tied to a Project , the project number will default into the Project field on the Distribution Details line. <i>All lines</i> on the requisition will be <i>charged</i> to the <i>project</i> . Users can <i>change</i> the Accounting Tag for a <i>specific line</i> on the <i>Line Distribution</i> page. <i>See the Adjust Accounting Tag Information module in this manual.</i>
38.	Your business unit designation - LSUNO/HCSO/LAKMC - will be your <i>PC Bus Unit</i> and is recommended for use on <u>all requisitions</u> .
39.	PeopleSoft does <u>not</u> allow the use of <i>two Accounting Tags</i> on the Requisitions Defaults page. However, if the user needs to split the cost of all items on the requisitions, an <i>additional row</i> may be added to the page. The <i>new row</i> will be a <i>duplicate</i> of the <i>current chartstring</i> . The user <u>must</u> <i>change</i> at least <i>one (1) chartfield</i> (e.g., Account, Dept, Fund, Program, Class, and/or Project) to create a <i>valid chartstring</i> for splitting item costs. <i>NOTE: If the user only wants to split the cost of one item, the second row would not be added on the Requisition Defaults page. Instead, it would be added to the Distribution page for the specific line item.</i> Click the Add multiple new rows at row 1 button. 
40.	The number of rows to add defaults to one (1). Users can add as many rows as desired, however, PeopleSoft does not like blank rows. Any unused rows will need to be deleted prior to navigating away from the page. <i>It is recommended that one line be added at a time.</i> Click the OK button. 

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Step	Action
41.	<p>Percent</p> <p>When the cost of an item(s) is split between two chartstrings, the percentage to be applied to each must be designated using the Percent field. When the new row is added, the system will assign 100% of the cost to the original chartstring. Users <u>must</u> change the percentage based on how funds will be split (e.g., 50% charged to row 1 and 50% charged to row 2).</p>
42.	<p>A duplicate row of row one (1) is added.</p> <p>In this example, users will change the Percent so that each chartstring is charged 50% of the cost of the item(s) to be ordered.</p> <p>Enter the desired information into the Line 1 Percent field. Enter "50".</p>
43.	Enter the desired information into the Line 2 Percent field. Enter " 50 ".
44.	Enter the desired information into the Fund field. Enter " 111 ".
45.	Enter the desired information into the Program field. Enter " 00055 ".
46.	Enter the desired information into the Class field. Enter " 10105 ".
47.	Highlight and delete the Project number.
48.	The two rows now have two distinct chartstrings.
49.	<p>Row 2 will be deleted since splitting the costs of all line items is not desired for this requisition.</p> <p>Click the Delete row 2 button.</p> 
50.	<p>A warning message displays asking you to confirm the deletion of row 2.</p> <p>Click the OK button.</p> 
51.	<p>The Percent for row 1 <u>must</u> be changed back to 100%.</p> <p>Enter the desired information into the Percent field. Enter "100".</p>
52.	<p>Once all default information has been entered, click the OK button to <i>return</i> to the Maintain Requisitions page.</p> <p>Click the OK button.</p> 

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Step	Action
53.	This completes <i>Enter Requisition Header and Default Information</i> . End of Procedure.

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Enter Item Information and Save the Requisition

Procedure

In this topic you will learn how to **Enter Item Information and Save the Requisition**.


Step	Action
1.	<p>Step 4: Enter Item(s) and Save the requisition (required)</p> <p>Step 4 is multi-pronged. It requires users to <i>enter item information and save the requisition</i>.</p> <p>In this exercise, users will request the following items: Binders and Gel Pens. After entering item information for Binders, the user will <i>save</i> the requisition. The system will automatically assign the next available requisition number to the requisition.</p>
2.	<p>The <i>Tabs above Line 1</i> (Ship To/Due Date, Status, Supplier Information, Item Information, Attributes, Contract, and Sourcing Controls) provide a compilation of the information entered into the requisitions. The system <i>automatically defaults</i> needed <i>information</i> into the <i>tabs</i>.</p> <p>NOTE: Users should never change any information on these tabs. The Details tab is only tab in which users will enter information.</p>
3.	<p>NOTE: The Item Number will always be left blank when entering a requisition.</p>
4.	<p>Description</p> <p>A description <u>must</u> be entered for each line item. You may enter the description <i>directly</i> into the Description field if the description is <i>no more than 20 characters</i> long.</p> <p>If the description is more than 20 characters, users will enter the description on the Details page in the Transaction Item Description box. The <i>Details</i> page is located to the <i>right of the line number</i>.</p>


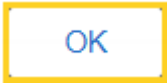

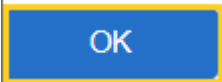
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The screenshot displays the 'Purchasing' interface within the 'LSU Health Financials' system. The top navigation bar includes 'LSU Health Financials PAT' and various utility icons. The main form area is titled 'Business Unit LSUNO' and 'Requisition ID NEXT'. The 'Requisition Name' is 'Clinic Supplies'. The 'Status' is 'Pending' and 'Budget Status' is 'Not Chkd'. A 'Copy From' button is visible next to the requisition name. Below the header, the 'Requester' is 'KOCONN' (O'Connor, Karen) and the 'Requisition Date' is '11/18/2025'. The 'Origin' is 'ONL' (On-Line Entry) and the 'Currency Code' is 'USD' (US Dollar). The 'Accounting Date' is '11/18/2025'. An 'Amount Summary' section shows a 'Total Amount' of '0.00'. There are links for 'Requisition Defaults', 'Requisition Activities', 'Add Comments', 'Purchasing Kit Item Search', and 'Catalog Requisition Items'. A 'Line' section is visible at the bottom, showing a table with columns for 'Line', 'Item', 'Description', 'Quantity', and 'UOM'. The first line item is '1' with a quantity of '0.0000'. A 'Details' button is highlighted in the line item section.





Step	Action
5.	Click the Details button. 
6.	Transaction Item Description Transaction Item Description is a free text edit field. This means any type of character can be entered into the field (e.g., letters, numbers, special characters, etc.). Description information must be entered in ALL CAPS . The box is limited to 254 characters , which includes spaces. The system will allow you to enter more than 254 characters, but the system will truncate the number of characters entered down to 254.
7.	In this example, you will enter the <i>Transaction Item Description</i> for <i>Medium Blue Non-Sterile Exam Gloves</i> . Enter the desired information into the Transaction Item Description field. Enter "CRITERION N100 NITRILE EXAM GLOVES MEDIUM, STANDARD BLUE NON-STERILE, 10BX/CA" .

Step	Action
8.	<p>A spell check (<i>book with a check mark</i>) feature is also available and works similarly as the spell check used in Word and other Microsoft applications.</p> <p>Click the Spell Check Transaction Item Description button.</p> 
9.	<p>If an error is found, the Spell Check will highlight the questionable text. In this example, there are no misspellings found.</p> <p>Click the OK button.</p> 
10.	<p>Below the <i>*Transaction Item Description</i> box are five (5) collapsed sections: Supplier Information, Item Information, Attributes, Contract and Sourcing Controls.</p> <p>The Expand All link allows you to expand all five (5) sections at one time. The Collapse All link minimizes all five (5) sections at one time. Individual lines may be expanded by selecting the Expand arrow for a specific line.</p> <p>Click the Expand All link.</p> 
11.	<p>Supplier Information</p> <p>The supplier information defaults into the Supplier Information fields. The fields will remain as defaulted.</p>
12.	<p>Item Information</p> <p>If a user has found the desired item in a supplier's catalog, the user may enter the <i>Supplier Catalog name</i> and <i>Supplier Item ID</i> in the Item Information section. These are the <u>only</u> two <i>fields</i> users should <i>utilize</i>, and <i>most end-users</i> will <u>not</u> enter information into these fields.</p> <p>Also, if the user knows the requisition will need to go out for quote, the checkbox to the left of the RFQ Required for each line item. If the user is <u>unsure</u> as to whether the <i>requisition</i> will <i>go out for quote</i>, <u>do not check</u> the <i>RFQ Required</i>.</p>
13.	<p>Click the OK button.</p> 





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Step	Action
14.	<p>Quantity</p> <p>The Quantity <u>must</u> be entered in whole numbers (e.g., 3 or 4 rather than 3.5)</p> <p><i>NOTE: Delete the value in the Quantity field before entering the new value to prevent keying errors. The system will automatically populate the decimal point and trailing zeros when the page is refreshed (e.g., 4.0000)</i></p> <p>Enter the desired information into the Quantity field. Enter "4".</p>
15.	<p>Unit of Measure (UOM)</p> <p>UOM is a required field and may be entered in upper, lower, or mixed case. The system will automatically change the UOM to upper case when the page is refreshed. You may enter the UOM directly into the field, or search for it by clicking the <i>Look up UOM</i> button to the right of the field.</p> <p>Click the Look up UOM button.</p> 
16.	<p>You are searching for a UOM for Case.</p> <p>Enter the desired information into the Unit of Measure field. Enter "CA".</p>
17.	<p>Click the Search button.</p> 
18.	<p>Select the CAS option for a Case.</p> <p>Click the CAS link.</p> 
19.	<p>Category</p> <p>The Category is a value from the <i>Inventory Tables of the State Commodity Code</i>. The Category code will vary by business unit.</p> <p>LSUNO users will search for the appropriate Category code using the <i>Look up Category</i> option. If the appropriate code cannot be found, contact Purchasing for assistance.</p> <p>Click the Look up Category button.</p> 




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Step	Action
20.	Enter the desired information into the Description field. Enter " GLOVES, DISPOSABLE ".
21.	Click the Search button. 
22.	Click the 47541 - GLOVES, DISPOSABLE, MEDICAL TY link. 
23.	If you receive this message, select the " Yes " button to default the Category Code to the appropriate Line tabs. Click the Yes button. 
24.	Price When entering the cost of an item into the Price field, users <u>must</u> enter the <i>decimal point</i> to indicate <i>cents</i> (e.g., \$20.76). <i>NOTE: Delete the value in the Price field before entering the new value to prevent keying errors. The system will automatically populate the trailing zeros when the page is refreshed (e.g., 20.7600)</i> Enter the desired information into the Price field. Enter " 20.76 ".
25.	Select the Refresh button to update Line-item fields. Click the Refresh button. 
26.	The total amount of Line 1 will display in the Merchandise Amount field.


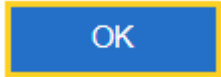



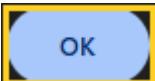


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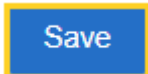
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Step	Action
27.	<p>NOTE: <i>The first time you save the requisition the system will automatically assign the next available requisition id number to the requisition.</i></p> <p>You cannot successfully Save the requisition until <i>all required fields are populated</i>. The minimal date required is:</p> <ol style="list-style-type: none"> 1. Requester 2. Requisition Date 3. Accounting Date 4. Account 5. Department 6. Location 7. Fund 8. Program 9. Class 10. Description 11. Quantity 12. UOM (unit of measure) 13. Category 15. Price
28.	<p>NOTE: <i>If a multiple line-item requisition is created, and a red box or Save Edit message is received, the line item containing the blank field(s) will not be identified. It is strongly recommended the user <u>save after</u> the completion of <u>each line item</u>.</i></p> <p>Click the Save button.</p> 
29.	<p>The Requisition ID displays. The Requisition ID is <u>not</u> the <i>PO number</i>. A <i>separate PO</i> will be assigned by Purchasing when the PO is generated. The <i>Status</i> will remain as "Pending" until the <i>Hold From Further Processing</i> is unchecked and the requisition is saved.</p> <p>Users will <i>add another line</i> to the requisition for 2 - <i>Ibuprofen Tablets 800/mg Bottle 100/Bottle</i>.</p>
30.	<p>Click the Add multiple new rows at row 1 button.</p> 
31.	<p>Click the OK button.</p> 

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Step	Action
32.	Click the Details button. 
33.	Enter the desired information into the Transaction Item Description field. Enter " CRITERION N100 NITRILE EXAM GLOVES LARGE STANDARD BLUE NON-STERILE, 10BX/CA ".
34.	Click the OK button. 
35.	Enter the desired information into the Quantity field. Enter " 3 ".
36.	Enter the desired information into the UOM field. Enter " CAS ".
37.	Enter the desired information into the Category field. Enter " 47541 ".
38.	Enter the desired information into the Price field. Enter " 15.27 ".
39.	Click the Save button. 
40.	If you <i>receive the message displayed</i> , select the "Yes" button. Click the Save button. 
41.	The <i>Line-item tabs</i> are <i>updated</i> , and the necessary zeroes have <i>defaulted</i> . The <i>Merchandise Amount</i> has been <i>calculated</i> .
42.	Click the Row 2 – Add a new row at row 2 button. 
43.	Click the OK button. 
44.	Click the Details button. 
45.	Enter the desired information into the *Transaction Item Description field. Enter " IBUPROFEN TABLETS 800/MG BOTTLE 100/BOTTLE ".
46.	Click the OK button. 

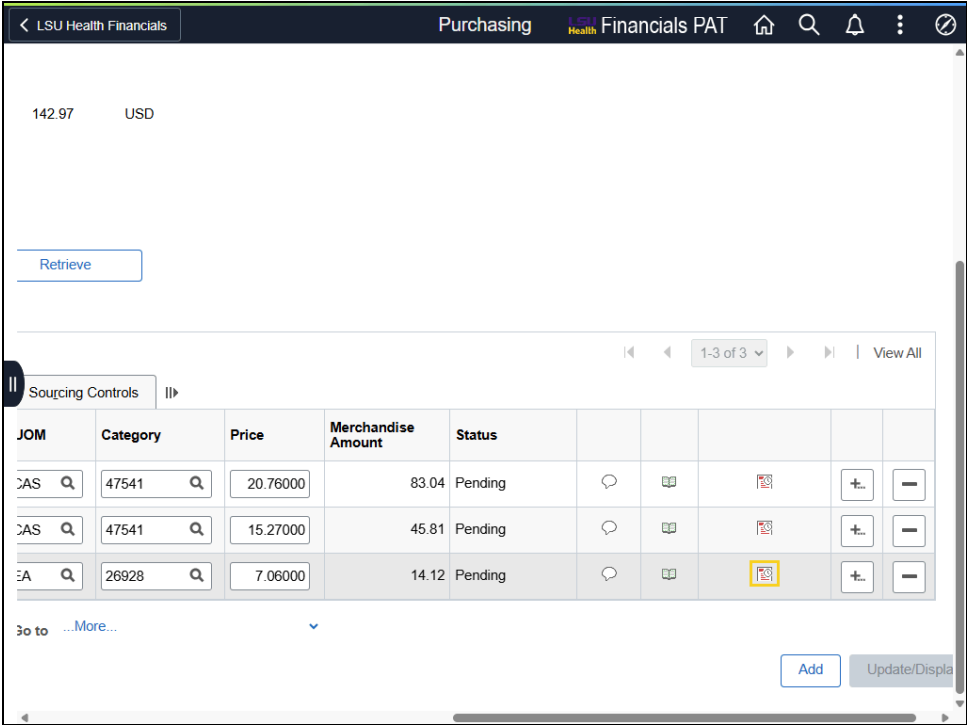
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Step	Action
47.	Enter the desired information into the field. Enter " 2 ".
48.	Enter the desired information into the field. Enter " EA ".
49.	Click the Category button. 
50.	Enter the desired information into the Description field. Enter " CENTRAL NERVOUS SYSTEM ".
51.	Click the Search button. 
52.	Click the 26928 - Central Nervous System Agents (Including Analgesic, Anticon) link.
53.	If you <i>receive the message displayed</i> , select the "Yes" button. Click the Yes button. 
54.	Enter the desired information into the Price field. Enter " 7.06 ".
55.	Click the Save button. 
56.	This completes <i>Enter Item Information and Save the Requisition</i> . End of Procedure.

Adjust Chartstring Information

Procedure

In this topic you will learn how to **Adjust Chartstring Information**.


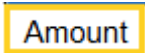




Step	Action
1.	<p>Step 5: Adjust Chartstring Information (required)</p> <p>Users can change the Distribute By for a <i>specific line item</i>. The Distribute By for a requisition is either <i>Quantity</i> or <i>Amount</i>. The Distribute By can be <i>changed</i> on the Distribution page for the specific line item. Users can also add, change, or delete chartstring information for a <i>specific line item</i> on the Distribution page as well. The <i>Distribution</i> page is located on the Line item's Schedule page.</p> <p>Click the Schedule... button on line 3.</p> 
2.	<p>The Schedule defines when and where the user wants the specific item delivered.</p> <p>Click the Distribution button.</p> 

Training Guide

Managing Requisitions Fluid





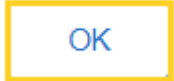
LSUNO/HCSO/LAKMC

Step	Action
3.	<p>The Distribution page defines <i>how departments and accounts are charged</i> for an item.</p> <p>In this example, users will <i>change</i> the <i>Distribute By</i> from Quantity to Amount. The <i>Multi-Accounting Tags</i> link will be used to first overwrite the current chartstring and then used again to append the overwritten chartstring so that two chartstrings split the cost of the item.</p>
4.	<p>Begin by changing the <i>Distribute By</i> from Quantity to Amount.</p> <p>Click the button to the right of the Distribute By field.</p> 
5.	<p>Click the Amount list item.</p> 
6.	<p>By changing the Distribute By to Amount, the system automatically <i>removed Quantity</i> from Distributions line and <i>moved Merchandise Amount</i> next to Percent.</p>
7.	<p>NOTE: The Multi-Accounting Tags link will <u>not</u> be used by any LSUNO, LAKMC, and HCSO users.</p>
8.	<p>In this example, the <i>Accounting Tags</i> option will be used to "Overwrite" the current chartstring. The <i>Accounting Tag</i> used will be 0497100012.</p> <p>Enter the desired information into the Accounting Tag field. Enter "0492000034".</p>
9.	<p>Use the <i>Look up Accounting Tag</i> button to verify the tag number used.</p> <p>Click the Look up Accounting Tag button.</p> 
10.	<p>Click the 0492000034 - 449650032 MED/PULMON-OPER EXP link.</p> 
11.	<p>The new chartstring has overwritten the previous chartstring. The Program was previously <i>10001</i> and now is <i>00055</i>. The Account is <u>not</u> copied over, so the user must enter the Account information.</p> <p>Enter the desired information into the Account field. Enter "545720".</p>
12.	<p>Users can <i>append</i> the item's <i>distribution</i> by <i>adding a second row and chartstring</i>. <i>Multiple chartstring</i> can be used on the <i>Distributions</i> page, <i>unlike the Defaults</i> page, to make <i>splitting the cost of an item easier</i> and <i>reducing keying errors</i>.</p>

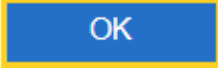


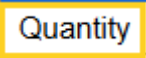
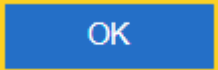


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LSUNO/HCSO/LAKMC

Step	Action
13.	Click the Add multiple new rows to row 1 button. 
14.	The system <i>defaults on</i> the number of rows to add to 1 . However, users can <i>change</i> that number to add multiple lines (e.g., 2, 3, 4, etc.). PeopleSoft does <u>not</u> accept blank lines, so the user will have to delete any unused lines that have been added. Click the OK button. 
15.	The system <i>automatically adds</i> the chartstring used for the other items as the second distribution line. Users can overwrite the defaulted chartstring if desired by manually entering another chartstring. In this example, you will use the defaulted chartstring and change the Percent for Line 1 from 100 to 75. Enter the desired information into the Line 1 - Percent field. Enter "75" .
16.	Enter the desired information into the Line 2 - Percent field. Enter "25" .
17.	Click the Refresh button. 
18.	By selecting Refresh , the Merchandise Amounts change to \$10.59 and \$3.53, respectively. All other fields will remain as defaulted.
19.	This chartstring will <u>not</u> be split, so the user will delete row 2. Click the Delete row 2 button. 
20.	Confirm that you wish to delete row 2. Click the OK button. 
21.	Change the Line 1 Percent back to 100 . Enter the desired information into the Percent field. Enter "100" .

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Step	Action
22.	<p>A warning message displays to confirm the deletion of row 1.</p> <p>Click the OK button.</p> 
23.	<p>Click the Refresh button.</p> 
24.	<p>The Merchandise Amount is <i>changed</i> to \$14.12, which is the <i>total amount</i> for this line.</p> <p>Enter the desired information into the Percent field. Enter "100".</p>
25.	<p>Change the Distribute By back to <i>Quantity</i>.</p> <p>Click the button to the right of the Distribute By field.</p> 
26.	<p>Click the Quantity list item.</p> 
27.	<p>Notice the Quantity field again displays to the <i>right</i> of the <i>Percent</i> field.</p> <p>Click the OK button.</p> 
28.	<p>Click in the Return to Main Page field.</p> 
29.	<p><i>Changes have been made to the Distribution page, so the requisition needs to be saved.</i></p> <p>Click the Save button.</p> 
30.	<p>This completes <i>Adjust ChartString Information</i>.</p> <p>End of Procedure.</p>

Enter Comments and Attach Documents

Procedure

In this topic you will learn how to [Enter Comments and Attach Documents](#).




The screenshot shows the 'Maintain Requisitions' interface. The 'Requisition' header section includes fields for Business Unit (LSUNO), Requisition ID (0068359), and Requisition Name (Clinical Supplies). It also shows the status as 'Pending' and 'Budget Status' as 'Not Chk'd'. A checkbox for 'Hold From Further P' is checked. The 'Header' section contains fields for *Requester (KOCONN), *Requisition Date (11/18/2025), Origin (ONL), *Currency Code (USD), and Accounting Date (11/18/2025). The 'Amount Summary' section shows a 'Total Amount' of 142.97. The 'Add Comments' link is highlighted with a yellow box. Below the header, there are links for 'Requisition Defaults', 'Requisition Activities', and 'Document Status'. The 'Add Items From' section includes 'Purchasing Kit Item Search' and 'Catalog Requester Items'. The 'Select Lines To Display' section has a search bar and a 'Retrieve' button. The 'Line' section at the bottom has a search bar and a 'Details' button.





Step	Action
1.	<p>Step 6: Enter Comments and Attach Documents (optional)</p> <p>Comments can be added at the Header level using the "Add Comments" link.</p> <p>Click the Add Comments link.</p> <p>Add Comments</p>
2.	<p>NOTE: The method used to add, change, and delete comments is the same method used to add comments on the Line level. In this exercise, comments will be demonstrated at the Line level. However, comments that can added at the Header level will be discussed first.</p> <p>NOTE: Comments entered at the Header level will display and print above all line-item information on the requisition. Please do <u>not</u> include any comments you do not wish to be seen or shared.</p>

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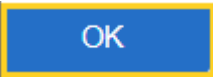
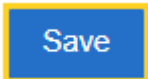


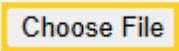
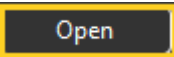
Step	Action
3.	Users will only enter information at the Header level that <i>applies to the entire requisition</i> (e.g., new supplier information, suggested suppliers for bid, address for the mailing the Purchase Order when the supplier has multiple locations, etc.). <i>Specific shipping or delivery instructions</i> applicable to all line items may also be entered at the Header level.
4.	Likewise, <i>justification for purchase</i> can be added as well at the Header level. The Approval Justification box will be <i>checked</i> and <i>will display</i> on the <i>requisition approval page</i> when the Approver selects the requisition.
5.	Click the Close button. 
6.	There is <i>no link</i> to click when <i>entering comments</i> at the Line level. Instead, users will <i>click</i> the speech/text bubble (Line Comments) found <i>to the right</i> of the <i>Status</i> field. NOTE: Comments added at the Line level will display and print below the corresponding line-item information on the requisition. Please do <u>not</u> include any comments you do not wish to be seen or shared. Click the Line Comments button. 
7.	Only information that pertains to the <i>specific line</i> (e.g., item specifications) will be added to Line Comments . The Comments field is a free-text field, and your <i>Enter</i> key on your keyboard can be <i>used to move between lines</i> . It is <i>recommended</i> users <i>limit comments</i> in each box to <i>half a page</i> . The <i>first comment box</i> defaults onto the page.
8.	<i>Additional comment boxes</i> can be <i>generated</i> if required. PeopleSoft is a <i>web-based</i> application, so <i>data</i> (e.g., item specifications) from the <i>web or other Microsoft sources</i> can be <i>copied and pasted</i> into <i>comment boxes</i> . The <i>spell check feature</i> is also available for <i>each comment box</i> .
9.	If the <i>comments</i> are <i>lengthy</i> , the user can elect to <i>utilize the attach option</i> and <i>upload any supporting documents</i> such as <i>specification, quotes, etc.</i> Attaching and uploading documents will be demonstrated later in this topic.
10.	LSUNO/HCSO/LAKMC do <u>not</u> use the " Use Standard Comments " and " Use Item Specifications " links.
11.	Enter the desired information into the Comments field. Enter " PLEASE DELIVER SUPPLIES BETWEEN 8:00 AM AND 2:00 PM. ".
12.	Click the Spell Check button. 

Step	Action
13.	<p>No misspelled words were found.</p> <p>Click the OK button.</p> 
14.	<p><i>Purchasing will determine at the PO level if Comment options such as "Send to Supplier", "Show at Voucher", and/or "Show at Receipt" are required.</i></p>
15.	<p>If additional space is needed, a new row can be inserted.</p> <p>Click the Add a new row at row 1 button.</p> 
16.	<p>When the new row is added, users can only see the new row. The View All link allows users to view all comment box rows.</p> <p>Click the View All link.</p> 
17.	<p><i>Inserted rows are independent of each other and will be viewed in ascending order unless sort sequencing is changed.</i></p>
18.	<p>Enter the desired information into the Row 2 - Comments field. Enter "TEST".</p>
19.	<p>Inactivate</p> <p>Comments cannot be deleted but can be inactivated so they will not show in the system or on the requisition. The comments box will be grayed out by the system when the Inactivate button is clicked.</p> <p>NOTE: When users navigate away from the Line Comments page, the system will remove the inactivated comment boxes from the page. Inactivated boxes cannot be retrieved once a user navigates away from the page; they must be re-entered.</p> <p>Click the Row 2 - Inactivate button.</p> 




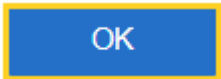

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Step	Action
20.	<p>Undo</p> <p>Notice the <i>comments</i> area is <i>grayed out</i>. The Undo button will <i>re-activate</i> a <i>comment box</i> as long as the user has <u>not</u> <i>navigated away</i> from the Line Comments page.</p> <p>Click the Row 2 - Undo button.</p> 
21.	<p>Click the Row 2 - Inactivate button.</p> 
22.	<p>Click the OK button to <i>navigate away</i> from the Line Comments page.</p> 
23.	<p>Click the Save button.</p> 
24.	<p>Notice the Line Comments <i>bubble</i> now <i>contains blue dots</i> which <i>denote</i> that <i>comments</i> are <i>available</i>.</p> <p>Click the Line Comments button.</p> 
25.	<p>Notice you are <i>only</i> able to view <i>1 of 1 Comments</i>. The <i>second Comment</i> row is <i>hidden</i>.</p>
26.	<p><i>Documents</i> can be <i>attached</i> rather than <i>typing, copying and/or pasting</i> information if <i>comments</i> are <i>lengthy</i>.</p> <p>Click the Attach button.</p> 
27.	<p>In this example, users will attach the Binders document.</p> <p>Click the Choose File button.</p> 
28.	<p>Click the Open button.</p> 

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Step	Action
29.	<p>Click the Upload button.</p> <p><i>NOTE: If you receive a "<u>File Failed to Attach</u>" message, check the file name length. If the file name contains more than 60 characters, the file will <u>not</u> attach. Rename the file to reduce the number of characters and repeat the attachment process.</i></p> 
30.	<p>The <i>file name</i> displays to the <i>right</i> of Attachment. Users can view the file to verify the correct file was selected.</p> <p>Click the View button.</p> 
31.	<p>Click the Close button.</p> 
32.	<p>The Delete button will <i>activate</i> once the user navigates away from the Line Comments page and saves the requisition.</p> <p>Click the OK button.</p> 
33.	<p>Click the Save button.</p> 
34.	<p>This completes <i>Enter Comments and Attach Documents</i>. End of Procedure.</p>

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Managing Requisitions Fluid
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View Approvals and Print a Requisition
Procedure

In this topic you will learn how to **View Approvals and Print a Requisition**.

The screenshot shows the 'Requisitions' form in the 'Purchasing' module of the 'LSU Health Financials PAT' system. The form is for a requisition with ID 0068359, titled 'Clinical Supplies'. The Business Unit is LSUNO. The status is 'Pending' and the Budget Status is 'Not Chk'd'. There is a checkbox for 'Hold From Further Processing' which is currently checked. The Requester is KOCONN (O'Connor, Karen) with a Requisition Date of 11/18/2025. The Origin is ONL (On-Line Entry) and the Currency Code is USD (US Dollar). The Accounting Date is 11/18/2025. The Amount Summary shows a Total Amount of 142.97 USD. There are links for 'Requisition Defaults', 'Requisition Activities', 'Document Status', 'Add Comments', 'Purchasing Kit Item Search', and 'Catalog Requester Items'. At the bottom, there are tabs for 'Ship To/Due Date', 'Status', 'Supplier Information', 'Item Information', 'Attributes', 'Contract', and 'Sourcing Controls'.

Step	Action
1.	<p>Step 7: View Approvals and Print a Requisition (optional)</p> <p>The Hold From Further Processing must be <i>unchecked</i> and the requisition Saved to <i>move</i> the requisition <i>forward</i> in the Purchasing <i>process</i>.</p> <p>Click the Hold From Further Processing option.</p> <p><input checked="" type="checkbox"/></p>
2.	<p>Even though the <i>Hold From Further Processing</i> has been <i>unchecked</i>, the requisition still must be Saved for it to move forward in the Purchasing process.</p> <p>Click the Save button.</p> <p>Save</p>
3.	<p>If the <i>Requester</i> is their own <i>approver</i>, the system will <i>automatically run the approval process and approve</i> the requisition.</p>

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Step	Action
4.	<p>Step 7: View Approvals and Print the Requisition (optional)</p> <p>Users can <i>view requisition approval steps</i> on the View Approvals page.</p> <p>Click the View Approvals link.</p> <p>View Approvals</p>
5.	<p>In this example, the <i>requester</i> is their own <i>approver</i>, and the requisition has been approved. If the <i>requester</i> is <u>not</u> their own <i>approver</i>, the Status = Pending and the <i>name of the approver</i> will display.</p> <p>Click the Return button.</p> <p>Return</p>
6.	<p>There are two (2) methods that can be used to Print a requisition:</p> <ol style="list-style-type: none"> 1. View Printable Version 2. Accessing the Process Scheduler <p>NOTE: Users may only <u>REQUEST AND PRINT ONE REPORT AT A TIME.</u></p> <p>NOTE: The View Printable Version cannot be used for printing once the Status = Complete or Closed. You must use the Accessing the Process Monitor option once the Status = Complete or Closed.</p> <p>Click the View Printable Version link.</p> <p>View Printable Version</p>
7.	<p>The SQR Report box displays Status = Processing. The SQR process begins with <i>Queued</i>, then <i>Processing</i>, and then change to <i>Success</i>. When the Status = Success, a line will appear stating the system is preparing the report. The report will open automatically in the SQR Report box.</p>

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Requisition					Page:
Ship To:	LSUHSC New Orleans Attn: Medicine/Pulmonary 2021 Perdido Street 5228 New Orleans LA 70112		Requisition Number	0068359	
Suggested Vendor:	0000000624 HENRY SCHEIN INC DEPT CH1 10241 PALATINE IL 60055-0241		Date	11/18/2025	
			Requester		
			Telephone	1492450	
			Department	1492450	
			Location	1201/2025	
			Date Desired		
			Requester Signature		
LINE	ITEM ID AND COMMODITY/SERVICE DESCRIPTION	QTY	ORD UNIT	UNIT PRICE	EXTENDED AMOUNT
1	CRITERION N100 NITRILE EXAM GLOVES MEDIUM STANDARD BLUE NON-STERILE, 10BX/CA DELIVER SUPPLIES BETWEEN 8:00 AM AND 2:00 PM Attn:	4.00	CAS	20.76	83.04
2	CRITERION N100 NITRILE EXAM GLOVES LARGE STANDARD BLUE NON-STERILE, 10BX/CA Attn: O'Connor, Karen	3.00	CAS	15.27	45.81
3	IBUPROFEN TABLETS 800/MG BOTTLE 100/BOTTLE Attn: O'Connor, Karen	2.00	EA	7.06	14.12
<u>Total Requisition Amount:</u>					<u>142.97</u>

Step	Action
8.	<p>Select the Printer icon to <i>print</i> the requisition.</p> <p>Click the Printer button.</p> 

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LSUNO/HCSO/LAKMC

Requisition

Page

Ship To:

LSUHSC New Orleans

Attn: Medicine/Catheterary

228 Perdido Street

New Orleans LA 70112

Suggested Vendor:

000000624

HENRY SCHEIN INC

DEPT C211 - 11041

PALATINE IL 60055-0241

Requisition Number

0068359

Date

12/24/20

Location

1284200

Location

1284200

Date Entered

12/24/2020

Requester Signature

LINE	ITEM ID AND COMMODITY SERVICE DESCRIPTION	QTY	UNIT	UNIT PRICE	EXTENDED AMOUNT
1	CRITERION N100 NITRILE EXAM GLOVES MEDIUM STANDARD BLUE NON-STERILE, 100/BOX	1.00	CAS	22.14	22.14
	DELIVER SUPPLIES BETWEEN 8:00 AM AND 2:00 PM				
	HIN: O'Connor, Karen				
2	CRITERION N100 NITRILE EXAM GLOVES LARGE STANDARD BLUE NON-STERILE, 100/BOX	1.00	CAS	13.27	13.27
	HIN: O'Connor, Karen				
3	BUPROFEN TABLETS 800MG BOTTLE 100/BOTTLE	2.00	EA	7.06	14.12
	HIN: O'Connor, Karen				
	Total Requisition Amount:				49.53

Approval Signature

Date

Approval Signature

Date

Approval Signature

Date

Print

1 sheet of paper

Destination

HPIC88628 (HP Officele)

Pages

All

Copies

1


Color

Black and white

More settings

Print

Cancel

Step	Action
9.	<p>Users can <i>designate the number of copies to print, the destination printer, etc.</i></p> <p>For training purposes only, click the Cancel button.</p> 

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Requisition Page: 1

Ship To: LSUHSC New Orleans
Attn: Medicine/Pulmonary
2021 Perdido Street
5228
New Orleans LA 70112

Suggested Vendor: 0000000624
HENRY SCHEIN INC
DEPT CH1 10241
PALATINE IL 60055-0241

Requisition Number: 0068359
Date: 11/18/2023
Requester:
Telephone: 1492450
Department: 1492450
Location: 1492450
Date Desired: 12/01/2025
Requester Signature:





LINE	ITEM ID AND COMMODITY/SERVICE DESCRIPTION	QTY	ORD	UNIT	UNIT PRICE	EXTENDED AMOUNT
1	CRITERION N100 NITRILE EXAM GLOVES MEDIUM, STANDARD BLUE NON-STERILE, 10BX/CA DELIVER SUPPLIES BETWEEN 8:00 AM AND 2:00 PM Attn:	4.00		CAS	20.76	83.04
2	CRITERION N100 NITRILE EXAM GLOVES LARGE STANDARD BLUE NON-STERILE, 10BX/CA Attn: O'Connor, Karen	3.00		CAS	15.27	45.81
3	IBUPROFEN TABLETS 800MG BOTTLE 100/BOTTLE Attn: O'Connor, Karen	2.00		EA	7.06	14.12
Total Requisition Amount:						142.97


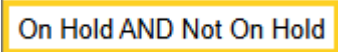




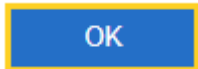
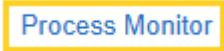

Step	Action
10.	Click the Close Print tab. 
11.	The <i>second method</i> for <i>printing</i> the requisition is using the Process Scheduler . Click the Navigation Area button. 
12.	Click the (select to expand or collapse child steps) Reports button. 
13.	Click the Print Requisition button. 

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Step	Action
14.	<p>The first time you run the Requisition Print process, you must create a Run Control ID.</p> <p><i>See the Create/Find a Run Control ID topic under Requisition Basics for instructions on how to create a valid run control id.</i></p> <p>Click the Add a New Value tab.</p> 
15.	<p>Enter the desired information into the Run Control ID: field. Enter "PRINT_REQ".</p>
16.	<p>Click the Add button.</p> 
17.	<p>Click the Navigation Area button.</p> 
18.	<p>The parameters entered on the Print Requisition's page will be saved to a <i>specified run control id</i>. When running the report in the <i>future</i>, the user will <i>only change</i> the <i>Requisition ID</i> - all other fields will remain as defaulted.</p> <p>Enter the desired information into the Business Unit field. Enter "LSUNO".</p>
19.	<p>Requisition ID</p> <p>The user may enter the requisition id <i>directly</i> into the Requisition ID field, or <i>search</i> for it using the <i>Look up Requisition ID</i> option. It is recommended the user note the requisition id when attempting to enter it on the page and print the requisition.</p> <p>Enter the desired information into the Requisition ID field. Enter "0068359".</p>
20.	<p>NOTE: Do <u>not</u> enter From Date, Through Date or Requester on the Print Requisition page. If this information is entered incorrectly, it can prevent the requisition from printing. Since requisitions must be <u>REQUESTED AND PRINTED ONE AT A TIME</u>, entering the requisition id will be sufficient to identify the requisition.</p>
21.	<p>Selecting all statuses to be included means that the <i>requisition ID</i> that you enter will be <i>printed regardless</i> of the <i>status</i> of the requisition.</p> <p>Click the Select All button.</p> 

Step	Action
22.	Click the button to the right of the Statuses to Include field. 
23.	For simplicity, users will want to <i>select the most inclusive</i> option. Click the On Hold AND Not on Hold list item. 
24.	Click the Save button. 
25.	Process Scheduler The <i>Process Scheduler</i> defines the Run Location and Output Destination of the print request. Click the Run button. 
26.	Click the button to the right of the Server Name field. 
27.	Click the PSNT list item. 
28.	NOTE: The Type field will default as Web and the Format field as PDF. These fields will remain as defaulted. If the Type and Format fields do not default correctly, the user will need to correct them.
29.	Click the OK button. 
30.	Click the Process Monitor link. 
31.	NOTE: If the <u>Run Status</u> is <u>not Success</u> and the <u>Distribution Status</u> is <u>not Posted</u>, click the <u>Refresh</u> button until both statuses are achieved. In this example, the Run Status = Success and the Distribution Status = Posted . Click the Report Manager button. 

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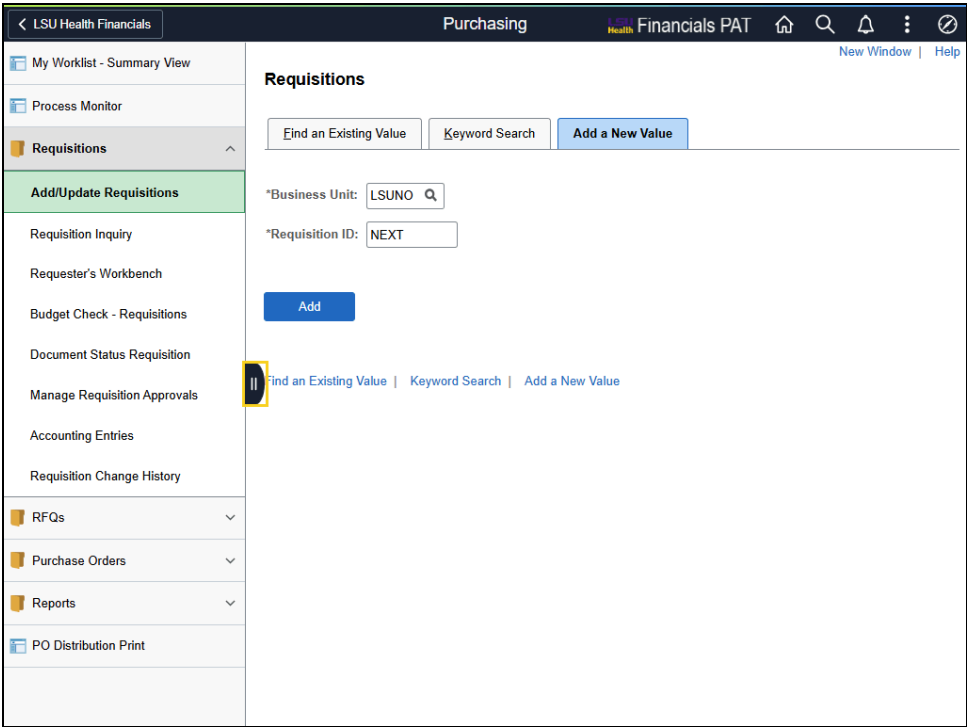
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LSUNO/HCSO/LAKMC

Step	Action
32.	Click the Administration tab. 
33.	The <i>top line</i> is <i>always</i> the most current print. The <i>report</i> is <i>complete</i> and <i>ready</i> for <i>viewing</i> when the Requisition Print SQR under the Description column turns into a <i>blue link</i> and the Status = Posted . NOTE: Click the Refresh button until the Status = Posted and the Requisition Print SQR link becomes active. Click the Requisition Print SQR link. NOTE: Clicking the Requisition SQR link will open and display in a new tab. 
34.	Select the Printer icon to set <i>parameters</i> and <i>print</i> your report. Click the Close tab. 
35.	Click the Go back to Process Requests link. 
36.	Click in the Go back to Requisition Print field. 
37.	Users can enter another Requisition ID to print another requisition. All other parameters will remain as defaulted.
38.	This completes View Approvals and Print a Requisition . End of Procedure.

View and Copy an Existing Requisition
Procedure

In this topic you will learn how to **View and Copy an Existing Requisition**.




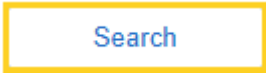




Step	Action
1.	<p>Step 8: View and Copy an Existing Requisition (optional)</p> <p>Click the Close Navigation Area button.</p> 
2.	<p>A new requisition must be added to copy a requisition. The <i>Business Unit</i> will default as LSUNO/HCSO/LAKMC, and the <i>Requisition ID</i> will default as NEXT.</p> <p>Click the Add button.</p> 
3.	<p>Click the Hold From Further Processing option.</p> 

Training Guide

Managing Requisitions Fluid

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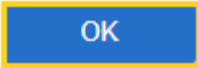



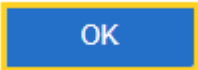
Step	Action
4.	<p>Scenario</p> <p>Users may <i>copy</i> their <i>own requisitions</i> <i>or</i> the requisition of <i>another requester</i>. In this exercise, a <i>new requisition</i> will be created by <i>copying</i> a <i>Requester's own requisition</i> using the Copy From option.</p>
5.	<p>When copying a requisition, you will not perform Step 3: Enter Requisition Defaults. The defaults, line item(s), distribution of funds, and comments are copied from the old requisition to the new requisition. Once copied, the requester will make any necessary additions/changes/deletions to the line items, Schedule page, Distributions page, and/or Comments page.</p> <p>NOTE: It is recommended to enter a new requisition rather than copying a requisition if extensive changes will be made to the requisition.</p>
6.	<p>Cancelled Lines and Requisitions</p> <p>A requisition with cancelled rows or a cancelled requisition can be copied to a new requisition. If the user copies a requisition that has <i>one or more lines cancelled</i>, only the active lines from the existing requisition will be copied to the new requisition. If the user copies a <i>cancelled requisition</i>, all the lines from the cancelled requisition are copied to the new requisition and the status of the lines are made active.</p> <p>Users can override any values that are copied over with the requisition. <i>Activity and original requisition dates are not copied over.</i></p>
7.	<p>Click the Copy From link.</p> <p></p>
8.	<p>Search for an Existing Requisition to Copy</p> <p>Users may search for an existing requisition to copy by entering all or part of one of the following Search criteria:</p> <ul style="list-style-type: none"> • Requisition ID - to view a specific requisition; or • Requester – to view requisitions associated with a specific requester.
9.	<p>Requisition ID</p> <p>It is <i>highly recommended</i> you <i>note</i> the <i>Requisition ID</i> you wish to use when copying a requisition. You will then be able to <i>enter it directly</i> into the Requisition ID field. You may <i>search</i> for a requisition id using the <i>Look up Requisition ID</i> (magnifying glass).</p>

Step	Action
10.	<p>Requester</p> <p>You must enter the User ID of the person whose requisition you wish to copy in the Requester field. the user id must be entered in ALL CAPS. If you enter the requester's name, or enter the user id in lower case, you will receive a warning message stating you entered an invalid value. You may search for the requester's user id using the Look up Requester option.</p> <p><i>NOTE: It is <u>not</u> recommended that any of the remaining options be used when searching for a requester user id.</i></p>
11.	Enter the desired information into the Requester field. Enter " KOCONN ".
12.	<p>Click the Search button.</p> 
13.	<p>The system defaulted the check into the Sel box since the Requester has only one requisition that can be copied. Requisition information can be reviewed by selecting the Req ID.</p> <p><i>NOTE: This will open a new tab and display the Req Inquiry page.</i></p> <p>Click the 0068359 link.</p> 
14.	<p>You are taken to the Req Inquiry page. Select the requisition number to view requisition items.</p> <p><i>NOTE: This will take you to the Requisition Details panel.</i></p> <p>Click the 0068359 link.</p> 
15.	<p>Additional requisition information displays. Users can select the More tab to view Buyer information.</p> <p>Click the Close Requisitions tab.</p> 
16.	<p>Select the "X" button on the Requisitions tab to close the new window.</p> <p>Click the Close tab.</p> 

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Step	Action
17.	<p>NOTE: Additional requisitions can be reviewed by selecting the desired requisition and then selecting the appropriate Req ID link. The user will repeat the previous steps until the desired requisition is located.</p> <p>Click the 0068359 checkbox to select this option.</p> 
18.	<p>Click the OK button to copy the requisition.</p> 
19.	<p>The information copied from the old requisition displays in the new requisition.</p> <p>NOTE: Any changes made to the new requisition will have no effect on the original requisition that was copied.</p>
20.	<p>The Requester's user id, for the requisition being copied, defaults into the Requester field. No changes are required since the Requester and person copying the requisition are the same. However, if you copy someone else's requisition, the Requester must be changed to your user id.</p> <p>NOTE: The Requester user id must be entered in ALL CAPS.</p>
21.	<p>Click the Requisition Defaults link.</p> 
22.	<p>Users must enter default information onto the Requisitions Default page or on the Distributions page for each line item. In this example, users will enter the new Due Date of 12/23/25.</p> <p>NOTE: Users may also enter the Due Date directly into the field.</p> <p>Click the Calendar Due Date button.</p> 
23.	<p>Click the 23rd date.</p> 
24.	<p>NOTE: If the user were copying someone else's requisition, additional default information would need to be checked and changed as needed, such as: Ship To, Distribute By, chartstring information, account information, etc.</p> <p>Click the OK button.</p> 


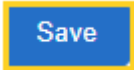
Training Guide Managing Requisitions Fluid LSUNO/HCSO/LAKMC

Step	Action
25.	<p>The "Mark All" option is selected so that all listed settings will automatically be changed by the system for all Distribution lines.</p> <p>Click the Mark All link.</p> 
26.	<p>Click the OK button.</p> 
27.	<p>Line items must be checked and necessary changes made. For this example, the user will make the following changes:</p> <p>Line 1 - Quantity: change quantity from 4 to 5 Line 2 - Price: change from 15.27 to 15.32 Line 3 - Delete line 3</p>
28.	<p>Line 1 - Quantity: change quantity from 4 to 5</p> <p>Enter the desired information into the Quantity field. Enter "5".</p>
29.	<p>Line 1 - Price: change from 15.27 to 15.32</p> <p>Enter the desired information into the Price field. Enter "15.32".</p>
30.	<p>Line 2: Delete line 2</p> <p>Click the Delete row 3 button.</p> 
31.	<p>A confirmation message to delete the row displays.</p> <p>Click the OK button.</p> 
32.	<p>The system will <i>assign</i> the <i>Requisition ID</i> number since this is the first time the requisition is saved.</p> <p>Click the Save button.</p> 

Training Guide

Managing Requisitions Fluid

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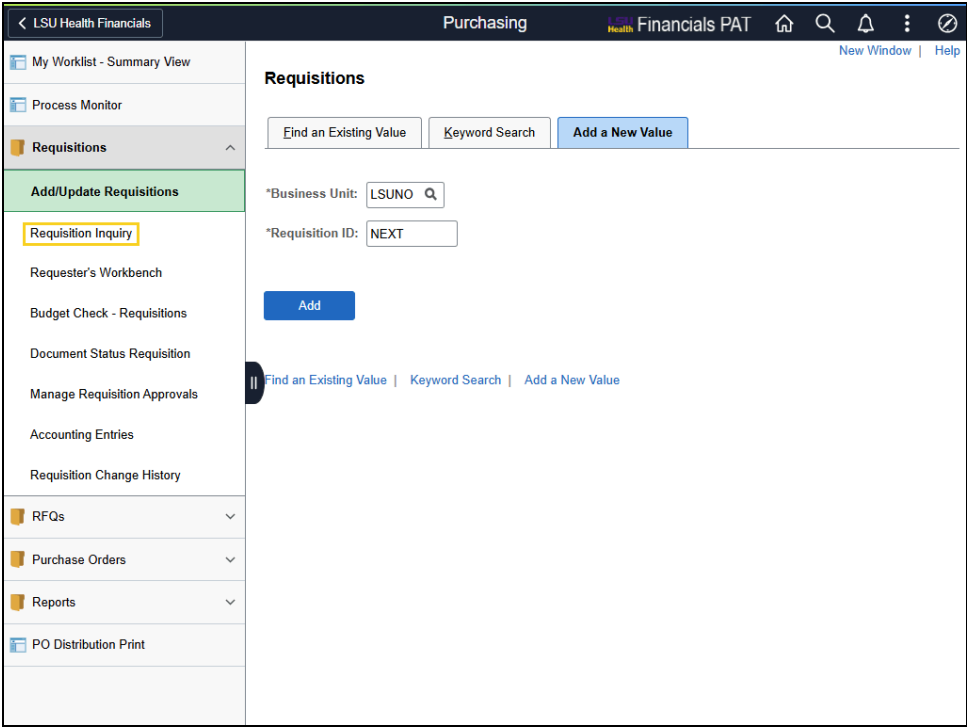
Step	Action
33.	<p>If <u>all changes</u> have been made to the requisition, users <u>must uncheck</u> Hold From Further Processing and Save the requisition for it to move through the Purchasing process.</p> <p>Click the Hold From Further Processing option.</p> 
34.	<p>Click the Save button.</p> 
35.	<p>This completes <i>View and Copy an Existing Requisition</i>.</p> <p>End of Procedure.</p>

Review Requisition Documents and Process Status

Inquire on a Requisition using Requisition Inquiry

Procedure

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





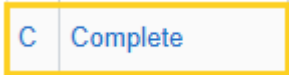
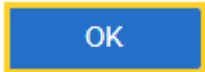


Step	Action
1.	Click the Requisition Inquiry button. Requisition Inquiry
2.	Click the Close Navigation Area button.

Training Guide

Managing Requisitions Fluid



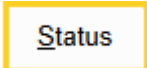




LSUNO/HCSO/LAKMC

Step	Action
3.	<p>Users may <i>search to inquire</i> on an <i>existing requisition</i> by entering <i>all or part</i> of the following <i>search criteria</i>:</p> <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition. • Req Status – used in conjunction with Requester, can focus search to specific requisition status. • Requester – to view requisitions associated with a specific user. • Supplier ID – to view requisitions for a specific supplier; or • Department – to view requisitions for a specific department.
4.	<p>In this example, users will search for the Requester and the Req Status of <i>Complete</i>.</p> <p>Click the Look up Requester button.</p> 
5.	<p>In this example, the <i>requester</i> is <i>Denise Boudreaux</i>. Use the Description field to enter the Last Name of the requester.</p> <p>NOTE: Use the Last Name <u>only</u> when entering information into the <i>Description</i> field. If you attempt to enter the entire username, and it is not entered in the correct format, you will receive a "No Matching Values Found" message.</p> <p>Enter the desired information into the Description: field. Enter "Boudreaux".</p>
6.	<p>Click the Look Up button.</p> 
7.	<p>Click the JCRIS1 link.</p> 
8.	<p>Click the Look up Req Status button.</p> 
9.	<p>Select the appropriate requisition status to focus search results.</p> <p>Click the Complete link.</p> 
10.	<p>Click the OK button.</p> 
11.	<p>The first <i>six (6) options of 159</i> display. You can use the View 100 link to display the first 100 options.</p>

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Managing Requisitions Fluid


LSUNO/HCSO/LAKMC

Step	Action
12.	The Requisition Name column can aid in identifying the requisition sought.
13.	<p>In this example, <i>4 Gold HP printer cartridges</i> have been requisitioned from <i>LD Products Inc.</i> The requisition id is 0064650.</p> <p>Click the 0064650 link.</p> 
14.	From the Requisition Details panel, users can view Description information, supplier information, quantity, and UOM.
15.	Selecting the Show All Columns button allows users to <i>view the merchandise amount</i> and the Schedule button. The Distribution button is found on the Schedule Details panel which <i>displays additional chartstring information</i> .
16.	<p>Click the Close Requisition Details button.</p> 
17.	<p>Click the Status tab.</p> 
18.	<p>The linked "Y" values on the Req Inquiry page allow the user to <i>review additional information</i> such as the <i>Purchase Order Inquiry</i> page or the <i>Voucher Inquiry</i> page. The linked "Y" values <i>display only in columns</i> for which <i>documents</i> are <i>available</i>.</p> <p>Click the On PO - Y link for Requisition 0064650.</p> 
19.	<p>Select the linked Purchase Order number (00396098) to view the PO Inquiry page.</p> <p>Click the Close Requisition to Purchase Order List button.</p> 
20.	<p>Click the On Voucher - Y link for requisition 0057873.</p> 
21.	<p>Select a linked Voucher number (00462844 and 00462845) to view the Voucher Inquiry page.</p> <p>Select the Payment Information link to view the Voucher Payments page.</p> <p>Click the Close Requisition to Voucher List button.</p> 

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Managing Requisitions Fluid

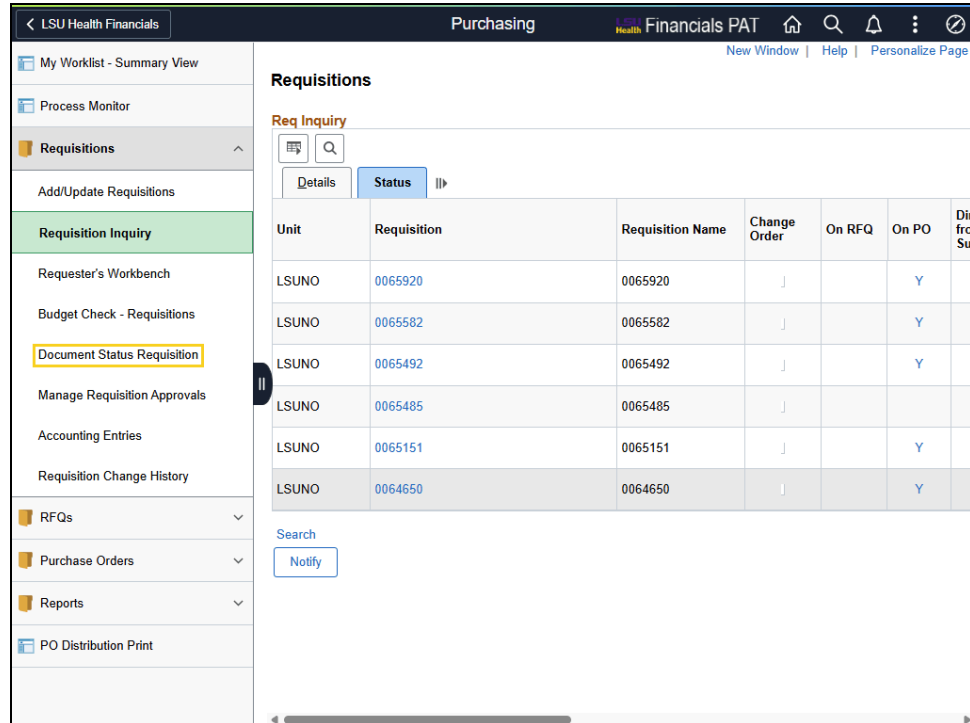
LSUNO/HCSD/LAKMC


Step	Action
22.	Click the Open Navigation Area button. 
23.	This completes <i>Inquire on a Requisition using Requisition Inquiry</i> . End of Procedure.

Inquire on a Requisition using Document Status

Procedure

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




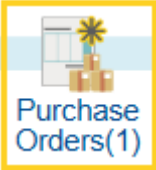










Step	Action
1.	<p>The Document Status page provides a <i>process stream</i> view of a requisition from <i>entry to completion</i>. Documents associated with the various steps within the process stream are <i>available for review</i> such as: Requisition Inquiry page, the PO Inquiry page, the Voucher Inquiry page and the Payment Inquiry page.</p> <p>NOTE: You may only view the <i>Voucher and Payment Inquiry</i> pages if you have the required security access.</p> <p>Click the Document Status Requisition button.</p> <p>Document Status Requisition</p>
2.	<p>Click the Close Navigation Area button.</p> <p></p>

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Step	Action
3.	<p>It is <i>recommended</i> users <i>search</i> by Requisition ID or Requester. <i>Requisition Status</i> can be used in conjunction with <i>Requester</i> to help focus on requisitions retrieved.</p> <p>Enter the desired information into the Requisition ID: field. Enter "0064650".</p>
4.	<p>Click the Search button.</p> 
5.	<p>The Document Status page provides a pictorial as well as Doc ID hyperlinks for available <i>process stream documentation</i>.</p> <p>Click the Req ID 0064650 link.</p> 
6.	<p>The Req Inquiry panel displays.</p> <p>Click the Close Requisitions tab.</p> 
7.	<p>Users may select the Purchase Orders (1) picture or the Doc ID link to view PO information.</p> <p>Click the Purchase Orders (1) link.</p> 
8.	<p>The Purchasing Document Status page displays. Select the Doc ID to view the Purchase Order Inquiry page.</p> <p>Click the 00386098 link.</p> 
9.	<p>The Purchase Order Inquiry page displays.</p> <p>Click the Close Purchase Order tab.</p> 
10.	<p>Click the Vouchers (2) link.</p> 

Step	Action
11.	<p>The Voucher Documents Status page displays. Select the Doc ID to view the Voucher Inquiry page.</p> <p>Click the 00462844 link.</p> 
12.	<p>The Voucher Inquiry page displays.</p> <p>Click the Actions dropdown button to activate the menu.</p> 
13.	<p>A list of <i>Action items/documents</i> display. The user <u>must</u> have the <i>appropriate security access</i> to access any of the listed pages.</p> <p>Click the Close Voucher tab.</p> 
14.	<p>Click the Payments (1) link.</p> 
15.	<p>The Purchasing Document Status page displays. Select the Payment Reference Doc ID to view the Voucher For a Payment page.</p> <p>Click the 702418 link.</p> 
16.	<p>Voucher payment information displays based on Voucher ID in the lower section of the page. Supplier information including <i>supplier address</i> is shown on the <i>upper left</i> section of the page. Payment information is shown on the <i>top right</i> of the page.</p>
17.	<p>This completes <i>Inquire on a Requisition using Document Status</i>. End of Procedure.</p>

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Requisition Basics

Use the Look up Feature

Procedure

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

LSU Health Financials PAT

Maintain Requisitions

Requisition

Business Unit LSUNO Status Pending

Requisition ID NEXT Budget Status Not Chk'd

Requisition Name Copy From

Header

*Requester KOCONN O'Connor, Karen

*Requisition Date 12/15/2025 Requester Info

Origin ONL On-Line Entry

*Currency Code USD US Dollar

Accounting Date 12/15/2025

Amount Summary

Total Amount 0.00 USD

Requisition Defaults

Requisition Activities

Add Comments

Add Items From

Purchasing Kit Item Search

Catalog Requirer Items

Line

Line	Item	Description	Quantity	*UOM	Category
1			0.0000		

Step	Action
1.	<p>Navigation: LSU Health Financials homepage > Purchasing tile > Requisitions > Add/Update Requisitions</p> <p>Click the Requisition Defaults link.</p> <p>Requisition Defaults</p>

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Requisition Defaults

Business Unit LSUNO Requisition Date 12/15/2025
 Requisition ID NEXT Status Pending

Default Options ⓘ

☐ Default If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

☒ Override If you select this option, all default values entered on this page override the default values found in the default hierarchy, only non-blank values are assigned.

Line

Buyer
 Supplier
 Category

Unit of Measure
 Supplier Location
[Supplier Lookup](#)

Schedule

Ship To LSUNO
 Due Date
 Ultimate Use Code
 Attention To

*Distribute By Quantity
 Ship Via GRND
 Freight Terms DES

Distribution

Accounting Tag

Distributions

[Details](#) [Asset Information](#) [Its](#)

Step	Action
2.	<p>The Look up feature allows you to search for all valid values in the database for a specific field. It can also be used to narrow the scope of your search when a large number of values are returned.</p> <p>The Look up feature is depicted as a magnifying glass in PeopleSoft. Anytime you see a magnifying glass next to a field, you have look up capability.</p>
3.	<p>Scenario</p> <p>In this exercise, you will search for an appropriate <i>value</i> for the Supplier field. The <i>10-digit Supplier ID number</i> is the value needed for the <i>Supplier field</i> rather than the supplier's name. You will use Henry Schein Inc as the supplier. You will locate and select Henry Schein Inc utilizing the <i>Look up feature</i>. Once selected, the system will <i>auto populate</i> the <i>Supplier ID number</i> into the <i>Supplier field</i>, thus <i>completing the Look up process</i>.</p>
4.	<p>Click the Look up Supplier button.</p> <p><input type="button" value="Q"/></p>

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Managing Requisitions Fluid

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Look Up Supplier

SetID: SHARF

Supplier ID: begins with

Short Supplier Name: begins with

Search Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed

View 100 1-300 of 300

Supplier ID	Short Supplier Name	Supplier Name	Additional Name	Our Custom Number
0000000001	AETNA LIFE-001	AETNA LIFE & CASUALTY	AETNA LIFE & CASUALTY	(blank)
0000000017	LA DEFERRED CO	LA DEFERRED COMPENSATION PLAN	LA DEFERRED COMP	(blank)
0000000019	LA STATE EMPLO	LA STATE EMPLOYEES' RETIREMENT	LA STATE EMP RETIREMENT	(blank)
0000000035	STATE EMPL-001	STATE EMPLOYEE GROUP BENEFITS	STATE EMPLOYEE GROUP	(blank)
0000000040	TEACHERS' RETI	TEACHERS' RETIREMENT SYSTEM OF	TEACHERS' RETIREMENT SYSTEM	(blank)
0000000066	AMERICAN HERIT	AMERICAN HERITAGE LIFE INSURANCE	(blank)	(blank)
0000000068	AMERICAN P-015	AMERICAN PUBLIC LIFE INSURANCE CO	(blank)	(blank)
0000000070	ANNETTE CLAYTO	ANNETTE CLAYTON CRAWFORD TRUSTEE	SUPPORT ENFORCEMENT	(blank)
0000000091	COLONIAL LIFE	COLONIAL LIFE AND ACCIDENT INSURANCE	ATTN: RECOVERY SERVICES	(blank)


Step	Action
5.	The system will <i>automatically display up to 300 results</i> on the <i>Look up pagelet</i> . If <i>more than 300 results</i> are available, a <i>message will display</i> above the returned results. You will then <i>use the search fields provided</i> to <i>narrow the scope of your search</i> .
6.	<p>The number of <i>results retrieved</i> can be <i>reduced</i> by entering <i>all or part</i> of either the Supplier ID or the Supplier Short Name into the search field provided. <i>Most users will utilize the Short Supplier Name option as their search parameter.</i></p> <p>There are two operators that can be used to <i>help narrow your search results</i>. They are:</p> <ul style="list-style-type: none"> • <i>begins with</i> and • <i>contains</i>.
7.	<p>begins with</p> <p>The system defaults the "begins with" operand for all search fields. In this example, you will search for <i>Henry Schein Inc.</i> using the <i>Short Supplier Name</i> field and the "begins with" operand.</p>
8.	Enter the desired information into the Short Supplier Name: field. Enter "HENRY" .
9.	Click the Search button.

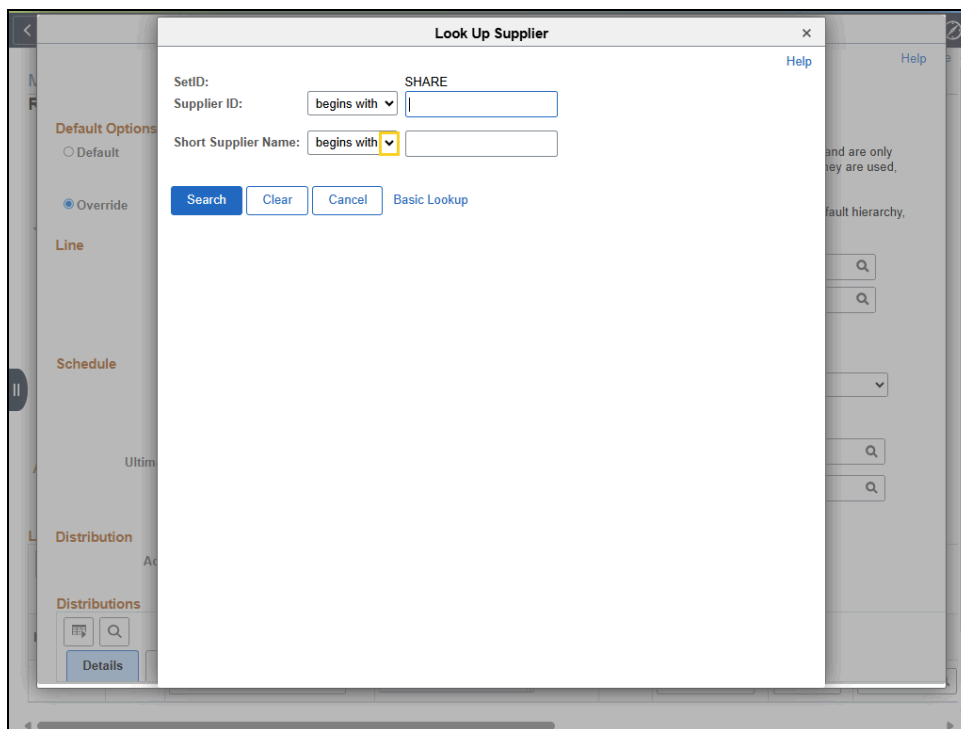



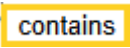
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Step	Action
10.	<p>The system <i>returned supplier names that begin with the word "HENRY", thus reducing the list of options to 11.</i></p> <p>Click the Clear button.</p> 





Step	Action
11.	<p>contains</p> <p>The <i>second search option is "contains". The "contains" option searches for any supplier name that "contains" the portion of the Short Supplier Name entered. The operand can be selected by clicking the drop-down arrow to the right of the Short Supplier Name field.</i></p> <p>Click the button to the right of the Short Supplier Name field.</p> 
12.	<p>Click the contains list item.</p> 

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Step	Action
13.	<p>In this example, you will use "HENRY S" as your <i>search component</i>.</p> <p>Enter the desired information into the Short Supplier Name: field. Enter "HENRY S".</p>
14.	<p>Click the Search button.</p> 
15.	<p>The system has <i>returned supplier names</i> that contain "HENRY S". Using the "contains" operand reduced the original search results to 3.</p> <p><i>Each line contains a series of links for the specified supplier. Links are generally underlined and blue in color. You can click anywhere on the desired supplier's line, and the system will default the needed information into the Supplier field on the Requisition Defaults page.</i></p> <p>Click in the OFFICE DEPOT field.</p> 
16.	<p>The 10-digit Supplier ID defaults into the Supplier field and the Supplier name displays to the right of the field.</p>
17.	<p>This completes <i>Use the Look up Feature</i>.</p> <p>End of Procedure.</p>

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Create/Find a Run Control ID

Procedure

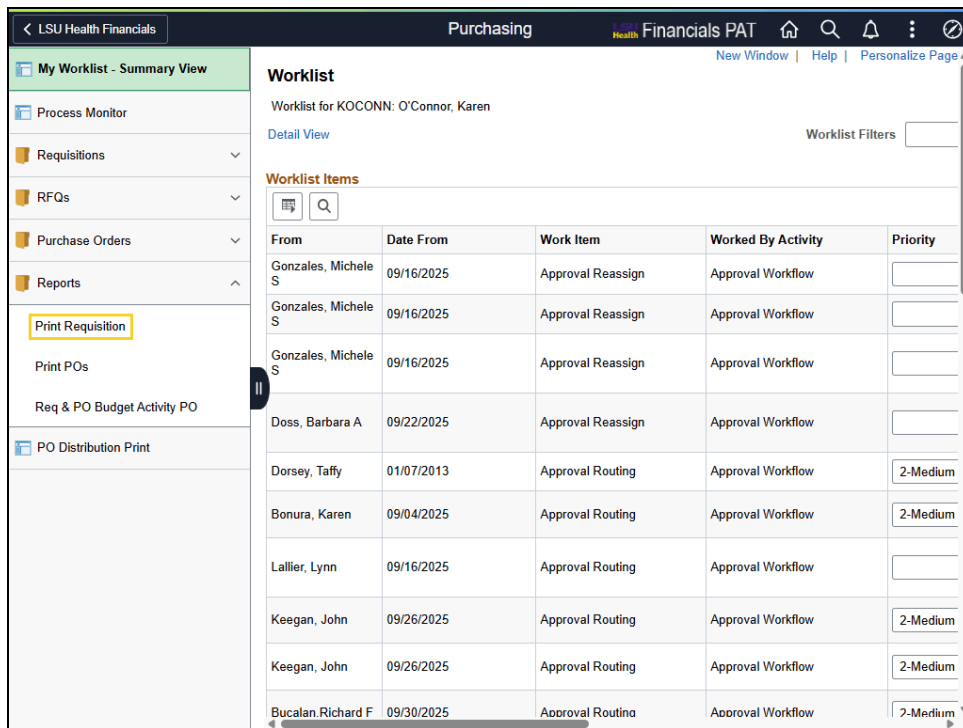
In this topic you will learn how to **Create/Find a Run Control ID**.



Step	Action
1.	<p>Users are able to <i>print a requisition</i> using the View Printable Version link on the Maintain Requisitions page. You can <i>also print</i> a requisition <i>through</i> the Process Scheduler.</p> <p><i>NOTE: See the 'Access the Process Scheduler' section in the <u>View Approvals and Print a Requisition</u> topic for instructions on printing a requisition using the Process Scheduler.</i></p>

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Step	Action
2.	<p>Navigation: LSU Health Financials homepage > Purchasing tile > Reports > Print Requisition</p> <p>Click the Print Requisition button.</p> <p></p>
3.	<p>Click the Close Navigation Area button.</p> <p></p>
4.	<p>The system <i>defaults</i> you into the <i>Find an Existing Value</i> tab. Selecting the Search button will <i>display</i> any existing run control ids.</p> <p>NOTE: On all subsequent prints you will use the <i>Find an Existing Value</i> tab to search for existing run control ids.</p>

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Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Run Control ID: begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step	Action
5.	The <i>first time</i> you use Requisition Print , you will <i>create</i> a <i>Run Control ID</i> to access the Process Scheduler . Select the Add a New Value tab or hyperlink to create a new run control id.
6.	Click in the Add a New Value field. Add a New Value


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Managing Requisitions Fluid

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The screenshot shows the 'Requisition Print' interface. At the top, there's a navigation bar with 'LSU Health Financials', 'Purchasing', and 'LSU Health Financials PAT'. Below this, the title 'Requisition Print' is displayed. There are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a search bar labeled '*Run Control ID:'. Below the search bar is an 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'.

Step	Action
7.	<p>Run Control ID</p> <p>A Run Control ID is used to access the Process Scheduler. Users may save parameters to a particular process or report to a run control id to minimize data entry when running recurring processes or reports.</p> <p>A Run Control ID is:</p> <ul style="list-style-type: none"> • Specific to an end-user's Operator (User) ID. • Can be entered in upper, lower, or mixed case. • Can be up to 30 characters long. • Characters can be either number or letters, but cannot include any special characters (e.g., \$, #, &, etc.). • Cannot contain blank spaces; and • Must be one continuous string of characters or words must be linked by an underscore.
8.	<p>Examples of run control ids that meet the requirements:</p> <ol style="list-style-type: none"> 1. PRINT_REQ can be used since the underscore links the two words together; or 2. PRINTREQUISITION can be used because it is one continuous string of character.

Step	Action
9.	<p>Examples of run control ids that <u>do not meet</u> the requirements:</p> <p>1. PRINT REQ because there is a blank space between the two words; or</p> <p>2. PRINT_REQUISITION'S because a special character, and apostrophe, is used.</p>
10.	<p>A run control id <u>must</u> be created to run many reports in PeopleSoft. If a run control is created to a specific type of report, such as printing a requisition, it can be used to run that specific type of report in the future. The advantage of this method is that all parameters are saved with the run control. When running future reports, a user would only have to change the Requisition ID instead of entering all report parameters again. If the user creates a run control id to use for all reports, then the user will need to change the report parameters each time the report is run.</p>
11.	<p>Enter the desired information into the Run Control ID: field. Enter "REQ_PRINT".</p>
12.	<p>Click the Add button.</p> 

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The screenshot shows the 'Print Requisition' interface. At the top, there's a navigation bar with 'LSU Health Financials', 'Purchasing', and 'Financials PAT'. Below this, the 'Print Requisition' title is followed by 'Run Control ID: REQ_PRINT' and a 'Run' button. There are also links for 'Report Manager' and 'Process Monitor'. The 'Language' section shows 'English' selected. The 'Report Request Parameters' section contains input fields for 'Business Unit', 'Requisition ID', 'From Date', 'Through Date', and 'Requester'. To the right of these fields is a 'Statutes to Include' section with checkboxes for 'Approved', 'Canceled', 'Completed', 'Open', and 'Pending', along with a 'Select All' button. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

Step	Action
13.	<p>The parameters you enter on the Print Requisition page will be <u>saved</u> to the newly created run control id. When running the report in the future, you will only change the Requisition ID; all other fields will remain as defaulted. If you <u>do not save</u> your parameters to the run control id, the user will have to enter the parameters the next time the report is run.</p> <p><i>NOTE: See the View Approvals and Print a Requisition topic for instructions on printing your report.</i></p>
14.	<p>If your Business Unit does not default, it <u>must</u> be entered.</p> <p>Enter the desired information into the Business Unit field. Enter "LSUNO".</p>
15.	<p>Enter the desired information into the Requisition ID field. Enter "0062925".</p>

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Print Requisition

Run Control ID: REQ_PRINT [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English [Specified Language](#) [Recipient's Language](#)

Report Request Parameters

Business Unit: LSUNO

Requisition ID: 0068359

From Date: [Calendar Icon]

Through Date: [Calendar Icon]

Requester: [Search Icon]

Statuses to Include

☐ Approved ☐ Canceled ☐ Completed ☐ Open ☐ Pending

[Select All](#)

NOT On Hold


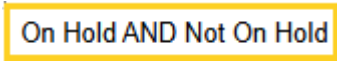
[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
16.	<p>NOTE: Do <u>not</u> enter From Date, Through Date, or Requester. If this information is entered <u>incorrectly</u>, it may prevent the requisition from printing. Since requisitions must be <u>REQUESTED AND PRINTED ONE AT A TIME</u>, entering the Requisition ID will be sufficient to identify the requisition.</p>
17.	<p>Statuses to Include</p> <p>If the user <i>selects</i> the <i>wrong status</i> of the requisition, it will <i>prevent</i> the requisition from <i>printing</i> (i.e., the end-user checked Pending, but the requisition is already Approved). By <i>choosing</i> the Select All button, users will be <i>able</i> to <i>print</i> the requisition in any status.</p> <p>Click the Select All button.</p> <div> Select All </div>

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Step	Action
18.	<p>Statutes to Include (continued)</p> <p>As previously stated, selecting the wrong status will prevent the requisition from printing. This is also true if the user selects the wrong Hold type. In this case, using the default NOT On Hold rather than On Hold AND Not On Hold. If the requisition is on hold, meaning the <i>Hold from Further Processing</i> box is checked on the Maintain Requisitions page, the requisition would not print using the NOT On Hold option. By selecting On Hold AND Not On Hold, you will be able to print the requisition regardless of whether the <i>Hold From Further Processing</i> box is checked or unchecked.</p> <p>Click the button to the right of the NOT On Hold field.</p> 
19.	<p>Click the On Hold AND Not On Hold list item.</p> 

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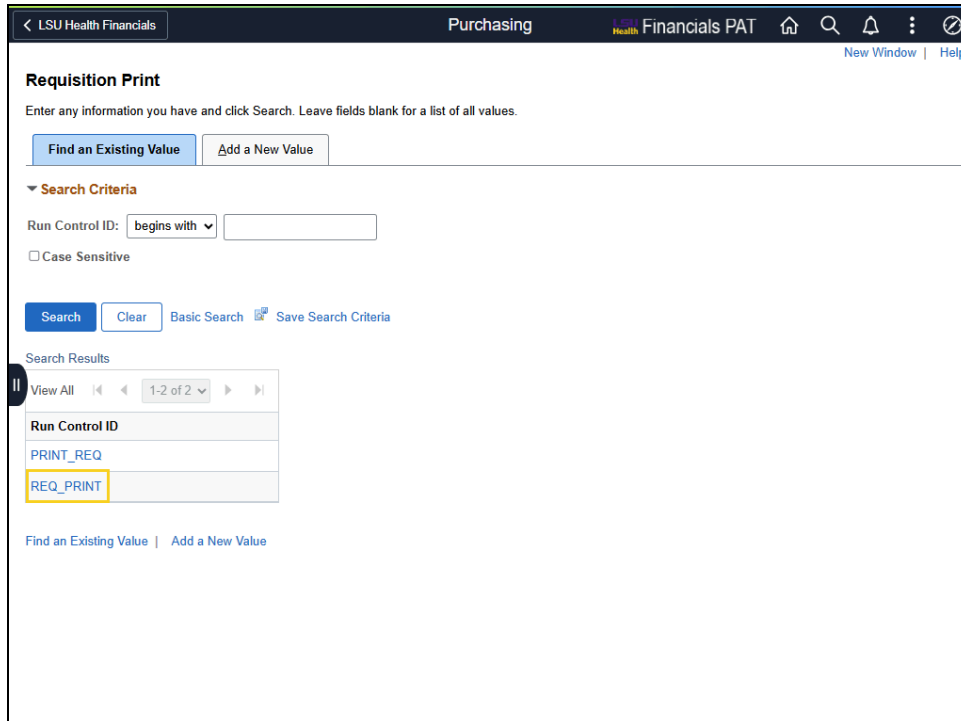
Step	Action
20.	<p>Click the Save button.</p> <p><i>NOTE: Parameters must be saved for them to default when printing in the future.</i></p> 
21.	<p>After saving your parameters, the user clicks the Run button to begin the print process. The user must access the Report Manager to view and print the report.</p> <p><i>See the View Approvals and Print a Requisition topic for instructions on how to print a report.</i></p> <p>For <u>training purposes only</u>, click the Open Navigation Area button.</p> 
22.	<p>Click the Print Requisition button.</p> 

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Step	Action
23.	Click the Close Navigation Area button. 
24.	The system defaults you into the Find an Existing Value tab. Select the Search button for a list of existing run control ids. Click the Search button. 



LSU Health Financials PAT

Purchasing

Requisition Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results


View All 1-2 of 2

Run Control ID

PRINT_REQ

REQ_PRINT

Find an Existing Value Add a New Value

Step	Action
25.	A list of available run control ids displays. Once a run control has been selected, the Print Requisition page displays the parameters from the most recent print request for that run control id. Click the REQ_PRINT cell. 

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Step	Action
26.	The requisition is displayed and the user can continue with the print process.
27.	This completes <i>Create/Find a Run Control ID</i> . End of Procedure.