2010

The University of New Orleans

PeopleSoft 9.0: Purchase Requisition End-User Training

Updated: June 15, 2010

Training Group

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UNIVERSITY PURCHASING POLICY

ALL COMMITMENTS OF UNIVERSITY FUNDS REQUIRE PRE-AUTHORIZATION FROM THE PURCHASING OR ACCOUNTS PAYABLE OFFICES. THE ACCOUNTS PAYABLE OFFICE PROCESSES PAYMENTS FOR ITEMS LISTED ON THEIR WEBSITE. SOME OF THESE ARE DESCRIBED IN THE "EXCEPTIONS TO THE NEED FOR PRE-AUTHORIZATION FROM THE PURCHASING OFFICE" SECTION. APPROVALS PROCESSED THROUGH THE PURCHASING OFFICE ARE SUBMITTED VIA THE ONLINE PURCHASE REQUISITION PROCESS. APPROVALS PROCESSED THROUGH THE ACCOUNTS PAYABLE OFFICE ARE SUBMITTED WITH THE APPROPRIATE FORM LOCATED ON THE WEBSITE http://financialservices.uno.edu/acctg_services/accts_payable/.

PURCHASES OF $999.99 OR LESS (including shipping and other charges)

These purchases are exempt from competition and will be assigned a Verbal Purchase Order. Please complete the online Purchase Requisition form. Once you obtain the PO number from the Purchasing Office, you can then place your order with the vendor providing the PO number, your name, department and "ship-to" address. The vendor should be instructed to send the invoice referencing the PO number to Accounts Payable, University of New Orleans, 2000 Lakeshore Drive, New Orleans, LA 70148.

PURCHASES BETWEEN $1000.00 AND $5000.00 (including shipping and other charges)

These purchases require competitive phone quotes with a few exceptions as noted under the "Exceptions to the need for Competitive Bidding" section. The telephone quotation sheet (located on the Purchasing SharePoint site) should be completed with a verbal quote from at least three vendors. One of the vendors must be from the Hudson Initiative list published by the Louisiana Department of Economic Development. The list of vendors is provided on the state purchasing website (http://doa.louisiana.gov/osp/se/secv.htm). Electronic versions of the telephone quotation sheet and the quote from the winning vendor will be needed to attach to the online requisition comments section. *(Note: Hard copies of documents can be scanned to create an electronic copy for attachment.)*

PURCHASES OVER $5000.00 (including shipping and other charges)

The purchase requisition submitted should list specifications for the goods or services requested in the comments section (a copy of the specifications may be attached). The Purchasing Office will issue an Invitation to Bid for these purchases to at least five potential vendors, two of which must be from the list of certified small and emerging businesses (SEB). The length of time required for the bid process will be influenced by the following three factors:

BID PREPARATION TIME

The time required for this phase can be reduced by assistance from your department.

Complete specifications must be prepared for the products and/or services requested – a process usually requiring the input of the end user. If the department does not have a prepared specification, it is very helpful for the end user to highlight vendor specifications, product brochures, websites, or quotes to indicate which of the features are essential. (**Note: Electronic copies of these documents are always helpful and save data entry time in most cases.**)

Providing a list of potential bidders on the products or services including the name, address, voice/fax numbers and email addresses will also help to expedite the process. The Purchasing Office can locate potential vendors; however it will require research in many cases which may add to the time required to complete the bid invitation.

BIDDING TIME

The time allowed for vendors to respond will depend on the total cost of the purchase.

$5000 - $25,000

The Invitation to Bid may be faxed to the vendors who may in turn fax their responses to the Purchasing Office. The time period from the issuing of the Invitation to Bid to the bid opening will be at least three working days. Complex bids (e.g. requiring samples to be submitted) may need to be handled as a mailed bid and require a longer time.

$25,000 and greater

The Invitation to Bid must be mailed to the vendors who must return the original completed bid by mail or in person to the Purchasing Office. The bid must be advertised in the Morning Advocate and the Times Picayune newspapers as well as the LaPAC state purchasing website in the open solicitation section. The time period from the appearance of the advertisement to the bid opening will be at least 21 calendar days. This may be reduced to 14 calendar days with a written justification from the department.

AWARD PREPARATION TIME

The time required from the opening of the bids until the issuance of the Purchase Order will depend on factors such as receiving approval for award from the department, obtaining any required insurance certificates from the vendors, etc.

EXCEPTIONS TO THE NEED FOR COMPETITIVE BIDDING

Although the following items are exempt from the competitive bidding process, pre-authorization from the Purchasing Office is still required.

STATE CONTRACTS

Items on State Contracts can be purchased without competitive bidding regardless of the cost. The State Contract number and line number of each item must be in the comments of the requisition. State Contracts can be viewed on the internet at https://ecat.doa.louisiana.gov/ecat/external/search/externalSearch.sdo. Some commodities involving a purchase of $25,000 or more will require a comparison of state contracts.

SOFTWARE ($100,000 AND LESS)

Purchases of software up to $100,000 are exempt from competition. Software and hardware maintenance under $100,000 do not require competitive bidding. For software and hardware maintenance over $100,000, contact the

Purchasing Office prior to submitting a purchase requisition. ***Any written agreement or contract must be signed by an individual in the Purchasing Office with authority to sign University Contracts.*** Virus protection software and some Microsoft products are available through campus site licenses. Check the UCC website or contact the Purchasing Office for details.

PUBLICATIONS OR COPYRIGHT MATERIALS

Publications and/or copyright materials purchased directly from the publisher or copyright holder are exempt from competitive bidding. A written statement from the vendor confirming they are the publisher or copyright holder is required with the requisition. This statement should be attached to the comments with the vendor quote.

INTER-STATE OR GOVERNMENT AGENCIES

Purchases from other state budget units or government agencies are exempt from competition.

SOLE SOURCE / PROPRIETARY

Purchases may be exempt from competitive bidding if Proprietary Specifications can be justified (Reasons why no other brand or model can be used for this application) and the **manufacturer confirms in writing that the vendor is a 'Sole-Source'** (That this item must be purchased directly from the vendor and they have no other marketing channel.) Forms for Proprietary Specifications and Sole Source may be obtained from the Purchasing SharePoint site.

AUTHORIZED DEALER REPAIR OR PARTS

Repairs and/or parts associated with repairs to equipment may be obtained from an "Authorized Dealer" (Certified by the manufacturer to sell and/or perform maintenance on their equipment) without competitive bids. A "Louisiana Authorized Dealer" shall be used if available. For amounts over $999.99, a written quote must be obtained and submitted with the online requisition, and a Purchase Order issued before proceeding with the work.

SCIENTIFIC LABORATORY SUPPLIES OR EQUIPMENT

Scientific laboratory supplies and equipment for scientific research up to $25,000 per transaction are exempt from competition.

ADVERTISING

No competitive process is required for advertising; however, the Chief Marketing Officer must certify that specific media is required to reach the targeted audience. The approval form can be found on the Purchasing SharePoint site.

EXCEPTIONS ALLOWED WITH LIMITED COMPETITION

The following items require telephone quotations from at least three vendors, where feasible, even when amounts are in excess of $5000. Submit the telephone quotation sheet along with the written quote from the vendor or a memo

documenting why three quotes cannot be obtained. One of the quotes must be from a vendor on the list of Small and Emerging Businesses (SEB) or document why this is not possible.

1. Facilities for Meetings and Conferences: If the facility selected requires use of in-house catering, photography, audio visual or other services, these may be purchased from the facility. However, if the facility does not have such a policy, the purchase of these services must follow normal competition regulations based on amount.

2. Air and Bus Charters.

EXCEPTIONS TO PRE-AUTHORIZATION FROM THE PURCHASING OFFICE

Items to be processed directly by the Accounts Payable Department include the following:

PERSONAL REIMBURSEMENTS

Personal reimbursements should be used **ONLY** for unavoidable or emergency situations and should not be used as an alternative to the Purchase Order process with vendors who provide us with credit terms and sales tax exempt status. For amounts less that $1000 (excluding laptop computers), a CHECK REQUEST approved by the supervisor of the person receiving the reimbursement should be submitted to Accounts Payable with the original receipt attached.

TRAVEL EXPENSES

A *TRAVEL EXPENSE VOUCHER* should be submitted to Accounts Payable. Instructional Support can be found at the Travel Reimbursement website (http://financialservices.uno.edu/travel/).

REQUESTS FOR PAYMENT OF HONORARIA

Submit a *REQUEST FOR PAYMENT OF HONORARIUM/CONTRACTURAL SERVICE* FORM TO Accounts Payable. (The submission must be in accordance with AP 10.2.)

CONTRACTURAL SERVICES

The Office of Financial Services and/or the Office of Research and Sponsored Programs will assist departments with the preparation of contracts for professional, personal or consulting services. For payment submit a *REQUEST FOR PAYMENT OF HONORARIA/CONTRACTURAL SERVICE FORM* with an original invoice attached. (The submission must be in accordance with AP 10.8.)

REQUESTING A PURCHASE ORDER

The process for requesting purchase orders on campus is changing. You will now need to complete an online purchase requisition, save it with a **"VALID" budget check**, and submit the printed copy with the proper signatures and backup documents to the Purchasing Office.

VERBAL PURCHASE ORDER

Verbal Purchase Orders are issued for orders that total $999.99 or less and do not require competition. In April 2009, a SharePoint process was implemented for obtaining your verbal purchase order which has proven to be both effective and efficient. This process will now be replaced with the online requisition entry into PeopleSoft. This will help us to migrate from using two systems (SharePoint and PeopleSoft) to using one system (PeopleSoft) for all purchasing requests. A requisition will be required to pass budget checking prior to the verbal purchase order is issued. This process will continue until the procurement card is available on campus. Should you have an emergency situation, the requisition should be in valid budget check prior to making the phone call to the purchasing office.

BLANKET PURCHASE ORDER

Blanket purchase orders will only be issued for certain exceptions such as emergency maintenance or service contracts as approved by the Purchasing Office. We will no longer issue a single purchase order number that can be used repeatedly throughout the year for units that do not have a need for exceptions.

In order to acquire a Purchase Order for items that would historically have used a *blanket purchase order*, complete an online requisition for the items with the required competitive quotes and submit it to the purchasing office to obtain your purchase order number. In cases where competition is not required and the purchase is below $1000 total including freight and miscellaneous charges request a Verbal Purchase Order.

GENERAL PURCHASE ORDER

General Purchase Orders will be issued for all purchases of goods or services that are not for a specific time period.

TERM PURCHASE ORDER

Term Purchase Orders will be issued for all purchases related to services or agreements that are payable yearly, quarterly or monthly and require renewal each year (e.g. Copier Rentals, Software Maintenance, and Campus Landscaping).

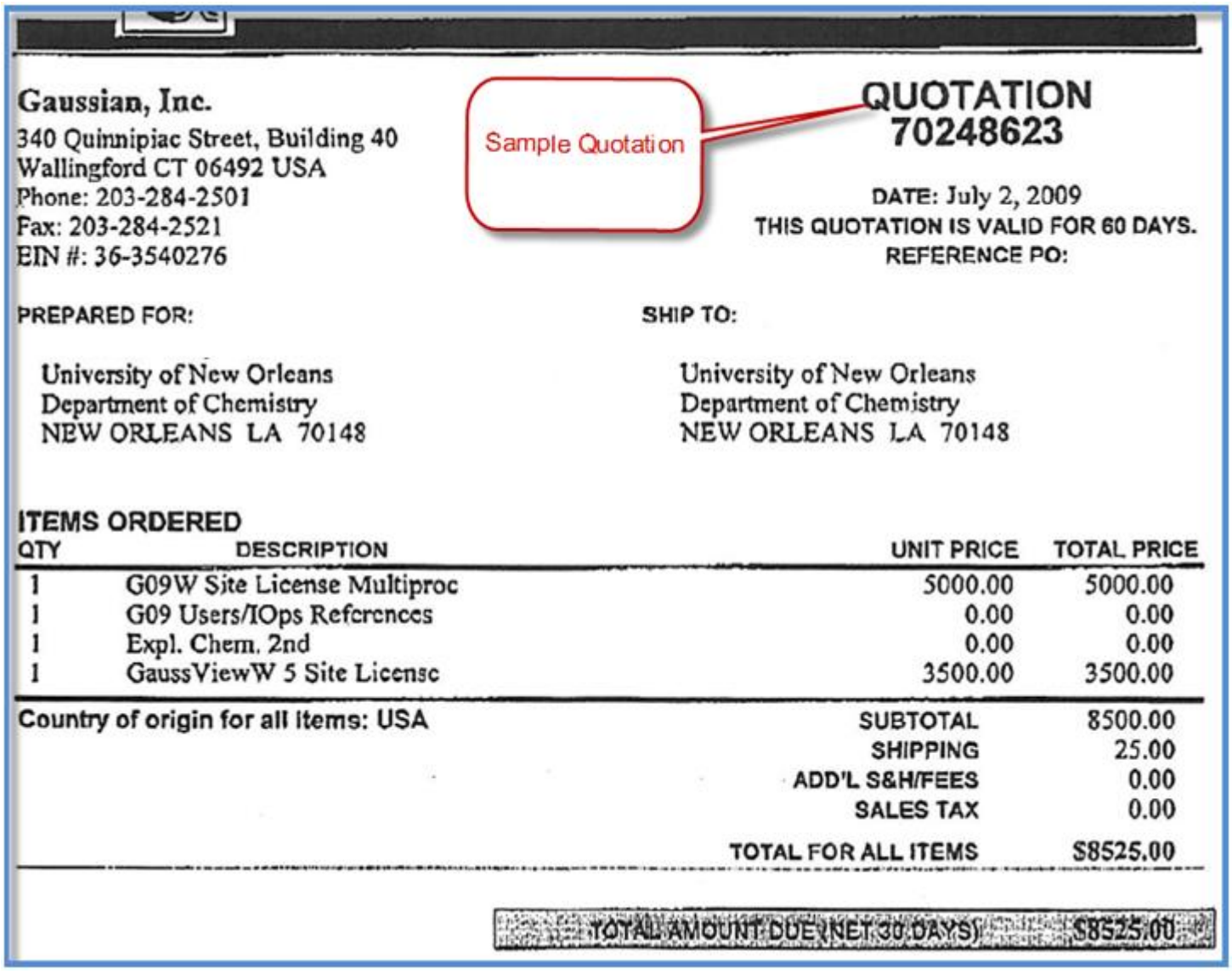
SOLE SOURCE PURCHASE ORDER

Sole Source Purchase Orders will be issued for purchases that have met the terms and conditions of a 'Sole Source / Proprietary' purchase as previously described.

ENTERING A PURCHASE REQUISITION

Before entering a purchase requisition your completed telephone quotation sheet, written quote from the vendor, product specifications, and other documents should be available for attaching to your submission.

The purchase requisition should be entered exactly as quoted by the vendor and saved with a **"VALID" budget check**. The Purchasing Office will not be able to move forward on any orders that do not have a **"VALID" budget check**.



Gaussian, Inc.
340 Quinnipiac Street, Building 40
Wallingford CT 06492 USA
Phone: 203-284-2501
Fax: 203-284-2521
EIN #: 36-3540276

Sample Quotation

QUOTATION 70248623

DATE: July 2, 2009
THIS QUOTATION IS VALID FOR 60 DAYS.
REFERENCE PO:

PREPARED FOR:

University of New Orleans
Department of Chemistry
NEW ORLEANS LA 70148

SHIP TO:

University of New Orleans
Department of Chemistry
NEW ORLEANS LA 70148

ITEMS ORDERED

QTY	DESCRIPTION	UNIT PRICE	TOTAL PRICE
1	G09W Site License Multiproc	5000.00	5000.00
1	G09 Users/IOps References	0.00	0.00
1	Expl. Chem. 2nd	0.00	0.00
1	GaussViewW 5 Site License	3500.00	3500.00

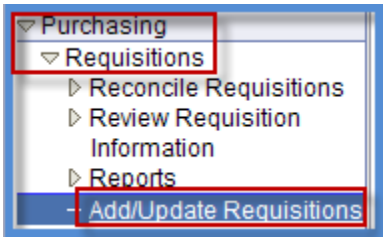
Country of origin for all items: USA

SUBTOTAL	8500.00
SHIPPING	25.00
ADD'L S&H/FEES	0.00
SALES TAX	0.00
TOTAL FOR ALL ITEMS	$8525.00

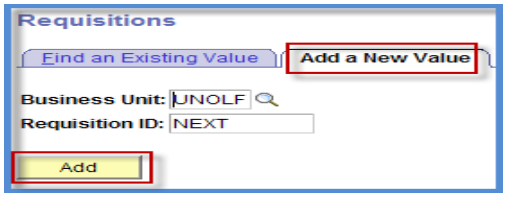
TOTAL AMOUNT DUE (NET 30 DAYS) $8525.00

NAVIGATION

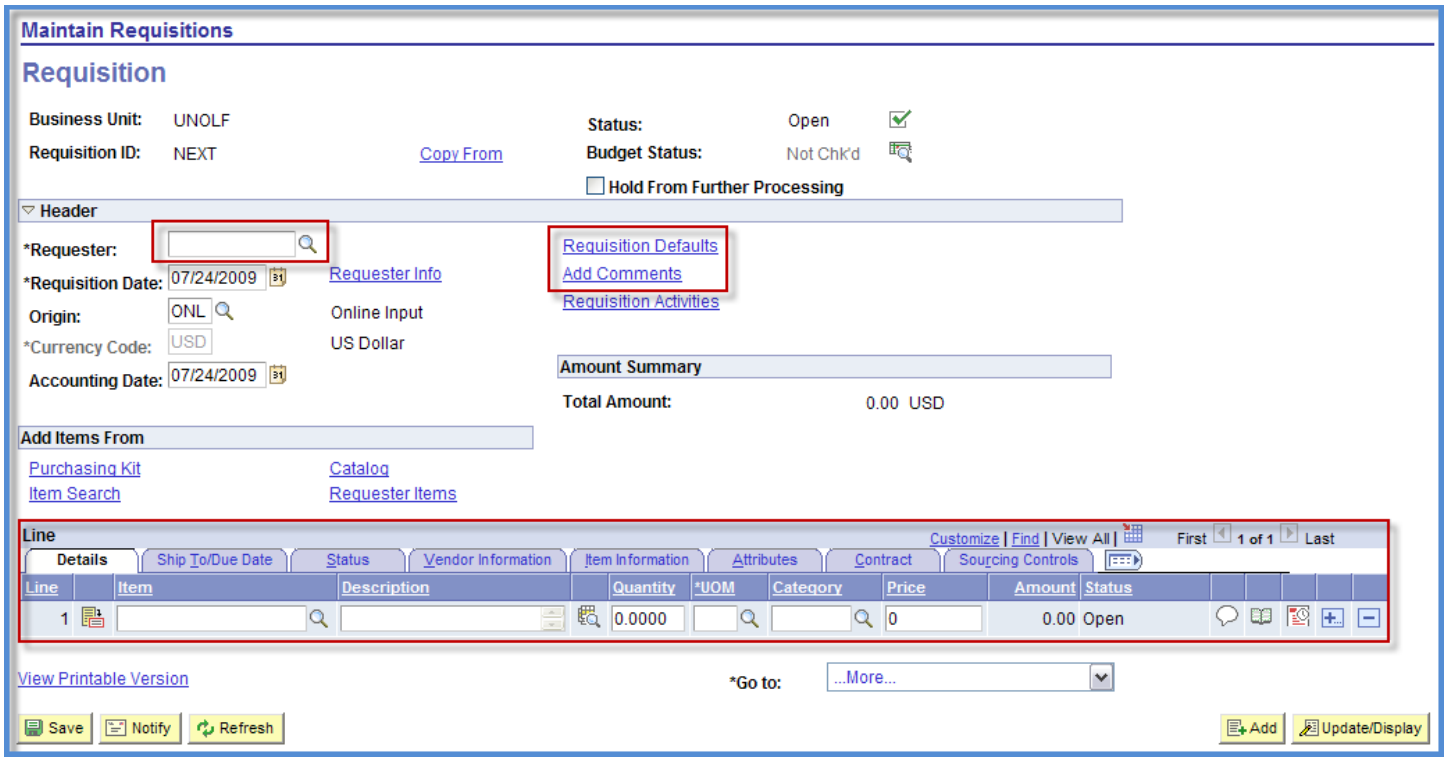
Purchasing > Requisitions > Add/Update Requisitions



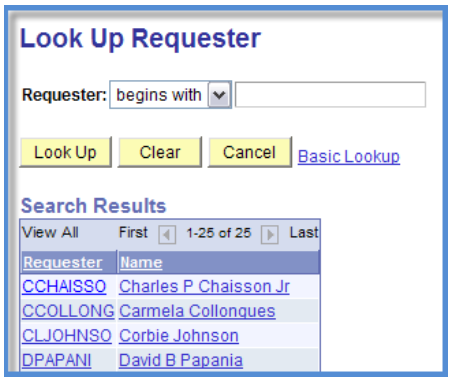
Select Add



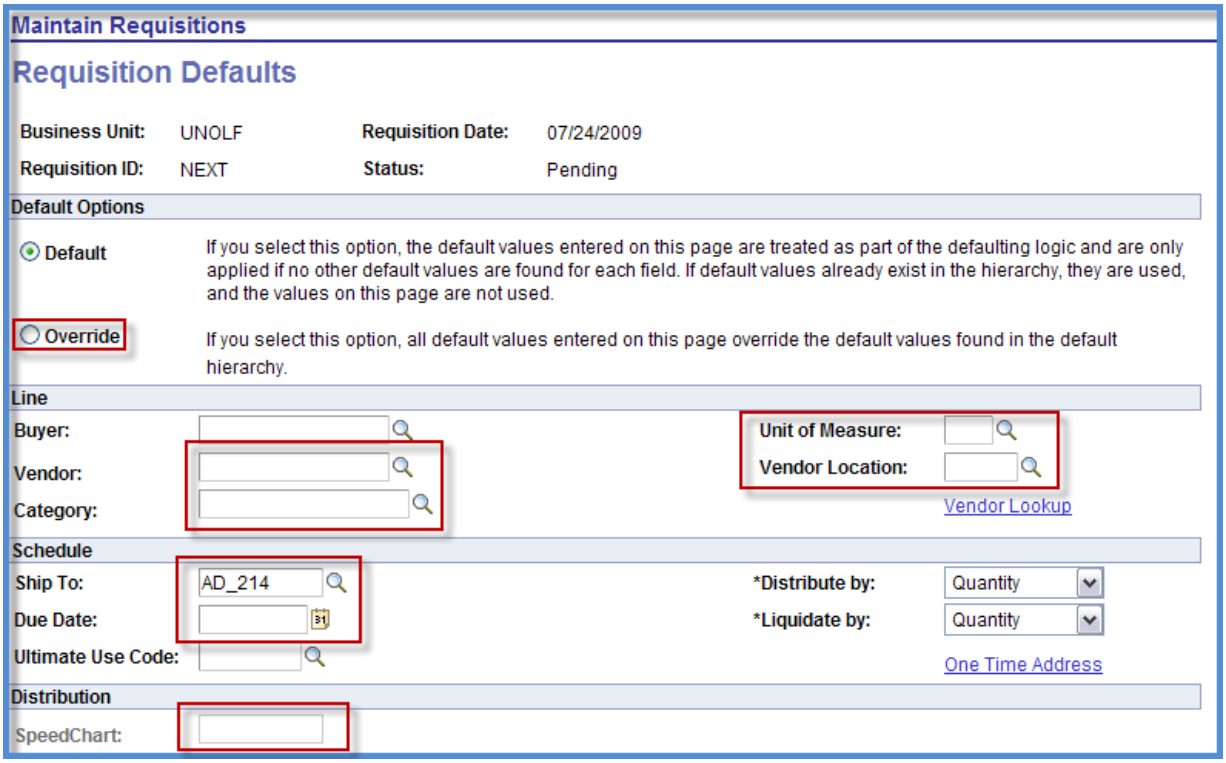
ENTRY SCREEN



1. Your name should default. If this does not happen please email the Purchasing Office (purchasing@uno.edu) so that your user preferences can be corrected. If your name does not default, you may select it from the drop down menu by selecting the to the right of 'Requestor'.

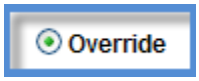


2. Select the 'Requisition Defaults' hyperlink.



3. You will not update the *'Buyer'* or *'Ultimate Use Code'* fields.

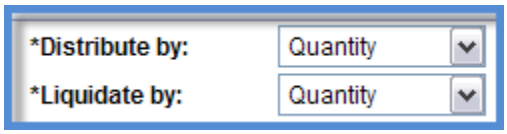
4. Select the override radial button.



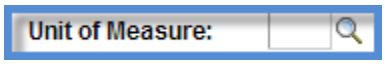
5. Select the vendor. If you vendor is not in the database, you will need to obtain a W-9 form and submit it with the vendor request form on the Purchasing SharePoint site.

6. Select the Category. To shorten your search options, you can enter 003, 004, etc before selecting the magnifying glass to view the list of options. Please refer to the 'Choosing the Correct Category' section of this document.

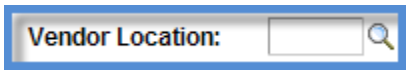
7. Liquidate by and Distribute by methods will remain Quantity for the majority of purchases on campus. The only time you will change these fields is for processing a blanket or subcontract purchase order. Please refer to the appropriate section for each PO type later in this document.



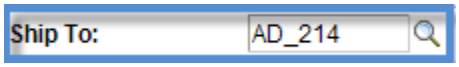
8. Select the Unit of Measure



9. The Vendor Location will default from the selected vendor. You will not modify this field.

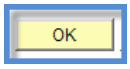


10. Your ship to location should default. You can also change this location by selecting the magnifying glass lookup.



11. Enter the due date. The due date should always be the current date.

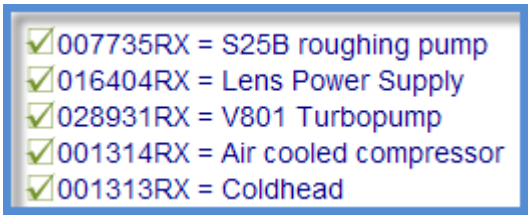
12. Enter your Speed Key. If there are multiple speed keys to be used on this requisition. Please refer to the "Entering Multiple Speed Key" section later in this document.

13. Select OK. 

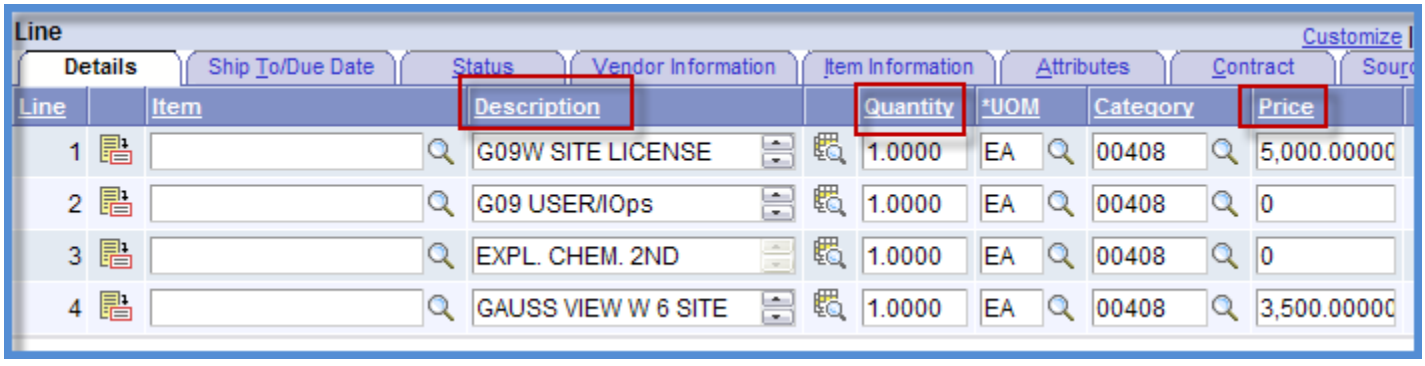
This will take you back to the main requisition entry screen.

14. Enter the line information for Line 1. We do not use the "ITEM" field. This will always be blank.

    a. Enter your descriptions, quantity and price exactly as stated on the quotation. **G09 Site License (Item #: 12345)**. The item number is placed at the end where applicable.
        i. The description should be something generic that states what items are being purchased. For example if you are purchasing repair parts for a spectrometer you would list your description as: REPAIR PART FOR SPECTROMETER (ITEM: 007735RX – S25B ROUGHING PUMP)

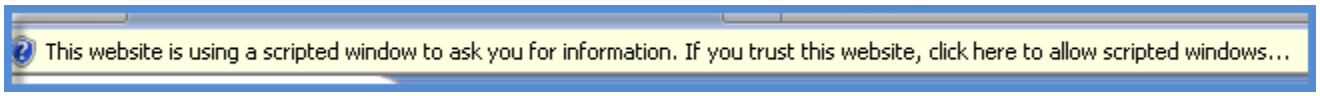


    b. Then select the 'Refresh' button to populate the 'requisition defaults' previously entered. The completed screen should look similar to the one below. Please note that even though you entered the complete descriptions from the quotation, only the first line of text appears.

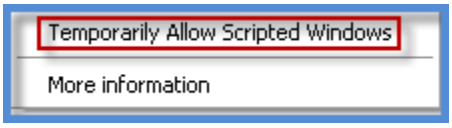


c. To **add additional lines**, select the at the very right of the line section.

d. A dialog bar may appear toward the top of your browser requesting you to allow scripted windows.

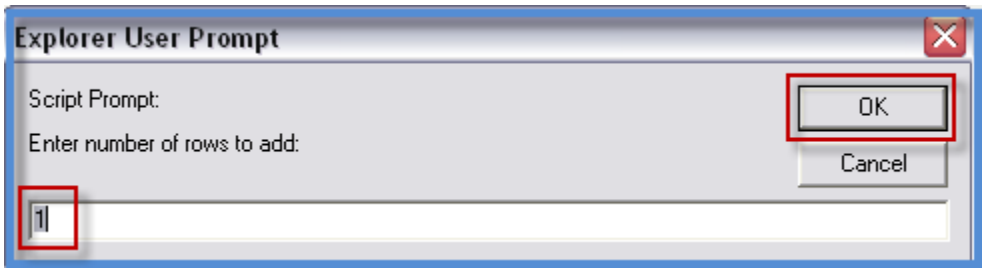


i. Right click on the dialog bar and select 'Temporary Allow Scripted Windows'

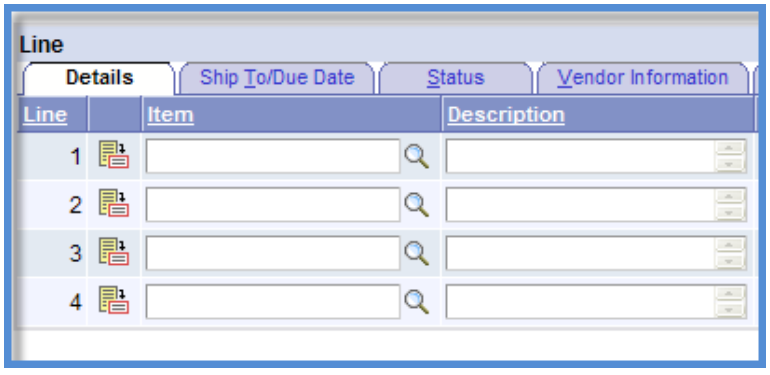


ii. Select the at the very right of the line section, again.

e. Enter the number of additional rows you will need in the lines section according to your quotation. This example would require 3 additional lines and select ok.



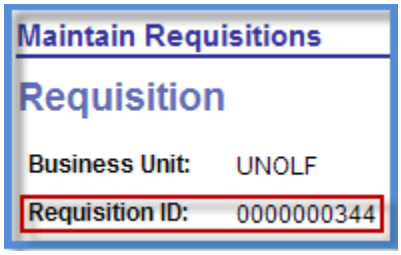
f. Your requisition now has 4 lines.



g. Repeat steps 15 A & B for the additional lines.

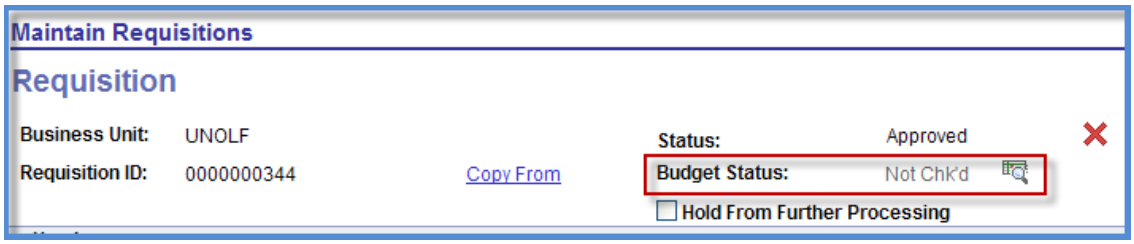
h. Select Save.

i. Your requisition id is now at the top of the page. Please make note of this requisition number as you may need it in case any unexpected system issue occurs.



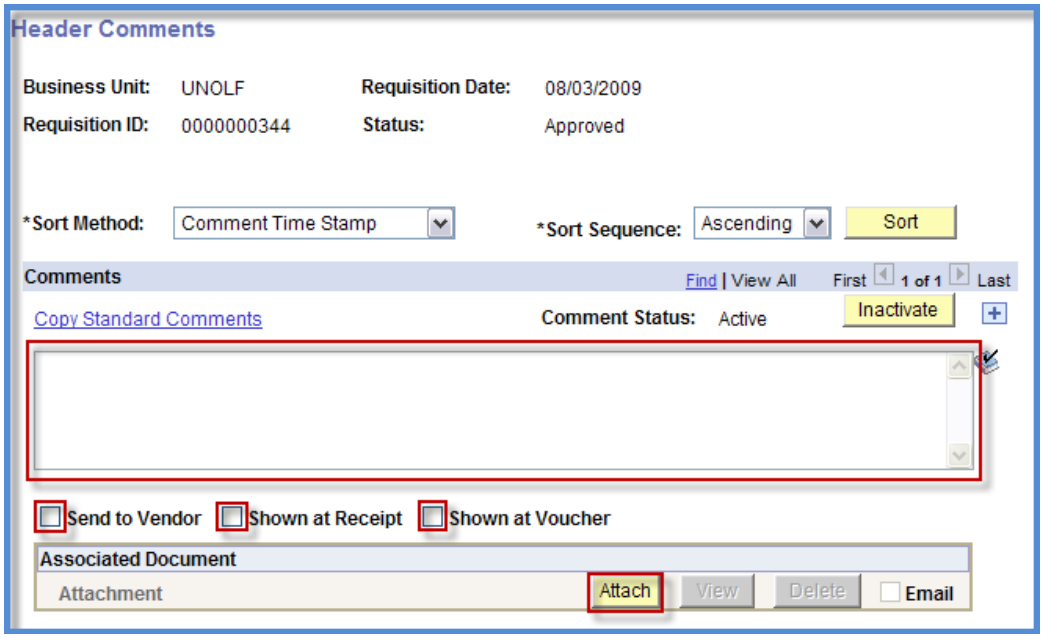
j. Approve the Requisition by selecting the green check next to Status.

k. Budget Check the requisition by selecting the icon next to the budget status. In order for the purchase order to be created, the budget check status must be valid. **It will be the requesting unit's responsibility to assure the budget check status is valid prior to submitting the request to the Purchasing Office. Budget errors will be submitted to the appropriate budget offices for review on Tuesday and Friday of each week. Should you have an emergency situation, please contact the Purchasing Office with the requisition number.**



l. Once the budget check is valid or error, go to the add comments section of the requisition.

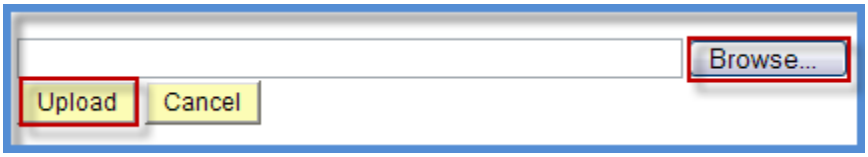
m. On this screen enter any necessary comments and attach the required backup documents.



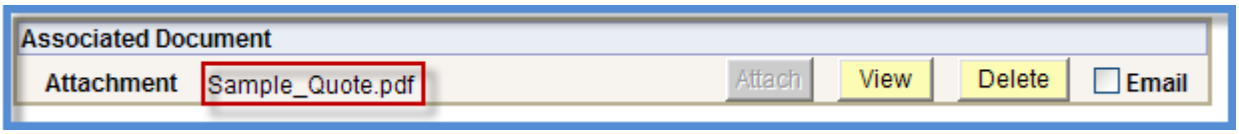
n. Select the check box in front of 'Send to Vendor', 'Shown at Receipt', and 'Shown at Voucher' for each comment you enter. You may enter any comment necessary regarding the purchase order. (e.g. start and end date of service, quote number, quote date, end user information (contact name, phone number and email). There are several standard comments which may be selected from the 'Copy Standard Comments' hyperlink. Available comments are detailed later in the 'Selecting a Standard Comment' section of this document. Once the comment is selected, a preview window will appear. In this window the comment statements may be reviewed. Once reviewed, select OK to accept the comment. An editable window will open and allow changes or additions to the standard comment.

   i. **Each requisition must contain the applicable standard comments from the requisition comments. This information is vital in completing the requisition to a purchase order. The comment type is REQ and comment id is ALL.**

o. To attach documents first scan and save the file. Then select Attach. (Note: Only one attachment per comment is allowed). To add additional comments select the '+' icon to the right.



   i. Browse for the file you wish to attach.
   ii. Select Upload. Your document name should appear.

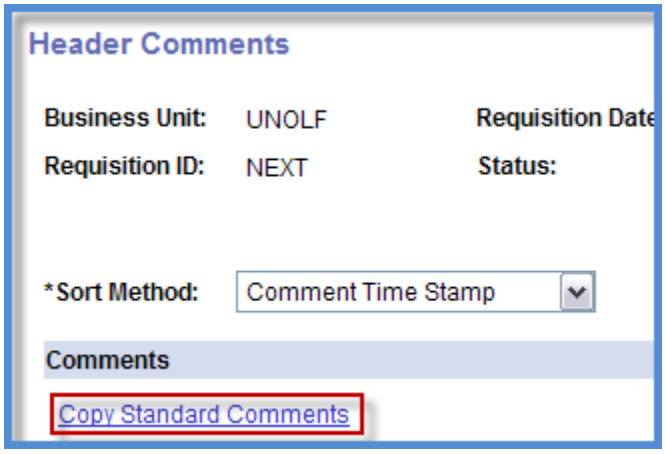


p. Select OK.

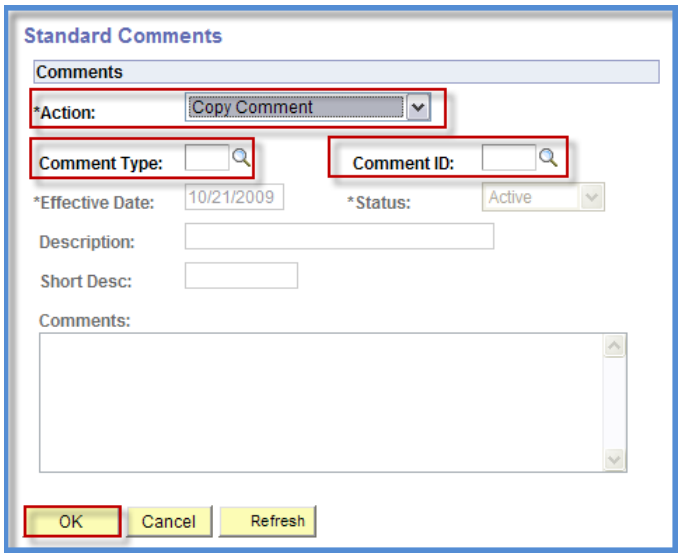
q. Select Save.

SELECTING STANDARD COMMENTS

To select a standard comment select the 'Copy Standard Comment' hyperlink available on the header comments page.



This will open the standard comments selection page.



COMMENT TYPE

Select the magnifying glass next to comment type. This will display the list of comment types available to choose from. The only comments that will be chosen for requisitions will be in the comment types (BPO, SUB & TRM).

BPO - Blanket Purchase Order Clauses
SUB – Subcontractor Clauses
TRM – Term Purchase Order Clauses (e.g. Copier Rental, Software Agreement)
REQ – Requisition Comments (required on all requisitions)

COMMENT ID

Once you have chosen the comment type group you wish to select from, you will then select your comment ID. Each of the three comment types has several comment id's which you can choose from. Please note that some comments require entry of certain information in order to complete them. This information is specific to the individual order.

BPO COMMENT ID

ADV (Advertising) – Used for advertising purchases that is placed by the office of Marketing and Communications.

BID (Bid Blanket PO Clause) – Used when a blanket purchase order has been approved by the Purchasing Office and the contract is associated with a bid.

LINE (One line of purchase order is an estimate) – Used as comment on the specific line of the purchase order that is estimated. This is only used when other lines of the purchase order are not estimates. (e.g. Copier Rental for 12 months and a 2nd line for estimate overage charges).

MISC (Miscellaneous BPO $5000 Max) – Used with miscellaneous blanket purchase order for supplies in which the need cannot be pre-determined. These must be pre-approved by the Purchasing Office.

REG (Regular Clause) – Used on all blanket purchase orders that do not have a bid or limit restriction.

RES (Research Limit) – Used on all blanket purchase orders for scientific equipment or laboratory supplies for research. These must be pre-approved by the Purchasing Office.

RESL (Resale Items) – Used only by the UNO Bookstore for brand name items purchased for resale.

SUB COMMENT ID

REG (Subcontractor Encumbrance) – Used for all subcontract purchase orders.

TRM COMMENT ID

COPM (Copier Maintenance) – Used for all copier maintenance purchases

COPR (Copier Rental) – Used for all copier rentals

LSE (Lease) – Used for lease agreements.

TERM – Used for all other agreements over a period of time.

FYCY – Used for all Term contracts which cross fiscal year.

REQ COMMENT ID

ALL – Must be used on all requisitions.

CHOOSING THE CORRECT CATEGORY

The category code assigns the budget *account* number for the expense. It is very important that you select the correct category code when entering your requisition.

OPERATING SERVICES

Category Code	Description	Account	Used For:
00302	Advertising	630200	Advertising space in newspapers/periodicals; television/radio commercials; promotional items
00304	OffSite Catering	630300	Offsite catering services. All onsite catering services must be provided by our contracted food service company. Onsite services are processed through interdepartmental transfers and do not require a purchase order.
00306	Conference Services	630400	Facilities for UNO Sponsored Meetings
00308	Computer Services- Off Campus	631200	Hosting Services
00312	Insurance-Other	632405	Travel Abroad and Athletics
00314	Laundry	633400	Dry cleaning, laundering of uniforms, etc
00316	Linen Services	633410	Rental of linens
00318	Copier Equipment Rent/Lease	634201	Rental or Lease of Copier Equipment

00320	Parking	634300	All campus parking agreements off site.
00322	Garbage and Waste Disposal	634500	All garbage and waste disposal.
00324	Document Destruction	634510	Destruction of sensitive documents
00326	Maint of Prop & Eqpt Auto Rep	634601	Repairs and maintenance on state automobiles, trucks, tractors and trailers.
00328	Maintenance of Buildings	634602	Repairs and maintenance on buildings, grounds and improvements other than buildings. (e.g. installation of windows)
00330	Maintenance of Equipment	634603	Repairs and maintenance plans on equipment (research equipment, piano maintenance, musical instruments, etc.).
00332	Maintenance Janitorial/Custodi	634604	All Janitorial / Custodial contracts
00334	Maint Data Proc and Comp Equip	634605	Repair and maintenance of personal computer systems, computer center hardware (including printer and peripherals).
00338	Pest Control	634607	All campus pest control services.
00340	Membership Dues to Prof Organ	635000	Dues and membership fee for membership in professional organizations, including on-site visit fees for Accreditation.
00342	Miscellaneous Operating Expens	635400	Charges for services performed by non-budgeted state agency or private business organization that cannot be classified into specific accounts in operating services. (e.g. Telephone Survey Services)
00344	Training	635410	All UNO personnel training.
00346	Postage, Freight and Express	635800	Postage, freight and express usage
00348	Mailing Services	635900	Contracted mail services.
00350	Printing, Binding & Duplicate	636200	Printing, binding or copying of campus materials (e.g. manuals, signs, brochures, flyers, etc.) used in conducting the university's affairs.
00352	Publication of Dissertations	636300	
00354	Publication of Funded Findings	636600	Journal page charges for research findings.
00356	Relocation Exp of Employees	637000	Relocation for incoming applicants as approved by the Chancellor's office.

00358	Moving Expenses-Departments	637100	Relocation of departments units.
00360	Moving Expenses-Nonpersonnel	637100	Relocation of all other units or items on campus.
00362	Rentals - Buildings	637401	Rental and/or lease of buildings and/or land.
00364	Rentals - Equipment	637402	Rental and/or lease of building and grounds equipment (e.g. generators, etc)
00366	Rentals - D.P. Equipment	637403	Rental of office machines (e.g. mailing machines), data processing equipment.
00370	Rentals - Other	637405	Rentals and/or leases not otherwise specified (e.g. cylinder rentals, etc)
00372	Software Maintenance	637406	Maintenance agreements associated with software packages.
00374	Subscriptions	638200	Online data access and publications
00376	Basic Telephone Charges	638601	Charges for all local service, long distance services, line service, maintenance contracts for the campus telephone system
00378	Data Lines & Circuits	638602	Charges for all internet, data services and cell phones (to be coordinated with the University Computing Center)
00380	Network Installation	638603	Installation of network lines to an area of campus.
00382	Other Communication Services	638604	Cable service, digital music tuners, etc.
00390	Temporary Agency Employee Svs	639000	Temporary employees employed through the contracted Temp Agency. (Must be processed through Human Resource Management.)
00394	Security Services	639020	All security services on campus (e.g. building alarms)
00395	Armored Car Services	639030	All armored car services (e.g. pick up of cash from departments and delivery to bank)

OPERATING SUPPLIES

Category Code	Description	Account	Used For:
00402	Agricultural Supplies	640200	Plants, soil, landscaping
00404	Automobile & Truck Supplies	640700	Supplies used in operation of automobiles (e.g. fuel, oil & lubrication, batteries, tires, etc.)

00406	Oper Supplies Clothing & Unifo	641700	Clothing and uniforms for departments.
00408	Software Purchase & Licensing	642200	Purchase and Licensing of Software products
00410	Computer Supplies	642700	Supplies used in the operation of a personal computer. (e.g. printer toner , DVDs, scanner under $1k, printer under $1k, flash drives, external drives)
00412	Food Supplies	643700	Food for Human Consumption only
00414	Household Supplies	644700	Janitorial supplies used in maintaining cleanliness (e.g. paper towels, window cleaner, disinfectants, etc)
00418	Inventory- New Text 645201	645201	**To be used by resale units only.**
00420	Inventory-Used Text 645202	645202	**To be used by resale units only.**
00422	Inventory-Trade Book 645203	645203	**To be used by resale units only.**
00424	Inventory-Supplies 645204	645204	**To be used by resale units only.**
00426	Inventory-Insignia 645205	645205	**To be used by resale units only.**
00428	Inventory-Cards 645206	645206	**To be used by resale units only.**
00430	Inventory-Specials 645207	645207	**To be used by resale units only.**
00432	Inventory-Miscellaneous 645208	645208	**To be used by resale units only.**
00434	Inventory-Food 645209	645209	**To be used by resale units only.**
00436	Inventory-Ofc Supp RES 645210	645210	**To be used by resale units only.**
00438	Inventory - Concessions 645211	645211	**To be used by resale units only.**
00440	Inventory - Beer - 645212	645212	**To be used by resale units only.**
00442	Inventory - Liquor 645213	645213	**To be used by resale units only.**
00444	Inventory - Novelties 645214	645214	**To be used by resale units only.**
00446	Opr Supplies Medical & Dental	645700	Special items used in medical care and treatment of sick or injured. (e.g. first aid kit, drugs, medical laboratory supplies, etc.)
00450	Office Supplies	646700	Supplies used in the operation of an office. (e.g. staples, paper, pencils, etc)
00452	Other Supplies	647200	Supplies used in operation of the campus not otherwise specified.
00456	Repair & Maintenance Supplies	648200	Supplies and materials used to make minor repairs to buildings, grounds, and other areas of campus (e.g. paint, lumber, plumbing, electrical, etc)

00458	Teaching & Research Supplies	649200	Supplies and materials used to aid with teaching, labwork or research.
00460	Telephony	649300	Purchase of telephones and related supplies

PROFESSIONAL SERVICES

Category Code	Description	Account	Used For:
00510	Banking Services	651001	Banking Services performed by sources outside of the state government.
00520	Bank Card Services	651003	Bank Card Services performed by sources outside of the state government.
00525	Collection Services	651004	Collection Services performed by sources outside of the state government.
00530	Collection Svcs-Student Loans	651005	Collection services for student loans performed by sources outside of the state government.
00535	Credit Reporting Services	651006	Credit reporting services performed by sources outside of the state government.
00561	Subcontracts - 1st $25K	655501	Used for the first $25,000 of a contract through Office of Research and Sponsored Programs.
00562	Subcontracts - Over 1st $25K	655502	Used for balance over the first $25,000 of a contract through Office of Research and Sponsored Programs.
00565	Information Technology Svs	655600	Information Technology services performed by a source outside of state government.
00615	Regist. Fees for Conf/Seminar	666800	Registration fees for conference or seminar.
00620	Royalities	667100	Royalties paid by UNO.

EQUIPMENT / ASSETS

Category Code	Description	Account	Used For:
00720	Automotive Equip <$5000	670800	Cost of automobiles, trucks, and trailers including all delivered accessories of the vehicle, taxes, delivery charges, title registration, and other purchase-related costs with a total value between $1000 and $4999.99
00722	Automotive Equip Captlz	670802	Cost of automobiles, trucks, and trailers including all delivered accessories of the vehicle, taxes, delivery charges, title registration, and other purchase-related costs with a total value $5000 and greater.
00730	Miscellaneous Equipment <$5000	670900	Cost of all other equipment not specified elsewhere including all purchase-related costs between $1000 and $4999.99.
00732	Miscellaneous Equipment Captlz	670902	Cost of all other equipment not specified elsewhere including all purchase-related costs $5000 and greater.
00740	Boats & Aircraft - Equip <$500	671000	Cost of boats and aircrafts including all delivered accessories of the vehicle, taxes, delivery charges, title registration, and other purchase-related costs with a total value between $1000 and $4999.99
00742	Boats & Aircraft - Equip Captl	671002	Cost of boats and aircrafts including all delivered accessories of the vehicle, taxes, delivery charges, title registration, and other purchase-related costs with a total value $5000 and greater.
00750	Equip Bldg,Grnds & Gen<$5000	671300	Immovable or stationary equipment for buildings and general plant use including installation charges, freight, taxes and other purchase-related charges between $1000 and $4999.99
00752	Equip Bldg,Grnds & Gen Captl	671302	Immovable or stationary equipment for buildings and general plant use including installation charges, freight, taxes and other purchase-related charges $5000 and greater.

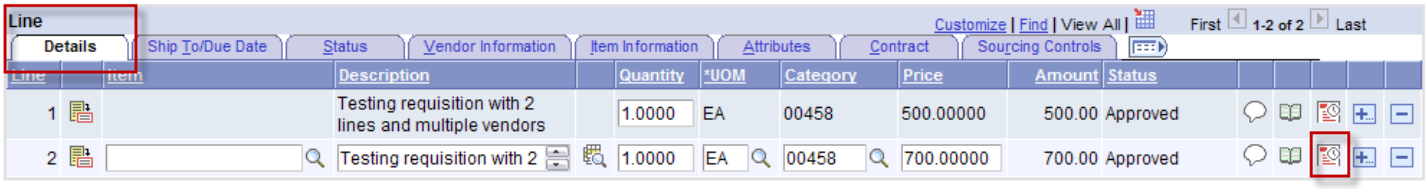
00760	Communications Equip<$5000	671600	Equipment used for communications such as radios, antennas, etc including the cost of delivery charges, taxes, title fees, installation, licenses and other purchase-related costs between $1000 and $4999.99
00762	Communications Equip Captl	671602	Equipment used for communications such as radios, antennas, etc including the cost of delivery charges, taxes, title fees, installation, licenses and other purchase-related costs $5000 and greater.
00770	Computer Hardware Equip<$5000	671900	Computer hardware, including peripherals between $1000 and $4999.99
00772	Computer Hardware Equip Captlz	671902	Computer hardware, including peripherals $5000 and greater.
00790	Educ,Research & Lab Equip<$5K	672500	Equipment used for education or research including the cost of delivery, taxes, installation and other purchase-related costs between $1000 and $4999.99.
00792	Educ,Research &Lab Equip Captl	672502	Equipment used for education or research including the cost of delivery, taxes, installation and other purchase-related costs greater than $5000.
00810	Household Equip - <$5000	673100	Equipment used in housekeeping, janitorial and laundry functions including the costs of delivery, taxes, installation and other purchase-related costs between $1000 and $4999.99
00812	Household Equip - Captlz	673102	Equipment used in housekeeping, janitorial and laundry functions including the costs of delivery, taxes, installation and other purchase-related costs $5000 and greater.
00820	Library Reference Material<$5K	673400	Books, films, microfilms, records and periodicals when maintained by an agency in a library for its general use including the cost of delivery, taxes, and other purchase-related costs between $1000 and $4999.99
00822	Library Reference Matr Captlz	673402	Books, films, microfilms, records and periodicals when maintained by an agency in a library for its general use including the cost of delivery, taxes, and other purchase-related costs $5000 and greater.

00840	Medical Equipment - <$5000	673700	Equipment used in the treatment or diagnosis of the sick or injured including the cost of delivery, installation, taxes and other purchase-related costs between $1000 and $4999.99
00842	Medical Equipment - Captlz	673702	Equipment used in the treatment or diagnosis of the sick or injured including the cost of delivery, installation, taxes and other purchase-related costs $5000 and greater.
00850	Office Equipment - <$5000	674000	Equipment used in the operation of an office including the cost of delivery, taxes and other purchase-related costs between $1000 and $4999.99. (e.g. furniture, office machines)
00852	Office Equipment - Captlz	674002	Equipment used in the operation of an office including the cost of delivery, taxes and other purchase-related costs $5000 and greater.(e.g. furniture, office machines)
00860	Rec,Sports & Cultur Equip<$5K	674600	Equipment used for recreational and cultural enrichment including the cost of delivery, taxes and other purchase-related costs between $1000 and $4999.99 (e.g. TV, weights, musical instruments, etc.)
00862	Rec,Sports &Cultur Equip Captl	674602	Equipment used for recreational and cultural enrichment including the cost of delivery, taxes and other purchase-related costs $5000 and greater.(e.g. TV, weights, musical instruments, etc.)

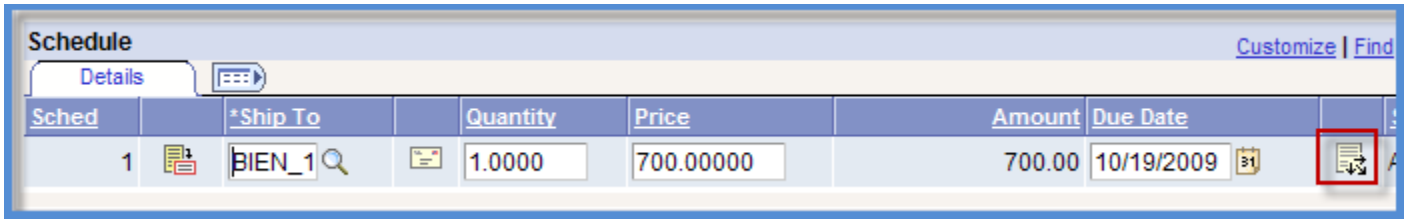
ENTERING MULTIPLE SPEED KEYS

When using multiple speed keys on a purchase order you must enter the information on the distribution of each line. The Requisition Defaults cannot be used when entering multiple speed keys on a requisition.

To enter multiple speed keys (distributions) on a requisition line, select the schedule icon at the end of the line details tab.

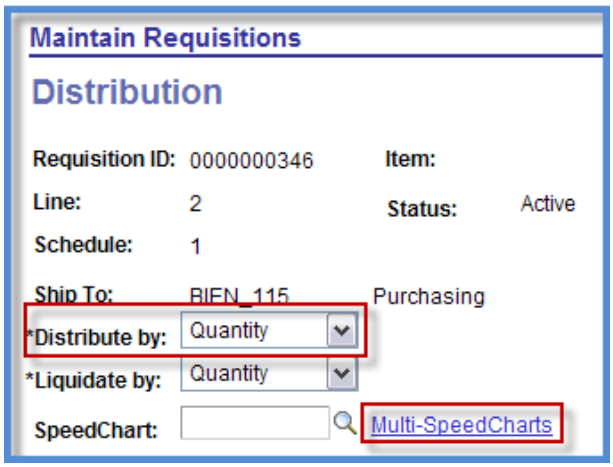


This will open the schedules panel. From the schedules panel select the distribution icon to the right.



This will open the distributions panel.

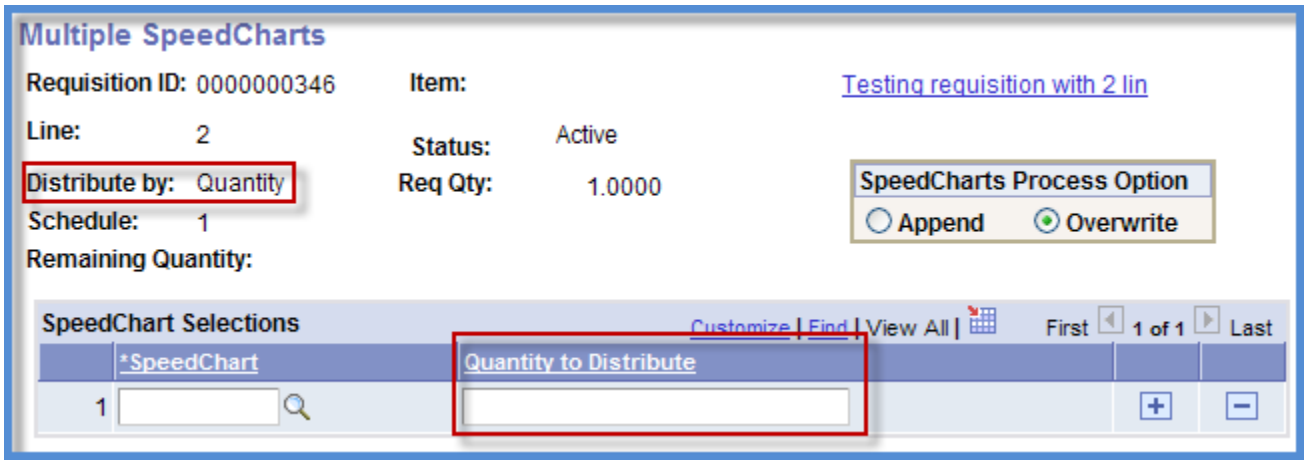
Make a note of the Distribute and Liquidate methods that appear on the distribution panel.

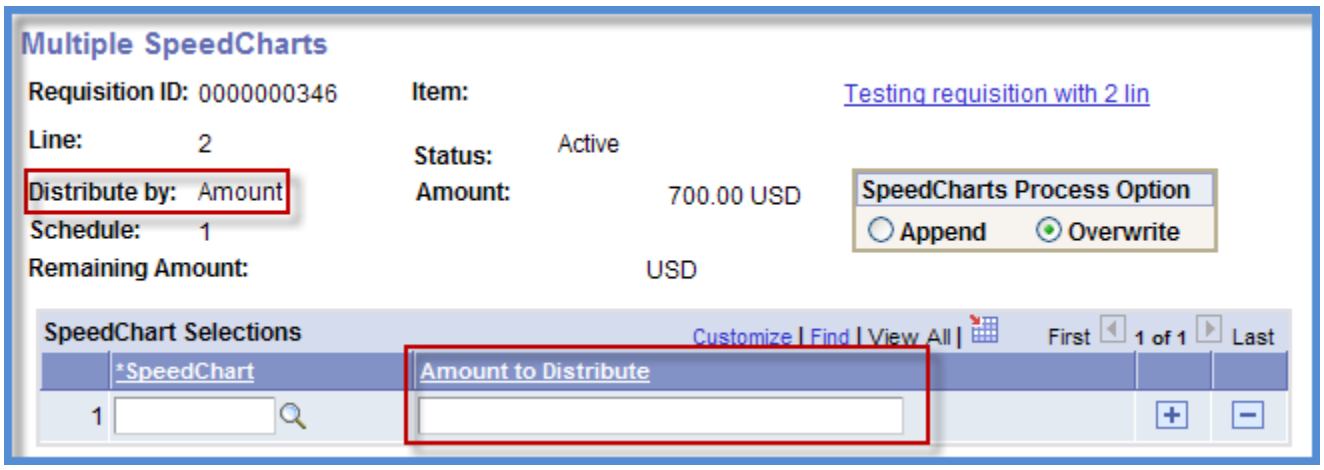


You will then select the appropriate distribution by method that you wish to calculate. You will select either 'Quantity' or 'Amount'. (e.g. If you have the quantity of 12 on a line and you want to pay for 10 from one speed key and 2 from another speed key, you will select quantity. If you have a quantity of 12 items on a line and you wish to pay for $100 from one speed key and $300 from another speed key, you will select amount.)

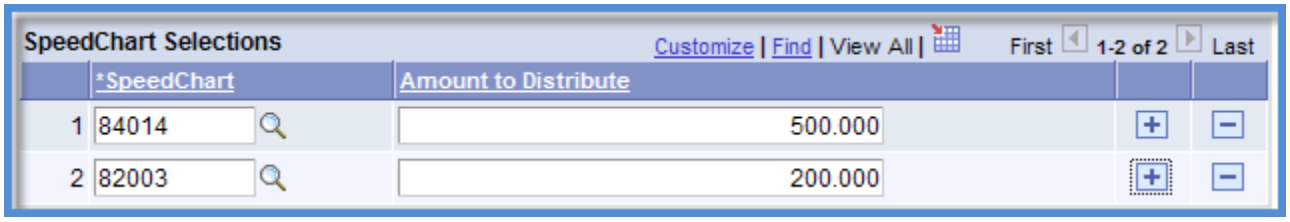
Select the Multi-SpeedCharts hyperlink.

Depending on the method you chose you will see the following screens:

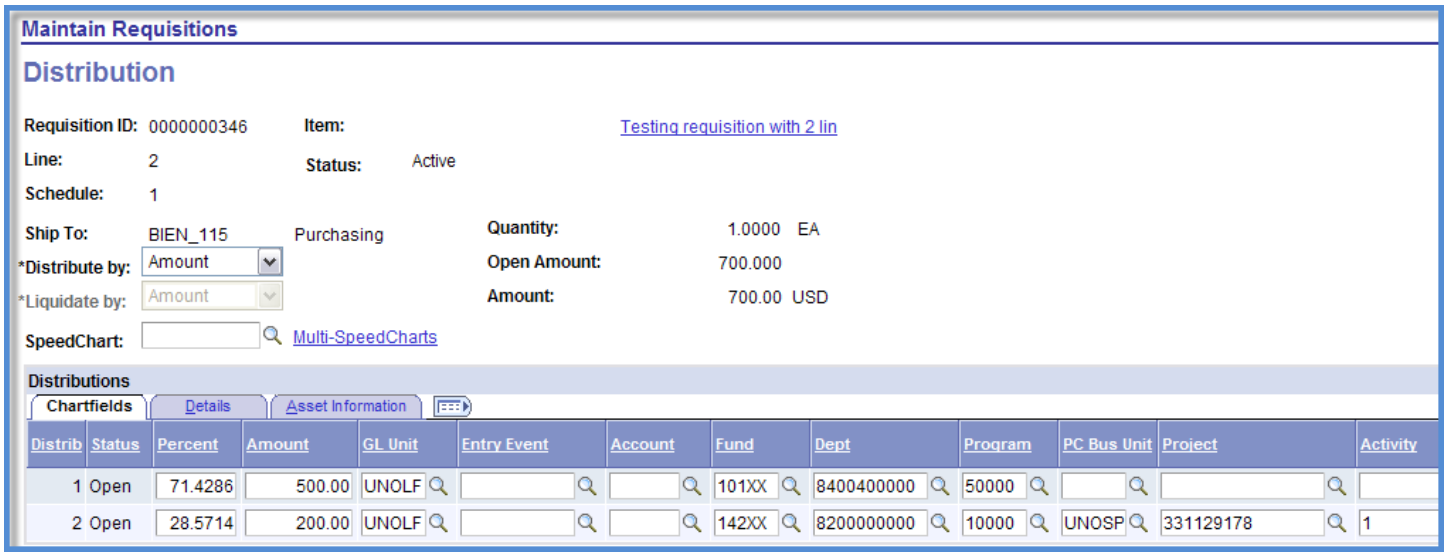




Key in your speed key and amount or quantity you wish to distribute to that speed key. Then select the at the end of the line for additional speed key lines.

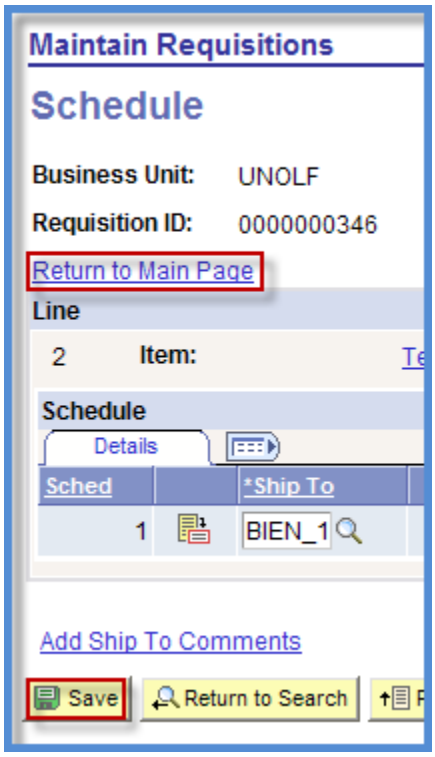


Once you have entered all speed keys and distributions, select ok. This will bring you back to the distribution page.



Change your 'distribute by' and 'liquidate by' methods back to what it was originally if you have changed it.

Select ok.



Select Save.

Select Return to Main Page hyperlink.

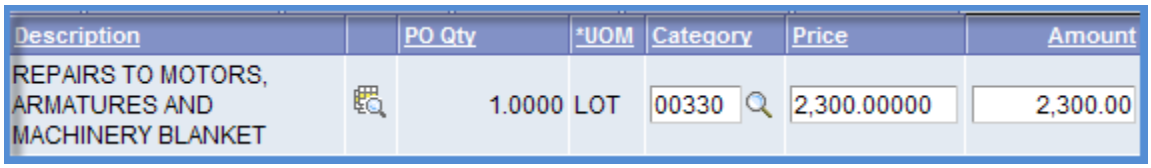
Continue these steps for all lines until you have completed the distributions for each.

BLANKET PURCHASE REQUISITION ENTRY

As mentioned earlier, all blanket purchase requests must be pre-approved by the purchase office. Once approved please follow this process for any purchase order lines that pertain to a blanket order with an estimated amount. If the blanket purchase order is for an estimated quantity of specific items, the regular requisition entry processes apply.

EXAMPLE OF BLANKET PURCHASE REQUEST WITH ESTIMATED AMOUNT

For necessary campus-critical services, such as repair and maintenance, we have purchase orders in place using an estimated amount for usage. These services may include plumbing, electrical or building repairs as approved by the Purchasing Office. These requisitions are entered with a Qty of 1, set to 'Amount only,' with an estimated amount for the term of the purchase order up to June 30 of the current fiscal year.



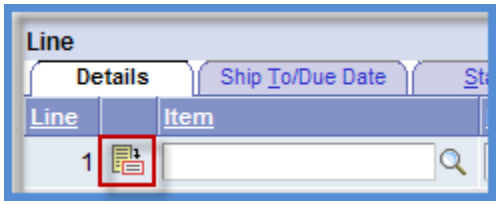
Description		PO Qty	*UOM	Category	Price	Amount
REPAIRS TO MOTORS, ARMATURES AND MACHINERY BLANKET		1.0000	LOT	00330	2,300.00000	2,300.00

ENTER A BLANKET REQUISITION WITH ESTIMATED AMOUNT

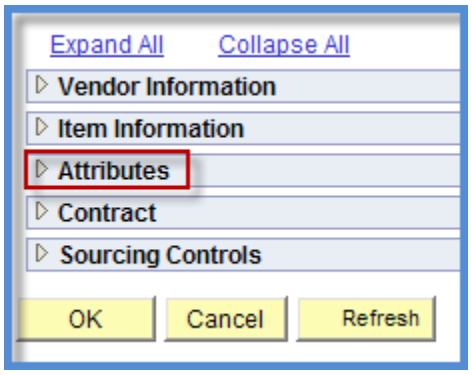
Follow the same process for regular requisition entry. Once you get to the line section of the requisitions, each line pertaining to the blanket amount request must be set as 'amount only' in the Line Attributes. To do this:

AMOUNT ONLY LINE ATTRIBUTE

Select the Line Details icon next to the line number.

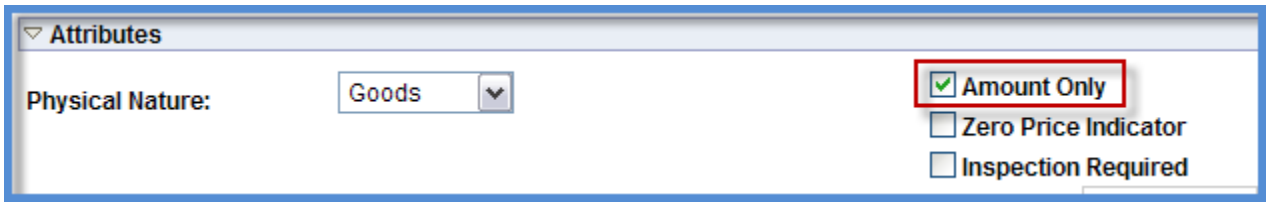


Next select the drop down menu beside the Attributes section toward the bottom of the line details page.



This will expand the attributes section.

Select the Amount only check box.



Select ok.

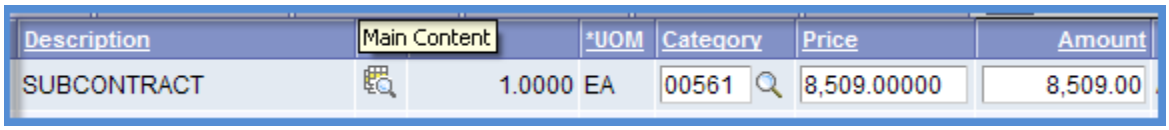
Repeat this for every line of the requisition which is for an estimated amount line.

SUBCONTRACT PURCHASE REQUISITION ENTRY

All subcontract purchase requisitions must comply with the current policies and procedures set forth by the Office of Research and Sponsored Programs. A subcontract requisitions should only have the category codes 00561 (Subcontract 1st $25k) and 00562 (Subcontract amount above $25K). All lines must have the line description of subcontract, line attribute of 'amount only', and the subcontract details in the provided blanks to complete on the comment.

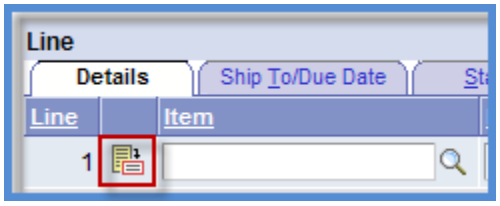
EXAMPLE OF SUBCONTRACT UNDER $25K

For all subcontracts under $25,000 there will only be one line on the requisition assigned to category code 00561.

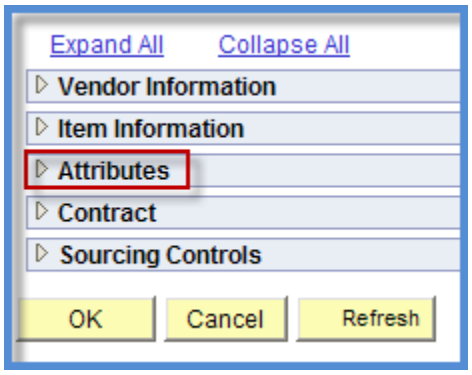


AMOUNT ONLY LINE ATTRIBUTE

Select the Line Details icon next to the line number.

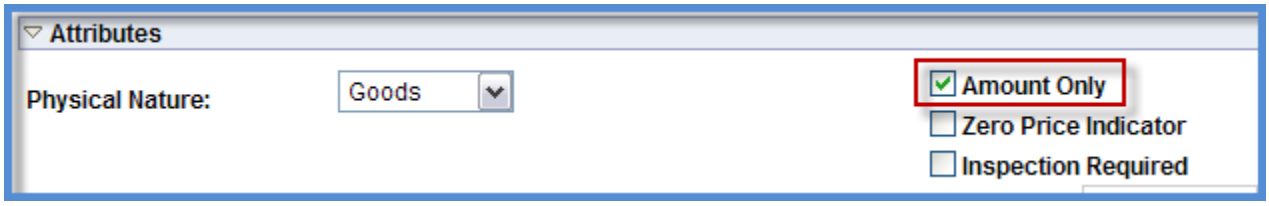


Next select the drop down menu beside the Attributes section toward the bottom of the line details page.



This will expand the attributes section.

Select the Amount only check box.



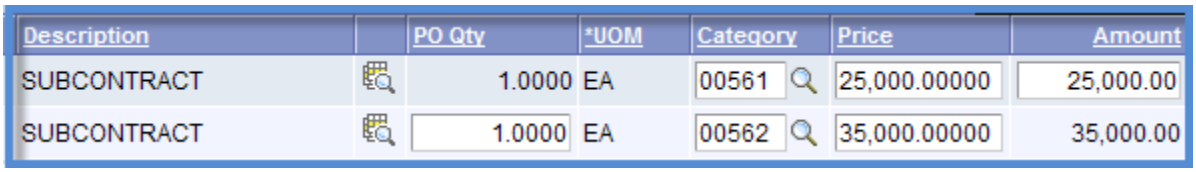
Select ok.

Repeat this for every line of the requisition.

Select the appropriate comments for subcontract and complete the blanks provided.

EXAMPLE OF SUBCONTRACT OVER $25K

For all subcontract greater than $25,000 there will be two lines on the purchase requisition. The first line will be for $25,000 (category code 00561) and the second line will be for the amount above $25,000 (category code 00562).



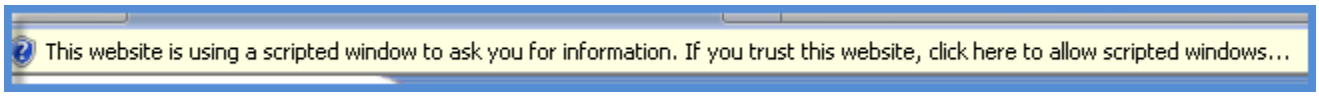
Description		PO Qty	*UOM	Category	Price	Amount
SUBCONTRACT		1.0000	EA	00561	25,000.00000	25,000.00
SUBCONTRACT		1.0000	EA	00562	35,000.00000	35,000.00

Select the appropriate comments for subcontract and complete the blanks provided.

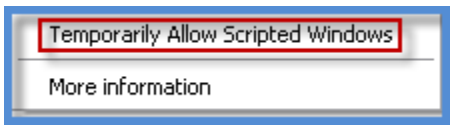
Additional Lines

To add additional lines, select the at the very right of the line section.

A dialog bar may appear toward the top of your browser requesting you to allow scripted windows.

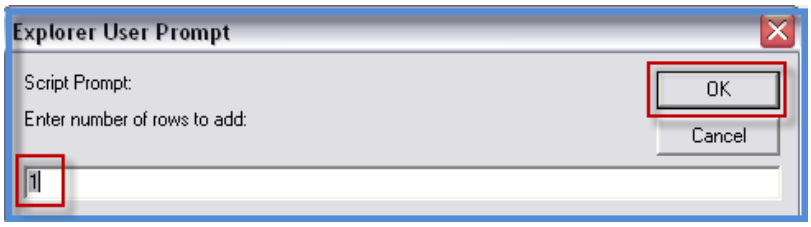


Right click on the dialog bar and select 'Temporary Allow Scripted Windows'

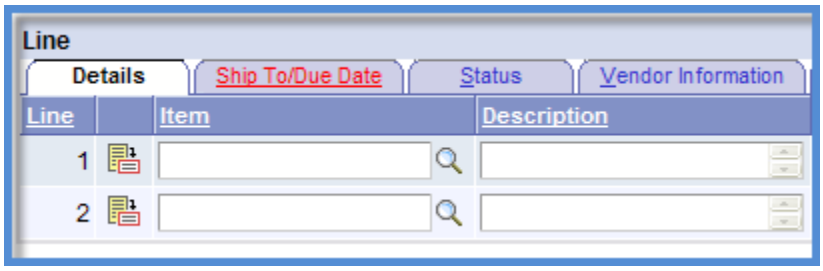


Select the at the very right of the line section, again.

a. Enter the number of additional rows you will need in the lines section according to your quotation. This example would require 1 additional line and select ok.



b. Your requisition now has 2 lines.



c. Repeat all steps for the additional lines as needed

TERM PURCHASE REQUISITION ENTRY

Term Purchase Orders are issued for items that have recurring charges based on yearly, annual, or quarterly billing cycles from the vendor. A few examples of these are: software maintenance agreements, copier rentals, lease agreements, and equipment rental. Request the vendor to quote the item(s) in accordance with the fiscal year term (July 1 through June 30). Whenever possible, the term should be pro-rated by the vendor to accommodate the fiscal year term.

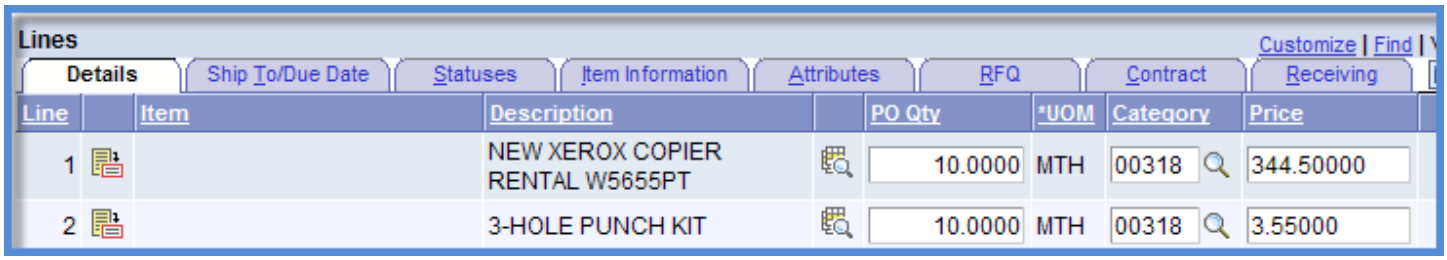
EXAMPLE OF TERM REQUISITION WITHIN FISCAL YEAR DATES (JULY 1 TO JUNE 30)

Each line of the term purchase order is entered using the regular entry process. (NOTE: For copier rental agreements, we include a line for both the monthly rental agreement rate and the estimated quantity of overage charges expected for the year based on the unit cost (e.g. Qty 10 copies at $0.0055 each)).

EXAMPLE OF COPIER RENTAL / TERM WITHIN FISCAL YEAR DATES

A separate line should be available for each line item or individual unit/serial number associated with the contract. A line should also be added for copier rental agreements where overage charges are allowed.

This example shows a copier rental agreement for copier and 3-hole punch kit for the 10 months remaining in the fiscal year. A line is needed for each component of the copier. A new requisition will be required for July 1 to start next year's agreement.

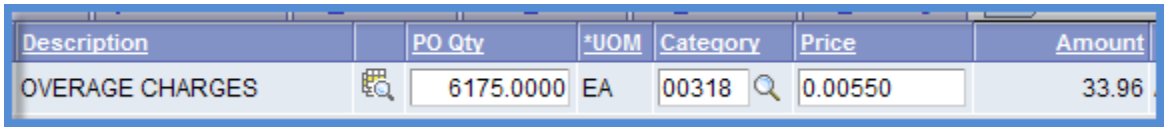

Lines

Customize | Find

Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving

Line	Item	Description	PO Qty	*UOM	Category	Price
1		NEW XEROX COPIER RENTAL W5655PT	10.0000	MTH	00318	344.50000
2		3-HOLE PUNCH KIT	10.0000	MTH	00318	3.55000

This example shows the overage line with the overage quantity estimated at 6175. This amount can be increased or decreased as needed through change order requests to the purchasing office.



Description	PO Qty	*UOM	Category	Price	Amount
OVERAGE CHARGES	6175.0000	EA	00318	0.00550	33.96

Attach the appropriate comments, completing the applicable blanks with specific information related to your agreement or contract.

VERBAL PURCHASE REQUISITON ENTRY

Verbal Purchase Orders are issued for orders that total $999.99 or less and do not require competition. Verbal Purchase Orders can only be issued for the following category codes:

Category_Item	Descr	Acct	Category_Item	Descr	Acct
00302	Advertising	630200	00330	Maintenance of Equipment	634603
00402	Agricultural Supplies	640200	00336	Maintenance Prop & Eqpt Other	634606
00395	Armored Car Services	639030	00392	Management Services	639010
00404	Automobile & Truck Supplies	640700	00340	Membership Dues to Prof Organ	635000
00376	Basic Telephone Charges	638601	00342	Miscellaneous Expense	635400
00304	Catering	630300	00358	Moving Expenses-Departments	637100
00308	Computer Services- Off Campus	631200	00360	Moving Expenses-Nonpersonnel	637100
00410	Computer Supplies	642700	00380	Network Installation	638603
00306	Conference Services	630400	00448	Non-Automove Equipment Supply	646200
00378	Data Lines & Circuits	638602	00450	Office Supplies	646700
00324	Document Destruction	634510	00406	Oper Supplies Clothing & Unifo	641700
00412	Food Supplies	643700	00446	Opr Supplies Medical & Dental	645700
00322	Garbage and Waste Disposal	634500	00382	Other Communication Services	638604
00414	Household Supplies	644700	00452	Other Supplies	647200
00440	Inventory - Beer	645212	00320	Parking	634300
00438	Inventory - Concessions	645211	00454	Personal Supplies	647700
00442	Inventory - Liquor	645213	00338	Pest Control	634607
00444	Inventory - Novelties	645214	00346	Postage, Freight and Express	635800
00418	Inventory- New Text	645201	00350	Printing, Binding & Duplicate	636200
00428	Inventory-Cards	645206	00352	Publication of Dissertations	636300
00434	Inventory-Food	645209	00354	Publication of Funded Findings	636600
00426	Inventory-Insignia	645205	00362	Rentals - Buildings	637401
00432	Inventory-Miscellaneous	645208	00366	Rentals - D.P. Equipment	637403
00436	Inventory-Office Supplies resa	645210	00364	Rentals - Equipment	637402
00430	Inventory-Specials	645207	00370	Rentals - Other	637405
00424	Inventory-Supplies	645204	00456	Repair & Maintenance Supplies	648200
00422	Inventory-Trade Book	645203	00394	Security Services	639020
00420	Inventory-Used Text	645202	00372	Software Maintenance	637406
00314	Laundry	633400	00408	Software Purchase & Licensing	642200
00318	Leases-Rent Duplicating Equip	634201	00374	Subscriptions	638200
00316	Linen Services	633410	00458	Teaching & Research Supplies	649200
00348	Mailing Services	635900	00386	Telephone Installation	638606
00326	Maint of Prop & Eqpt Auto Rep	634601	00460	Telephony	649300
00334	Maintenance DP Eqpt & Software	634605	00390	Temporary Agency Employee Svs	639000
00332	Maintenance Janitorial/Custodi	634604	00344	Training	635410
00328	Maintenance of Buildings	634602			

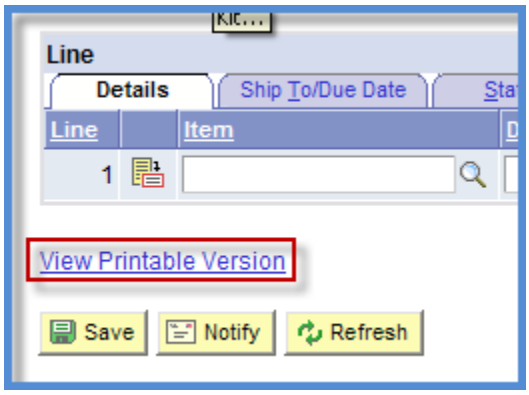
ENTER A VERBAL REQUISITION WITH ESTIMATED AMOUNT

Follow the same process for regular requisition entry. The line description used on this requisition will be what appears on the NVision reporting system. We require a general description for purchasing and payment processing but an internal reference may be added to the end of the description for ease of NVision tracking (e.g. Office Supplies (Internal Reference)).

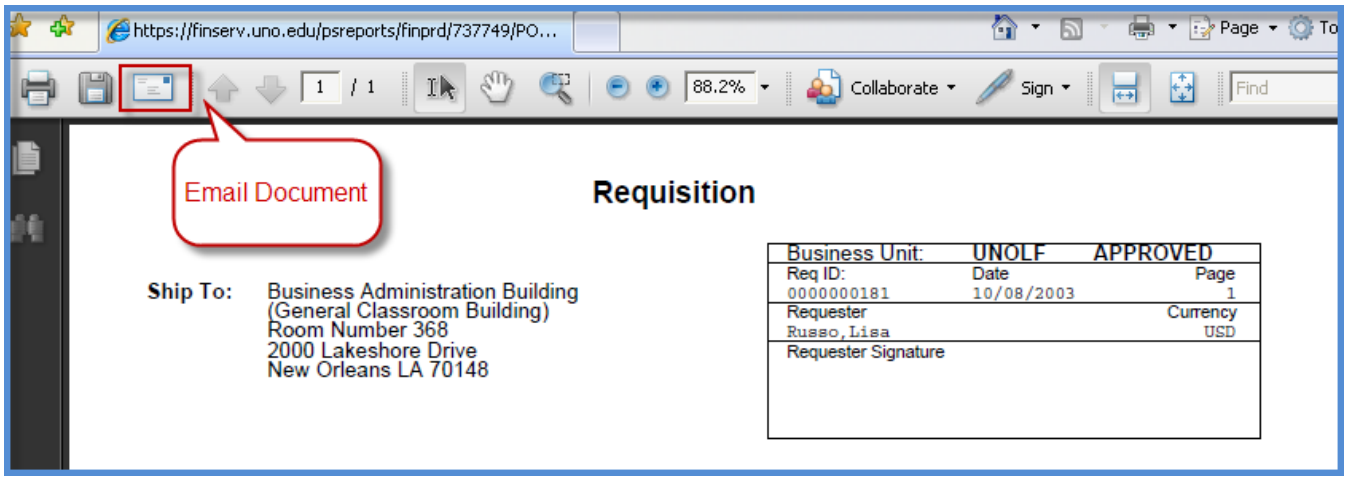
SUBMITTING THE VERBAL PURCHASE REQUISITION TO THE PURCHASING OFFICE

A completed and budget checked verbal request can be submitted via email to the purchasing mailbox (purchasing@uno.edu). Once receive the requisition will be entered as a purchase order and an reply email confirming the purchase order number will be sent.

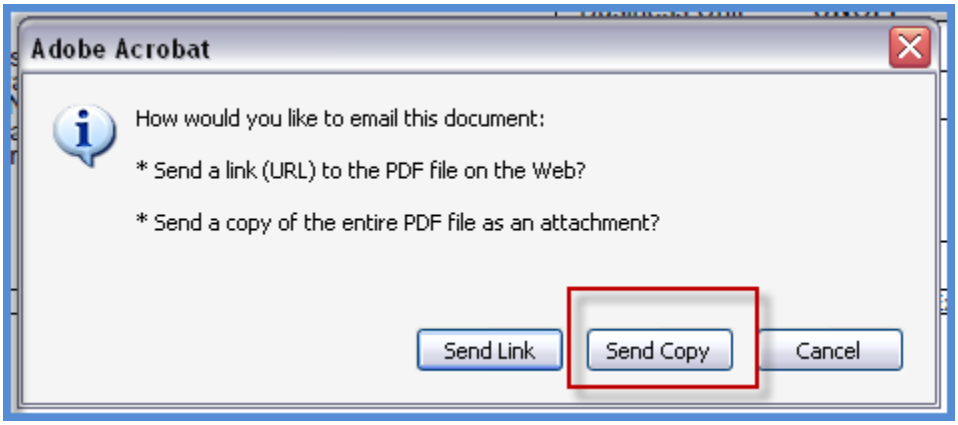
To submit the requisition, select the 'View Printable Version' hyperlink at the bottom left of the requisition entry screen.



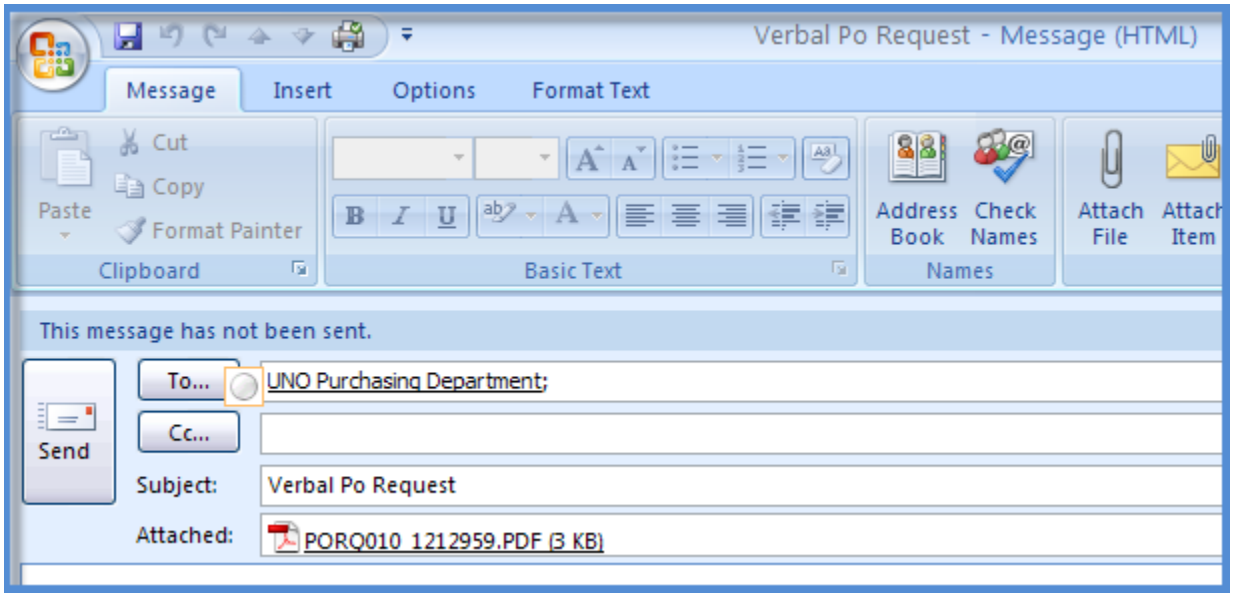
An Adobe PDF version of the requisition will open on screen. Select the email document icon (highlighted below) to send an email the request to the Purchasing Office for completion.



The next window will appear asking to select sending the link or sending a copy. Select the Send Copy option.



An Outlook email message window will open to compose the email. The email address is purchasing@uno.edu . The subject line should be Verbal PO Request. Any additional comments needed may be typed into the context of the email. Select Send when complete. The request will then be routed to the purchasing office for completion.

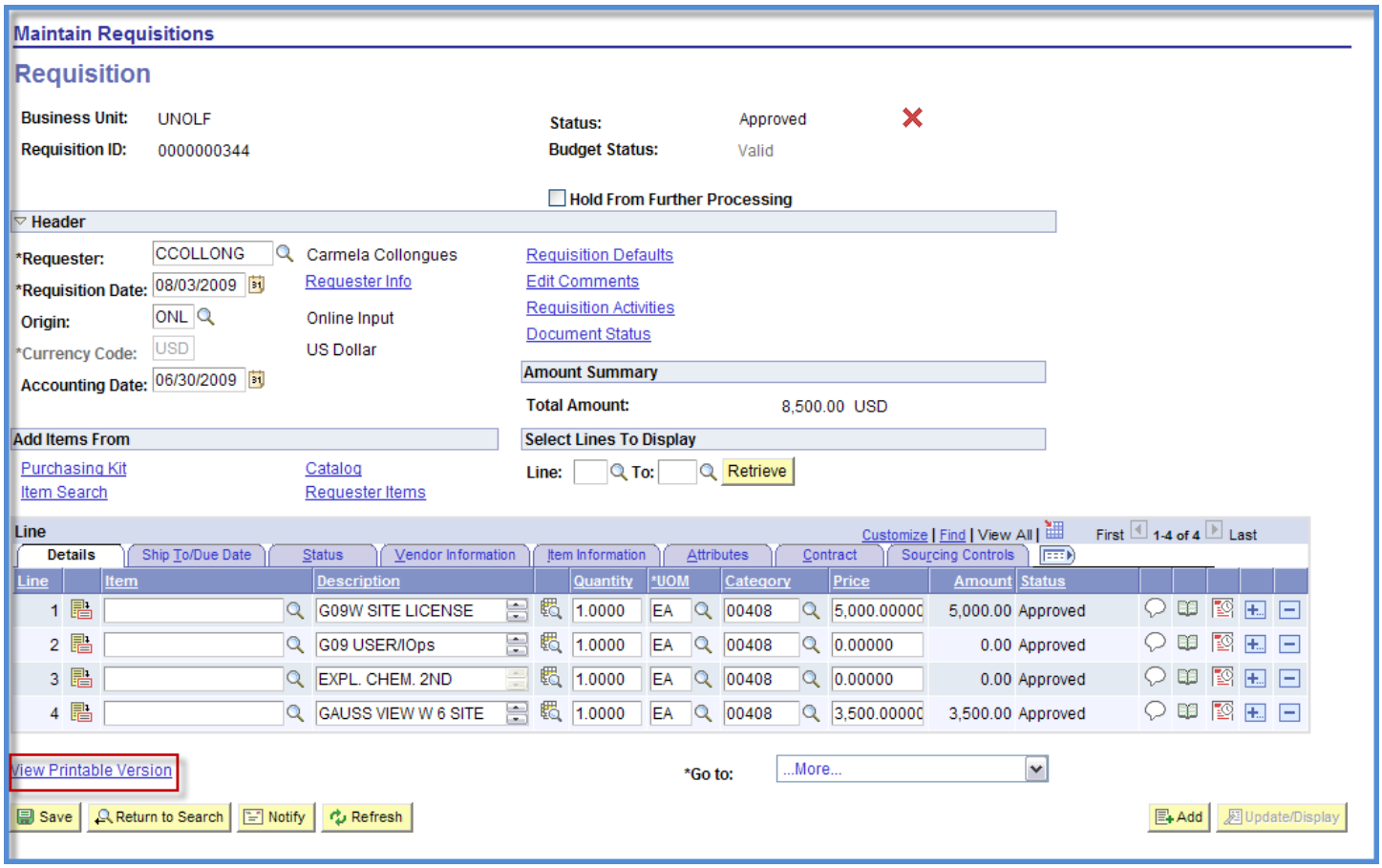


At any time you can review the document status of your requisition to check for the purchase order number and other associated documents that were processed.

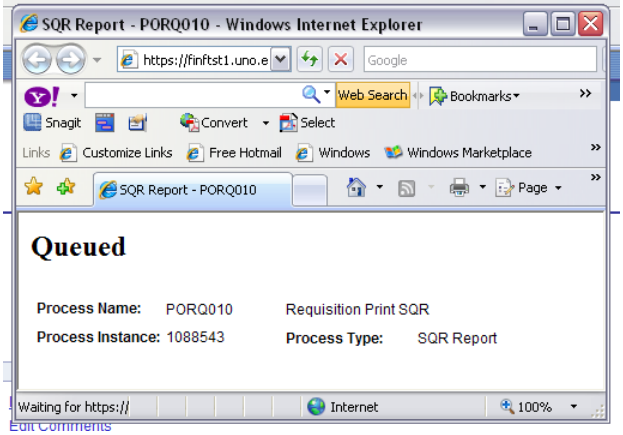
PRINTING THE PURCHASE REQUISITION

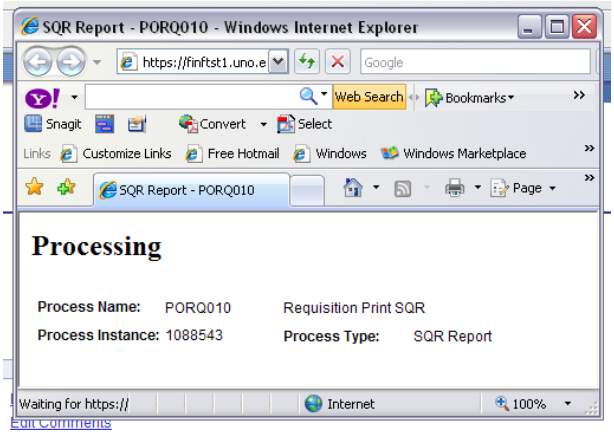
After entering the information into PeopleSoft, print a copy of the purchase requisition, complete the scientific equipment purchase authorization section (where applicable), obtain the required signatures and submit the signed copy to the Purchasing Office with the backup documentation attached.

To get a printable view of the purchase requisition, select the 'View Printable Version' hyperlink towards the bottom of the page.

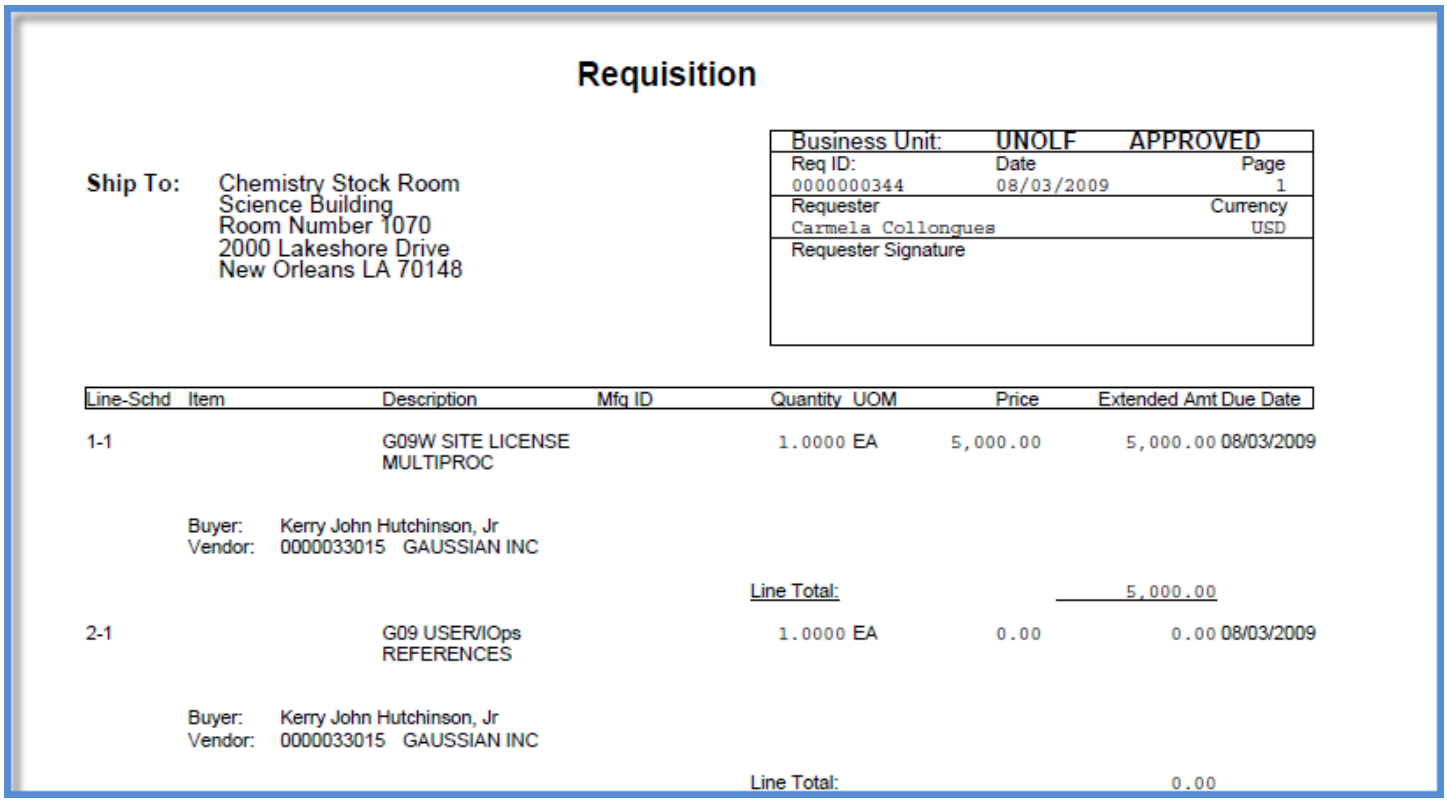


Next a window will appear for the queue and processing of the document.





When complete the PDF version of the requisition will appear on your screen for printing.



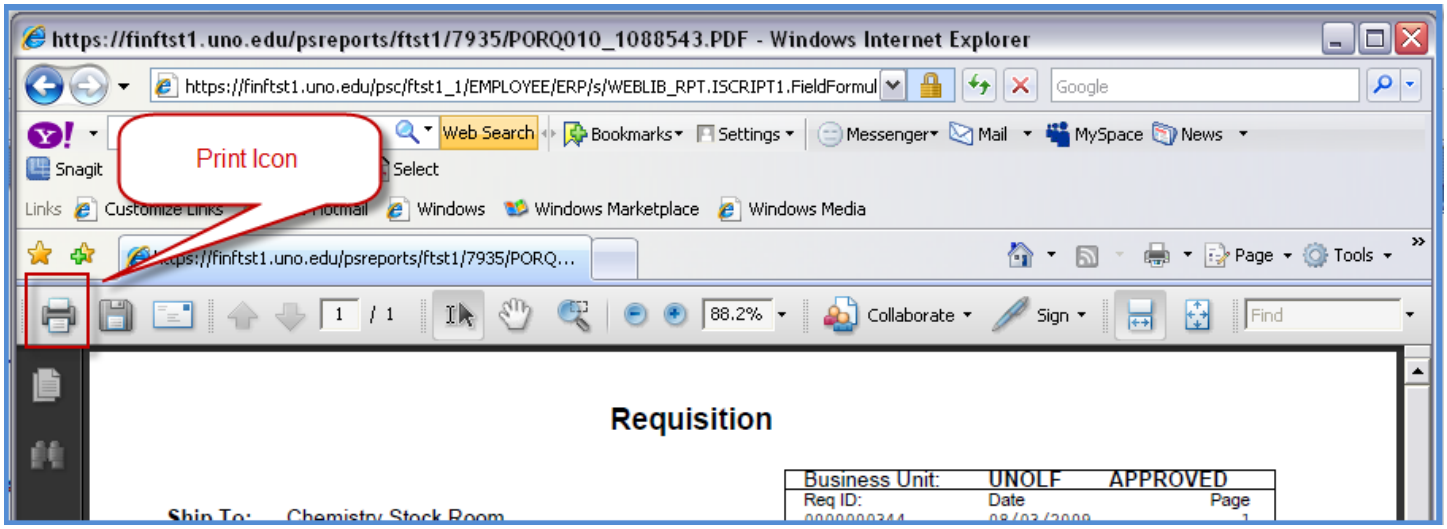
Requisition

Ship To: Chemistry Stock Room
Science Building
Room Number 1070
2000 Lakeshore Drive
New Orleans LA 70148

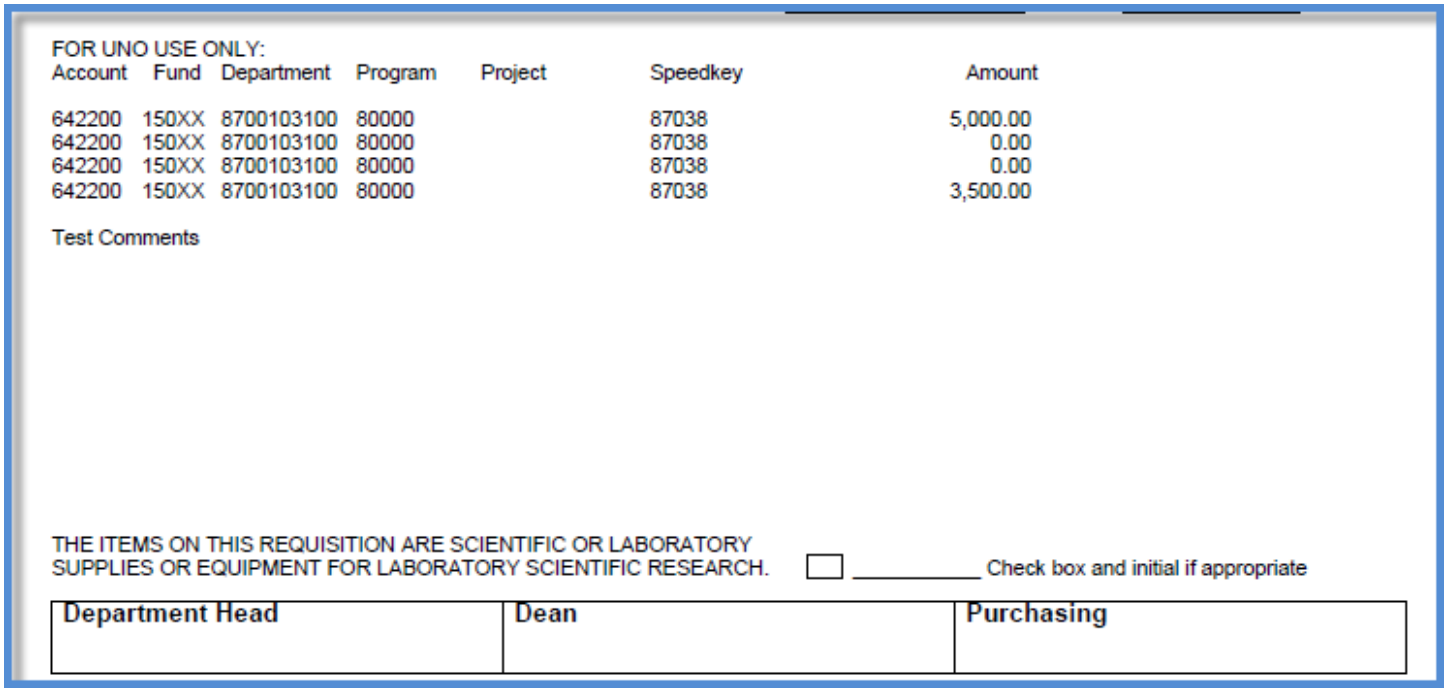
Business Unit:	UNOLF	APPROVED
Req ID:	Date	Page
0000000344	08/03/2009	1
Requester		Currency
Carmela Collongues		USD
Requester Signature		

Line-Schd	Item	Description	Mfg ID	Quantity	UOM	Price	Extended Amt	Due Date
1-1		G09W SITE LICENSE MULTIPROC		1.0000	EA	5,000.00	5,000.00	08/03/2009
	Buyer: Kerry John Hutchinson, Jr							
	Vendor: 0000033015 GAUSSIAN INC							
				Line Total:			5,000.00	
2-1		G09 USER/IOps REFERENCES		1.0000	EA	0.00	0.00	08/03/2009
	Buyer: Kerry John Hutchinson, Jr							
	Vendor: 0000033015 GAUSSIAN INC							
				Line Total:			0.00	

You can then print the requisition by selecting the print icon.



Note: The speed key and amounts for each line will print at the bottom of the requisition.



FOR UNO USE ONLY:

Account	Fund	Department	Program	Project	Speedkey	Amount
642200	150XX	8700103100	80000		87038	5,000.00
642200	150XX	8700103100	80000		87038	0.00
642200	150XX	8700103100	80000		87038	0.00
642200	150XX	8700103100	80000		87038	3,500.00

Test Comments

THE ITEMS ON THIS REQUISITION ARE SCIENTIFIC OR LABORATORY SUPPLIES OR EQUIPMENT FOR LABORATORY SCIENTIFIC RESEARCH. ☐ _____ Check box and initial if appropriate

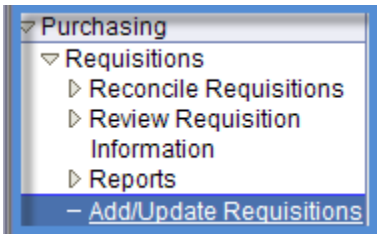
Department Head	Dean	Purchasing

CHECKING THE STATUS OF YOUR REQUISITION

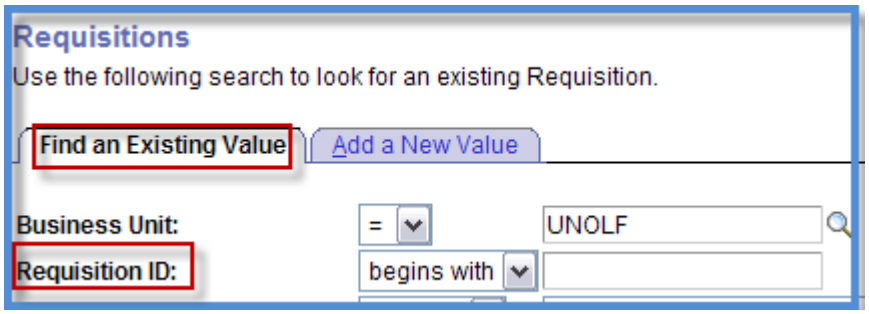
You can check the status of your requisition from the requisition entry screens.

Once the Purchasing Office receives your requisition a buyer will be assigned in the Requisition Defaults. This will let you know it has arrived in the Purchasing Office and who to contact regarding the status.

Navigation: Purchasing > Requisitions > Add/Update Requisitions

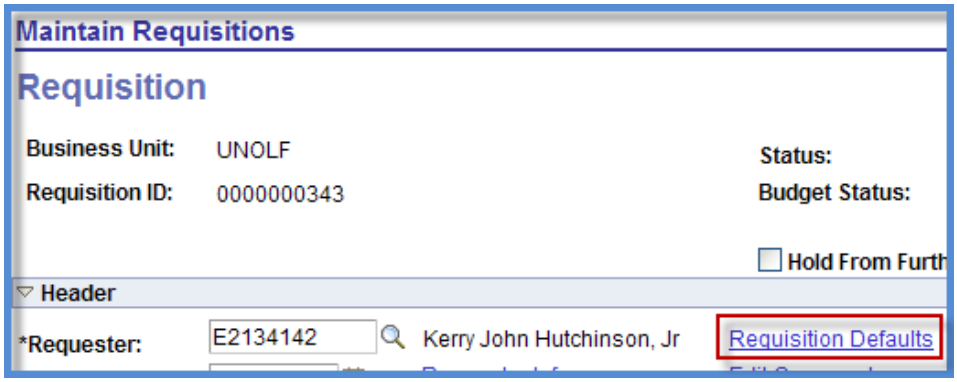


Select the "Find an Existing Value" tab.

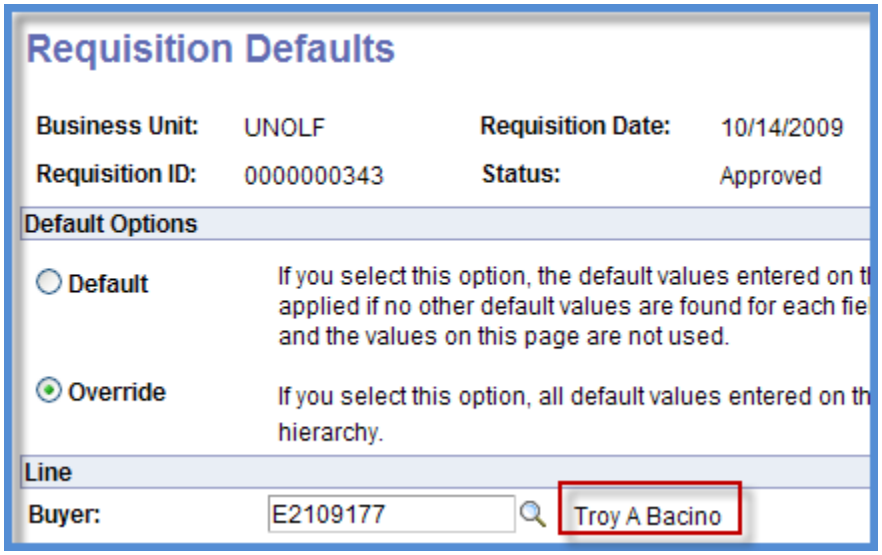


Enter your requisition ID and select search to retrieve the Maintain Requisition page.

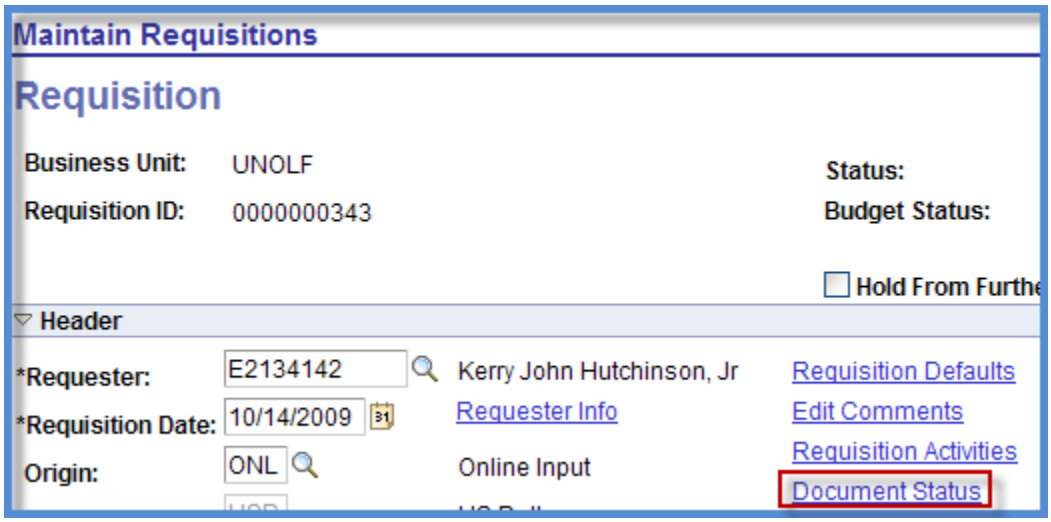
To access this information, select the Requisition Defaults hyperlink on the Maintain Requisitions page.



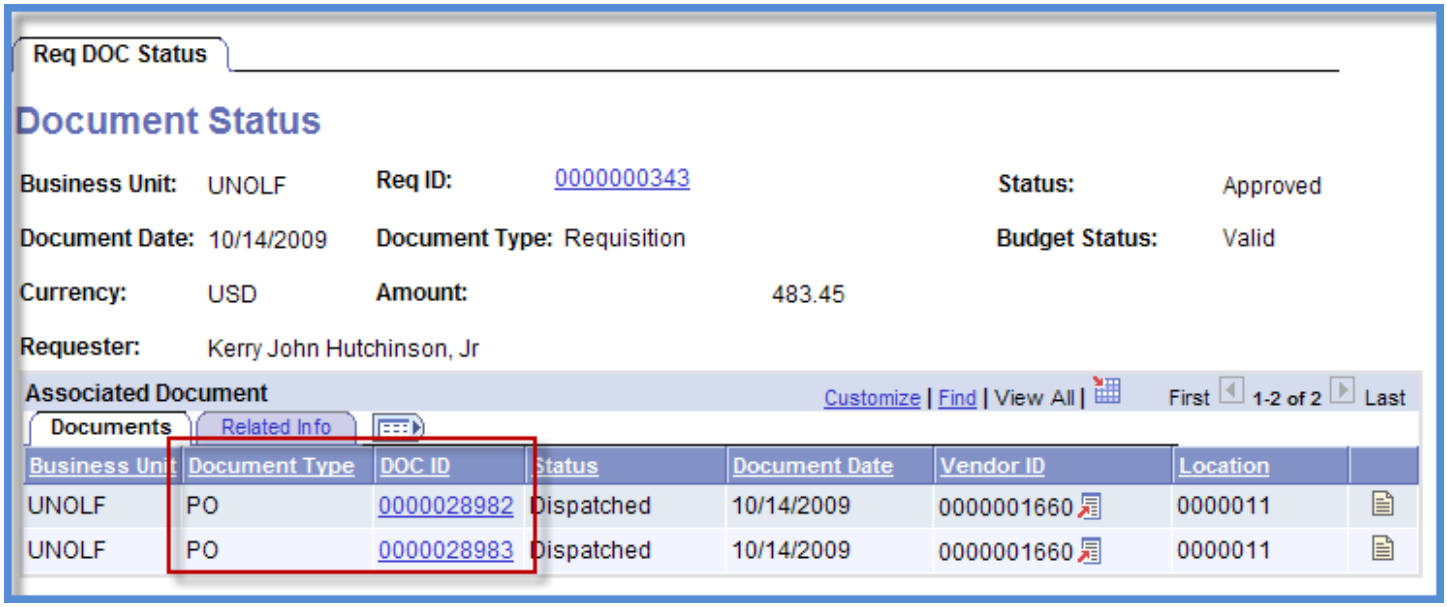
You will then be directed to the Requisition Defaults Page. The buyer will be listed as shown below.



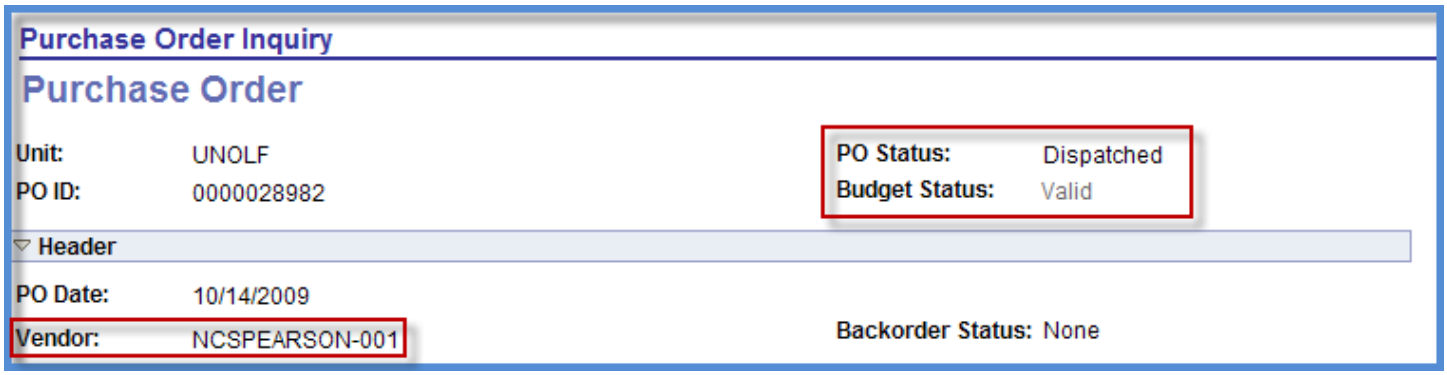
Once the requisition has been transitioned to a purchase order, you can use the Document Status hyperlink on the maintain requisitions page to check the purchase order number. Please assure your pop-up blocker is turned off as this will open a new window.



This particular purchase requisition was assigned to two different purchase orders as noted in the Documents Type & DOC ID sections.



To check on the status of the purchase order, you can select the hyperlink with either purchase order you wish to review. This will bring you to another new window to inquire on the purchase order. On this screen you will be able to verify the PO Status, Budget Status & Vendor it was assigned to. In order for a purchase order to be submitted to the vendor, the **Budget Status must be VALID** and the **PO Status must be DISPATCHED**. If either of these is different, the purchase order has not been submitted to the vendor. Please check with the buyer for that order on the status. All budget errors are submitted to the appropriate budget offices for review and correction.



PRINTING THE PURCHASE ORDER

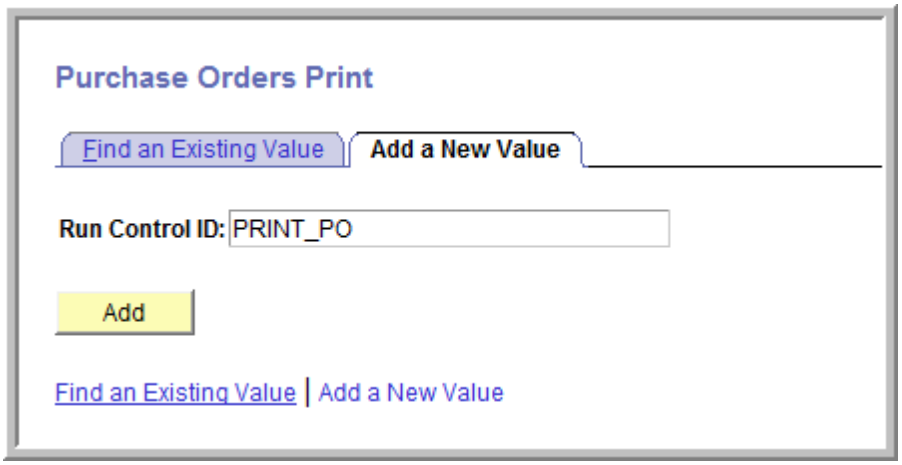
Navigation: Purchasing>Purchase Order>Review PO Information>Print POs

To print a purchase order:

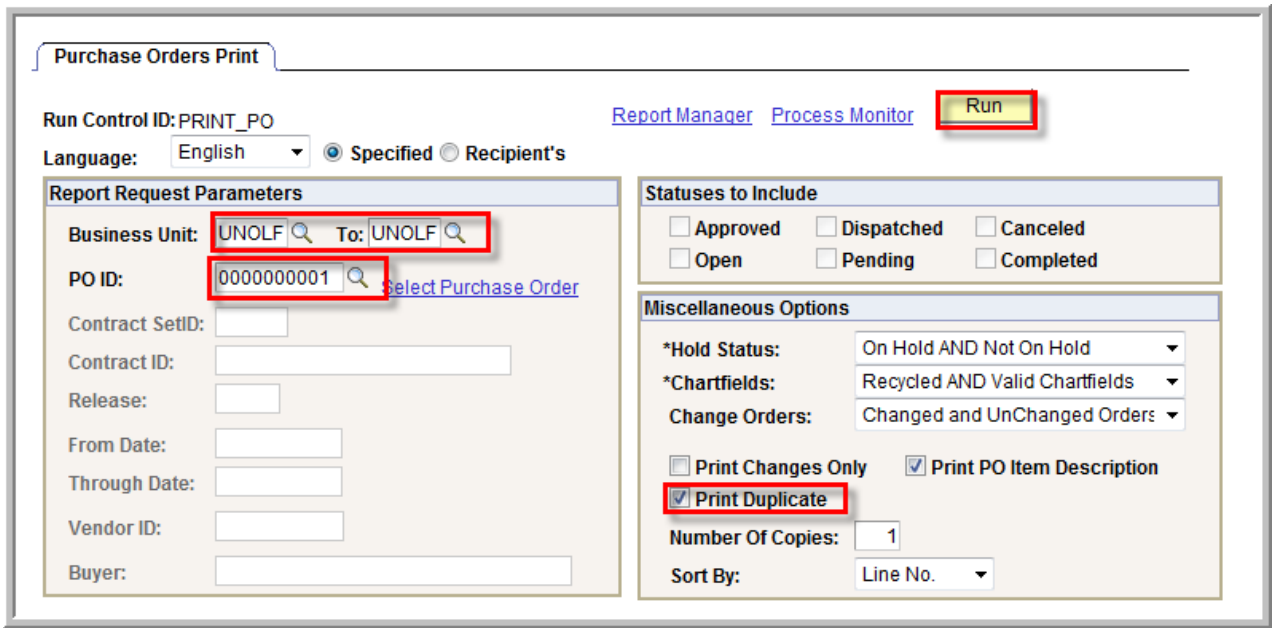
Select the Add a New Value Tab

Create a Run Control of your choice. Note: To run a report (print a purchase order), you must create a run control. A run control is a unique name that is used each time you request to run

Select the Add Button



Once a run control is added, it can be found on the find an existing value tab for future uses. Please avoid creating multiple run controls if possible.

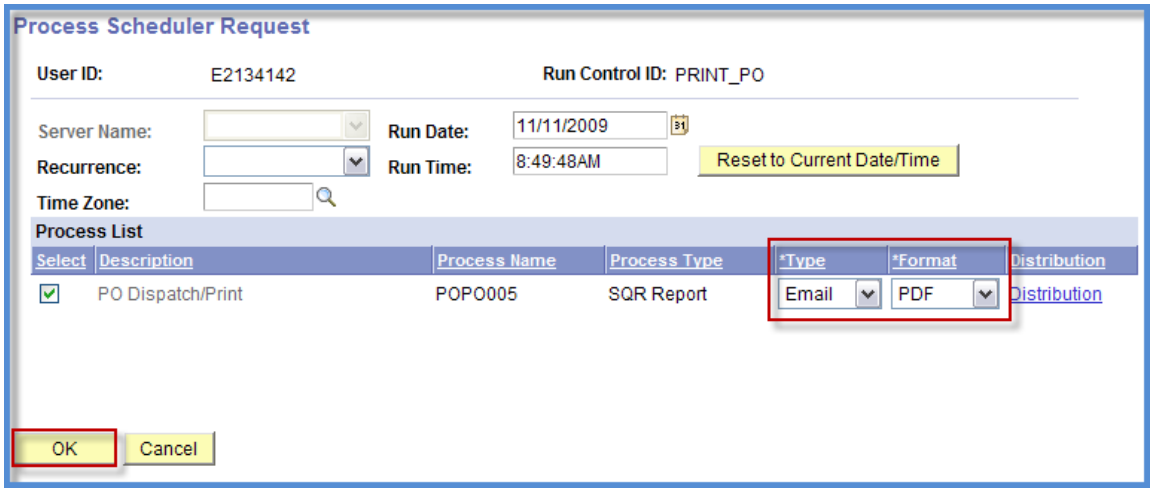


Enter Business Unit: UNOLF

Enter Purchase order number in the PO ID field.

Check print duplicate

Select the Run button



Select Email Type, PDF Format and Ok from the Process Scheduler Request Screen. An email will be sent to the requestor's inbox with the PDF of the purchase order attached.