ARKANSAS TECH UNIVERSITY Young Building East End 203 West O Street Russellville, AR 72801-2222

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Prepared by

Purchasing Department Tel: 479-968-0269 Fax: 479-968-0633

http://www.atu.edu/purchasing/

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As of August 16, 2006

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CODE OF ETHICS

The Arkansas Tech University Purchasing Department subscribes to the Code of Ethics developed by the National Association of Educational Procurement:

- 1. Give first consideration to the objectives and policies of my institution
- 2. Strive to obtain the maximum value for each dollar of expenditure
- 3. Decline personal gifts or gratuities
- 4. Grant all competitive suppliers equal consideration insofar as state or federal statute and institutional policy allows.
- 5. Conduct business with potential and current suppliers in an atmosphere of good faith, devoid of intentional misrepresentations.
- 6. Demand honesty in sales representation whether offered through the medium of a verbal or written statement, an advertisement or a sample of the product.
- 7. Receive consent of originator of proprietary ideas and designs before using them for competitive purchasing practices.
- 8. Make every reasonable effort to negotiate an equitable and mutually agreeable settlement of any controversy with a supplier; and/or be willing to submit any major controversies to other third party review, insofar as the established policies of my institution permit.
- 9. Accord a prompt and courteous reception insofar as conditions permit to all who call on legitimate business missions.
- 10. Cooperate with trade, industry and professional associations and with govern-mental and private agencies for the purposes of promoting and developing sound business methods.
- 11. Foster fair, ethical and legal trade practices.
- 12. Counsel and cooperate with NAEB members and promote a spirit of unity and a keen interest in professional growth among them.

ERGONOMIC TIPS

Rule No. 1:	If it hurts, STOP doing it. Find another way to do it that doesn't hurt.
Rule No. 2:	Your Mother was right –sit up straight and keep your feet on the floor! In other words, practice good posture.
Rule No. 3:	Don't spend hours doing one thing. Break up your routine by changing tasks and/or by taking short breaks.

TELEPHONE	DO: DON'T:	Hold the receiver with your hand or use a headset. Hold the receiver between your cheek and shoulder.
MONITOR	DO: DON'T:	Place screen directly in front of you Place screen at or slightly lower than eye level. Avoid glare by keeping work area evenly lit Sit sideways or with head twisted Sit with your head tilted back or stuck out
KEYBOARD & MOUSE	DO: DON'T:	Place keyboard at or slightly below elbow height Place mouse near and on the same level as the keyboard Have arms hanging straight down from shoulders Have forearms at a 90° angle to arms Keep wrists straight Rest wrists on keyboard Work with hands bent back at the wrist Reach for the mouse
CHAIR	DO: DON'T:	Sit all the way back in the chair Sit with lower back fitted into lumbar support Have thighs parallel to the floor Have knees slightly higher than hip joints Keep feet flat on floor or on a footrest Slouch or sit hunched over Twist around and reach behind you Sit on your feet

ELECTRONIC REQUISITIONS

GENERAL INFORMATION:

Always check One Tech for messages regarding the Banner system before entering requisitions.

A requisition is only a request for a purchase. An official Purchas Order will be the authorized document used to place an order with a vendor. A requisition only reserves funds. Funds will not be encumbered until a purchase order is issued.

For internal requisitions (such as Bookstore, Physical Plant, Motor Pool, etc) see appropriate section of this manual.

APPROVALS:

Requisitions from **grants** or **special funds** – *regardless of the amount* - require the approval of the Budget Office or the Office of the Vice President for Administration and Finance. These requisitions will be automatically forwarded to the appropriate area for approval BEFORE they are forwarded to Purchasing.

Requisitions exceeding amounts set by the appropriate vice president will be forwarded by Purchasing for approval by the appropriate vice president. <u>The Purchasing Department cannot process requisitions that have not been approved.</u>

CHANGES/CORRECTIONS TO REQUISITIONS:

The Purchasing Department will not be able to modify a requisition once it has been through the approval process (such as account number, increase/decrease quantity, add an item, etc). It will be necessary for the requesting department to cancel the requisition and issue another.

Also, any requisition that is "disapproved" will be canceled by the Purchasing. The requesting department will be notified of the cancellation.

PURCHASE ORDERS:

As verification that an order has been placed, a DEPARTMENTAL COPY of the purchase order will be **e-mailed** to the requesting department. If you do not receive a copy of the purchase order within a reasonable time (three working days for regular orders and three weeks for bids), please contact the Purchasing Department.

TRAVEL:

After any necessary approvals, requisitions for **travel** (object codes 704000), <u>will be electronically</u> <u>forwarded to the Budget Office for processing</u>. Call 356-2034 for assistance or if you have questions relating to travel. See the appropriate section of this manual for additional instructions.

Self Service Requisition Manual

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Accessing Requisition Form:

SUNGARD [®] SCT • HIGHER EDUCATION	FIEDDIGITALCAMPUS
Personal Information Finance	
Search Go	ACCESSIBILITY SITE MAP HELP EXIT
Main Menu	
Personal Information Update addresses, contact information or marital status; review name or social secu Finance Create or review financial documents, budget information, approvals	urity number change information; Change your PIN; Customize your directory profile.
RELEASE: 7.0	Powered by SunGard SCT
1. Click on Finance	

Search @	RETURN TO MENU SITE MAP HELP EXI
Finance	
Budget Queries	
Encumbrance Query	
Purchase Order	
Approve Documents	
View Document	
Budget Transfer	
Multiple Line Budget Transfer	
[Budget Queries Encumbrance Query Requisition Purchase Or Bud	rder Approve Documents View Document Budget Transfer Multiple Line Iget Transfer]
RELEASE: 7.0	Powered by SunGard SCT

2. Click on Requisition

Requisition Form:

Begin by creating a requisition or retrieving an existing template. Enter Vendor ID and select Vendor Validate to default related informate Enter or modify vendor, requesting, commodify, and accounting information. Use Code Lookup to query a list of available values. Select Document Text link to attach text to the requisition. Select Item number link to add Item Text for a commodity. Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing. Use Templete None W Patriave Prenerotion Vendor Validate Vendor Validate Vendor Validate Vendor Validate Vendor Validate Vendor Contact Requestor Name Phone Ext AX Area Phone FAX Number FAX Ext Chone W Discount Code None W Document Text Tem Commodity Code Commodity Description 1/M Quantity Validate None W Commodity Validate None W Contract Reguestor Amount Additional Amount Net Amount 1 None W Income M 2 None W Income M	Requisition							
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Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing. Ise Templete None Frensection Date 12 W JW 0005 W Perdor Date	Select Docume	nt Text link to a	ttach text to the rec	quisition. S	elect Item nu	mber link to add	d Item Text for a c	ommodity.
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Note - The recommended ways of navigating through this form are using the "Tab" key or the mouse. Using the "Enter" key will result in errors in the form.

Note - Self Serve times out after one hour of inactivity. All information will be lost.

Requisition Form – Dates / Vendor ID:

Transaction Date 12 v JUN Delivery Date 12 v JUN Vendor ID Address Type	2005 2005 2005 Vendor Validate Address Sequence	
Vendor Contact Requestor Name Requestor E-mail		Vendor E-mail
Phone Area FAX Area Chart of Accounts Currency Code None V	Phone FAX Number Organization Discount Code	Ext FAX Ext
Comments	Attention To	Document Text

- 1. Enter Delivery Date by using pull down menu: Delivery Date 2005 * 2005 * Delivery Date must be equal to or greater than the transaction date.*
- 2. Enter Vendor ID in the field shown: | vendor ID
 - To search for Vendor ID go to Lookup Section
 - If a vendor is not in the system, a Request for New Vendor must be completed.

Vendor Validate

- 3. Click on Vendor Validate button: Vendor Validate
 - a. The following information should automatically fill in
 - i. Address Type
 - ii. Address Sequence *Note*
 - iii. Chart of Accounts (Required Field)
 - iv. Organization (Required Field)
 - v. Ship Code (Required Field)
 - vi. Attention To

Note - Vendor Address will default as sequence 1. To view vendor's alternative addresses, change the sequence number and click the Vendor Validate button.

Vendor Validate

- b. The following information will automatically fill in if data is in the Banner Finance System
 - i. Vendor Contact
 - ii. Vendor E-mail
 - iii. Requestor Name
 - iv. Requestor E-Mail
 - v. Phone Information
 - vi. Fax Information
- 4. Type any comments in the Comments field | comments
 Note Information entered in the Comments field will not print on the Requisition or
 Purchase order. If Purchasing needs the information, put it in a field that prints, such as

Document Text.

5. To enter Document Text see next section

Requisition Form – Document Text:

Vendor ID Address Type Vendor Contact	Vendor Validate Address Sequence	Vendor E-mail
Requestor Name Requestor E-mail		
Phone Area	Phone FAX Number	Ext FAX Ext
Chart of Accounts	Organization Discount Code	None 💌
Comments	Attention To	Document Text

1. Click Document Text

		~	
Enter Document	Text, No Print:	<u> </u>	
////	mm	///	

- 2. Type in top or bottom box
 - a. Text in top box will print on Requisition. If you want Purchasing to see the text, enter it here.
 - b. Text in bottom box will not print on Requisition
- 3. Click on Save button: Save

Requisition Form – Commodity:

Item Commo	dity Code Commodity Description U/M Quantity Unit Price Discount Amount Additional Amount
1	
3	
4	
5	
Commodi	primodity Amounts
Item Exten	ded Amount Discount Amount Additional Amount Net Amount
3	
5	
Totals:	
1.	Type In Commodity Description:
2.	For additional item text, click on the number at the beginning of each line.
	• Type Text in the top box so that it will print on the Requisition
	Click on Save button: Save
3.	Select U/M (Unit of Measure) from the pull down menu: Required*
4.	Type in Quantity: Required*
5.	 Type in Unit Price *Required* Must have decimal point if cents are included Do not type dollar signs (\$) or commas (,)
6.	Discount Amount -Do not use this field.
	Additional Amount
7.	: Do not use this field.
8.	 Repeat steps 1-6 for Items 2 thru 5 If you have more than five (5) items, you will have to do multiple requisitions. Select
	"Another Requisition, Same Vendor."
9.	Click on Commodity Validate button:
10	The Calculated Commodity Amounts will fill in automatically
Calc Item	ilated Commodity Amounts Extended Amount Discount Amount Additional Amount Net Amount

Item	Extended Amount	Discount	Amount	Additional Amou	nt Net Amount
1					
2					
3					
4					
5					
Totals:					

Requisition Form – Accounting – Percents - Index:

Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
2									
3									
4									
5									

When the Percents radio button is selected, the total Percent amount of the commodities listed above must equal the total Percent amount listed in the Accounting Column.

- 1. Click the Percent radio button
- 2. Type "T" in the Chart of Accounts Code in the field \square *Required*
- Type Index Code in the field
 (To search for code go to Lookup Section)
- 4. Click Validate button Validate
 - An error Message will appear » Total of Accounting percents does not equal 100
 - Scroll back down to Accounting Section
 - This will populate the Fund, Orgn and Program
 - Index Code will no longer be displayed
- Type Account in the field Required*
 Remember, this is the old object code, with 70 in front (For questions about Account Numbers, call the Controller's Office at 968-0394)
- 6. Type in Percent Amount in Accounting Field *Required*
 - Total of Accounting Column must equal 100
- 7. Repeat Steps 2-6 until all accounting has been entered
- 8. Click Validate button again Validate
- 9. The message at the top of the form should read:
- Double check the Requisition once more for errors. Remember that once complete, Requisitions CANNOT be changed. Click Document Complete
 Complete

Requisition Form – Accounting – Dollars - Index:

۲	Dollars	0	Percents						
Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1									
2									
3									
4									
5									
Save	as Tem	plate							
🔲 Sł	nared								
Vali	date	Complete							

When the Dollars radio button is selected, the total dollar amount of the commodities listed above must equal the total dollar amount listed in the Accounting Column.

- 1. Click the Dollar radio button
- 2. Type "T" in the Chart of Accounts Code in the field Required*
- Type Index Code in the field (To search for code go to Lookup Section)
- 4. Click Validate button Validate
 - An error Message will appear Dotal of Accounting percents does not equal 100
 - Scroll back down to Accounting Section
 - This will populate the Fund, Orgn and Program
 - Index Code will no longer be displayed

5. Type Account in the field Required*
 Remember, this is the old object code, with 70 in front (For questions about Account Numbers, call the Controller's Office at 968-0394)

- 6. Type in Dollar Amount in Accounting Field *Required*
 - Total of Accounting Column must equal Net Amount
- 7. Repeat Steps 2-6 until all accounting has been entered
- 8. Click Validate button again Validate
- 9. The message at the top of the form should read:

Document Validated with no errors

- Double check the Requisition once more for errors. Remember that once complete, Requisitions CANNOT be changed. Click Document Complete
 Complete
- 11. Do not click the Save and Process button.

Code Lookup Instructions

Code Look-Up is located at the bottom of the form. It allows you to search for a many things, including indexes, ship to addresses, and vendors. There are two ways to search, by code or by title

This is case sensitive. Always capitalize the first letter of names.

I			
l	Code Lookup		
l	Chart of Accounts Code	A 🕶	
l	Туре	account 💌	
l	Code Criteria		
l	Title Criteria		
I	Maximum rows to return	10 💌	
I	Execute Query		

To search by Code, used when you only know part of the code:

- 1. Select "T" Chart of Accounts Code from pull down menu: Chart of Accounts Code
 - 2. Select type from pull down menu: Type Vendor
 - 3. Type in part of the Code followed by a %. If no part is known then type %.
 - Note: (%) is called a Wildcard
- 4. Select the Maximum Rows to Return from Pull-down Menu Maximum rows to return 10
 - Note The amount of rows that will be shown can be adjusted by selecting a different number from the pull down menu
- 5. Click Execute Query button: Execute Query
- 6. Results will appear at the top of the form. Make note of Code and scroll down to enter.

To search by Title, used when you only know part of the name:

- 1. Select "T" Chart of Accounts Code from pull down menu: Chart of Accounts Code ST
- 2. Select type from pull down menu: Type
- 3. Type in part of the Title followed by a %. If no part is known then type %.

Code Criteria

•

- Note: (%) is called a Wildcard
- 4. Select the Maximum Rows to Return from Pull-down Menu Maximum rows to return 10
 - Note The amount of rows that will be shown can be adjusted by selecting a different number from the pull down menu
- 5. Click Execute Query button: Execute Query

Results will appear at the top of the form. Make note of Code and scroll down to enter.

Requisition – Save Template

Do not use a Shared Template. These templates cannot be deleted!

Templates speed up the requisition process to companies that you frequently requisition, such as Office Depot or Dell.

Save as Template

• Create name of Template and type in "Save as Template"

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Accessing Requisition Form:

SUNGARD [®] SCT + Higher education	UNIFIEDDIGITALCAMPUS
Personal Information Finance	
Search Go	ACCESSIBILITY SITE MAP HELP EXI
Main Menu	
Personal Information Update addresses, contact information or marital status; review name or Finance Create or review financial documents, budget information, approvals.	social security number change information; Change your PIN; Customize your directory profile.
RELEASE: 7.0	Powered by SunGard SCT
3. Click on Finance	
SUNGARD	UNIFIEDDIGITALCAMPUS

Search Go		RETURN TO MENU	SITE MAP	HELP	EXI
Finance					
Budget Queries					
Encumbrance Query					
Requisition					
Purchase Order					
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4. Click on Requisition

Requisition Form:

Begin by creating a requisition or retrieving an existing template. Enter Vendor ID and select Vendor Validate to default related informate Enter or modify vendor, requesting, commodify, and accounting information. Use Code Lookup to query a list of available values. Select Document Text link to attach text to the requisition. Select Item number link to add Item Text for a commodity. Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing. Use Templete None W Patriave Prenerotion Vendor Validate Vendor Validate Vendor Validate Vendor Validate Vendor Validate Vendor Contact Requestor Name Phone Ext AX Area Phone FAX Number FAX Ext Chone W Discount Code None W Document Text Tem Commodity Code Commodity Description 1/M Quantity Validate None W Commodity Validate None W Contract Reguestor Amount Additional Amount Net Amount 1 None W Income M 2 None W Income M	Requisition							
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Note - The recommended ways of navigating through this form are using the "Tab" key or the mouse. Using the "Enter" key will result in errors in the form.

Note - Self Serve times out after one hour of inactivity. All information will be lost.

Requisition Form – Dates / Vendor ID:

Transaction Date 12 JUN Delivery Date 12 JUN	4 ¥ 2005 ¥	
Vendor ID	Vendor Validate	
Address Type	Address Sequence	
Vendor Contact		Vendor E-mail
Requestor Name		
Requestor E-mail		
Phone Area	Phone	Ext
FAX Area	FAX Number	FAX Ext
Chart of Accounts	Organization	
Currency Code None 🗸	Discount Code	None 💌
Ship Code	Attention To	
Comments		Document Text

- 6. Enter Delivery Date by using pull down menu: Delivery Date 2005 * Delivery Date must be equal to or greater than the transaction date.*
- 7. Enter Vendor ID in the field shown: | vendor ID
 - To search for Vendor ID go to Lookup Section
 - If a vendor is not in the system, a Request for New Vendor must be completed.

Vendor Validate

- 8. Click on Vendor Validate button: Vendor Validate
 - a. The following information should automatically fill in
 - i. Address Type
 - ii. Address Sequence *Note*
 - iii. Chart of Accounts (Required Field)
 - iv. Organization (Required Field)
 - v. Ship Code (Required Field)
 - vi. Attention To

Note - Vendor Address will default as sequence 1. To view vendor's alternative addresses, change the sequence number and click the Vendor Validate button.

Vendor Validate

- b. The following information will automatically fill in if data is in the Banner Finance System
 - i. Vendor Contact
 - ii. Vendor E-mail
 - iii. Requestor Name
 - iv. Requestor E-Mail
 - v. Phone Information
 - vi. Fax Information
- 9. Type any comments in the Comments field | ^{comments}

Note - Information entered in the Comments field will not print on the Requisition or Purchase order. If Purchasing needs the information, put it in a field that prints, such as Document Text.

10. To enter Document Text see next section

Requisition Form – Document Text:

Vendor ID	Vendor Validate	
Address Type	Address Sequence	
Vendor Contact		Vendor E-mail
Requestor Name		
Requestor E-mail		
Phone Area	Phone	Ext
FAX Area	FAX Number	FAX Ext
Chart of Accounts	Organization	
Currency Code None 🗸	Discount Code	None 🗸
Ship Code	Attention To	
Comments		Document Text

4. Click Document Text

nter Document Text, Prin	t:	
Enter Document Text, No I	Print:	
Enter Document Text, No I	vrint:	
Enter Document Text, No I	vrint:	

- 5. Type in top or bottom box
 - a. Text in top box will print on Requisition. If you want Purchasing to see the text, enter it here.
 - b. Text in bottom box will not print on Requisition
- 6. Click on Save button: Save

Requisition Form – Commodity:

Item 1	Commodity Cod	e Commodity Description	U/M Qu None 🗸	uantity Un	iit Price	Discount Amoun	nt Additional Amount
2			None 🛩				
4			None ¥				
5	Commodity Validat	3	None 💌				
Calcu	lated Commodi	ty Amounts					
Item 1	Extended Amo	unt Discount Amount Additio	onal Amount Ne	et Amount			
2 3 4							
5 Totals	5:						
						Commodi	ity Description
	11. Ty	pe In Comm	nodity]	Descr	iption	:	*Required*
	12. Fo	r additional	item te	ext, cli	ick on	the nur	mber at the beginning of each line.
		• Type T	ext in t	the to	p box	so that	it will print on the Requisition
		Click of	n Save	e butto	on: 🖙	e	
	12 50	laat II/N/ (II	nit of N	Maagu	ra) fr	om tha	u/M *Paquirod*
	13. 30		int of f	vicasi	11C) II		puil down menu
			Quar	ntity			
	14. Ty	pe in Quanti	ity:		*Req	uired*	
			Un	nit Price			
	15. Ty	pe in Unit P	rice:		*R	equired]*
		• Must ha	ave dec	cimal	point	if cents	s are included
		• Do not	type d	ollar s	- signs ((\$) or co	ommas (,)
			• •		Discount	Amount	
	16. Tv	pe in Discou	ınt Am	nount:	Discount	*(Optional*
	5	• If vende	or does	s not l	have d	liscount	ts set up in the Banner Finance System this column
		will not	t appea	ar.			
		• Must ha	ave de	cimal	point	if cents	s are included
		• Do not	type d	ollar s	signs ((\$) or co	ommas ()
			uppe a	onur			
	17 Tv	ne in Additi	onal A	moun	Addi nt•	tional Amoui	*Ontional*
	17.19	• For eva	mnle	use fo	or chir	ning	- Optional
		 Nust h 	anpie,	cimal	noint	if cents	are included
		Nust II Do not	tupo di	ollor	point iona ((\mathbf{f}) or α	
		• Do not	type u	onars	signs ((\$) or co	ommas (,)
	18. Re	peat steps 1-	-6 for I	[tems	2 thru	5	
		• If you h	nave m	ore th	nan fiv	ve (5) ite	ems, you will have to do multiple requisitions. Selec
		"An other D		tion	0	Vandan	222 Another Requisition, Same Vendor
		Another R	equisi	tion, s	Same	vendor	
	19. Cli	ick on Comm	nodity	Valid	late bi	utton: 🗆	Commodity Validate
	20. Th	e Calculated	l Comr	nodit	y Amo	ounts w	vill fill in automatically
	Calculated C Item Exten	ommodity Amounts ded Amount Discount Amour	nt Additional An	mount Net Am	nount		
	1 2						
	3 4 5						
	Totals:						

Requisition Form – Accounting – Percents - Index:

3eq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
F.									
5									

When the Percents radio button is selected, the total Percent amount of the commodities listed above must equal the total Percent amount listed in the Accounting Column.

- 11. Click the Percent radio button
- 12. Type "T" in the Chart of Accounts Code in the field \square *Required*
- 13. Type Index Code in the field (To search for code go to Lookup Section)
- 14. Click Validate button Validate
 - An error Message will appear D Total of Accounting percents does not equal 100
 - Scroll back down to Accounting Section
 - This will populate the Fund, Orgn and Program
 - Index Code will no longer be displayed
- 15. Type Account in the field Required* Remember, this is the old object code, with 70 in front (For questions about Account Numbers, call the Controller's Office at 968-0394)
- 16. Type in Percent Amount in Accounting Field *Required*
 - Total of Accounting Column must equal 100
- 17. Repeat Steps 2-6 until all accounting has been entered
- 18. Click Validate button again validate
- 19. The message at the top of the form should read:

Document Validated with no errors

20. Double check the Requisition once more for errors. Remember that once complete, Requisitions CANNOT be changed. Click Document Complete

Requisition Form – Accounting – Dollars - Index:

۲	Dollars	0	Percents						
Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting
1									
2									
3									
4									
5									
Save	as Tem	plate							
🔲 Sł	nared								
Vali	date	Complete							

When the Dollars radio button is selected, the total dollar amount of the commodities listed above must equal the total dollar amount listed in the Accounting Column.

- 12. Click the Dollar radio button
- 13. Type "T" in the Chart of Accounts Code in the field Required*
- 14. Type Index Code in the field (To search for code go to Lookup Section)
- 15. Click Validate button Validate
 - An error Message will appear Dotal of Accounting percents does not equal 100
 - Scroll back down to Accounting Section
 - This will populate the Fund, Orgn and Program
 - Index Code will no longer be displayed

16. Type Account in the field Required* Remember, this is the old object code, with 70 in front (For questions about Account Numbers, call the Controller's Office at 968-0394)

- 17. Type in Dollar Amount in Accounting Field *Required*
 - Total of Accounting Column must equal Net Amount
- 18. Repeat Steps 2-6 until all accounting has been entered
- 19. Click Validate button again Validate
- 20. The message at the top of the form should read:

Document Validated with no errors

21. Double check the Requisition once more for errors. Remember that once complete, Requisitions CANNOT be changed. Click Document Complete

Code Lookup Instructions

Code Look-Up is located at the bottom of the form. It allows you to search for a many things, including indexes, ship to addresses, and vendors. There are two ways to search, by code or by title

This is case sensitive. Always capitalize the first letter of names.

L			
l	Code Lookup		
l	Chart of Accounts Code	A 🕶	
l	Туре	account 💌	
l	Code Criteria		
l	Title Criteria		
	Maximum rows to return	10 💌	
	Execute Query		

To search by Code, used when you only know part of the code:

- 7. Select "T" Chart of Accounts Code from pull down menu: Chart of Accounts Code
 - 8. Select type from pull down menu: Type Vendor
 - 9. Type in part of the Code followed by a %. If no part is known then type %.
 - Note: (%) is called a Wildcard
 - 10. Select the Maximum Rows to Return from Pull-down Menu
 - Note The amount of rows that will be shown can be adjusted by selecting a different number from the pull down menu
 - 11. Click Execute Query button: Execute Query
 - 12. Results will appear at the top of the form. Make note of Code and scroll down to enter.

To search by Title, used when you only know part of the name:

- 6. Select "T" Chart of Accounts Code from pull down menu: Chart of Accounts Code ST
- 7. Select type from pull down menu: Type
- 8. Type in part of the Title followed by a %. If no part is known then type %.

Code Criteria

•

- Note: (%) is called a Wildcard
- 9. Select the Maximum Rows to Return from Pull-down Menu Maximum rows to return 10
 - Note The amount of rows that will be shown can be adjusted by selecting a different number from the pull down menu
- 10. Click Execute Query button: Execute Query

Results will appear at the top of the form. Make note of Code and scroll down to enter.

Requisition – Save Template

Templates speed up the requisition process to companies that you frequently requisition, such as Office Depot or Dell.

Save as Template

• Create name of Template and type in "Save as Template"

Templates cannot be deleted!