

PantherSoft Financials 9.0

Purchasing



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- Trouble logging in?
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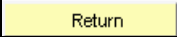








All Flow Charts, Business Processes, and UPKs (User Productivity Kit) can be found for all modules at:

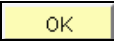

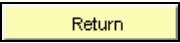


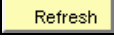






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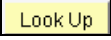

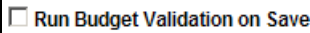


Contact psfin@fiu.edu for further assistance. For additional information, please continue to visit this website and panthersoft.fiu.edu/financials

Commodity and Department Travel Cards

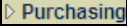



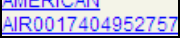



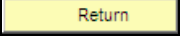


Cardholder Commodity/Dept. Travel Card

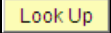


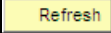


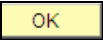
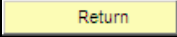
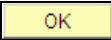
1.	Click the Purchasing link. 
2.	Click the Procurement Cards link. 
3.	Click the Reconcile link. 
4.	Click the Reconcile Statement link. 
5.	Click on any of the Merchant links, if you wish you see more information about that specific merchant. Click the COMFORT INN link. 
6.	Click the Return button. 
7.	Click the Line Details graphic to see more detailed information about a specific transaction. 
8.	Click the Show all columns graphic if you wish to expand all the tabs and see any additional information about a specific transaction. 
9.	Click the Comments graphic to add comments specific to the line item. 
10.	Enter the desired information into the Comments: field. Enter a valid value e.g. " Enter comments about the transaction. ".
11.	Click the OK button. 
12.	Click the Distribution graphic to change your distribution chartfields. 
13.	Click the Look up Dept (Alt+5) graphic to find a specific department. 
14.	Enter the desired information into the Department: field. Enter a valid value e.g. " 144000102 ".
15.	Click the Look Up button. 
16.	Click the 144000102 link. 

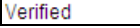


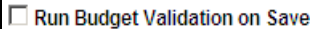


17.	<p>Click the OK button.</p> 
18.	<p>Notice how the Redistrib field changes to "Yes" after you make changes.</p> <p>Click the Yes link to see more information.</p> 
19.	<p>This page will show you information about who changed the distribution information and when it was changed.</p> <p>Click the Return button.</p> 
20.	<p>You will also be able to split each transaction between several departments or projects.</p> <p>Click the scrollbar to scroll to end of the line and add one more line to your distribution.</p>
21.	<p>Click the Add Button 1 (A+7) graphic to add an additional line to your distribution.</p> 
22.	<p>Specify the number of rows that you want to add.</p> <p>Then click the OK button.</p> 
23.	<p>For this example, we are splitting the line evenly by percent.</p> <p>Enter the desired information into the field. Enter a valid value e.g. "50.00".</p>
24.	<p>Click the Refresh button to see the change you just made.</p> 
25.	<p>Enter the desired information into the field. Enter a valid value e.g. "50.00".</p>
26.	<p>Click the Refresh button.</p> 
27.	<p>Click the Dept button to change the chartfields for the additional distribution line.</p> 
28.	<p>Enter the desired information into the Department field. Enter a valid value e.g. "144000101".</p>
29.	<p>Click the Look Up button.</p> 
30.	<p>Click the 144000101 link.</p> 
31.	<p>Click the OK button.</p> 
32.	<p>The distribution information can also be edited for every line in your Bank Statement.</p> <p>Click the Select All link to select all yours transactions at once.</p> 

33.	Click the Distribution Template link. 
34.	Click the Look up Account (Alt+5) graphic. 
35.	Enter the desired information into the Account: field. Enter a valid value e.g. " 711013 ".
36.	Click the Look Up button. 
37.	Click the 711013 link. 
38.	Enter the desired information into the Department: field. Enter a valid value e.g. " 144000102 ".
39.	Click the Look Up button. 
40.	Click the 144000102 link. 
41.	Please remember to enter the rest of your chartfield information (i.e. Fund Code, Class, and Program Code). This information can be found through this navigation in Peoplesoft: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Chartfield Values > Speedtypes
42.	Click the Run Budget Validation on Save option. This option only checks to see if the distribution listed for each line is a valid chartfield combination. It does not affect your budget in any way. 
43.	Click the Save button. 
44.	Click the Home link. 
45.	Congratulations. You have successfully edited the distribution on your transactions. End of Procedure.

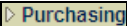






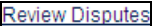

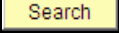

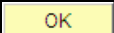



Reconciler - Reconciling Commodity/Dept. Travel Card


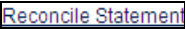


1.	Click the Purchasing link. 
2.	Click the Procurement Cards link. 
3.	Click the Reconcile link. 
4.	Click the Reconcile Statement link. 
5.	Click an entry in the Merchant column to view specific information about a merchant. 
6.	Click the Return button. 
7.	Click the Line Details button if you wish to see further details about your transaction. 
8.	Click the Show all columns button to expand the line and see further detail about your transaction. 
9.	Click the scrollbar.
10.	Click the Return button. 
11.	Click the Distribution button to view/edit the Distribution chartfield. 
12.	Click the Dept button. For Contracts & Grants project IDs, the following fields must be populated: Department (Organizational Department ID) Class Fund Code PC Bus Unit: Enter 'FSR01' Project Activity: Enter 'SPN' Run the following query to identify the correct combination of the above fields for a particular project ID: FIU_GL_DEPT_PROJ_LOOKUP 
13.	Enter the desired information into the Department field. Enter a valid value e.g. " 144000103 ".

14.	Click the Look Up button. 
15.	Click an entry in the Description column. PANTHERSOFT ADMINISTRATIVE
16.	Click the Horizontal scrollbar button.
17.	Click the Add multiple new rows (Alt+7) button. 
18.	Click the OK button. 
19.	Enter the desired information into the Percent field. Enter a valid value e.g. " 50.00 ".
20.	Enter the desired information into the Percent field. Enter a valid value e.g. " 50.00 ".
21.	Click the Refresh button. 
22.	Double-click the Dept object. 
23.	Enter the desired information into the Department field. Enter a valid value e.g. " 144000101 ".
24.	Click the Look Up button. 
25.	Click an entry in the Manager Name column. Maria N Perez
26.	Click the OK button. 
27.	Click an entry in the Redistrib column to view the redistribution history, and the users who have modified it. Yes
28.	Click the Return button. 
29.	Click the Select All link to select every transaction listed under the current Bank Statement. Select All
30.	Click the Distribution Template link to view the distribution line field. This will apply this Distribution Template to all of the selected transactions. Distribution Template
31.	Click the OK button. 

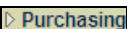
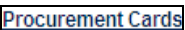

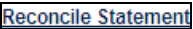

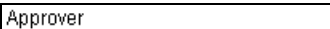
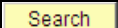

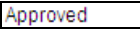

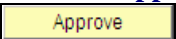

32.	<p>Click the Verified list item.</p> <p>When you have confirmed that a transaction is accurate and legitimate, the status must be changed to Verified.</p> 
33.	<p>Click the Select All link to select every transaction listed under the current Bank Statement.</p> 
34.	<p>Click the Verify button to Verify all of the selected transactions.</p> 
35.	<p>Click the Run Budget Validation on Save option.</p> <p>When you save the Procurement Card Transaction, this option will run chartfield edit on every transaction line to make sure that their individual chartfield combinations are correct.</p> 
36.	<p>Click the Save button.</p> 
37.	<p>Click the Home link.</p> 
38.	<p>Congratulations. You have successfully completed Reconciling a Procurement Card Transaction.</p> <p>End of Procedure.</p>

Reconciler - Resolving Disputed Transactions

1.	Click the Purchasing link. 
2.	Click the Procurement Cards link. 
3.	Click the Reconcile link. 
4.	Click the Reconcile Statement link. 
5.	Click the Billing tab. 
6.	Click in the Dispute Amount field to enter the disputed difference in the Billing Amount charge. 
7.	Enter the desired information into the Dispute Amount field. Enter a valid value e.g. " 3.42 ".
8.	Click the Save button. 
9.	Click the Review Disputes link to search for disputed transactions. 
10.	Click the Reconciler list item. 
11.	Enter the desired information into the Employee ID field. Enter a valid value e.g. " pcarduser2 ".
12.	Click the Search button. 
13.	Click the Comments button. 
14.	Enter the desired information into the Comments field. Enter a valid value e.g. " Disputing this charge because I was charged the incorrect amount. ".
15.	Click the OK button. 
16.	Click the Billing tab to review information regarding the disputed transactions. 
17.	Click the Cardholder tab. 
18.	Click the Collected option once the dispute has been settled. 






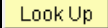







19.	Click the Save button. 
20.	Click the Reconcile Statement link. 
21.	Click the Billing tab. 
22.	Click the Home link. Notice: There is a check in the Credit Collected column for the Disputed Amount that was settled. 
23.	Congratulations. You have successfully Resolved a Disputed Transaction. End of Procedure.


Budget Authority - Reconciling Commodity/Dept. Travel Card

1.	Click the Purchasing link. 
2.	Click the Procurement Cards link. 
3.	Click the Reconcile link. 
4.	Click the Reconcile Statement link. 
5.	Click the Role Name list. 
6.	Click the Approver list item. 
7.	Enter the desired information into the Employee ID field. Enter a valid value e.g. " pcarduser2 ".
8.	Click the Search button. 
9.	Click the Status list. 
10.	Click the Approved list item to Approve the selected transaction. 
11.	Click the Select All link to select every transaction listed under the current Bank Statement. 
12.	Click the Approve button to Approve all of the selected transactions. 
13.	Click the Save button. 
14.	Click on the Home link.
15.	Congratulations. You have successfully Reconciled a Procurement Card Transaction as a Budget Authority. End of Procedure.

Managing Requisitions

Creating a Requisition

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Add/Update Requisitions link. 
4.	Click the Add button. 
5.	Click the Look up Requester graphic. 
6.	Enter the desired information into the Requester: field. Enter a valid value e.g. " 1290091 ". Enter the employee ID of the individual requesting the Requisition.
7.	Click the Look Up button. 
8.	Click the 1290091 link. 
9.	Click the Requisition Defaults link. 
10.	Click the Override option. Once Override is selected, you will be able to enter a value for the SpeedChart field under the Distribution section. 
11.	Click the Search graphic. To select the appropriate vendor. 
12.	Click the 0000000011 link. 
13.	Click the Look up Ship To graphic. 
14.	Click the Central Receiving - UP link. 

<p>15.</p>	<p>Enter the desired information into the Due Date: field. Enter a valid value e.g. "04/30/2009".</p> <p>Enter default shipment due date to populate the requisition schedule. If you don't specify a due date here, when you source the requisition to a purchase order, the system derives the due date by incrementing the purchase order date by the number of lead time days defined for the item.</p> <p>If the item is not defined in the system, the due date defaults to the purchase order date.</p>
<p>16.</p>	<p>Click the Look up SpeedChart graphic, to quickly populate information in the distribution fields.</p> <p>Distribution information entered in Requisition Defaults will affect all lines in a requisition. Splitting the distribution between departments or projects will be shown in the Entering Requisition Schedule Information topic.</p> 
<p>17.</p>	<p>Enter the desired information into the SpeedChart Key: field. Enter a valid value e.g. "144000103".</p> <p>To find the desired department or project ID.</p>
<p>18.</p>	<p>Click the Look Up button.</p> <input data-bbox="370 951 483 993" type="text"/>
<p>19.</p>	<p>Click the 144000103 link.</p> <p>To select desired department.</p> <input data-bbox="370 1119 483 1161" type="text"/>
<p>20.</p>	<p>For Contracts & Grants project IDs, the following fields must be populated:</p> <p>Department (Organizational Department ID) Class Fund Code PC Bus Unit: Enter 'FSR01' Project Activity: Enter 'SPN'</p> <p>Run the following query to identify the correct combination of the above fields for a particular project ID: FIU_GL_DEPT_PROJ_LOOKUP</p>
<p>21.</p>	<p>Release the mouse button.</p>
<p>22.</p>	<p>The Location listed here is the default location for the Requestor.</p> <p>If you do not wish for the items to be shipped to this location, please use the lookup button and change the location.</p> <p>Click the Look up Location graphic.</p> <input data-bbox="370 1791 402 1833" type="text"/>

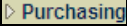



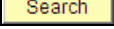
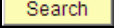




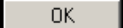
23.	Click in the Description: field to search for your location. <input type="text"/>
24.	Click the W10C 0105 link. <input type="text"/>
25.	Click the OK button. <input type="text"/>
26.	Click the Add Comments link to add Header Comments. Header Comments are used to view and enter comments for a selected requisition. If the link reads "Edit Comments", this indicates that there are existing comments. <input type="text"/>
27.	Enter the desired information into the field. Enter a valid value e.g. " Test Comment ".
28.	Use the Comments Box to specify shipping locations that may not have been found in the appropriate fields. A list of Authorized Users for a Blanket Purchase Order can be entered here as well. You can also use this page to attach vendor quotes. Please use the Send to Vendor, Shown at Receipt, or Shown at Voucher checkboxes, to indicate who will be able to view the comments you specified.
29.	Click the Attach button. <input type="text"/>
30.	Click the Open button. After you have selected the file you wish to attach to this requisition. <input type="text"/>
31.	Click the Upload button. <input type="text"/>
32.	Click the OK button. <input type="text"/>
33.	Click the Customize link to edit the Line Details view.
34.	Click the Item (frozen) list item. <input type="text"/>
35.	Click the Hidden option. PantherSoft has no need for the Item field under the Line Details section. This will help reduce clutter in the Requisition form. <input type="checkbox"/>
36.	Click the Vertical button of the scrollbar.
37.	Click the OK button. <input type="text"/>

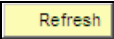
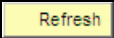

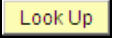
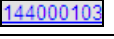
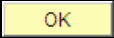
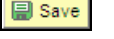



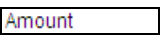
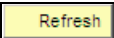
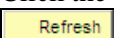

38.	<p>Enter the desired information into the field. Enter a valid value e.g. "Gold Paint".</p> <p>The description field will explain exactly what the item is.</p>
39.	<p>A full description of the item is required by Property Control. Be as specific as possible in your description. (i.e. Dell laptop, Microscope, HP Printer, etc.)</p> <p>Item or Catalog numbers can be entered in the Item Information tab, which will be explained in a later frame.</p>
40.	<p>Enter the desired information into the field. Enter a valid value e.g. "25.00".</p> <p>The quantity explains the amount of the given item you wish to order.</p>
41.	<p>Click the Look up UOM graphic.</p> <p>To define the Unit of Measurement that the item will be associated with.</p> <input type="checkbox"/>
42.	<p>Click the CAN link.</p> <p>This will indicate that we are buying the paint in cans.</p> <input type="checkbox"/>
43.	<p>Click the Look up Category (Alt+5) graphic.</p> <input type="checkbox"/>
44.	<p>Enter the desired information into the Description: field to find a category. You can use '%' character as a wild card.</p> <p>Enter a valid value e.g. "%office%".</p>
45.	<p>Click the Look Up button.</p> <input type="text"/>
46.	<p>Click the 61500 link.</p> <input type="checkbox"/>
47.	<p>Enter the desired information into the field. Enter a valid value e.g. "10.00".</p>
48.	<p>Click the item Information link.</p> <p>To add further information about the item.</p> <input type="text"/>
49.	<p>Enter the desired information into the field. Enter a valid value e.g. "1122334455".</p> <p>Enter the Vendor Item ID from the vendor's catalog/ordering information.</p>
50.	<p>Enter the desired information into the field. Enter a valid value e.g. "ABC2233".</p> <p>This is the actual catalog that the Vendor Item ID is found in.</p>
51.	<p>Click the Save button.</p> <p>To save the line information</p> <input type="text"/>

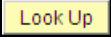



52.	Notice that a Requisition ID has been generated for this form.
53.	Use the Line Comments icon to add comments specific to each line. Click the Line Comments graphic. <input type="checkbox"/>
54.	You can use the Line Comments page to include comments specific to the line item or perhaps to indicate terms and conditions regarding the order. You can also use this page to attach more documents.
55.	Click the Send to Vendor, Shown at Receipt, Shown at Voucher option. Remember that whichever party's box is checked, they will be able to view the comments. So be sure to include only those who need to view the comments section. <input type="checkbox"/>
56.	Click the Attach button. <input type="checkbox"/>
57.	Click the Browse... button. <input type="checkbox"/>
58.	Click the Entire Train List list item. <input type="checkbox"/>
59.	Click the Open button. <input type="checkbox"/>
60.	Click the Upload button. <input type="checkbox"/>
61.	Click the OK button. <input type="checkbox"/>
62.	Click the Add multiple new rows at row 1 (Alt+7) graphic. <input type="checkbox"/>
63.	Click the OK button. Confirm the amount of new rows you wish to add, then select OK. <input type="checkbox"/>
64.	Enter the desired information into the field. Enter a valid value e.g. " Blue Paint ".
65.	Enter the desired information into the field. Enter a valid value e.g. " 25.00 ".
66.	Click the Look up UOM (Alt+5) graphic. <input type="checkbox"/>
67.	Click the CAN link. To indicate that we are buying the paint by the can. <input type="checkbox"/>
68.	Click the Look up Category (Alt+5) graphic. <input type="checkbox"/>

69.	Enter the desired information into the Description: field. Enter a valid value e.g. "%office%".
70.	Click the Look Up button. <input type="text"/>
71.	Click the 61500 link. <input type="text"/>
72.	Enter the desired information into the field. Enter a valid value e.g. "9.00".
73.	Click the item Information link. <input type="text"/>
74.	Enter the desired information into the field. Enter a valid value e.g. "1122334444".
75.	Enter the desired information into the field. Enter a valid value e.g. "ABC2233".
76.	Click the Save button. Once all information has been entered. <input type="text"/>
77.	Click the Status Checkmark to change the status of the Requisition to Pending. <input type="checkbox"/>
78.	The system will budget check the requisition in batch periodically and will route budget errors if any to the budget manager.
79.	Click the Save button. <input type="text"/>
80.	Click in the Home link. <input type="text"/>
81.	Congratulations. You have successfully Created a Requisition. End of Procedure.




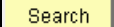






Entering Requisition Schedule Information

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Add/Update Requisitions link. 
4.	Click the Find an Existing Value tab. 
5.	Click the Search button. 
6.	Click the Search button. 
7.	Click an entry in the Requisition ID column. 
8.	Click the Horizontal scrollbar.
9.	Click the Schedule... button. 
10.	Click the Distribution button. 
11.	You will be shown how to distribute this requisition by both the quantity and amount. Regardless of which one you choose, the steps to save the requisition will be the same.
12.	For Contracts & Grants project IDs, the following fields must be populated: Department (Organizational Department ID) Class Fund Code PC Bus Unit: Enter 'FSR01' Project Activity: Enter 'SPN' Run the following query to identify the correct combination of the above fields for a particular project ID: FIU_GL_DEPT_PROJ_LOOKUP
13.	Click the Horizontal scrollbar.
14.	Click the Add multiple new rows at row 1 (Alt+7) button. 
15.	Click the OK button. 
16.	Click the Horizontal scrollbar.




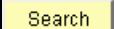



17.	Enter the desired information into the Quantity field. Enter a valid value e.g. " 10.0 ".
18.	Click the Refresh button to update the Percent field. 
19.	Enter the desired information into the Quantity field. Enter a valid value e.g. " 10.0 ".
20.	Click the Refresh button to update the Percent field. 
21.	Click the Dept button to search for a different department to distribute the cost to. 
22.	Enter the desired information into the Department field. Enter a valid value e.g. " 144000103 ".
23.	Click the Look Up button. 
24.	Click an entry in the Department column. 
25.	Click the OK button. 
26.	Click the Save button. 
27.	You will now be shown how to distribute by Amount.
28.	Click the Distribution button. 
29.	Click the Horizontal scrollbar.
30.	Click the Add multiple new rows at row 1 (Alt+7) button. 
31.	Click the OK button. 
32.	Click the Horizontal scrollbar.
33.	Click the Distribute by list. 
34.	Click the Amount list item. 
35.	Enter the desired information into the Amount field. Enter a valid value e.g. " 1000.00 ".
36.	Click the Refresh button to update the Percent field. 
37.	Enter the desired information into the Amount field. Enter a valid value e.g. " 1000.00 ".
38.	Click the Refresh button to update the Percent field. 
39.	Click the Dept button. 

40.	Enter the desired information into the Department field. Enter a valid value e.g. " 144000103 ".
41.	Click the Look Up button. 
42.	Click an entry in the Department column. 
43.	Click the OK button. 
44.	Click the Save button. 
45.	Congratulations! You have successfully updated distribution fields on a requisition. End of Procedure.











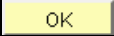


Approving a Requisition

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Approve Amounts link. 
4.	Enter the desired information into the Requisition ID: field. Enter a valid value e.g. " 0000073885 ".
5.	Click the Search button. 
6.	Click the Details link to view specifics about the requisitions. 
7.	Click the Details link. 
8.	Click the Approval link. 
9.	Click the Approval Action drop down menu and select 'Approve' from the drop down box if you want to approve this requisition. You can also 'Deny' the requisition outright, or choose 'Recycle' which sends it back to the Requester for review and possible resubmission. 
10.	Enter the desired information into the Comment field. Enter a valid value e.g. " Requisition Approved ".
11.	Click the Save button. 
12.	Notice that the Approval Status has been changed to Complete now. Now that the requisition has been approved, it will automatically be routed to a Buyer in the Purchasing Department for processing.
13.	Click the 'Worklist' hyperlink to view your entire worklist.
14.	Once you have approved or denied the requisition, go back to your worklist and click the 'Mark Worked' button. This will take it off your worklist.
15.	Click the Home link. 
16.	Congratulations. You have successfully Approved a Requisition. End of Procedure.




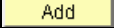

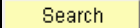
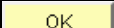



Denying Requisition Amounts

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Approve Amounts link. 
4.	Enter the desired information into the Requisition ID: field. Enter a valid value e.g. " 000073886 ".
5.	Click the Search button. 
6.	Click Approval Action drop down menu and select 'Deny'. 
7.	Enter the desired information into the Comment field. Enter a valid value e.g. " Requisition has been denied (enter information for the reason) ". A comment should be entered in the Comment section explaining the reason for denial. A workflow notification along with the comment entered will be sent to the user that entered the requisition. The user should then either modify or cancel the requisition, whichever is appropriate.
8.	Click the Save button. 
9.	Notice the Approval Status has been changed to denied. This indicates that the requisition has been denied.
10.	Click the Home link. 
11.	Congratulations. You have successfully denied a requisition amount. End of Procedure.


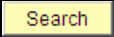
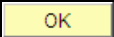




Viewing Requisition Information

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Review Requisition Information link. 
4.	Click the Requisitions link. 
5.	Enter the desired information into the Requisition ID: field. Enter a valid value e.g. " 000073885 ".
6.	Click the OK button. 
7.	Click the Status tab to review requisition information. 
8.	Click the 000073885 link to further view information regarding this requisition. 
9.	Click the Horizontal button of the scrollbar. 
10.	Click the Schedule Details button to view shipment schedule information about a requisition line. 
11.	Notice that the Shipment Details page here displays the ship to location for the schedule line, the item price, the requisition quantity, and the total amount for the requisitioned items.
12.	Click the Central Rec link under the Ship To location to access the 'Requisition Ship To Address' page. You can view the ship to address, including a one-time address for this requisition within this page. 
13.	Click the OK button. 
14.	Click the Return button. 
15.	Click the Home link. 
16.	Congratulations. You have successfully Viewed Requisition Information. End of Procedure.

Copying a Requisition




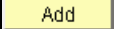

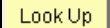


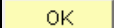
1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Add/Update Requisitions link. 
4.	Click the Add button. 
5.	Click the Copy From link. 
6.	Enter the desired information into the Requisition ID: field. Enter a valid value e.g. " 000073883 ". Enter the ID of the requisition you wish to copy.
7.	Click the Search button. To search for the entered requisition. 
8.	Click the OK button. Once you have selected the requisition that you wish to copy from the list. 
9.	Remember to update the distribution and location information on the newly copied requisition.
10.	Click the Pending Approval graphic. 
11.	Click the Save button. Notice that a new Requisition ID has been assigned. 
12.	Click the Home link. 
13.	Congratulations. You have successfully copied a requisition. End of Procedure.











Finding a Purchase Order (PO)


1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click on Add/Update Requisitions
4.	Make sure that the field for Hold From Further Processing Enter By is blank Click the Search button. 
5.	Click an entry in the Business Unit column. 
6.	Click the OK button. 
7.	Click the Status tab. 
8.	Click the Document Status button. 
9.	Click the Maximize/Restore button. 
10.	Click the Go To Document Status Inquiry button. 
11.	Click the Maximize/Restore button. 
12.	Click the Go To Document Status Inquiry button. 
13.	Here is your PO ID number
14.	Click the Home link. 
15.	Congratulations. You have successfully found your PO number. End of Procedure.

Managing Receipts




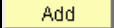
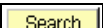
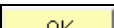

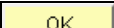
Creating Receipts

1.	Click the Purchasing link. 
2.	Click the Receipts link. 
3.	Click the Add/Update Receipts link. 
4.	Click the Add button. 
5.	Use the Select Purchase order page to search for and retrieve purchase order schedules against which to create receipts. The search functionality of this page enables you to perform a broad or narrow search based on a variety of search criteria. You can use one or all of the available fields. After the search retrieves a list of items, you can identify the selections and have the system place them on the transaction document.
6.	Select the '30' entry in the ' Days +/- Today: ' field and delete it by pressing [Backspace] .
7.	Select the '03/23/2009' entry in the ' Start Date ' field and delete it by pressing [Backspace] .
8.	Select the '05/22/2009' entry in the ' End Date ' field and delete it by pressing [Backspace] .
9.	Click the Look up Vendor (Alt+5) graphic. 
10.	Enter the desired information into the Short Vendor Name: field. Enter a valid value e.g. " %dell ". This will search for any vendors that include the 'Dell' name.
11.	Click the Look Up button. 
12.	Click the DELL-003 link. 
13.	Click the Search graphic to find any vendors with the name 'Dell-003'. 
14.	Click the Select Checkbox for the item you wish to create a receipt for. <input type="checkbox"/>
15.	Click the OK button. 





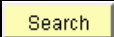








16.	<p>Enter the desired information into the Receipt Qty field. Enter</p> <p>For this Purchase order, only received 15 of the 25 items ordered were received. It is important that the Receipt Qty field accurately reflects that amount that was actually received, and not the amount on the Purchase order.</p>
17.	<p>Click the More Details link.</p> 
18.	<p>Click the Optional Input link.</p> 
19.	<p>Click the Receipt Lines link.</p> 
20.	<p>Click the Save button.</p> 
21.	<p>Click the Home link.</p> <p>Notice that the Receipt Status has changed to 'Received', and a Receipt ID has been generated.</p> 
22.	<p>The first receipt that we completed only dealt with Quantity received. However, some Purchase Orders will require you to deal with Amount received instead. This following receipt will allow you to familiarize yourself with receipts that deal in Amount</p> <p>The steps to search and create the receipt are the same as before, so we'll jump into a receipt form already populated in the Maintaining Receipts page.</p>
23.	<p>Enter the desired information into the Price field. Enter "4000.00", which is less than the initial Purchase Order request of "6398.2200".</p> <p>Sometimes the amount paid is less than the Purchase Order requests. It is important to make sure that the actual amount paid is reflected under the Price field.</p>
24.	<p>Click the Horizontal button of the scrollbar.</p> 
25.	<p>Click the Horizontal button of the scrollbar.</p> 
26.	<p>Click the Optional Input link.</p> 
27.	<p>Click the Receipt Lines link.</p> 
28.	<p>Click the Save button.</p> 



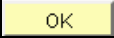

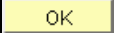


29.	Click the Home link. Notice that the Receipt Status has changed to 'Received', and a Receipt ID has been generated. 
30.	Congratulations. You have successfully Created a Receipt in PantherSoft Purchasing. End of Procedure.

Adjusting the Status of a PO Receipt

1.	Click the Purchasing link. 
2.	Click the Receipts link. 
3.	Click the Add/Update Receipts link. 
4.	Click the Add button. 
5.	Select the '30' entry in the ' Days +/- Today: ' field and delete it by pressing [Backspace] .
6.	Select the '03/23/2009' entry in the ' Start Date ' field and delete it by pressing [Backspace] .
7.	Select the '05/22/2009' entry in the ' End Date ' field and delete it by pressing [Backspace] .
8.	Select the PO Remaining Qty option.
9.	Click the Search button. 
10.	Click the Checkbox option associated with your desired PO. <input type="checkbox"/>
11.	Click the OK button. 
12.	Click the Header Details link to access the Maintain Receipts - Header Details page. 
13.	Click the Vertical scrollbar.
14.	Click the Hold Receipt check box to hold processing of this receipt in PantherSoft purchasing. <input type="checkbox"/>
15.	Click the OK button. 
16.	Click the Save button. Notice how the Receipt Status has changed to 'Hold'.
17.	Click the Home link.
18.	Congratulations. You have successfully Adjusted the Status of a PO Receipt. End of Procedure.

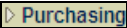




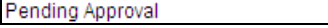
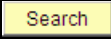

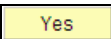

Entering Receipt Comments and Activities

1.	Click the Purchasing link. 
2.	Click the Receipts link. 
3.	Click the Add/Update Receipts link. 
4.	Click the Find an Existing Value link. 
5.	Enter the desired information into the Receipt Number: field. Enter
6.	Click the Search button. 
7.	Click the 0000099999 link to select the desired receipt. 
8.	Click the Add Comments link to enter comments for a transaction. You can enter a unique comment or select from predefined standard comments. 
9.	Use the Sort Method: drop-down list to select the method that you want to use to sort the comments retrieval. - Comment Time Stamp: Select to sort the comments by the time stamp assigned by the system when they were created. - Vendor Flag: Select to sort by comments flagged to be sent to the vendor. 
10.	Click the Sort Sequence: drop-down list to sort by Ascending or Descending dates. 
11.	Click the Copy Standard Comments link to copy standard comments to the purchase order header comments. 
12.	Click the Action drop-down table to select the action that you want to perform on the standard comments. For the purpose of this topic we will select ' Copy Comment '. 
13.	Click the Search graphic to select a comment type. This will allow you to chose from a list of Standard Comment types specified by FIU.
14.	Click the BBC link. 
15.	Click the Search graphic to select a comment that is associated with the Comment Type, which in this topic is ' BBC '. 

16.	Click the BBC link to select the 'Biscayne Bay Campus Address' comment. 
17.	Click the OK button. Notice how the comments field is now populated with shipping information for the BBC campus. 
18.	Click the OK button. 
19.	Click the Activities link. Use the Activities page to enter and track activities associated with a particular transaction. Keep the activity comments organized by logging the due date and by selecting the Done check box. 
20.	Enter the desired information into the *Due Date field. Enter a valid value e.g. " 04/30/2009 ".
21.	Enter the desired information into the Comments field. Enter a valid value e.g. " Confirm quality of items received ".
22.	Click the OK button. 
23.	Click the Save button. 
24.	Click the Home link. 
25.	Congratulations. You have successfully entered Receipt Comments and Activities. End of Procedure.

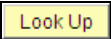



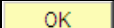



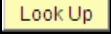



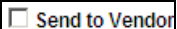
Changing Requisitions

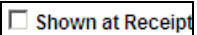
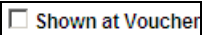
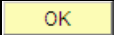

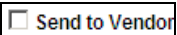
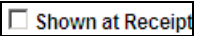
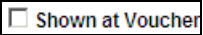
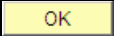



Deleting a Requisition

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Add/Update Requisitions link. 
4.	Click the Find an Existing Value tab. 
5.	Click the Requisition Status list. 
6.	Click the Pending Approval list item. 
7.	Click the Search button. 
8.	Click the Delete Requisition button. 
9.	Click the Yes button. 
10.	Click the Home link. 
11.	Congratulations. You have successfully deleted a requisition. End of Procedure.

Entering Requisition Change Order

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Add/Update Requisitions link. 
4.	Click the Add button. 
5.	Click the Look up Requester (Alt+5) button. 
6.	Enter the desired information into the Requester field. Enter a valid value e.g. " 2345704 ".
7.	Click the Look Up button. 
8.	Click an entry in the Name column. 
9.	Click the Look up Origin (Alt+5) button. 
10.	Click an entry in the Description column. 
11.	Click the Requisition Defaults link. 
12.	Click the Override option. 
13.	Click the Look up Vendor (Alt+5) button. 
14.	Enter the desired information into the Short Vendor Name field. Enter a valid value e.g. " DELL ".
15.	Click the Look Up button. 
16.	Click an entry in the Short Vendor Name column. 
17.	Click the Look up Ship To (Alt+5) button. 
18.	Click an entry in the Ship To Location column. 
19.	Click the Look up SpeedChart (Alt+5) button. 

20.	Enter the desired information into the SpeedChart Key field. Enter a valid value e.g. " 144000102 ".
21.	Click the Look Up button. 
22.	Click an entry in the SpeedChart Key column. 
23.	Click the Horizontal scrollbar.
24.	Click the Location button. 
25.	Click an entry in the Location Code column. 
26.	Click the Horizontal scrollbar.
27.	Click the OK button. 
28.	Enter the desired information into the Description field. Enter a valid value e.g. " CO to PO 0000041578 ".
29.	Enter the desired information into the Quantity field. Enter a valid value e.g. " 20.00 ".
30.	The quantity entered here should reflect the additional quantity that you are requesting.
31.	Click the UOM button. 
32.	Click an entry in the Unit of Measure column. 
33.	Click the Category button. 
34.	Enter the desired information into the Category field. Enter a valid value e.g. " 99907 ".
35.	Click the Look Up button. 
36.	Click an entry in the Category column. 
37.	Enter the desired information into the Price field. Enter a valid value e.g. " 100.00 ".
38.	Click the Save button. 
39.	Click the Add Comments link. 
40.	Enter the desired information into the Spell Check Comments (Alt+5) field. Enter a valid value e.g. " If you have any comments for the vendor or the purchasing department, please en ".
41.	Click the Send to Vendor option. 

42.	Click the Shown at Receipt option. 
43.	Click the Shown at Voucher option. 
44.	Click the OK button. 
45.	Click the Horizontal scrollbar.
46.	Click the Line Comments button. 
47.	Enter the desired information into the Spell Check Comments (Alt+5) field. Enter a valid value e.g. "Please enter comments specific to the line here."
48.	Click the Send to Vendor option. 
49.	Click the Shown at Receipt option. 
50.	Click the Shown at Voucher option. 
51.	Click the OK button. 
52.	Click the Horizontal scrollbar.
53.	Click the Save button. 
54.	Click the Pending Approval button. 
55.	Click the Save button. 
56.	Congratulations! You have successfully created a Change Order . End of Procedure.

Reviewing Requisition Change History

1.	Click the Purchasing link. 
2.	Click the Requisitions link. 
3.	Click the Review Requisition Information link. 
4.	Click the Change History link. 
5.	Click the Look up Business Unit (Alt+5) graphic to enter the FIU01 Business Unit. 
6.	Click the FIU01 link. 
7.	Enter the desired information into the Requisition ID: field. Enter
8.	Click the Search button. 
9.	Click the Header link. Use the Header page to view requisition change order header history. 
10.	Click the Line link. Use the Line page to view requisition change order line history. 
11.	Click the Ship link. Use the Ship page to view requisition change order ship history. 
12.	Click the Return to Search button. 
13.	Click the Home link. 
14.	Congratulations. You have successfully reviewed Requisition Change History. End of Procedure.