



***Checklist & Instructions for Vendor Services, General***

***Purchases and Purchase Requisitions***

***STEP 1: INSURANCE AND INDEMNIFICATION REQUIREMENTS***

It is of the upmost importance that any vendor providing a service to our facility possesses the required insurance and indemnification. The link below provides information about the insurance requirements for external providers and our indemnification agreement (to be executed by contractor/vendor/caterer/provider.)

<http://www.southeastern.edu/admin/purch/insurance/index.html>

Feel free to contact your procurement specialist if you have any questions/concerns about vendor eligibility. Once insurance and indemnification eligibility has been verified, you may proceed with getting the vendor set-up in our financial system (if they are not currently in our system.)

***STEP 2: MAKE SURE THAT YOU ARE FOLLOWING PROCEDURE***

Certain procedures must be followed when making purchases for your department, regardless of the cost of the purchase. For example, office supplies **MUST** be purchased from the Bookstore or a small and emerging business vendor (such as GBP Direct.) If one of these vendors cannot provide the items you wish to

purchase or the cost is too high compared to other sources, contact the Purchasing Dept. Prior approval from the Director of Purchasing must be gotten before the purchase can be made. If approval is granted, documentation proving that the Bookstore and GBP Direct could not provide the item(s) or that the cost was too high must be sent to the PCard Office with the PCard statement and receipt. The link to the Purchasing Guidelines/Office Supplies is listed below:

[http://www.southeastern.edu/admin/purch/guidelines/office\\_supplies\\_12-11-15.pdf](http://www.southeastern.edu/admin/purch/guidelines/office_supplies_12-11-15.pdf)

When purchasing office equipment such as copiers, fax machines, telephones, computers, etc, you MUST first contact the Client Services Dept for prior approval. This also includes items such as printer ink and attachments/add-ons to be used on existing equipment. The How to Purchase Responsibly link is below:

[http://www.southeastern.edu/admin/purch/how\\_purch\\_resp/index.html](http://www.southeastern.edu/admin/purch/how_purch_resp/index.html)

Equipment in which the total cost equals \$1000 or more must be tagged by the Property Control Dept. Also, an asset form must be submitted with documentation when entering a purchase requisition into Peoplesoft Financials. The Asset Form link is below:

<http://www.southeastern.edu/leonet/financials/assets/assetattachment.pdf>

For a complete list of purchasing guidelines and procedures, please visit the below link:

<http://www.southeastern.edu/admin/purch/guidelines/index.html>

### ***STEP 3: VENDOR SET-UP PROCEDURE (FOR PURCHASE ORDERS)***

In order to enter a purchase requisition into Peoplesoft Financials, the vendor must first be entered into the financial system (if they haven't been already.) The Account's Payable Department will need a completed Vendor Set-Up Form and a completed Substitute W-9 Vendor Form. These forms can be found in the link below:

[http://www.southeastern.edu/admin/controller/accounts\\_payable/index.html](http://www.southeastern.edu/admin/controller/accounts_payable/index.html)

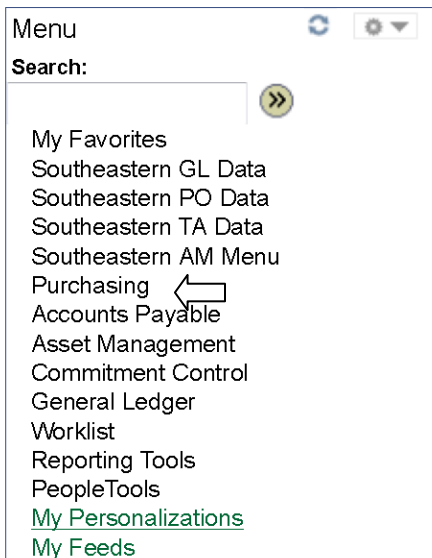
Please email the completed forms to [acctspayable@selu.edu](mailto:acctspayable@selu.edu) or fax them to 985-549-3802. You may request to be notified when set-up is complete. The Account's Payable Dept. will give you the newly created vendor ID # when complete.

When you have the necessary insurance/indemnification and the vendor has been set-up in our system, you may enter a purchase requisition into Peoplesoft financials.

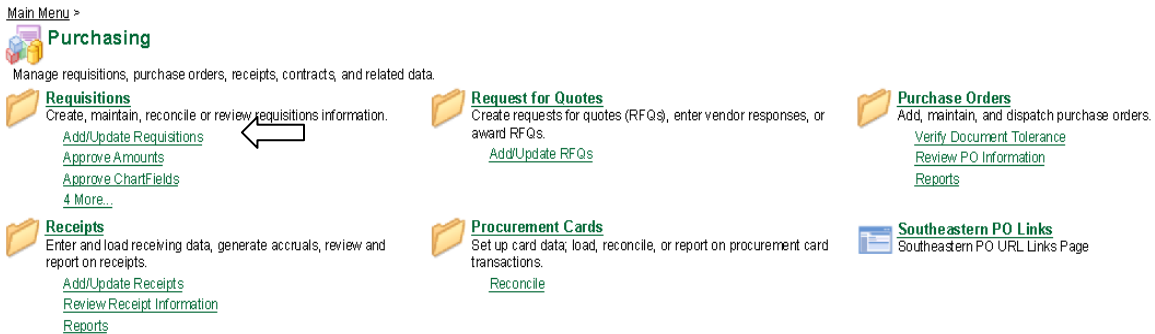
### ***STEP 4: ENTERING A PURCHASE REQUISITION***

Peoplesoft Financials must be accessed through the Mozilla/Firefox search engine in order to work properly. To access Peoplesoft Financials, visit the Southeastern Louisiana University main page, go to "My Den" and scroll to the Faculty/Staff Links section. There you will find the Peoplesoft Financials link. You will need to login with your username and LEONet password.

When you have logged in, you will see the Menu bar on the top/left side of the screen (see below.)



You will choose the “Purchasing” link within the Menu bar. The below options will appear on your screen:



You will choose “Add/Update Requisitions.” When the below screen appears, click on the “ADD” button.

**Requisitions**

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

Business Unit:

Requisition ID:

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

You first choose the “Requester.” This is most likely your department’s budget unit head. Then, you will choose the “Requisition Defaults.”

**Maintain Requisitions**

**Requisition Defaults**

Business Unit: SLULA      Requisition Date: 08/28/2017  
 Requisition ID: NEXT      Status: Open

**Default Options**

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

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

**Line**

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

**Schedule**

Ship To:       \*Distribute by:   
 Due Date:    
 Ultimate Use Code:       [One Time Address](#)

**Distribution**

SpeedChart:

**Distributions**

Details      Asset Information     

Dist	Percent	GL Unit	Account	Fund	Budget Unit	Program	Class	Bud Ref	PC Bus Unit	Project
1	<input type="text"/>	<input type="text" value="SLULA"/>	<input type="text"/>							

Select your “Buyer” (procurement specialist,) select your “Vendor” (use the vendor ID provided by the Account’s Payable Dept when the vendor was set-up,) select the “Category” (the name of the expense code that the requisition will

be charged to,) select the “Unit of Measure” (for ex: EA, Job, etc,) select the “Due Date” (use the current date,) enter the “Speedchart” (this is the Budget Unit the requisition will be charge to,) enter the “Account” (this is the numerical expense code. For ex: 540440.) Click the “Refresh” button. You will need to reenter the Speedchart. Then, click “OK.” You will be brought back to the main requisition page. Click the “Add Comments” button. You will be brought to the page below:

**Header Comments**

**Business Unit:** SLULA      **Requisition Date:** 08/28/2017  
**Requisition ID:** NEXT      **Status:** Open

\*Sort Method:       \*Sort Sequence:      

**Comments**      [Find](#) | [View All](#)      [First](#)    1 of 1    [Last](#)

[Copy Standard Comments](#)      **Comment Status:** Active     

Send to Vendor     Shown at Receipt     Shown at Voucher

**Associated Document**

Attachment	<input type="button" value="Attach"/> <input type="button" value="View"/> <input type="button" value="Delete"/> <input type="checkbox"/> Email
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From -> REQ SLULA-NEXT

Use the “comments” section to list the Department, Budget Unit/Expense code, departmental contact name and ext. and a description of the items/services provided. For ex: Purchasing Dept.

General office supplies

Contact Julie Ridgel 985-549-2064

24051/540100 (Operating Supplies: Office Supplies)

Your procurement specialist will inform you if any more information is needed in this section.

Next, you will attach any documents that you have pertaining to this requisition. This is where you will attach the insurance, indemnification agreement, quotes/estimates, state contract information if applicable, authorized dealer forms if applicable, asset form if applicable, sole source forms if applicable, etc. Visit the Purchasing web page to verify which documents may be required depending on the scope of the requisition. Once the document is attached, click “OK.” This will bring you back to the main requisition page.

**Maintain Requisitions**

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**Requisition**

Business Unit: SLULA      Status: Open

Requisition ID: NEXT      Copy From      Budget Status: Not Chk'd

Hold From Further Processing

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**Header**

\*Requester:       Requisition Defaults

\*Requisition Date: 08/28/2017       Requester Info      Add Comments

Origin: ONL       Online Entry      Requisition Activities

\*Currency Code: USD      Dollar

Accounting Date: 08/28/2017

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**Amount Summary**

Total Amount: 0.00 USD

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**Add Items From**

[Purchasing Kit](#)      [Catalog](#)

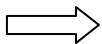
[Item Search](#)      [Requester Items](#)

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Line	Description	Quantity	UOM	Category	Price	Amount	Status
1		0.0000			0	0.00	Open



View Printable Version      \*Go to: ...More...



You will then enter a “Description” of the scope of work to be done, service to be provided or items/materials to be purchased. Enter a “Quantity,” enter a “UOM” (Unit of Measure ex: EA, JOB, WK, MNTH, etc,) enter the price per the unit of measure you selected. The “Category” will automatically appear; there is no need to enter anything in that box.

When you have completed choosing your defaults, adding comments, giving descriptions, etc, select “save” at the bottom/left of the page. Next, find the “Status” section on the top/right of the page. There, you will find a box with a green checkmark. Click on the green checkmark (which will then turn into a red X.)

Status: Open  ←  
Budget Status: Not Chk'd   
 Hold From Further Processing

Click “Save” on the bottom/left of the page again. PeopleSoft Financials has now assigned a requisition number to this request. If you would like to print this page for your records, click the “View Printable Version” tab. It will bring you to the printable requisition page. The purchase requisition has now gone into workflow to be approved by the budget unit head. After the requisition is approved, it will go into your procurement specialist’s workflow. After your specialist has verified that all of the necessary documents are valid and that the vendor is eligible to provide service, that the budget unit/expense code you selected has the funds available and that all approvals necessary have been obtained, a purchase order will be issued (of which you will be notified.)

**\*\*\*\*\*KEEP IN MIND THAT SERVICES TOTALING UNDER \$1000 MAY BE PAID FOR USING A PCARD. IF YOU HAVE CHOSEN TO PAY WITH A PCARD RATHER THAN ENTER A PURCHASE REQUISITION, YOU MUST STILL PROVIDE PROOF OF INSURANCE AND INDEMNIFICATION FROM THE VENDOR. THESE DOCUMENTS ARE NEEDED ANY TIME A VENDOR PROVIDES A SERVICE TO OUR FACILITY, REGARDLESS OF THE AMOUNT OF THE SERVICE.\*\*\*\*\***

**FEEL FREE TO CONTACT THE PURCHASING DEPT AT EXT 2064 OR YOUR PROCUREMENT SPECIALIST IF MORE INFORMATION IS NEEDED.**



**Southeastern Louisiana University**  
Purchasing Department

