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**INTRODUCTION**

Introduction

To manage a department, grant, or any other financial unit here at Southeastern Louisiana University, an understanding of the available tools and procedures is needed. This booklet is not all-inclusive, but it will, hopefully, provide a starting point for working with the financial management tools that are available.

**Disclaimer:** In all cases this document is to be used as a guide to website resources where information is being maintained. Please be advised that the website is the official record and is subject to change as policy dictates.
BUDGET UNIT TERMINOLOGY

Budget Unit Terminology

Budget Unit Number

Your budget unit number is the 5-digit tracking number for the funds that your department/grant has been assigned. It is used to retrieve data when you review your budget in PeopleSoft Financials. It is also used to allocate the costs when you make a purchase. Some sample budget units are:

- 44611 – English Film Lab
- 44612 – English Lab Fee
- 44633 – Digital Apps in Literacy

The budget unit number represents a great deal of information in Southeastern’s PeopleSoft financial system. For instance, when a requisition is entered and “charged” to Budget Unit 44633 (Digital Apps in Literacy), the system automatically assigns the entry to:

<table>
<thead>
<tr>
<th>Fund</th>
<th>30 (Restricted)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>10000 (Instruction)</td>
</tr>
<tr>
<td>Class</td>
<td>GSTAT (Grant, State)</td>
</tr>
<tr>
<td>Home Department</td>
<td>44601 (English)</td>
</tr>
<tr>
<td>Project</td>
<td>GR44633 (a Grant ID)</td>
</tr>
</tbody>
</table>

While you may occasionally see the Fund, Program, Class, Home Department, and Project information for your Budget Unit in the PeopleSoft Financials screens, you will only need your Budget Unit number for monitoring your budgets, putting in requisitions, etc.

Category/Account Number

When using your budget unit’s funds, you must indicate the type of expense that is to be incurred. In our PeopleSoft financial system, the type of expense is known as the category. The category automatically provides the system with the appropriate corresponding account number. In some of the financial transactions that are performed outside our PeopleSoft system, you may be asked to provide an account number. Some sample categories and their corresponding account numbers are:

- Advertising 539001
- Education Supplies 540230
- Professional Svcs – Engineer 550300
WHERE TO FIND BUDGET UNITS

Where to Find Budget Units and Account Numbers

The current list of budget units and accounts can be found on the Controllers Office page on the Southeastern web site:

- **Southeastern Home -> Administration -> Controller’s Office -> Faculty & Staff Information ->**
  - Budget Unit Numbers are listed in: **Budget Unit List**
  - Account Numbers are listed in: **GL Account List**

**Budget Unit Setup and Changes**

To create a new budget unit or make modifications (description, manager, project dates, etc.) complete the “Create/Update Budget Unit Form” found on the PeopleSoft Financials web page:

- **Southeastern Home -> LeoNet -> PeopleSoft Financials -> PeopleSoft Financials Forms**
MONITORING AND ADJUSTING YOUR BUDGET

Monitoring and Adjusting Your Budget

Intro to Budgets

When funds are allocated to a budget unit, a budget is created in the PeopleSoft Financials system for the types of expenditures that are anticipated. For example, budgets would show funds that are available for “Office Supplies” or “Telephone-Long Distance”.

When purchases are made through one of the purchasing mechanisms on campus (such as a PeopleSoft requisition or the procurement card), the category code/account number is required. The purchase and remaining budget is reflected on the PeopleSoft budget (aka commitment control) review screens and reports.

Note that purchases made on the Procurement card can take a week or more to be loaded into our PeopleSoft Financials System. Also, if a “Process Form for Payment” has been submitted, the transaction will reduce the budget when it is entered into PeopleSoft by the Controller’s Office. These types of transactions must also be considered when determining if budget dollars are available for a purchase.

Monitoring a Budget

There are three tools available in PeopleSoft Financials for monitoring a budget – the Monthly Departmental Budget Report, the Detailed Budget Unit Transaction Report, and the Budget Overview on-line lookup. “How Do I?” documents are available for each of these tools on the PeopleSoft Financials web page:

Southeastern Home -> LeoNet -> PeopleSoft Financials -> How Do I?

A Budget Overview screen would appear in a format similar to the following:
**MONITORING AND ADJUSTING YOUR BUDGET (Con’t)**

The numeric columns contain the following information:

- **Budget** – the original budgeted amount for the account
- **Expense** – the amount that has been paid from the account
- **Encumbrance** – the amount that is currently on purchase order for the account
- **Pre-Encumbrance** – the amount that is currently on a purchase requisition for the account

**Adjusting a Budget**

In the screen shown in the above section, only $50 is budgeted for printing during the year. If $100 of the supplies budget must be reallocated to the printing budget, this would be a “Budget Adjustment”. These adjustments are handled by submitting a “Budget Adjustment Request” form to the Budget Office. The form can be found on the Budget Office web page:

Southeastern Home -> Administration -> Budget Office -> Budget Adjustment Forms

Note that adjustments for Budget Units that relate to grants must be reviewed by the Office of Sponsored Research and Programs.
Travel Authorizations and Reimbursements

When traveling for the university, you will need to fully understand Louisiana and Southeastern travel regulations. These regulations, along with information on the state travel card, contracted travel agencies, etc. are described on the “Travel Information” web page:

Southeastern Home -> Administration -> Controller’s Office -> Faculty & Staff Information -> Travel Information

As described on the “Travel Information” web page, prior to most university travel, a Travel Authorization request must be entered and approved in the PeopleSoft Financials system.

For step-by-step instructions on Travel Authorization entry, approval, and review, visit the PeopleSoft Financials Training web page and select “Travel Authorization Training Topics”:

Southeastern Home -> LeoNet -> PeopleSoft Financials -> PeopleSoft Financials Training -> Travel Authorization Training Topics

“How Do I?” documents are also available at

Southeastern Home -> LeoNet -> PeopleSoft Financials -> How Do I?

Travel expense reimbursement requires submission of the paper “Expense Account” form available from Southeastern’s Travel Office.
GRANT PROPOSALS

Grant Proposals

When a grant proposal has been completed in the PeopleSoft Financials system by the Principal Investigator (PI) and reviewed by the Office of Sponsored Research and Programs (OSRP), it will be submitted for electronic approval to the Budget Unit Head of the Home Department that was designated on the proposal.

The following steps are required to review and approve the grant proposal:

- Log into PeopleSoft with your standard PS User ID and password on the PeopleSoft Financials (FSPRD) screen.

- Check your Worklist. When the proposal is ready for review/approval, you will receive a message in your Worklist with an active link to the Proposal Component Approval/Submit screen. Select this hyperlink.

- Link directly to the proposal information by clicking on the V101 hyperlink on the Proposal Component Approval/Submit screen. The proposal must be reviewed prior to the “Approval”/“Send Back” action.

Use the navigation within the proposal to access all pages and links. DO NOT use the “back” button on the browser or you may encounter problems within the system.

- Open the PROPOSAL page and review the general information such as PI name, sponsor, dates of the project, etc

- Open the BUDGETS page. Select the Period (Year) hyperlink(s) to access each budget year, itemized as to items and dollars on the Enter Budget Detail page.

If match is required on the proposal, access to the match details (amounts/budgets responsible) will be included on the Cost Share page. This page is accessed through the Cost Share hyperlink on the individual line items shown on the Enter Budget Detail page. Be sure to monitor this information carefully as your electronic signature confirms approval of match provided by your budget. All budget unit heads providing match will be required to electronically approve the proposal.

If cost share is reviewed, you will receive an alert message that you have unsaved data when you select the Return to Maintain Proposal hyperlink. If you do
receive this message, select the Cancel box from this screen in order to successfully return to the BUDGETS page.

Note: The Budget Justification should be found as a separate file on the ATTACHMENTS page.

 gyr. Open the ATTACHMENTS page and review documents such as the Narrative, Budget Justification, Abstract, and other items to be submitted to the funding agency.

 gyr. At this point the review of the required pages of the proposal is complete. Information completed by the PI/OSRP is also found on the PROJECTS, RESOURCES, and KEY WORDS pages. These are optional review pages.

 gyr. You are now ready to either “Approve” or “Send Back.” Go to the Menu on the left-hand side and select Grants. Then select Proposals. Then select Proposal Component Approval. This hyperlink will open the Proposal Proponent Approval/Submit screen once again.

 gyr. Either “Approve” or “Send Back” the proposal by checking the appropriate box. The Comment hyperlink will open the Proposal Component Comments box. You may make a comment if you Approve, but you MUST include an explanation if you choose to Send Back the proposal.

 gyr. Select the Save button. If you did select the “Send Back” option, you will be asked for confirmation that you want to send the proposal back. Select the “Yes” button to continue.

 gyr. At this point, you have completed your level of the approval process.
PROPERTY CONTROL

Property Control

When Southeastern acquires moveable property that is computer hardware or over a set dollar amount, it is tagged by the Office of Property Control and becomes part of Southeastern’s asset inventory. A Budget Unit Head is assigned responsibility for managing the asset. This responsibility includes monitoring the asset’s location, “surplusing” the asset if it is no longer needed, and making requests for asset status changes, when appropriate (e.g., if the asset is stolen). To facilitate these tasks, a set of asset management self-service functions are available in the PeopleSoft Financials system. (Note that a Budget Unit Head can authorize another employee to modify location information or enter property control transactions by completing a Property Control Transaction Authorization Form. This form is available at the PeopleSoft Financials web page.

Reviewing Asset Information

To see the list of tagged assets that are assigned to a Budget Unit or to look for asset information, choose from the queries on the PeopleSoft Financials “Southeastern AM Links” menu by navigating in Peoplesoft Financials to

Asset Management -> Southeastern AM Links

Managing Assets

During the life of an asset, its location, custodian, or status may change. For tagged assets, not only must information be updated in the PeopleSoft Financials System, but many changes require approval from offices at Southeastern or even the State of Louisiana before they can be implemented. The PeopleSoft “Property Control Transactions” screen allows Budget Unit Heads and/or their authorized representatives to enter these transactions for tagged assets. For step-by-step instructions on entering a tagged inventory asset transaction, see the “Entering a Property Control Inventory Transaction” document at

Southeastern Home -> LeoNet -> PeopleSoft Financials -> How Do I?
PROPERTY CONTROL (Con’t)

For non-inventory (non-tagged) property, several types of transactions also require approval before they can be completed. These transactions include surplusing items, trading in items, dismantling for parts, and reporting the items as lost/stolen. (Location changes do not require approval for non-inventory items.) These transactions can be entered by using the PeopleSoft “Prop Cntrl Non-Inventory items” screen. For step-by-step instructions for these transactions, see the “Entering a Property Control Non-Inventory Transaction” document on the “How Do I?” menu.

Approving Transactions

When an asset transaction has been submitted and needs approval from one or more PeopleSoft Financials users, an email will be sent to the first approver, and it will appear in their PeopleSoft Financials Worklist. The Worklist icon appears at the top right corner of the PeopleSoft Financials home page:

(See the “How Do I” document “Approving Property Control Transactions” for additional information on approving the transaction.)

The transaction will progress through the required approvals (unless approval is denied by one of the approvers). The final approval for all transactions (other than location changes) comes from the Office of Property Control.
Purchasing at Southeastern

There are currently four purchasing methods used for budget units at Southeastern:

1. The Procurement Card (also known as the P-Card)
2. The Process Form for Payment
3. Internal Request Form
4. PeopleSoft Requisition (becomes a Purchase Order)

Procurement Card

This VISA credit card is the purchasing method of choice by Southeastern for most purchases up to $1000. Employees are issued a P-Card by Bank of America, make purchases directly from vendors, code transactions on-line using Bank of America’s “Works” program, and reconcile their statement on a monthly basis.

There are guidelines and restrictions that apply to purchases. For instance, the P-Card is NOT to be used for travel (there is a separate travel card that is issued to employees for that purpose) and it cannot be used to purchase a computer. The procedures for obtaining and using a P-Card can be found on the Purchasing Department’s web pages:

Southeastern Home -> Administration -> Purchasing -> Procurement Card Program -> Procurement Card Policies and Procedures

Instructions for using the “Works” program to code transactions are also available on the Procurement Card Program web pages.

The following is the timeline for a P-Card transaction:

<table>
<thead>
<tr>
<th>P-CARD QUICK REFERENCE TIMELINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>When</td>
</tr>
<tr>
<td>1) Approximately 2 Days after Purchase</td>
</tr>
<tr>
<td>2) Within 2 Days of Works Notice</td>
</tr>
<tr>
<td>3) Within 2 Days of Approval Notice from Works</td>
</tr>
<tr>
<td>4) End of billing cycle (on the 6th)</td>
</tr>
<tr>
<td>5) Within 5 Days of statement (see NOTE below)</td>
</tr>
</tbody>
</table>
PROCUREMENT CARD (Con’t)

To clarify further (this is very important), the requirements for each step on the timeline are:

1) **Cardholder:** Approximately **2 days** after using the Procurement Card for a purchase, the cardholder will receive an email notice from Bank of America’s Works System that a transaction is waiting for coding to the correct Budget Unit/Account and the cardholder’s signoff.

2) **Cardholder:** Within **2 business days** after receiving the above notification from Works, the Cardholder must complete the coding and signoff. The cardholder’s immediate supervisor will then receive an email notice that their approval is required for the transaction. (See the “Works Cardholder Transaction Signoff” document for step-by-step instructions.)

3) **Supervisor:** Within **2 business days** after receiving notification from Works, the supervisor must access Works and complete the approval process for the transaction. (See the “Approving a PCard Transaction” document for step-by-step instructions.)

4) **Cardholder:** At the end of the Works billing cycle for the month (the 6th of the month), the cardholder will receive an email with the monthly Procurement Card Transactions Statement attached.

5) **Cardholder:** Within **5 business days** after receiving the statement, the cardholder must:

   a) scan the documentation for the purchases shown on the statement into a single pdf file (MUST be pdf or jpg—no other formats can be accepted),
   b) attach this scanned file to the monthly statement email, and,
   c) forward the original email with the statement and the additional file attached to pcard@selu.edu.

**NOTE:** If the statement documentation is not submitted within this 5-day time frame, a notice will be sent to the cardholder and supervisor. If documentation is not received within an additional 5 days of the reminder email, the procurement card will be suspended.
PROCESS FORM FOR PAYMENT

Process Form for Payment

The Process Form for Payment is a mechanism for transmitting invoices for payment without going through a formal requisitioning process. The form lists the types of transactions that can be transmitted to the Accounts Payable or Purchasing Departments through this method, including subscriptions, utility payments, lease payments, etc.

The form is available on the Purchasing Department’s web pages:

Southeastern Home -> Administration -> Purchasing -> Purchasing Forms -> Process Form for Payments

Internal Request Form

When purchasing materials or equipment from other departments within the University, you may be required to file a form that authorizes the transfer of goods and costs to your budget unit. Examples include:

   Computer Equipment Resales Purchase Request
   Computer Paper Resales Purchase Request

Each of these forms will be available from the department offering the goods and will vary in format, depending on the needed information. Visit the web site for the department to learn the purchasing procedure for these “internal requests”.

PEOPLESOF T RE QU ISITION

PeopleSoft Requisition

If your purchase cannot be completed through any of the methods just listed (meaning it is over $1000 or you could not use the P-Card due to a purchasing restriction), the procurement process is summarized below. A detailed description of each step follows.

The Requisition/Purchase Order Process

<table>
<thead>
<tr>
<th>PeopleSoft User</th>
<th>Budget Unit Head (Requester)</th>
<th>Procurement Spec &amp; Controller's Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Create requisition in PeopleSoft with scanned supporting documents</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 2 | A: Requisition appears in work list  
B: Approve or deny requisition (an approval sends request to OSRP and/or Basic Computing (if needed)) | | |
| 3 | Overnight, the Approved Req is budget checked and becomes an Unapproved PO | | |
| 4 | A: For <=$5,000 - Procurement Specialist will review, approve, or contact Requester, & place order  
B: For >$5,000 - As in 4A, plus Procurement Spec will obtain the bids | | |
| 5 When goods or services are delivered, enter Receiving in PeopleSoft. (Note that receipts for tagged assets are entered by Property Control) | | 6 Controller's Office receives invoice and pays vendor |

Step 1 (PeopleSoft User):

Create requisition in PeopleSoft with scanned supporting documents.

To log in to the PeopleSoft Financials system, navigate to the PeopleSoft Financials web page and choose the “PeopleSoft Login” link:

Southeastern Home -> LeoNet -> PeopleSoft Financials  
-> PeopleSoft Login
PEOPLESOFt REQuISITION (Con’t)

(See the “Getting Ready to Purchase or Travel” section of this guide for information on obtaining your user id for PeopleSoft Financials.)

Enter the requisition and attach any related documents by following the steps provided in the on-line training for PeopleSoft Financials at

Southeastern Home -> LeoNet -> PeopleSoft Financials
-> PeopleSoft Financials Training -> Purchase Requisition
Topics

Step-by-step instructions are also available on the PeopleSoft Financials web page:

Southeastern Home -> LeoNet -> PeopleSoft Financials
-> How Do I?

If your requisition is for a contract greater than $2000, the Procurement Specialist must have the original contract, signed by the vendor, before the purchase order (and payment) will be processed!

THERE IS ONE EXCEPTION TO THIS STEP!
Purchase requisitions can only be entered for one budget unit head’s approval, so for purchases involving multiple budget unit heads, use the Multi-Budget Unit Head Purchase Request Form:

Southeastern Home -> Administration -> Purchasing ->
Purchasing Forms -> Multi-Budget Unit Head Purchase Request

Step 2 (Approver):

A – Requisition appears in worklist

Every hour (on the half hour) a “workflow” process adds requisitions to the appropriate budget unit heads’ worklist for approval. To access the worklist, click on the “Worklist” link at the top of the screen as shown below:
A worklist similar to the following appears:

To access a requisition that is waiting for approval, press the link on the right side of the listing. For instance, 29_SLULA_0000000023 is a link to requisition number 23 that needs approval.

B -- Budget Unit Head approves or denies the requisition
PEOPLESOF T REQUISITION (Con’t)

To view the details of the requisition, the budget unit head can use the button. To approve the requisition, confirm that “Approve” is selected in the “Approval Action” drop-down listing and press the “Save” button at the bottom of the screen. To deny the requisition, simply change the “Approval Action” to “Deny” before saving.

If approved, the requisition then goes automatically to worklists for the Office of Sponsored Research and Programs (if needed) and/or Basic Computing (if needed) for additional approvals.

For additional training on requisition approval, visit the following web page:

Southeastern Home -> LeoNet -> PeopleSoft Financials -> PeopleSoft Financials Training -> Purchase Requisition Topics -> Approving a Requisition

A “How Do I” document for approving requisitions is also available on the PeopleSoft Financials web page.

Step 3 – (PeopleSoft System):

Overnight, the approved requisition is budget checked and becomes an unapproved purchase order

Step 4 (Procurement Specialist):

For purchases up to $5000, the Procurement Specialist will review the requisition, along with any quotes and other scanned documents, and will place the order.

For purchases over $5000, the Procurement Specialist will review and also obtain bids for the purchase if needed before placing an order.

***Note that orders are placed by the Procurement Specialist, not the Budget Unit***
PEOPLESOF T REQUISITION (Con’t)

Step 5 (PeopleSoft User):

When goods or services are delivered, enter the receiving in PeopleSoft. Remember, a receipt entry must be in PeopleSoft for the vendor to be paid. Step-by-step instructions for entering a receipt are available in a “How Do I?” document on the PeopleSoft Financials Web page.

Step 6 (Controller’s Office):

Invoices are sent to the Controller’s Office (Accounts Payable – SLU 10720) and a PeopleSoft voucher will be created in the system. If the quantities and pricing on the voucher, receiver, and purchase order all agree, the vendor will be paid. If they do not agree, your procurement specialist will investigate the discrepancy and resolve the problem.
GETTING READY TO PURCHASE

Getting Ready to Purchase

1. Make sure you have a procurement card (P-Card) if you will make purchases up to $1000.

If you need a P-Card, contact Scott Morrow, smorrow@selu.edu or 549-5323.

2. Complete the online assessment for entering a requisition. The “Getting Started” link on the PeopleSoft Financials web page will guide you through the steps necessary to prepare for and complete the assessment:

Southeastern Home -> LeoNet -> PeopleSoft Financials
-> PeopleSoft-Based Financials – Getting Started

3. Request your financials user access by submitting the scoring results from the “Adding a New Requisition” assessment (completed in 2. above) to the PeopleSoft Financials team at SLU Box 10725 or fax to x3315. Staff who are not budget unit managers, must also submit a “Requisitioning Authorization Form” that gives authorization to enter requisitions for a budget unit. This form can be found at:

Southeastern Home -> LeoNet -> PeopleSoft Financials
-> Requisitioning Authorization Form

4. Also, submit an “Application for Faculty/Staff Account” to SLU Computing Services for a login to the PeopleSoft Financials system. This form is available at:

Southeastern Home -> Administration-> Basic Computing Services -> Help Desk -> Available Documents

5. Make sure you have access to a scanner for purchasing attachments and/or submitting P-Card receipts.
RESOURCES FOR ASSISTANCE

Resources for Assistance

- For purchasing guidelines and procedures:
  Southeastern Home -> Administration -> Purchasing
  or contact the Procurement Specialist assigned to your Budget Unit.

- For PeopleSoft Financials Assistance:
  Email: PSFinancials@selu.edu
  Or call x3243

- For PCard (Procurement Card) Assistance:
  Email: smorrow@selu.edu
  Or call x5323

- For Travel Authorization, state travel policies and procedures, and other travel assistance:
  Southeastern Home -> Administration -> Controller’s Office -> Faculty & Staff Information -> Travel Information
  or call x2089

- For Grant Proposal Assistance, contact the Office of Sponsored Research and Programs (x3212).

- For Budget Assistance
  Southeastern Home -> Administration -> Budget Office -> Budget Information
  or email hoberschmidt@selu.edu
  or call x2283

- For Property Control Assistance
  Southeastern Home -> Administration -> Property Control
  Or email sandra.jenkins@selu.edu
  Or call x2205

- For Computer & Scanning Technical Support
  Southeastern Home -> Administration -> Basic Computing Services -> Helpdesk
  or call x5555
# CREATE/UPDATE BUDGET UNIT FORM

**PeopleSoft**

Create/Update Budget Unit Form

Date Requested: ____________________  
Requested by: ____________________  

For more information, contact extension 3244

**Please Mark an “X” by all that Apply**

- [ ] Create New Budget Unit  
- [ ] Update Budget Unit  
- [ ] Inactivate  

- [ ] Create New Project  
- [ ] Update Project  
- [ ] Other - If Other Explain: ____________________  

**Home Department Name**  
**Home Department No.**  

**Budget Unit Name**  
**Budget Unit Number**  

**Budget Unit Manager**  
**BU Manager W# Number**  

**Project Name**  
**Project Number**  

**Project Start Date**  
**Project End Date**  

**Fund**  
**Set Up for P-Card/Works**  

**Program**  
**Set Up for Payroll**  

**Class**  

**TA Department Name**  
**TA Department Number**  

**TA Division**  

**TA Sub Division**  

**TA Budget Unit Head**  
**TA Budget Unit Head W#**  

**TA Department Head**  
**TA Department Head W#**  

---

For PeopleSoft Analyst Use Only

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</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>Budget Unit</td>
<td>Commitment Control</td>
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<td>[ ]</td>
<td>Project</td>
<td>Tree Manager</td>
</tr>
<tr>
<td>[ ]</td>
<td>TA Department</td>
<td>HR Combo Table</td>
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<td>[ ]</td>
<td>SpeedType</td>
<td>Notify Controller’s Office</td>
</tr>
<tr>
<td>[ ]</td>
<td>SpeedChart</td>
<td>Notify 3rd Party Systems</td>
</tr>
</tbody>
</table>
# BUDGET ADJUSTMENT FORM

## SOUTHEASTERN LOUISIANA UNIVERSITY
BUDGET ADJUSTMENT REQUEST

**FUND CODE:** 10 Operating  20 Revenue  30 Restricted  xx Other  Fiscal Year 07-08

<table>
<thead>
<tr>
<th>Budget Unit #1</th>
<th>Budget Unit Name</th>
<th>Budget Unit #2</th>
<th>Budget Unit Name</th>
<th>Date Prepared</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<table>
<thead>
<tr>
<th>6 Digit Budget Unit</th>
<th>6 Digit Account</th>
<th>Account Name</th>
<th>Amount</th>
<th>Increase / Decrease</th>
</tr>
</thead>
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</table>

**PURPOSE OF REQUEST: (REQUIRED)**

[I certify that the funds are available for this requested budget adjustment.]

**Budget Unit Head**

**Coauthorizer by Other Budget Unit Head (if any)**

**Dean/Director/Supervisor (required only for two or more budget units)**

**Coauthorizer by Other Dean/Director/Supervisor (if any)**

**Supervising Vice President (required only with request for additional funds)**

**VP for Administration and Finance**

<table>
<thead>
<tr>
<th>Budget Office</th>
<th>DATE RECEIVED</th>
<th>DATE PROCESSED</th>
<th>Budget Adjustment #</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
# PROCESS FORM FOR PAYMENT

**SOUTHEASTERN LOUISIANA UNIVERSITY**

---

**VENDOR OR EMPLOYEE NAME**

---

**VENDOR NO. OR W #**

---

The following list of purchases are not required and should not be entered as a purchase requisition in PeopleSoft Financials. Mark the applicable item to be transmitted for payment.

---

>>>>>> Use One Form Per Vendor and/or Purchase Type <<<<<<

This form along with the original invoice or documentation shall be attached and "Sent To" Purchasing (SLU 10860) or Payables (SLU 10720) as indicated above.

<table>
<thead>
<tr>
<th>X</th>
<th>DESCRIPTION</th>
<th>PURCHASING</th>
<th>PAYABLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Advertising</td>
<td>SEND TO</td>
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<tr>
<td></td>
<td>Authorized Dealer Reps</td>
<td>SEND TO</td>
<td></td>
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<tr>
<td></td>
<td>Energy Mgmt Payments</td>
<td>SEND TO</td>
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<tr>
<td></td>
<td>Express Carrier Services</td>
<td>SEND TO</td>
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<tr>
<td></td>
<td>Freight Charges &lt; $1,000</td>
<td>SEND TO</td>
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<tr>
<td></td>
<td>Freight for Textbooks</td>
<td>SEND TO</td>
<td></td>
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<tr>
<td></td>
<td>Fuel for Univ Vehicles</td>
<td>SEND TO</td>
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<tr>
<td></td>
<td>Game Concession Sales</td>
<td>SEND TO</td>
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<td></td>
<td>Game Event Workups</td>
<td>SEND TO</td>
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<td></td>
<td>Game Guarantees</td>
<td>SEND TO</td>
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<td></td>
<td>Game Officials</td>
<td>SEND TO</td>
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<td></td>
<td>Government Payments</td>
<td>SEND TO</td>
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<td></td>
<td>Honoraries</td>
<td>SEND TO</td>
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<td></td>
<td>Lease Payments</td>
<td>SEND TO</td>
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<td>Membership - Institutional</td>
<td>SEND TO</td>
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<tr>
<td></td>
<td>Motor Vehicle Licensing</td>
<td>SEND TO</td>
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</tbody>
</table>

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Describe Payment in Detail:

---

I certify the description marked has been (1) received, inspected, counted and accepted or (2) performed satisfactorily.

---

**AMOUNT APPROVED FOR PAYMENT (Do not Leave Blank or Form Will Be Returned) $**

<table>
<thead>
<tr>
<th>Budget Unit Name(s)</th>
<th>Budget Unit Number(s)</th>
<th>Expense Acct</th>
<th>Amount</th>
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**Budget Unit Head Name (print or type)**

---

**Signature and Date**

---

**Sponsored Research & Programs Signature (if applicable)**

---

**Date:**

---

**FOR PURCHASING OR PAYABLES USE ONLY**

<table>
<thead>
<tr>
<th>Reviewed by</th>
<th>Date</th>
<th>Amount</th>
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</table>
**COMPUTER EQUIPMENT RESALES REQUEST FORM**

**Computer Equipment Resales
Purchase Request**

Requisitioning Department: 

Requisitioned by: 

Telephone Extension: Bldg/Rm: 

Date: 

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DESCRIPTION</th>
<th>QUANTITY</th>
<th>UNIT</th>
<th>UNIT PRICE</th>
<th>AMOUNT</th>
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Approved by (signature):

<table>
<thead>
<tr>
<th>Budget Unit</th>
<th>Expense Code</th>
<th>Encumbrance</th>
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</tbody>
</table>
# MULTI-BUDGET UNIT HEAD PURCHASE REQUEST

After obtaining all required approvals, please forward to:

The Purchasing Dept  
SLU 10300  
Hammond, LA 70402  
Ph: 985-549-2064

<table>
<thead>
<tr>
<th>ITEM</th>
<th>DESCRIPTION</th>
<th>QTY</th>
<th>UNIT</th>
<th>UNIT PRICE</th>
<th>AMOUNT</th>
<th>DUE DATE</th>
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</tbody>
</table>

Budget Unit (dept) | Expense (account) | Amount/Percentage
Approving Unit Head Signature | E-Mail Address

*Director, Sponsored Research & Programs  
(approval signature required for all project/grant expenditures)

Budget Unit (dept) | Expense (account) | Amount/Percentage
Approving Unit Head Signature | E-Mail Address

*Director, Sponsored Research & Programs  
(approval signature required for all project/grant expenditures)

Budget Unit (dept) | Expense (account) | Amount/Percentage
Approving Unit Head Signature | E-Mail Address

*Director, Sponsored Research & Programs  
(approval signature required for all project/grant expenditures)

PURCHASE REQUESTED BY: ___________________________ Ext. # __________ Procurement Specialist Approval Date Assigned PO #__________
REQUISITIONING AUTHORIZATION FORM

*** PLEASE PRINT CLEARLY ***

This form authorizes a user to enter and/or review requisitions on Southeastern's PeopleSoft Financial System. This form may also be used for Authorization Removal. The signature of each Budget Unit Head who authorizes the applicant to enter requisitions for their Budget Unit(s) is required. If this is the first requisitioning authorization form that you have submitted, please attach a certification form from the on-line assessment for "Adding a New Requisition".

*** NEW AUTHORIZATION ***

Date: ___________ PeopleSoft Financials User: ____________________________

I authorize the above PeopleSoft Financials User to enter requisitions for all Budget Unit(s) for which I am responsible:

<table>
<thead>
<tr>
<th>Budget Unit Head Name</th>
<th>Budget Unit Head Signature</th>
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</table>

Requestor’s Phone Number

**** REMOVE AUTHORIZATION ****

Date: ___________ PeopleSoft Financials User: ____________________________

I am requesting authorization removal of the above listed PeopleSoft User from all Budget Unit(s) for which I am responsible.

<table>
<thead>
<tr>
<th>Budget Unit Head Name</th>
<th>Budget Unit Head Signature</th>
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</table>

Requestor’s Phone Number

Send to PeopleSoft Financials • Fax #3315 or Box 10725

rev073010
PROPERTY CONTROL TRANSACTION AUTHORIZATION FORM

PEOPLESOFTH FINANCIALS
Property Control Transaction Authorization

This form authorizes a user to modify location information and/or enter Property Control transactions in the Southeastern PeopleSoft Financial System for budget units that are indicated below. These transactions could include requests to surplus assets, to transfer assets to another budget unit, to dismantle assets, or to report assets as missing. The Budget Unit Head approval will still be required for each transaction, with the exception of modifying location information.

Date: __________________

PeopleSoft Financials User: ______________________________________

I authorize the above PeopleSoft Financials User to modify asset locations and/or enter Property Control transactions for assets assigned to the following Budget Units for which I am responsible:

<table>
<thead>
<tr>
<th>Budget Unit number</th>
<th>Description</th>
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</tbody>
</table>

Budget Unit Head Name (please print) ____________________________
Signature ____________________________________________
Date ____________________________

Send to: PeopleSoft Financials - Fax #3315 or Box 10725