Purchasing through eProcurement
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Electronic Procurement, better known as eProcurement (ePro), is the business-to-business sale and purchase of goods and services via PantherSoft Financials. The main benefits of eProcurement are cost savings achieved by aggregating spend, increased efficiency, and improved transparency in organizational purchases. These benefits make e-Procurement an initiative that is very much aligned with the University's Worlds Ahead position, advancing our ability to leverage university spend and increase savings.

In addition to the above overall benefit, eProcurement functionalities provide requesters with a central place to manage their requisitions. Via the Manage Requisitions page, the Requisition Lifespan helps track the ePro process from requisition creation through payment. A central marketplace, myFIUmarket, provides functionalities for requesters to search for goods and services already under contract by the University, compare specifications and pricing between items and services, and shop directly from specific vendor catalogs.

Shopping from the myFIUmarket has unique benefits. Requisitions, once approved, are routed directly to the Supplier, decreasing the overall turn-around time for Purchase Orders.

Also, most market items have the NIGP/Category code built in, which alleviates potentially choosing the wrong category code. Requesters can add multiple suppliers to one requisition, as well as split ship to locations on one requisition adding ease and convenience to the Requisition process.

FIU Business Process

The purchasing process through eProcurement here at FIU follows the Requisition Lifespan from the creation of the requisition to payment. Users create a requisition for goods or services. That requisition is then routed for approval to one or more expense/project managers. After the requisition is approved, a purchase order is created. The purchase order is also routed for approval and dispatch to the supplier/vendor. After a purchase order is dispatched, the goods are received to the user or customer or the services are rendered. Users must create receipts for the goods/services received. The supplier/vendor sends an official invoice. The invoice, receipt, and purchase order undergo 3-way matching. A voucher is created and routed for approval. Upon approval, payment is scheduled and issued.

This manual and corresponding training covers the overall system processes for purchasing of creating different kinds of electronic requisitions and following them through to the creation of receipts.
Access Request

The ability to create and manage requisitions and the requisition process is granted through the PantherSoft Financials Access Request Form. This form is located through the NavBar with the following navigation:

**Main Menu > Access Request System > Access Request.**

1. Click on **Add a New Value** tab.

2. Enter the Panther ID for the employee needing access under **Empl ID**. Click **Add**.
3. Enter a business reason why the request is being submitted under **Description**. Select either 002 or 002A Access Roles. Click **Submit**.

![Access Roles Selection](image)

**NOTE:** Access to the myFIUmarket is given along with access to creating a requisition through Access Roles 002 (Super Receiver) and 002A (Casual Receiver). Even if it is only to view information.

**002 Requester/Super Receiver Access:** This role gives the user the ability to create requisitions and create receipts for any requisitions/purchase orders. If you are an expense manager approving transactions in PeopleSoft, you must select this role.

**002 Requester/ Casual Receiver Access:** This role gives the user the ability to create requisitions and create receipts only for their own requisitions/purchase orders.

All Access Requests are routed to an employee’s HR supervisor for approval. After approval it routes to Financial Systems and Support Services for implementation.
Shopping the myFIUmarket

The myFIUmarket is a one-stop location to purchase goods from the available contracted vendors and their specific catalogs, called Punchout Catalogs. Users can shop through suppliers to purchase various commodities for their departments. The myFIUmarket also includes additional functionality such as managing shopping carts. The sub-sections below provide detailed information into the market and its functions.

Adding Items to a myFIUmarket Requisition

The Purchasing Department encourages all Requesters to use the myFIUmarket before choosing to create a Special Request.

There are two ways to navigate to the myFIUmarket, from the Tiles or through the NavBar.

1. Click the Procurement Center tile on the Employee Self Service homepage within PantherSoft Financials.
2. Click the **Requisition** tile.

![Procurement Center screenshot]

**Alternative Navigation:**
An alternate way to access the myFIUmarket and/or to create a market requisition, is to navigate through the Nav Bar using the following navigation: *Main Menu > eProcurement > Requisition*

3. Whether navigating through tiles or the NavBar on the **Create Requisition** screen, click the **myFIUmarket** link.

![Create Requisition screenshot]
4. Select a specific **Punchout Catalog** and shop for the item(s) on the supplier’s catalogs.

![Punchout Catalog Image]

**NOTE:** The general search bar at the top of the screen can be used to shop for and search for specific items within ALL vendor catalogs, however it is recommended to navigate directly into a supplier’s punchout catalog to select items.

5. The myFIUmarket has a timer after entering any catalog. It is automatically set to 15 minutes. If this timer runs out, all catalog shopping data will be lost. For additional time to continue shopping, click the **Reset Session** button.

![Session Timer Image]

**NOTE:** To leave the catalog at any time, without adding any items, click the **Cancel Punchout** button in the top right of the screen.
6. Use the search or navigational functions within each catalog to search for items. Please note that different vendors/catalogs may have different capabilities.

![Procurement Center](image)

7. After finding a specific item to buy, confirm or update quantity, then click **Add To Cart** button.
8. After adding something to a cart within a vendor punchout catalog, click the **Continue Shopping** link to continue adding more items. To review the items in the cart, click the **Shopping Cart** button. To complete the order, click the **Check Out** button. Make sure to check out of the catalog back into the market.

![Continue Shopping and Shopping Cart](image1.png)

9. After checking out of a Punchout catalog, the system will return to the myFIUmarket **Shopping Cart**. Review items, then click **Proceed to Checkout** to continue making the requisition.

![Proceed to Checkout](image2.png)
10. Click the **Place Order** button to transcribe the contents of the myFIUmarket card to a requisition in PantherSoft Financials.

![Screenshot of myFIUmarket interface]

11. The system will redirect back to PantherSoft, to the Requisition’s **Checkout- Review and Submit** page. Items bought from the myFIUmarket will have a globe icon in front of the line, denoting the item is a “Market” item.

![Screenshot of PantherSoft checkout page]

Once items are added to the requisition, complete the checkout process. See the [Checkout – Review and Submit Page](#) section for more information.
Viewing and Modifying Shopping Carts

There are various options to find a shopping cart that was previously created and to modify those carts. Users can view an active shopping cart and past orders (last 5 orders and past 90 days) as well as see a history of their shopping carts. To view active carts, assigned carts, draft carts, and recent carts use the following steps:

1. Click the Shop button (the shopping cart icon) on the left-side toolbar, then select My Carts and Orders.

2. This menu includes “Open My Active Shopping Cart, View Carts, View My Orders (Last 90 Days), and View My Orders (Last 5 Orders).” Viewing draft and assigned carts are also available under “View Carts.”

   Click on “Open My Active Shopping Cart” to view the current cart that is being modified.

3. Click “View Carts” to find Draft Carts and Assigned Carts.
4. After navigating to View Carts, the **Cart Management** page opens with two tabs, **Draft Carts** and **Assigned Carts**. Draft Carts are incomplete carts that are pending additional items, review, or have not been submitted for approval. Assigned Carts are carts that have been assigned to another user for review, to add or edit items, or have not been submitted for approval.

5. **Draft Carts** have the following available actions, “View, Activate, Delete.” Click the **Action** drop down to choose an action.

6. To view and/or modify past orders, click again on the **Shop** icon then **View Carts**. Click “View My orders (Last 90 Days)” or “View My orders (Last 5 Orders).” This will navigate to the **My Recent Carts** page. This page has carts lost due to time out session in the market or simply just navigated to another page or browser or past orders.

Users can click the **Cart No** i.e. **105376497** to view the cart. Alternatively, users can click **resubmit cart** to re-activate the cart as a new cart in order to place the order again.
7. Once the **Cart No.** (actual number of cart) is clicked, the user is directed to the cart Summary page. The following tabs provide different information:

- **Comments** – Displays any comments the assignee entered back to the assigner.
- **Attachments** – If there were any quotes or docs attached, they can be viewed here.
- **History** – Shows the history of cart. (I.e. line deleted)

8. Users can take additional actions from the **Available Actions** drop down or **For selected line items**. Drop down. The **Available Actions** include:
   - Copy to New Cart – Takes existing cart items and transfers it to a new cart/order.
   - Resubmit Cart – Resubmits cart to the original assignee.
   - Add Comment – Adds comments to the actual cart.
   - Add Notes to History – Adds a note that associates to the history log.
For selected line items actions, click the checkbox next to any product line, then click the drop-down menu next to available actions which include:

Add to Favorites – Opens the Add Favorite box and adds a specific item to a favorites folder within myFIUmarket.

Add to Active Cart – Adds an item to a currently active shopping cart.

Add to Draft Cart or Pending PR/PO – Provides the options to add item to an Active Cart or Draft Cart.
Assign a Cart

The Assign a Cart functionality allows for users to assign a shopping cart to someone else to review, add, or complete the requisition.

1. Shop for items within a vendor’s punchout catalog. After returning into the market, make sure to name the shopping cart and click Update.
NOTE: If an item is brought into the myFIUmarket cart from the Supplier site, it is auto saved. If any changes are done to the cart, always click the Update button. Also cart name defaults to date of transaction and user name.

2. To assign the items in the current shopping cart to someone else, click the Assign Cart button.

3. A pop-up window will appear. Click Search for an Assignee link to choose the employee the cart is to be assigned.
4. Use the search fields to find the individual to whom the cart will be assigned. Click **Search**.

**NOTE:** For an assignee’s name to be available for selection, that assignee must have accessed a Punchout Catalog previously. Then, their name will be in the system to select.

5. Click the **select** link next to the person’s name for whom the cart is to be assigned.

**NOTE:** After selecting the name, there is an option to save that name by checking the **Add to Profile** box. This assignee will be amongst selections available the next time the requester logs in.

6. There is an option to include a message in the **Note To Assignee** field. Select the checkbox next to **Add to Profile**, in order for the note to display to the individual the cart is being assigned. After selecting Assignee, click **Assign**.
7. A confirmation page appears once the cart is successfully assigned. After the cart is assigned, ONLY the assignee can modify the cart. If the original creator needs to modify the cart, it must be unassigned from "My Carts and Orders". See the View Carts section.

8. Under the Action Items and Notification icon the assignee will see a message indicating a cart has been assigned to them. An email notification is also sent.
Working with Assigned Carts

After a cart is assigned to someone within the myFIUmarket there is an alert under Action Items.

1. To view the assigned cart, click on the highlighted bell icon. This will navigate to the Cart Management page, where the cart can be selected under the tab Assigned Carts.

Alternatively, users can find assigned carts through the Cart Icon Shop on the left-hand side, blue column. Select Shop > My Carts and Orders > View Carts.
2. Click on the **Assigned Carts** tab. Then to view and modify the cart, click on the corresponding **Shopping Cart Name** i.e. 2017-08-14 TRNAM01 01.

3. From the **View** action drop down, users have options to “View, Activate, Return, Delete” Assigned Carts.
As the assignee, when the cart modifications are completed, the cart can be returned to the user who assigned it originally.

1. Click the **Return Cart** button from within the Shopping Cart.

2. If desired, leave a **Note** then click **Return**.

3. A confirmation page will appear once the cart is successfully returned. The assignee will no longer be able to modify the cart.

The original requester will see a notification under the Notification alert icon after the assignee has returned the cart to them.
Merge Carts

To merge multiple carts that have been assigned, utilize the **Move to Another Cart** action.

1. Navigate from within myFIUmarket to **Shop** > **My Carts and Orders** > **View Carts**. From the Cart Management page, click on the **Shopping Cart Name** i.e. 2018-10-05-1075172 04.

2. Check the **Select All** checkbox or individually select the items that will be merged.

3. Select the **Move to Another Cart** link from the **Perform an action on** dropdown menu.
4. Select radial button for the cart the items are being moved to. Then, click the **Move** button.

   ![Image](image)

   **NOTE:** If there are carts already created, they will show up under Draft Cart. There is the option to merge to an existing cart or to a brand-new cart.

5. Click the **Leave Page** button on the confirmation screen. The system will return to the empty cart.
NOTE: The cart remains available, though it is empty. Additional items may be added to the cart, return the cart or delete the cart.

6. The destination cart will now contain the items selected from the original cart and reflect the total for the order, thus far.
After a cart is assigned to another individual, the original requester has the ability to unassign the cart, thus returning the cart back to themselves. An important note, a shopping cart can only be controlled by a one to one assignment. This means that if a shopping cart is assigned to multiple individuals past the original requester, the original requester cannot unassign. Only the last individual that has assigned a cart has the option to unassign.

1. As the original requester or last person to assign a cart, to view the carts that have been assigned to others, click the Shop icon (the shopping cart icon) > My Carts and Orders > View Carts.

2. Under the Assigned Carts tab, click on the dropdown menu under Action. Select “Unassign.”

3. The cart will be unassigned from the assignee and returned to the original requester as a Draft cart. The original requester can now proceed with any cart modifications and/or proceed to Checkout.
Special Requests

A Special Request refers to a type of requisition created for goods and services not available via the myFIUmarket. All special requests are bought from official, approved, registered FIU vendors. Any store, company, supplier, vendor must register via an application form on the Office of the Controller website. They must be fully approved in order to process and request a special request. Visit [http://finance.fiu.edu/purchasing/2supplier_reg_portal.html](http://finance.fiu.edu/purchasing/2supplier_reg_portal.html) for more information on vendors.

The following sections include how to create this type of requisition as well as options, settings and information related to these types of requisitions.

Creating a Special Request Requisition

1. From the [Employee Self-Service](#) homepage within Panther Soft Financials, click the [Procurement Center](#) Tile.

2. Click the [Requisition](#) Tile.

**Alternative Navigation:**

An alternate way to create a special request requisition, navigate through the Nav Bar using the following navigation: **Main Menu> eProcurement> Requisition**
3. Click **Special Requests** link.

![Create Requisition](image)

**NOTE:** This requisition will create expense lines as items are added. The number of lines is located at the top, right side of the screen, next to the shopping cart.

4. Fill in all required fields marked with an asterisk (*)

**Item Details Section:**
- a. Fill out **Item Description** with the name of the item being ordered.
- b. Fill out the appropriate **Price, Quantity, and Unit of Measure**.
- c. Enter the **Due Date**, if desired.

![Special Requests](image)

**NOTE:** For Blanket Purchase Orders and Change Orders, please see the **Blanket Purchase Orders** and **Change Orders** section for more details and instruction.
5. **Category** - To search for the category, click the magnifying glass.

- Search by “Category” or “Description”. Searching by **Description** is recommended.
- Leaving the search box blank will produce all of the categories.

**Browse Category Tree** – Do not select anything.

![Look Up Category](image)

This screen shows a search by “Description”. Choose the category by clicking any of the links in blue.

![Look Up Category](image)

**NOTE**: An expense account (associated with the category chosen; located in the Account Field) must exist under the Activity Number or Project ID being used. If not, the requisition will yield a budget error. Always read the information in the Description column before making a category selection.
6. **Supplier** - Complete the desired Supplier information.

- To search for the Supplier, click the search glass icon.
- Enter search fields then click **Find** or leave the fields blank then click **Find** to see a list of all available suppliers in order by their Supplier Number. Select the radio button next to the selected supplier as shown below.

![Supplier Search](image)

7. Select the row by clicking the radio button next to the Supplier ID. Click **Select** at the bottom.

![Search Results](image)
Supplier ID and Supplier Name will populate once chosen.

8. Comments can be entered in the Additional Information box. Send to Supplier, Show at Receipt, and/or Show at Voucher are options to use so that these comments will appear on the selected places.

9. After all fields have been filled out, click Add To Cart button to add the line into the cart icon.

NOTE: Request a New Item is not an FIU option. This would only apply if FIU implemented hosted catalogs.
10. Notice that items for the current requisition appear next to the shopping cart icon as lines. i.e. 1 line. Click the **Checkout** button to complete the lines for the special request requisition and proceed.

11. After checking out, the **Checkout- Review and Submit** page appears. Items bought from as a Special Request will have a butler icon in front of the line, denoting the item is a “Special Request” item.

Once items are added to the requisition, complete the checkout process. See the **Checkout – Review and Submit Page** section for more information.
The **Checkout - Review and Submit** page provides summary information about the requisition in the Header of the page, **Requisition Summary**. The **Requisition Lines** section provides detailed information about goods/services being requested or ordered.

Requesters continue completing information about a requisition such as confirming ship to locations and entering accounting information within this page.

At any point in time, requesters can add additional goods/services using the **Add More Items** button.
The Requisition Lines section of the Checkout – Review and Submit page allows users to view and/or modify information related to the specific good/service being requested. It also includes expandable sections for Shipping and Accounting information.

1. Click the triangle next to the line selection box, to expand the line. Once the line is expanded, the shipping information, unit details, and Accounting Lines are visible.
Modifying Item Ship To

It is essential to review, and where necessary, update the shipping information of the good/service being ordered.

1. Click the search glass next to **Ship To** field to select another campus address if necessary. See the [Ordering Hazardous Chemicals](#) section for information on these unique ship to locations. Also note that multiple Ship-to Addresses will generate multiple Purchase Order numbers, one PO number per ship to address.

   a. Use the search fields to find and choose a different location. After finding a location, click the number of the **Ship To Location**. It will add in field as the new Ship to location and navigate back to the previous page.

   ![Look Up Ship To]

   **NOTE:** An easy way to find locations is to select “contains” under the **Description** search parameter. Type in the number of the room in the field. Click the **Search** button. All locations in any building with that particular room number appear.
Comments and attachments may be an important component to the information that needs to be provided in order to complete the purchase of goods or services. Users can attach emails, supplemental documents or simply make comments regarding the items that will be purchased directly on the Requisition Lines.

1. To add Comments or Attachments to the line itself, click the **Comments Add** icon under the blue Comments header to the right side of the expense line. To see the details of the req click the Details icon. All screens are below.

2. The comments box appears. (Use **Standard Comments** link is not used at FIU). Enter comments and click **OK**. Add attachments to the line by clicking the **Add Attachments** button. Once complete, click **OK**.
Requisition Lines and Options

The Requisition Lines section of the Checkout page provides information about each good/service being bought. Users can change and provide details and more information along the line. Another aspect of the line information includes the Chatfield values and/or speedchart that will be used to indicate how the good/services is being purchased from a particular budget.

1. Click the Details icon under the blue Details header for information related to the good or service being requested.

The Line Details opens. It provides detailed information about the item being requested.

NOTE: Device Tracking, Zero Price Indicator, and Stockless Item, are not options available at FIU.
2. Users can delete lines from the actual requisition by clicking the trash can icon on the line or selecting the specific line and clicking the **Delete Selected** link.

3. Open the small expander triangle next to the **Accounting Lines** header. Users must enter the required chartfields or **SpeedChart** in order to complete the line accounting information.

   Enter the SpeedChart or use the search glass to find it. See [Requisition Settings](#) section for information on populating SpeedChart for multiple expense lines.

### Splitting Accounting Lines

In some circumstances departments may want to purchase something from more than one budget within the same expense line. There are many combinations, such as two different Activity Numbers or an Activity Number and a Project. An example would be where two departments are sharing the cost of an item. Perhaps fifty percent of the amount is paid from one Department’s Activity Number and the other fifty percent from the other Department’s Activity Number. The Accounting Lines can be split between budgets and they can also be distributed by Amount or Quantity. Follow the process below to split Accounting Lines.
1. Enter a SpeedChart or Chartfields for the first Accounting Distribution or first of the split distributions.

![Screenshot of Accounting Lines with SpeedChart option]

2. Click the plus icon at the end of the Line 1 Accounting Line. This will add an additional line.

![Screenshot of Accounting Lines with additional line]

3. Enter the Accounting Distribution for Line 2 with the additional accounting information. **These Chartfields must be entered manually. The SpeedChart functionality does not apply to additional lines.** It may also be easier to open the Show All Columns icon.

![Screenshot of Accounting Lines with Show All Columns icon]

**NOTE:** To confirm ChartFields within an Accounting Distribution (related to a Project or Activity Number) users may refer to the SpeedType navigation within PantherSoft Financials. Security Role 001 is required. Go to Main Menu> Set Up Financials/Supply Chain> Common Definitions> Design Chartfields > Define Values> SpeedTypes.
4. Users must define the Percent split of the Accounting Lines. This can be done by, entering the percent under the **Percent** field for each line.

5. The split accounting can be calculated by Merchandise Amount or Quantity (any quantity over 1) using the **Distribute By** drop-down.

---

**Example Distributing by Quantity:**

- **Line 1:** Location 004306325B, Quantity 2.00, Percent 50.0000, Merchandise Amt 2,000.00, GL Unit FIU01, Entry Event, Account 772103, Alt Acct 77200
- **Line 2:** Location 004306325B, Quantity 2.00, Percent 50.0000, Merchandise Amt 2,000.00, GL Unit FIU01, Entry Event, Account 772103, Alt Acct 77200
Example Distributing by Amount:

Continue to process the requisition, Save and Submit and Check Budget as usual. After the requisition is sourced and dispatched as a purchase order, users can then receive. It is important to understand how to receive the purchase order and the way the system has allocation setup.

Allocation Type refers to the method the system uses to distribute a purchase’s quantity or amount received when the receipt quantity/amount is less than the quantity/amount of the total. Refer to the Receiving Process and Receipts section for more information.

Requisition Settings

Requisition Settings provides functionalities that impact all or selected lines on a requisition. This includes Supplier, Line Detail, Ship To, and Accounting Distribution information. The Requisition Settings link is found in the top right corner of the Checkout, Review, and Submit requisition page.

1. Click Requisition Settings

2. Choose Override radial button to unblock certain fields. Enter the information to override from defaults.
3. To confirm changes, click the **OK** button at the bottom of the screen.
NOTE: If using the search glass to select the Speedchart, the speedchart will not show in the speedchart box. To verify the speedchart entered has auto-populated the correct fields, use the More Button to expand the Chartfield line.

Another box will appear. Choose the appropriate radio button to apply the changes and then click OK. The choices available are:

**All Distribution Lines** - to apply the settings to all requisition lines.

**Matching Distribution Lines** - when adjusting distribution line 1 (any line) - it will override ALL distribution line #1s throughout the req (for REQ line 1, 2, 3, 4, etc...)

**Replace Distribution Lines** - this will wipe away all distribution lines (no matter what #) and replace with updated values/combination
Header Comments and Attachments

Users can place comments or attach documents to the line on a requisition as previously discussed with the Comment icon. Comments or attachments can also be placed here in the Header of the requisition document with the following boxes. Users can use these boxes; however, it is strongly suggested to put comments and attachments at the line level.

Approval Justification comments be placed in the bottom box for expense/project manager approvers to view.

Submitting the Requisition

When completing a requisition, there are different options to save, continue or submit. Prior to submission, do not click the Check Budget link at the bottom of the page. A message will appear that saves the requisition in an Open Status and does not budget check. If that message appears, click Cancel to return to the requisition. If users click OK, the requisition will stay in an Open status state and a requisition ID is generated. However, no other action takes place.
There are four options to choose at the bottom of the **Checkout** page.

**Save and Submit:** Saves the document and submits it to begin the approval workflow

**Save for Later:** Saves the document to revisit the Requisition at a later time.

**Add More Items:** This will take users back to the main requisition screen to add either a market or special request item.

**Preview Approvals link:** users can show potential approver names; Approvals are driven by the Chartfields chosen on requisition lines.

1. Choose **Save and Submit.** The **Confirmation** page confirms the requisition submission. It provides the **Requisition ID** number as well. Click the **Multiple Approvers** link located at the bottom of the screen to view names and PantherID’s of the expense/project approvers for each line of the requisition.
A pop-up window will open with the Approver information (driven by the Chartfields chosen and the item cost/type.) Click **Close** to exit.

The Budget Check process for requisitions verifies that funds are available in a budget to pay for the requested item(s) and pre-encumbers those funds (sets them aside). Requesters must run Budget Checking by clicking the **Budget Check** link on the **Confirmation** page of the Requisition. Users can check the budget also from the **Manage Requisitions** Tile and choose “Budget Check” from the drop-down menu, or leave it unchecked and it can be budget checked by an approver.

1. Click the **Check Budget** link and wait for system to process and status to change.
   a. **Valid** – there is enough money to pre-encumber this cost in the associated budget and allow the requisition to proceed in approval workflow.
   b. **Error** – there is something stopping the requisition from proceeding because of an issue with budget checking. (See **Budget Status** Section of this manual on information related to budget errors.)
   c. **Not Chkd** – the budget has not been checked.
Once the Budget Checking is completed, the Budget Processor checks the transaction against all referenced budgets and returns a status of “Valid” or “Error” in the transaction Budget Status field. The system holds any transaction that is returned with a status of “Error.” Transaction with a status of “Error” have one or more transaction lines that have failed budget checking. The error must be corrected by a Budget Manager in order to complete the requisition. A requisition in Budget Status “Error” will not proceed in approval workflow.

The budget status initially is set to not checked, “Not Chkd.”

### How to Request a Quote (RFQ)

Request For Quote (RFQ) is used when the Requester would like a Procurement Buyer to generate a quote for them by reaching out to other suppliers. For example, a department wants to throw a Holiday party and would like a quote on party tables, chairs and a tent. One quote from one supplier has already been obtained by the department, but the Department wants to know if other quotes from other suppliers can be obtained. An RFQ can then be requested. RFQ is executed through a Special Request only.

1. Begin by creating a **Special Request Requisition**. In the **Requisition Lines** section of the **Checkout – Review and Submit** page, click the **Details** icon.

2. Check off the “RFQ Required” box. Click **OK**. The requisition is then routed to a specific Buyer to obtain the quote.
3. If there is a quote that you may have already been received, attach it at the line level. Click on the Comments Add icon. Proceed with uploading the attachment.

4. Complete the requisition as usual.

5. A Procurement Buyer will be in contact with the requester. Also, the requisition and status of a quote can be checked within Manage Requisitions page. See the Managing Requisitions section for more information.

Ordering Hazardous Materials

The University has implemented a process when it comes to ordering hazardous chemicals so that they are received at centralized and controlled receiving locations. Whether a hazardous material is ordered through a myFIUmarket catalog or as a special requisition, it must be shipped to one of FIU’s approved Ship To locations.

When ordering hazardous items from catalogs in myFIUmarket, such as Fischer, a system message will appear once the shopping cart is converted to a requisition on the Checkout – Review and Submit page.
Hazardous Materials notification message:

Requisition line 1 contains Hazardous Material (20008,1)
Please Select a Ship To location that handles hazardous materials.

OK

The Ship To location for the line containing the HAZMAT item must be changed to one of the following locations: (Please do not ship Airgas gases here. Use normal Ship To)

<table>
<thead>
<tr>
<th>Centralized Receiving Locations for Hazardous Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus/Dept</td>
</tr>
<tr>
<td>MMC Scientific Receiving</td>
</tr>
<tr>
<td>EC Engineering Center</td>
</tr>
<tr>
<td>BBC Receiving Dock</td>
</tr>
<tr>
<td>NFSTC Largo Florida</td>
</tr>
</tbody>
</table>

NOTE: Ship to locations have been updated as of February 23, 2019

All chemicals for research ordered from Fisher will give this error. If Hazardous Materials are ordered from other places, it is suggested that the central receiving addresses be used.

Operating Capital Outlay (OCO) Items

Within PantherSoft Financials, any good or service over $4,700 will trigger a message to change the category code to an OCO code. This is accomplished through the mass changes functionality. For more information about OCO items, users should review the Property Control Manual or consult Procurement Services.

The cost of your purchase indicates that this may be an OCO purchase (20006,7)

If total cost of each OCO purchase is $5,000 or greater (including additional equipment/parts, freight, training and installation), then click on the Mass Change link and select the appropriate OCO category for the OCO lines. If this purchase is not OCO, please click ‘Save and Submit’ to submit the requisition without changing the category code.

OK

Use the Mass Changes link to override the category code to a specific OCO category code. Mass Changes is the only way to change a category code to the appropriate OCO category code.

1. Select the Line that is incurring the OCO. In the below screenshot, line 2 is selected as that is the line over the threshold. (Total is $5174.29). Click Mass Changes link.
2. Click on the search glass to choose a category code in the **Category** field. Only OCO codes are available.

3. Click **OK**.
4. Click **OK** to confirm that the Category code was changed. Click on the **Details** button for that line to display the Category Code.
The **Requisition Approval Workflow** functionality enables users to view the approvals required for a requisition. When a transaction is submitted, the notification process is put in action. The appropriate users are notified when they are required to perform a function: approve, deny, or hold. The requester is also notified via Email with an electronic message.

### FIU Requisition Approval Workflow

<table>
<thead>
<tr>
<th>Requisition Workflow Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pending</strong></td>
<td>System has initiated the approval routing process and requisition is waiting for approval action and requires Budget Checking. Approver(s) receive email notification to Approve.</td>
</tr>
<tr>
<td><strong>Approved</strong></td>
<td>Requisition is approved. Approver and Requester will be unable to make any further changes and the request is ready to be selected for Purchase Order processing. Final Approval triggers and email notification to Requester.</td>
</tr>
<tr>
<td><strong>Deny</strong></td>
<td>If Approver denies the Requisition, the Requester will receive an email with comments. Requester can make changes to the Requisition and resubmit for approval (if needed).</td>
</tr>
<tr>
<td><strong>Hold</strong></td>
<td>If Approver puts the requisition on hold, the Requester will receive an email notification with comments.</td>
</tr>
</tbody>
</table>

**ORED Approval** is only for Office of Sponsored Research Projects (FSR01) The Project Manager must approve the requisition if they are the same as the Requester.
Blanket Purchase Orders

Blanket Purchase orders (BPOs) are used when the user would like to request a Purchase Order that can be received against over a period of time. A BPO can be open for up to one fiscal year (until June 30th of the current fiscal year). Blanket Purchase Orders are entered via Special Requests. For example, a department has a consultant for a year and the consultant costs $12,000. Every month the consultant must be paid $1000. In this scenario, the requester would open a BPO for $12,000 and as the good or service is received/performed, the requester will create a receipt in the system against the $12,000.

1. Click the Procurement Center tile

2. Click the Requisition tile

Alternative Navigation:
An alternate way to create a special request requisition, navigate through the Nav Bar using the following navigation: Main Menu> eProcurement> Requisition

When creating a blanket purchase order – special requisition, various settings are important to complete on a requisition so that the requisition and purchase order can be created correctly.

3. Click Special Requests
2. While entering information about the blanket purchase order, make sure to type the Item Description as follows: “Blanket Purchase Order for [Insert detailed description of goods or services] for the period of 7/01/20XX – 6/30/20XX”.

3. The Price should be the total for the BPO period.

4. Quantity should be 1, to be used up within the time period needed i.e. three months, 1 fiscal year.

5. Ensure the correct Category Code is used.

6. Due Date should be the end of the time period or 6/30/20XX for the entire fiscal year.

7. On the Checkout – Review and Submit page, the Origin must be set to BPO – Blanket Purchase Order.
8. BPO’s are setup so that users can receive by the amount of service provided or a set amount like a subscription fee. When setting up a BPO, users must ensure BPO items, expense lines, are set to receive by Amount Only, which is found under the Details icon. Click the Details icon. On the next screen select the checkbox for Amount Only. Then click OK to return.

9. After clicking OK, a message will appear confirming that the requisition will be set to amount only. Click YES.
The **Quantity** field will gray out and the **Price** field will open to the total of the requisition.

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Blanket Purchase Order for item</td>
<td></td>
<td>12TH AVENUE GRAPHICS</td>
<td>1.0000</td>
<td>Each</td>
<td>1,009,000</td>
<td>1000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Click the **Comments Add** icon. As available include the following in comments and attachments:
   a. Authorized User name(s) and contact information. These are the individuals authorized by a Department to call the supplier and place orders against the BPO throughout the fiscal year.
   b. A reference to the contract utilized for pricing.
   c. Account number if applicable.
   d. If using a vendor contract, attach a copy of the contract.
   e. Provide a sample quote/invoice to allow the buyer to check the supplier id for accuracy. It is the responsibility of the requester to select the correct supplier id, however, the buyers check against any backup documentation for accuracy.

**NOTE:** BPOs may not be used to purchase operating capital outlay (OCO) items.
Change Orders

Sometimes a requester needs to modify or change an existing Purchase Order. In this section, the steps and process for how and when to complete a Change Order is reviewed as well as the system steps. Please note, depending on the type of requisition and its current status, steps to initiating changes will differ.

<table>
<thead>
<tr>
<th>Req Type</th>
<th>Sourced to a PO?</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Item</td>
<td>YES</td>
<td><strong>Increase:</strong> Initiate new market req in ePro</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Decrease:</strong> work directly with Supplier/Buyer to decrease order</td>
</tr>
<tr>
<td></td>
<td>NO</td>
<td>From Manage Requisitions choose Edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All reqs not sourced to a PO can be edited. No Change Order needed.</td>
</tr>
<tr>
<td>Special Request (non-market)</td>
<td>YES</td>
<td><strong>Increase:</strong> Change Order needed Create a new Requisition with additional items.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Decrease:</strong> Receive Decreased Quantity. Once order has been Received, contact the Buyer to close PO and release remaining encumbrance.</td>
</tr>
<tr>
<td></td>
<td>NO</td>
<td>From Manage Requisitions choose Edit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All reqs not sourced to a PO can be edited or cancelled. No Change Order needed.</td>
</tr>
<tr>
<td>Mixed</td>
<td>YES</td>
<td>Follow instructions for non-catalog and market items separately</td>
</tr>
</tbody>
</table>

If a requester has a Special Request requisition and needs to continue with processing a change order, follow these steps to create a Change Order (CO) via Tiles:

1. Click the **Procurement Center** tile.
2. Click the **Requisition** tile.

![Requisition Tile](image)

3. Click the **Special Requests** link.

![Special Requests Link](image)

**Alternative Navigation:**

Via the **NavBar** use the following navigation: **Main Menu > eProcurement > Requisition**
4. Enter the Item Details for the Change Order. All required fields should be entered. Of particular note, the fields should reflect **additional quantity from the original PO (the difference)**.

   a. Example: Original Requisition made for $200 and PO has been sourced. To increase the order to $300, a Change Order would be created for the difference ($100).
5. On the **Checkout – Review and Submit** screen the **Requisition Name** field should say, “CO to PO# xxxxxx” (include the original PO#).

Select “CO” in the **Origin** field. Continue following the steps to submit a Special Request.

After the Change Order is submitted, budget checked, and approved, a Procurement Buyer will manually combine the Change Order requisition with the original requisition related to the same Purchase Order. The PO will then be re-dispatched to the supplier.
Receiving Process and Receipts

A Receipt must be created in PantherSoft Financials immediately following the delivery of goods/services. This acknowledges that what was requested via a dispatched Purchase Order was fulfilled by the Supplier. The Receipt is independent of the Supplier’s Invoice, which they should send directly to Accounts Payable (AP) per instructions on the Purchase Order.

After the Receipt is created by a requester against a dispatched Purchase Order and an Invoice is received by AP, a payment will be sent to the Supplier. If a Receipt is not entered and/or an invoice not received, the Supplier will not be paid – even if the goods/services were provided.

The following sections detail the security roles related to receiving, how to receive depending on those roles, how to cancel a whole receipt, and how to cancel individual receipt lines.

Receiving Security Roles

There are two security access roles within PantherSoft Financials that allow users to access requisitions and complete receiving.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requester/Casual Receiver Role 002A</td>
<td>This role gives someone the ability to create requisitions and create receipts only for their own requisitions/purchase orders.</td>
</tr>
<tr>
<td>Requester/Super Receiver Role 002</td>
<td>This role gives someone the ability to create requisitions and create receipts for any requisitions/purchase orders.</td>
</tr>
</tbody>
</table>

**NOTE:** If the requester is also an Expense Manager approving transactions in PantherSoft, the requester must select Access Role 002.

If the requester is changing from one role to another, please email controller@fiu.edu making sure to also copy a current HR supervisor.

For steps on requesting these roles, see the [Access Request](#) section.
Receiving Process for the Casual Receiver (Access Role 002A)

The following steps provide instructions on how the Casual Receiver creates a Receipt for Requisitions created only by themselves.

To create a Receipt via Tiles, follow the steps below:

1. Click the Procurement Center tile.

2. Click the ePro Receiving Tile.

3. The Search Criteria page will appear. Enter the Purchase Order ID or Requisition ID and click Search. Alternatively, just click Search (only open lines to receive will appear).
4. Select the checkbox next to the lines that are open to receive. Click **Receive selected**.

![Receive selected](image)

5. Enter the date that the good/service was actually received in the **Received Date** field. The Receipt Date must be the date the product was physically received or when the service was rendered – not the date that the receiving entry is made. **This is a mandatory field**.

![Received Date](image)

**NOTE:** The Receipt Date must be within 30 days from the current date.

6. Enter/Confirm the quantity or amount of the goods/services that are being received in either the **Received Amount** or **Received Quantity** field (this depends on whether the requisition was setup to be received by quantity or amount). Click **Review Receipt Details**.

![Review Receipt Details](image)
7. Review information on the receipt. Once complete, click **Submit**. Users also have the option to **Start Over** or go back and **Edit Receipt**.

![Receipt Image](Image)

8. A confirmation screen appears with a Receipt ID number.

![Receipt ID Image](Image)
Receiving Process for the Super Receiver (Access Role 002)

The following steps provide instructions on how the Super Receiver creates a Receipt for Requisitions created by themselves or others.

1. Navigate using tiles, click on **Procurement Center**.

![Procurement Center](image)

2. Click on **Manage Requisitions**.

![Manage Requisitions](image)
3. Click the Manage Receipts link at the bottom of the Manage Requisitions page.

NOTE: The PO Number is needed before entering a Receipt.

4. Click the Add New Receipt link at the bottom of the Manage Receipts page.
5. Click the **Add** button on the **Receiving** page, **Add a New Value** tab.

![Receiving Page](image)

6. Within the **Search Criteria** enter the PO Number (see Step 2) in the **ID** field. Remove all information in the **Days +/-**, **Start Date**, **End Date**, and **Ship To** fields, then click the **Search** button.

![Select Purchase Order](image)
7. Select the checkbox next to the line(s) to be received and click the OK button.

8. Enter a date into the Receipt Date field. The Receipt Date must be the date the product was physically received or when the service was rendered – not the date that the receiving entry is made. This is a mandatory field.
9. Enter/Confirm the quantity or amount of the goods/services that are being received in either the Receipt Qty or Receipt Price field (this depends on whether the requisition was setup to be received by quantity or amount).

10. Click the **Save** button.

11. A notification message will appear, providing the Receipt ID. Click the **OK** button.
12. Confirm the Receipt was successfully created by identifying the **Receipt ID**, **Receipt Status**, and **Receipt Lines Status** fields.

![Receipt Status Screenshot]

13. When a receipt is created, the Receiving icon lights up on the Manage Requisitions page (Main Menu > eProcurement > Manage Requisitions).
Changing Allocation Types on a Receipt

Allocation Type refers to the method in which a receipt’s quantity/amount is distributed against the purchased quantity/amount when it is less than the line total.

Changing the Allocation Type is ONLY available when a PO line has split accounting distribution. This is defaulted to first-in-first-out (FIFO) but can be changed to Prorate, Specify. In addition, only the Super Receiver Role 002 can change an allocation type.

**FIFO (first-in-first-out):** Applies the partially received quantity/amount in the order in which the split distribution was setup. For example, a split accounting distribution with two lines will exhaust the quantity/amount within the first accounting line totally and then proceed to the quantity/amount of the second accounting distribution line.

**Prorate:** Applies the partially received quantity/amount as a percent distribution across the accounting split. For example, an PO expense line’s accounting distribution is split by a percentage of 60% and 40%. The quantity/amount received will be prorated or split against that percent distribution.

**Specify:** Applies a partially received quantity/amount in the manner the user specifies on the receipt.

---

**Changing Allocation Type**

The following steps provide instructions on how the Super Receiver can change the Allocation Type.

1. Navigate using Tiles, click on **Procurement Center**.  

![Procurement Center Tile](image)
2. Click on **Manage Requisitions**.

3. Click on the **Manage Receipts** link at the bottom of the **Manage Requisitions** page.

4. Click on the **Add New Receipt** link at the bottom of the **Manage Receipts** page.
5. Click the **Add** button on the **Receiving** page, **Add a New Value** tab.

6. Within the **Search Criteria** enter the PO Number in the **ID** Field. Remove all information in the **Days +/-**, **Start Date**, **End Date**, and **Ship To** fields. Make sure to switch the radio button from the default of Ordered Quantity by choosing the radio button for **PO Remaining Qty**. Click the **Search** button.
7. Select the checkbox next to the line(s) to be received and click the OK button.

8. Enter the Receipt Qty/Amount on the Receipt Lines tab. A quantity or amount must be entered in order to later change an allocation type.
9. On the **Links and Status** tab, the Allocation Type is defaulted to “First In First Out”. To change the allocation type, click the **Distribution Icon** shown next to **Allocation Type** field.

10. Select the desired **Allocation Type**. Then click **OK**.

![Image of the Procure to Pay interface showing the Allocation Type and Allocation Icon]

![Image of the Receipt Distributions window with the Allocation Type options]

![Image of the Receipt Information table with various details and options]
The following are examples of how different allocation types might be applied after entering an Receipt Price (Amount) for $2000:

**FIFO:** In this case the $2000 is distributed to Line 1 first. After the amount is completely exhausted anything remaining moves to Line 2. No other lines are used because the $2000 were completed between the first two accounting distributions.

**Prorate:** In this case the $2000 is distributed based on the original split from the purchase order and the amount is distributed among all lines.
Specify: In this case the $2000 is distributed based on the original split from the purchase order, however each accounting distribution line is open to be manually changed to the desired amount.

11. Enter the Receipt Date and then click **Save**.

12. Click **OK** to accept this receipt.
13. Receipt Date is required. Click OK.

14. The Receipt is saved by the Distribution specified and a Receipt ID is generated. Click OK.
Cancelling an Entire Receipt (Casual User Role 002A)

There may be circumstances where an entire receipt may need to be cancelled. These instructions are based on the requisition/receiving security role Casual User 002A. However, a receipt cannot be cancelled that has been attached to a Voucher. The Voucher would have to be deleted by Accounts Payable first.

1. Navigate using the tiles by clicking on **Procurement Center**.

2. Click on **Manage Requisitions**.

**Alternative Navigation:**

An alternate way to access the myFIUmarket and/or to create a market requisition, navigate through the Nav Bar using the following navigation: **Main Menu> eProcurement> Manage Requisition**
3. Use the search parameters to find requisitions in the **Request State** field and choose the type of receipt, either **Partially Received** or **Received**.

4. Click on the Receiving icon to view the receipt(s) associated to a particular requisition.
5. Use the search parameters to find the receipt if it is not already showing. Click the red X to cancel the entire receipt, this includes all lines. (If one or more lines needs to be cancelled, not the entire receipt, see the section Cancelling Receipt Line(s) (Casual User Role 002A) and instructions.)

6. A confirmation message will appear. Click Yes to cancel the receipt including all lines.
After cancelling a receipt, the system displays the Receive Items screen. Click on the Manage Requisitions navigation to be taken back to all requisitions. Confirm that a receipt is deleted within Manage Requisitions.

Within the **Manage Requisitions**, when looking at a requisition, the Receiving icon will be greyed out if that was the only receipt related to the requisition.
There may be circumstances where an entire receipt may need to be cancelled. These instructions are based on the requisition/receiving security role Super Receiver 002. A receipt cannot be canceled if it has been attached to a Voucher. The Voucher would have to be deleted by Accounts Payable first.

1. Navigate using the tiles by clicking on **Procurement Center**.

2. Click on **Manage Requisitions**.

**Alternative Navigation:**

An alternate way to access the myFIUmarket and/or to create a market requisition, navigate through the Nav Bar using the following navigation: **Main Menu > eProcurement > Manage Requisition**
3. Use the search parameters to find requisitions under the Request State of Partially Received or Received.

4. Click on the Receiving icon to view the receipt(s) associated to a particular requisition.
5. Click on the details icon to view the actual receipt details.

6. To cancel the entire receipt, click the red X next to the **Receipt Status** Fully Received in the Header of the receipt.
7. You will be prompted with a message confirming cancellation. Click **Yes**. On the confirmation message click **OK**.

8. **Click OK.**

9. **Click OK.**
10. The **Receipt Status** has changed to Canceled. To confirm that there is no longer a receipt attached to the requisition, go back to Manage Requisitions.

11. On the Manage Requisitions screen, the Receiving icon will now be greyed out.
Cancelling Receipt Line(s) (Casual User Role 002A)

Users can cancel one or more lines that have already been received, if the receipt has not been attached to a voucher. These instructions are based on the requisition/receiving security role Casual User 002A.

The process to cancel a single receipt line or more than one receipt line is similar to cancelling an entire receipt. See Cancelling an Entire Receipt (Casual User Role 002A).

1. On the Manage Receipts page click on the Details icon.

2. Click a red X on the line that should be cancelled. A message box will appear, click Yes.
3. Make sure to save changes by clicking **Save Receipt**. A confirmation message will appear, click **OK**.

4. Click **Return to Manage Requisitions** to confirm line status change.
5. On the Manage Requisitions page, the cancelled requisition line(s) will show as PO Dispatched.
Cancelling Receipt Line(s) (Super User Role 002)

Users can cancel one or more lines that have already been received, if the receipt has not been attached to a voucher. These instructions are based on the requisition/receiving security role Casual User 002.

The process to cancel a single receipt line or more than one receipt line is similar to cancelling an entire receipt. See Cancelling an Entire Receipt (Super User Role 002).

1. On the Maintain Receipts Receiving page, click on a red X on the particular Receipt Line that should be cancelled. Then click Yes to confirm.

2. Click the red X next to any additional receipt lines that should be cancelled. When all receipt line cancelling is complete, click Save. Click Ok on the following messages.
Warning -- IMPORTANT: Receipt/Receive date is required. Please input the receipt/receive date that the item was physically received or that the services were rendered. Today's date should only be used if the item was physically received or the services were actually rendered today. (0,0).

The PeopleCode program executed a Warning statement, which has produced this message.

[Image: OK button]

Receipt, 0000443050, is saved and Job, RECV_00, has been scheduled for process (Process Instance = 4474230). (10300.253)

This means the receipt is being updated by the receipt integration process. Any additional processing for this receipt will require reopening the receipt in Update/Display mode.

[Image: OK button]

3. Go back to Manage Requisitions to confirm the receipt line(s) have been cancelled. The status of the line that was cancelled should now reflect PO Dispatched.
Managing Requisitions

After the creation and submission of a requisition, it continues along its lifespan. This section details information about the procurement process and how to manage the requisition throughout.

Users can view where a requisition is during the procurement process as well as take different actions as needed.

To access the Manage Requisitions page, use the following navigation steps:

1. Click the Procurement Center Tile.
2. Click the **Manage Requisitions** Tile.

Alternative Navigation:

An alternate way to access the Manage Requisitions, navigate through the Nav Bar using the following navigation: **Main Menu > eProcurement > Manage Requisitions**
3. By default, **Date From** and **Date To** fields are set for the last seven days. (Also, the Requester is defaulted to the current individual logged into PantherSoft Financials. Most users can only see requisitions that they created).

4. The most recent requisitions appear at the bottom. Use the Search fields to find a particular requisition.

Search fields and available actions and explanations:

**Business Unit:** This defaults to FIU01. It should not be changed.

**Requisition ID:** This search field can be used to find a specific Requisition. Type a requisition ID number or use the search glass to find it.

**Date From:** Defaulted to seven days prior to today. Use this field to find requisitions created starting on this date.
**Requester:** This is the Panther ID number of the requester. It can be changed to find a requisition created by other users. The functionality of searching for requisitions by another user is controlled via security role.

**Requisition Name:** The unique name given to a requisition by a requester, at the time of a requisitions creation.

**Request State:** Users can search using this field based on what is happening with a requisition. It includes both requisition status’ and purchase order status’ as well as additional conditions of a requisition.

![Request State](image)

**Date To:** Defaulted to the current date. Use this field to find requisitions up to this date.

**Entered By:** This field is the same as requester.

**Budget Status:** This field allows users to search by the status of budget checking of a requisition.

![Budget Status](image)

**PO ID:** Use this field to search for the requisition associated with a particular Purchase Order ID number.
The requisition lifespan provides a graphical view of the requisition from creation to payment. At FIU, the graphic icons in use are Requisition, Approvals, Purchase Orders, Receiving, Invoice, and Payment.

1. To view the lifespan and line items for a requisition, click the Expand triangle icon next to the Req ID number under the **Requisitions** heading. Whichever icon is colored, indicates the condition of the requisition currently. Icons that are still light or grey are not yet activated.
2. Each stage of the life cycle highlights as the requisition flows through the eProcurement process. Completed stages and "in progress" stages in the **Requisition Lifespan** cycle are highlighted with active links and illuminated icons.

Users can click directly on a highlighted icon for further information or action.

**Requisition** - An electronic requisition has been created in PantherSoft. Currently on this process. By clicking the icon, user is taken to a view only screen, **Requisition Details**.
Approval - Requisition is pending approval or has been approved by project/expense approvers. Users can click on icon to get detailed information about approvers. See Viewing Approvers section below.

Inventory – always greyed out (not FIU enabled)

Purchase Order - Requisition was sourced and a purchase order is created. It may be pending approval or dispatched. Only when the purchase order is dispatched, the user can click on it and see the PO number.

Change Request – always greyed out (not FIU enabled)

Receiving – a receipt has been created. After click on the icon users can view receipt information.

Returns - always greyed out (not FIU enabled)
**Invoice** - Supplier sent invoice to accounts payable. User can click on the icon when it is highlighted to view voucher information.

**Payment** - Accounts payable processed payment to supplier. Users can click on the highlighted icon and view payment information.
Depending on the status of the requisition, different actions are available per requisition in the Manage Requisition screen. The following sub-sections detail more information about actions available in Manage Requisitions.

### Viewing Approvers

Users can view pending or completed expense/project approvals for a requisition. Follow these steps:

1. Navigate to the **Manage Requisitions** Tile or **Main Menu>eProcurement>Manage Requisitions**

2. Select under the **Action** drop-down “Approvals” from the dropdown menu on the desired requisition to be reviewed. Click **Go**.

3. In order to review specific names and information for the approvers, click on the **Multiple Approvers** link. An additional screen appears with the information.
Editing a Requisition

Through the edit function, a requester can make changes to any Requisition that has not been sourced to a Purchase Order.

1. Navigate to the Manage Requisitions Tile or Main Menu>eProcurement>Manage Requisitions

2. Select under the Action drop-down “Edit” and click Go. If the requisition is in the approval workflow or already approved, a warning message will appear. A requisition that is edited may re-start the approval workflow again.
3. User is taken to the requisition to make the necessary edits. To re-submit, click **Save and submit** and proceed with budget checking again.

4. After finishing editing the requisition, budget check by clicking the **Check Budget** link. Click on the **Manage Requisitions** link to return to that page.
How to Cancel a Requisition

Users have the option to cancel a requisition depending on its place in the lifespan and status. Perhaps it is a duplicate or simply no longer needed. If a requisition has already been fully approved and a purchase order is created, users will not have the option to cancel.

1. Navigate to the Manage Requisitions Tile or Main Menu>eProcurement>Manage Requisitions

2. Select under the Action drop-down “Cancel” and click Go next to the requisition line to be cancelled.

3. Click on Cancel Requisition button. The request state of the requisition should change to Canceled.
4. After clicking the **Cancel Requisition** button, users may be taken back to the **Manage Requisitions** screen. Change the search parameters and the **Request State** field to “Canceled”. This will find the requisition that was just cancelled.

5. The **Request State** will be “Canceled”, but the **Budget** will say “Not Chk’d”. Make sure to check the budget again to release any pre-encumbrance amounts from the requisition. From the drop-down menu within the requisition, choose “Check Budget”. Then click **Go**.

6. The **Budget** will change to Valid and any pre-encumbrance amount will be 0.00.
How to Copy a Requisition

Users can copy a previously created requisition. An important exception is that users may not use this function for myFIUmarket Requisitions that have sourced to a Purchase Order.

1. Navigate to the Manage Requisitions Tile or Main Menu>eProcurement>Manage Requisitions

2. Select under the Action drop-down “Copy” and click Go.
3. A new requisition is opened with the items copied from the one selected. Everything is transferred from the requisition copied. Users can proceed with any updates or changes to the requisition and complete as usual practice.
How to View Printable Version

Users can print a requisition through an Action in Manage Requisitions.

1. Navigate to the Manage Requisitions Tile or Main Menu>eProcurement>Manage Requisitions.

2. Select under the Action drop-down “View Print” and click Go.

3. A message will appear whether to print with the distribution details. Click Yes or No depending on whether to show accounting information or not.
An example of a requisition view print:

```
| Business Unit: FIU01 |
| Request: 0000120211 |
| Requisition Name: J.TARDAGUILA. |
| Entered Date: 9/7/18 |
| Requester: 1380084 |
| Status: Open |
| Currency: USD |
| Requisition Total: 2,900.00 |

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<td></td>
<td>Category: 96258</td>
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<td></td>
<td>Line Status: Open</td>
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</table>

| Ship Line: 1 |
| Attention: BEST WAY |
| Ship Via: BEST WAY |
| Due Date: |
| Freight Terms: DEST |
| Address: BISCAYNE BAY |
| 5000 N.E. 151 ST. |
| MIAMI FL 33181 |
| United States |
| Shipping Quantity: 1.0000 |
| Shipping Total: 2,900.00 |

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<tr>
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</table>
```
View Comments and Attachments (Header and Line)

Within the **Manage Requisitions** Tile users can view comments or attachments made on a requisition at the line level or header level.

1. Search for the requisition and click the corresponding **Req ID** link.

   ![Manage Requisitions Tile](image)

2. For expense line comments and attachments, click on the **Paperclip** icon next to the line containing the attachment.

   ![Requisition Details](image)
3. The **Line Attachments** window will open. Locate the desired attachment and click the **View** button. The attachment will then open through its associated application.

4. For Header level comments or attachments, click on the **Paperclip** icon next to the Header Comments which contains the attachment.
5. The **Header Attachments** window will open. Locate the desired attachment and click the **View** button. The attachment will then open through its associated application.

![Header Attachments window](image)

**Multiple Purchase Order Numbers**

eProcurement provides the convenience of being able to customize Requisitions to specific needs. However, certain things entered cause multiple Purchase Orders to generate from one Requisition. Below is the list of actions that can generate Multiple Purchase Orders:

- **Mixed Requisitions** – Requester has both myFIUmarket items and a special request item on one requisition. Requester will receive a PO# for the market item and one for the special request item.

- **Multiple Suppliers** – If a user has more than one supplier on a special request or myFIUmarket requisition, user will receive one purchase order per supplier.

- **Multiple Supplier Locations** – If a user has the same supplier but with different supplier locations on a special request requisition, user will receive one purchase order per supplier location.

- **Multiple Ship To Addresses** – If the requester has more than one delivery location on any type of requisition, requester will receive a PO# per delivery location. This is very convenient when it is time to receive goods in the system.

- Any **combination** of the above will generate multiple purchase orders as well.
Three-Way Matching is a concept used to confirm merchandise and services amounts prior to payment being sent to a vendor. The Purchase Order amount is created from the requisition. It is dispatched to the vendor/supplier. After receiving a good or service, requesters/departments create receipts in the system. The receipt includes the quantity/amount of the good/service received. The vendor/supplier sends an invoice to FIU with the quantity and amount that they are charging. The three amounts together, PO amount, Receipt amount, and Invoice amount should match. After the matching process takes place, payment can be processed to the supplier/vendor.

Any invoice received by a requester/department needs to be sent to Accounts Payable via email to invoices@fiu.edu or by mail to CSC 310 in a timely manner for matching and processing.
Budget Statuses

**Not Checked** – Budget check has not occurred

**Valid** – there is enough money to cover the pre-encumbrance

**Error** - There are several reasons a transaction may fail budget checking. Click the Error link to review the specific budget error. Common errors include:

- Exceeds Budget Tolerance – the budget may be on hold, closed, or out of available funds.
- Budget date for the transaction is out of bounds – meaning the project dates are now closed
- No budget exists – a specific Account being used does not exist within the chartfield string used.

**Translation Tree Error** - The Category codes are built into most of the Market items. Not all items have a specific category code assigned. These items have been given a “dummy” code of 99999. If a budget error is received, check the details screen. If the Category Code is 99999, please wait until the next business day. The error should resolve through an automated technical process. If the budget needs to be validated sooner, please reach out to Purchasing directly for assistance.
Releasing Pre-Encumbrances from Denied Requisitions

Users may have a requisition that is denied by a project/expense approver. When a requisition status is fully or partially denied, and when the denied components are no longer needed, users must proceed with releasing any pre-encumbrances that exists since the creation of the requisition. the following sub-sections and instructions.

Fully Denied Requisitions (Request State = Denied)

1. Navigate to the Manage Requisitions Tile or Main Menu > eProcurement > Manage Requisitions.
2. Locate the requisition in “Denied” status (Request State “Denied”).

![Image of Manage Requisitions interface]

3. Set the Select Action dropdown menu to “Cancel”, then press the Go button.
4. Click the **Cancel Requisition** button on the **Requisition Details** page.

![Requisition Details](image)

5. The system will return to the **Manage Requisition** page. Verify the **Request State** is “Canceled” and the **Budget** is “Not Chk’d” by looking for the canceled requisition. The **Total** should be “0.00 USD”.

![Manage Requisitions](image)
6. Set the **Select Action** dropdown menu to “Check Budget”, then press the **Go** button.

7. Verify the **Budget** shows as “Valid”.
8. To validate the pre-encumbrance balance, click the **Req ID** and blue number.

The **Requisition Details** screen will then show the **Pre-Encumbrance Balance** as “0.00 USD”.

![Requisition Details](image-url)
Partially Denied Requisitions (Request State = See Lines)

1. Navigate to the **Manage Requisitions** Tile or **Main Menu > eProcurement > Manage Requisitions**.

2. Locate the denied requisition. The **Request Status** should show as “See Lines”.

   ![Manage Requisitions Tile](image1)

3. Click on the **Line Expansion** triangle next to the requisition ID to view all the requisition lines.

   ![Manage Requisitions](image2)
4. Identify the line with a **Status** of “Denied”.

5. Click the Red X icon on the requisition line that is denied.
6. Click the **OK** button on the confirmation message window.

![Confirmation Message Window]

7. Verify the line **Status** shows “Canceled” and the requisition’s **Budget** shows as “Not Check’d”. The **Request State** should now update to “Approved”, with the **Total** reflecting the balance from the remaining lines. In this case, “41.70 USD”.

![Requisition Details]
8. Set the **Select Action** dropdown menu to “Check Budget”, then press the **Go** button.

9. Verify the **Budget** shows as “Valid”.

---

**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.
10. To validate the pre-encumbrance balance, click the **Req ID**.

The **Requisition Details** screen will then show the **Pre-Encumbrance Balance**. This should reflect the total for the remaining, “**Approved**” lines of the requisition. In this case, “**47.79 USD**”.

---

**Requisitions**

**Requisitions Details**

**Requisition Summary**

**Requisition Lines**
Approver’s Actions

The requisition approval workflow is determined by the Accounting Distribution (Activity/Project Number) entered on line(s) of a requisition. Approvers receive an email notification when they have a requisition awaiting their approval. Users can click the link within the email to be taken online to approve a transaction. They can also navigate into various Tiles, Worklist, or eProcurement navigation.

Approving via eProcurement Navigation

When approving within the Financials system, navigation is possible through both the Tiles or the NavBar.

1. Navigate to the Manager Self Service homepage.

2. Click on the Requisition Approvals tile.

Alternative Navigation:

An alternate way to navigate to approve requisitions is through the NavBar using the following navigation:

Main Menu > Manager Self-Service > Requisition Approvals
3. Use the search parameters to locate a specific requisition, requisitions from a specific requester, requisitions within a date range or simply by status, such as all requisitions pending approval. Click Search.

**NOTE:** The Status field is defaulted to retrieve all pending requisitions for approval and the Date From and Date To default to the current day and previous seven days.

After the approver takes their desired action, the requisition requester will receive an email notification of the status of the requisition (approved, denied, hold,) and any comments that the approver entered.

Requisitions that are approved continue their workflow either to any additional approvers or to the Procurement Department for transition into Purchase Orders.

**FIU Mobile Requisition Approvals**

Users can approve requisitions through the FIU Mobile app or a browser on their mobile device. The FIU Mobile app can be downloaded through either Google Play or Apple App Store for free. If accessing PantherSoft Financials through a browser use [http://myfs.fiu.edu](http://myfs.fiu.edu).

Users must still login with their AD username and password as well as utilize the DUO two-factor authentication.

**Approval View of Comments and Attachments**

To view comments and/or attachments as an Approver, users can see them in the Requisition Approval Tile. Attachments or Comments may have been placed in either the Header or the Line level.
1. Navigate to the **Manager Self Service homepage**.

2. Click on the **Requisition Approvals** tile.

**Alternative Navigation:**

An alternate way to navigate to approve requisitions is through the NavBar using the following navigation:

*Main Menu > Manager Self-Service > Requisition Approvals*
3. Search for the requisition and click the corresponding **Req ID** link.

4. For comments or attachments made at the line level, click on the **Comments** icon along the line.
5. Locate the desired attachment and click the **View** button. The attachment will then open through its associated application.

6. For comments or attachments at the Header level, click the **Header Comments** link within the **Requisition Approval** screen.
7. Locate the attached file and click the file name link.

![Requisition Header Comments and Attachments](image)

**Purchasing Inquiry Pages**

Each module has an “Inquiry” and or “View” option in which a user can drill down when doing budget research. Users can view encumbrances, payments, vouchers and even journals to help verify data.

**Requisition Inquiry**

Requisition Inquiry allows users to verify/view the data included especially from reports or queries. It includes functionality that allows the user to research associated PO and Vouchers, chartfield strings attached. To view these screens users will need to have security Access Role 001. This can be requested via the Access Request Form within PantherSoft Financials.
1. Navigate using the NavBar to Main Menu>Purchasing>Requisitions>Review Requisition Information>Requisitions. Enter the Requisition ID including preceding zeroes and click OK.

2. The Requisitions Req Inquiry page appears. Any value highlighted in blue and underlined is a link that allows further drilldown to additional details. Click on Requisition number to drilldown to Requisition Details.

3. Requisition Details lists all the requisition line items entered for the requested good(s) or service(s). It shows the Supplier ID and name of the Supplier, and the Merchandise Amount which should match the amount associated to the Requisition ID.

   Click on the Schedule Details icon on the far right of the grid to drilldown to “schedule details” and further to the “requisition distribution details.”
Click on the **More** tab, to view the Buyer ID and the category for the line item. (Category is associated to a general expense account, which defaults on the requisition line distribution.)

The **More** tab displays the procurement buyer’s panther ID number and the also the category code.
4. Scroll to the furthest right to see the **Schedule Details** icon. After clicking on the Schedule Details icon, another window appears. It includes the Ship To location, and a link to the Distribution details.

5. To drill down to the Requisition Distribution lines click on the **Distribution Details** icon. Distribution Information window appears showing chartfield used for expenses.
6. For information on the status of the requisition, click on the **Status** tab. “Y” in a column indicates that all the requisition lines have been sourced to a PO, received, and vouchered. “P” in a column indicates that some requisition lines, not all, have been processed. The “Y” and “P” are links that allow drilldown to the associated PO, Receipt and Voucher.

7. To return to search results click **Return**.
Purchase Order Inquiry

Purchase Order Inquiry allows any user to verify/view the data included especially from reports or queries. It includes functionality that allows the user to research associated PO and Vouchers, Receipts, and Chartfield strings.

1. Navigate to **Main Menu>Purchasing>Purchase Orders>Review PO Information>Document Status.** Enter a PO number or other search criteria, then click **Search** button. Results may appear with blue links. Select a PO number to be taken to the **Document Status** page.
2. The **Document Status** Page appears. This page includes associated requisition(s), receipts, vouchers, and payments as the PO moves along its lifecycle. Click on the blue **PO ID** link at the top of the page for further information.

![Image of Document Status Page]

3. The **Purchase Order Inquiry** page opens. From this page, users can view the **PO Status**, check **Encumbrance balances** and view further information about receipts from the **Activity Summary**.

![Image of Purchase Order Inquiry Page]
4. **Activity Summary** provides tabs for **Receipt** information, whether a line has been invoiced on the **Invoice** column, and whether a voucher has been processed with matching on the **Matched** column.

![Activity Summary Table](image)

**Review Supplier Information**

All vendors/suppliers must be registered with FIU and active in PantherSoft Financials to complete a requisition. For information on supplier registration please visit the Office of the Controller website - [http://finance.fiu.edu/purchasing/2supplier_reg_portal.html](http://finance.fiu.edu/purchasing/2supplier_reg_portal.html)

1. To confirm supplier information users can check PantherSoft Financials under the following navigation: **Main Menu> Suppliers> Supplier Information> Add/Update> Review Suppliers**
If **Supplier ID** is not known, search by “Contains” and the Name. Different locations may be available per Supplier as well as their **Effective Status**.

2. After clicking **Search**, results will display at the bottom. Pay specific attention to Address/Location as well as Effective Status.
Viewing Pre-Encumbrance Activity

Further validation of a requisition’s pre-encumbrance balance and activity may be done via the Requisition Accounting Entries page.

1. Navigate to:

   **Main Menu > Purchasing > Requisitions > Review Requisition Information > Accounting Entries**

2. Ensure information is entered for the following fields: **Business Unit, From Req, To Req, Ledger Group,** and **GL Unit.**

   ![Selection Criteria](image)

   *NOTE:* The **From Req** and **To Req** fields should match with the desired requisition ID. It is recommended users select “CC_DEP” as the **Ledger Group.**

3. Click the **OK** button.

   ![Selection Criteria](image)
4. On the Accounting Entries page, click the Zoom Accounting Entries icon to see all pre-encumbrance details for the requisition.

5. The Requisition Accounting Entry screen now shows the requisition’s pre-encumbrance history. Positive amounts in the Monetary Amounts column represent incurred pre-encumbrances, while negative (-) amounts in the same column represent released pre-encumbrances.

NOTE: In this example, the pre-encumbrance was released due to a requisition cancellation. Another reason users will see pre-encumbrances released is when it is sourced to a PO that has been budget checked.
Useful Queries

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