

## How to Do a Panthersoft Requisition

- 1- log in to [Psoft Financials](#) with invoice in hand (it'll help if you have an electronic copy of it on your computer, in pdf)
  - 2- click on **My Favorites** (add *Maintain Requisitions to My Favorites* to create a shortcut for future)
  - 3- click on **Maintain Requisitions**
  - 4- click on **Add a New Value** tab
  - 5- click on **Add**
  - 6- click on the magnifying glass next to the empty box next to **Requestor**
  - 7- type the first two letters of your first name next to **Description** (if it's for you), click **Look Up**
  - 8- click on your name
  - 9- type in the description for the first item under **Description**
  - 10- type in the quantity under **Req Qty**
  - 11- type in the price under **Price**
  - 12- if you have more items proceed to *step 13*, if not proceed to *step 16*
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- 13- click on the blue + sign at the end of the first item's line
  - 14- type in the number of additional lines you'll need in the pop up window, click **OK**
  - 15- finish typing in all descriptions, quantities, and prices (only! Leave the rest of the fields as they are, for now)
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- 16- click on **Header Defaults** (bottom left link)
  - 17- click on the magnifying glass next to the empty box next to **Vendor**
  - 18- type in the first 3 letters of the vendor's name in **Short Vendor Name**, click **Look Up**
  - 19- click on your vendor (if you can't find it, you'll have to submit New Vendor forms to Controllers)
  - 20- click on the magnifying glass next to the box next to **Ship To**
  - 21- if the items should go to Armando, click *Scientific Receiving*. If the items should come to OE 167 (or the lab), click on *See Below*
  - 22- click on the magnifying glass next to empty box next to **Category**
  - 23- sometimes it's easier to scan the entire list for the category that's closest to what your items are. However, if they're lab supplies, type in *sup* next to **Description**, click **Look Up**. Click on *Supplies-Lab Supplies*
  - 24- click on the magnifying glass next to the empty box next to **UOM**
  - 25- most items are each, so click on *EA*. If it's another type of unit, click on whatever it is

- 26- click on the magnifying glass next to the empty box next to **SpeedChart**
- 27- click on the correct project/department ID (if it's to be split between projects/deps, ask me)
- 28- click on the magnifying glass next to the empty box under **Location**
- 29- in **Description**, type in the two or three letter code of the building where your items will be shipped, type in a space, type in 0 and the 3 digit room number, click **Look Up**. For example for ECS 153, type in *ecs 0153* (the case doesn't matter), for OE 167, type in *oe 0167*
- 30- click on the room number. If *No matching values were found*, type in *see* in the **Description**, click **Look Up**. Click *See Below*, click **OK**
- 31- click **Mark All** (blue link), click **OK**
- 32- if at this point you decide you need to add lines, click on the last blue **+** to do so. Do steps 14 and 15. Click on **Header Defaults**, make sure the **Vendor**, **Ship to**, **Category**, **UOM** and **DeptID** are all correct, click **OK**. Click **Mark All**, click **OK**, click **Save**
- 33- click **Header Comments** (next to **Header Defaults**)
- 34- type in any special information you want Purchasing or your vendor to know in the empty box under **Comments**. For example, I always type in the complete shipping name and address here (whether or not I put in a location earlier). I put in my phone number as the person who entered the req and the contact number of whoever can answer questions about the items (in your case, it would be you for both). If it's something being paid by Ken Furton, for example, I put in that he approved this expense as per his email on whatever date
- 35- click on checkboxes for **Send to Vendor**, **Shown at Receipt** and **Shown at Voucher**
- 36- if you have the invoice on your computer, click on **Add**, click on **Browse....** Find the document on your computer, click **Open**, click **Upload** (only 1 document can be uploaded), click **OK**. If you don't have an invoice, just click **OK**
- 37- click **Save**
- 38- click on the green check mark at the top right of the window (next to **Origin: PO**), make sure the **Status** is now *Pending* (under **Requester**)
- 39- click on the icon that looks like a document with a magnifying glass on it (3 icons down from the green check mark), make sure the **Budget Status** is now *Valid* (next to **Status: Pending**)
- 40- if you get **Budget Status: Error**, call me. If it's all good, print out the screen in landscape
- 41- you're done with the requisition, now you need to approve it (if it was for you)
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- 42- click on **My Favorites** (if you haven't shortcut *Approve Amounts*, let me know)
- 43- click on **Approve Amounts**
- 44- usually you can just click on **Search** to get a list of reqs waiting for your approval. If you don't see it, type in the req number in **Requisition ID**, including the preceding 0's, click **Search**
- 45- click on the req
- 46- click on **Save**