FORT HAYS STATE UNIVERSITY
ACTIVITY ACCOUNTS
IFAS Instructions

Contact:
Purchasing Office
Phone: 628-4250 or 628-4463

Guidelines:

1. If the budget authority (sponsor) has changed for your organization, an Account Changes New form on Lotus Notes must be completed and the form must be approved by the sponsor's supervisor before a PR is submitted. All accounts should have a backup budget authority, if possible.
2. PRs can be submitted for an estimated amount and approved prior to making purchases.
3. Before submitting a Purchase Requisition (PR), check the organization's account balance to make sure the account has enough money to cover the purchase at http://www.fhsu.edu/purchasing/Instructions-Reports.
4. Website Information is available at http://www.fhsu.edu/purchasing and http://www.fhsu.edu/sfs.

Log on Procedures

1. Log on to Internet Explorer and type in the web address sg1 or sg1.fhsu.edu
2. Enter assigned IFAS User ID and IFAS Password. Questions about IFAS login and password clearances should be directed to Rachel Depenbusch in the Business Office at 628-4454.
3. Select the folders PO, UP, PR or type in the Mask "POUPPR" in the Command Box. The POUPPR screen is split into two parts: Parent record (top) and Child record (bottom).

Submit Procedures

Search for the vendor in FIND Mode before beginning a PR. If the vendor is found, hit the Escape key, and follow the steps below to begin your PR. If the vendor was not found in the lookup, submit the Lotus Notes Workflow Vendor form (Vendors for state accounts require a W-9). After receiving the email notification that the vendor has been added, the PR may be created.

Step 1. Click on Add (yellow +) in the tool bar menu of the Parent Record.

Step 2. Choose the PR Seed by clicking on 3-dot button then selecting Auto.

Step 3. The Sec Cd should always correspond with the ORG Key (Ex. English Club: "SA1028" is "ENG"). The remainder of the boxes (PO, Status, Aprv, Next) should NOT be altered by the submitter.

Step 4. Go to the **Vendor** tab to select the vendor.

A. Click on the 3-dot button then choose Lookup. This brings up the PE (Person Entity) data lookup screen.
B. Type in the vendor name in the 3rd Filter Box on this screen. You can use the wild card "*****" (Ex. ***WAL*** can be used to search for WAL-MART or any vendor that has WAL in its name.)
C. Click Apply or hit Enter to search for the vendor.
D. Select the correct vendor and address (bottom of screen). Click OK.

Step 5. Go to **Ship To** tab and ALWAYS type ***NOSHIP***.

Step 6. **Details** Tab

A. Terms:
   1. Type “CC” if requesting a credit card.
   2. Type “BX” if requesting a cash box.
   3. For PRs that have to be processed by a specific date, type “DATED”.

B. End Use: Type in the person who is to pick up credit card or cash box.

Step 7. **Req Codes** Tab

A. No Req Codes are required
   Any instructions for documentation that needs to be mailed with a check or the name of the person the check needs to be mailed to should be entered in the Print After area.

Step 8. Hit Enter to save the Parent Record. The “Record Accepted” message MUST appear. OR Shift/Enter keys held at the same time should update a record.

Step 9. **Items** tab.

Enter the following:

A. Quantity
B. Units – ie. Lot, Case, etc.per drop down list
C. Description: Limit to only 30 characters, if possible (See Templates for requirements).
   a. REIMB-WAL-MART (Individual reimbursement should always list the vendor paid.)
   b. SUBSCRIPTION 00/00/00-00/00/00
   c. MEMBERSHIP 00/00/00-00/00/00
D. Amount per item
E. Account Number (ORG Key and object code): KEY=SA####0500 OBJ=5XXXXX
   1. SA=Stands for Student Activity account
   2. ####=Organizations 4-digit account number
   3. 0500=Student Activity Accounts will always use Fund 0500
   4. Object Code will default to all 0’s. Accounts Payable will enter the object code when paying the invoice.
F. Do not use the Tax Code fields.
G. Hit Enter or Shift Enter to get the “Record Accepted”. This will save Line 1. You will now be on Line 2 to add another item, if applicable. After all lines are complete for this PR, hit Enter or Shift Enter to ensure the last record was saved.
H. Once you receive the message “Record Accepted”, the PR is saved and cannot be deleted. Changes can still be made to the PR until it is submitted for approval.

Step 10. **Notes** Tab: ***Limited to 40 Characters per line.***

Print After Notes:

1. Include the contact person's name and phone number (person initiating the PR).
2. Type the date and **purpose** of the function or how the items will be used for FHSU activity (Ex. fundraiser, organization meeting).
3. If items are bought for resale, you must state "THESE ITEMS ARE FOR RESALE. TAX REMITTANCE #004-431922999F-01". Reminder: DO NOT add tax to the PR. **Give the vendor the tax remittance #004-431922999F-01 at the time the purchase is made.**
4. When DATED is used in the Terms box, type the justification and date the check is needed.

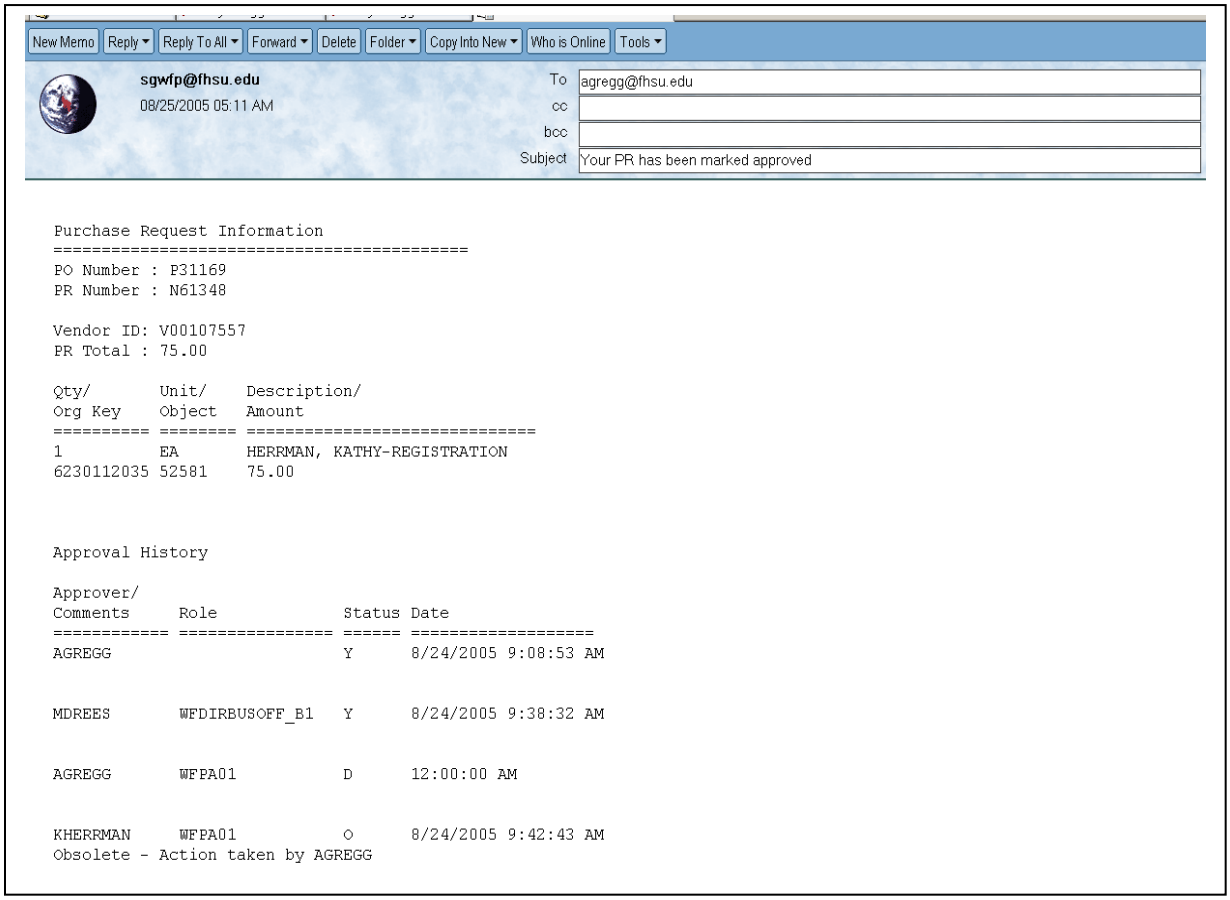
Step 11. Hit Enter or Shift Enter while in the Notes tab to save the PR and get "Record Accepted".

Step 12. **Attachments**: Can be forwarded to Purchasing via email (purchasing@fhsu.edu) or fax to Purchasing at 4046.

Step 13. Submit the PR

A. Click on the Double Arrows at the far left.
B. Click on the Workflow bar.
C. Click on the Green Check Mark by the submitter's name.
D. Click on the Submit button.
E. The PR will automatically go to the budget authority for approval. A Purchase Order (PO) number is assigned after all approvers have approved.
G. An email notification that the PO has been approved or denied will be sent from sgwfp@fhsu.edu (See example).
H. If a PO needs to be cancelled, complete the PR/PO Cancellation form on Lotus Notes or send an email to Purchasing with the PR#, PO# and the reason for the cancellation.
I. Contact Barb at 4460 with questions regarding the status of payment. The status is shown on the PR in the Status box:
   PR is Requisition – awaiting budget authority approval
   PO is Purchase Order – approved by budget authority – awaiting payment
   PP is Partially Paid – at least one payment has been paid
   CA is Cancelled – budget authority has denied
   FP is Fully Paid – Payment has been made to the vendor

Email Example



New Memo | Reply | Reply To All | Forward | Delete | Folder | Copy Into New | Who is Online | Tools

sgwfp@fhsu.edu
08/25/2005 05:11 AM

To: agregg@fhsu.edu
cc:
bcc:
Subject: Your PR has been marked approved

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Purchase Request Information
========================================
PO Number : P31169
PR Number : N61348

Vendor ID: V00107557
PR Total : 75.00

Qty/       Unit/    Description/
Org Key    Object   Amount
========== ======== ============================
1          EA       HERRMAN, KATHY-REGISTRATION
6230112035 52581    75.00


Approval History

Approver/
Comments     Role             Status Date
============ ================ ====== ==================
AGREGG                        Y      8/24/2005 9:08:53 AM

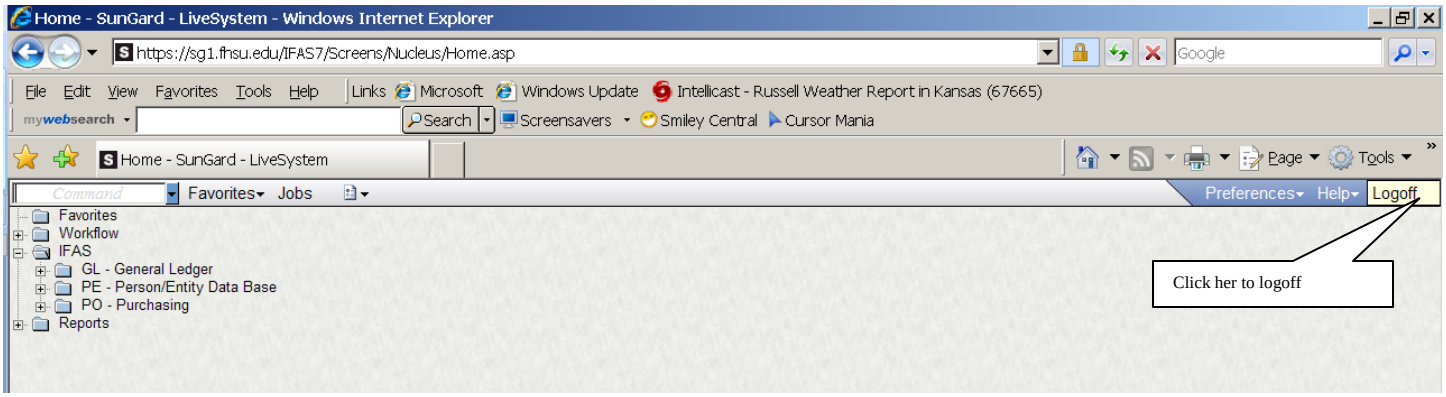

MDREES       WFDIRBUSOFF_B1   Y      8/24/2005 9:38:32 AM


AGREGG       WFPA01           D      12:00:00 AM


KHERRMAN     WFPA01           O      8/24/2005 9:42:43 AM
Obsolete - Action taken by AGREGG
```

Entity List

To view PRs/POs in POUPPR, go to Find (binoculars) and enter the search criteria using any of the fields on the screen and hit Enter. The left side of the screen under Workflow Option Bar will give the history of the approval cycle for the selected PR. The Entity List in the Options Bar will only show the first 100 records. To view the next 100 PRs, use the “>” sign (Ex. >N61000).

Log Off Procedures

1. When the submitter is ready to log off of IFAS, close the POUPPR screen by clicking on the “X”.
2. At the Home – SunGard Bi-Tech screen, click on the word Logoff at the far right.
3. Once you receive the message that you are logged out of the system, you can close the screen with the X.