FAMIS Cloud Training Manual
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NOTE: The fields displayed on the screen may vary from the illustrations below based on an individual user’s security rights or based on the specific configuration of the database. For any questions related to these fields, contact your system administrator. For additional definitions of fields which are not shown below, see Online Help.

2 LOGIN

Navigate to the UND Facilities Management Website for current link. Enter your NDUS (PeopleSoft) login credentials.

3 INITIAL VIEW

Once you log in, the first screen that you will see is shown below. Each of the items along the top (e.g. Space, Approvals, Dashboard, etc.) are menu items that you can select and will be covered in this training manual. The system default is the Work Orders menu item and the tabs within that menu item are under the main menu (Create Request, My Requests (default tab), Find Request and Run Report).
4 CREATE REQUEST

The Create Requests page lets you create a request. The items that should be filled out have the red box around them.

- Your information will populate the “Who is making this request?” section. If this information is not correct, contact administration to get it updated as it’s fed into Famis each night from PeopleSoft.

4.1 INFORMATION TO ENTER

1. The fields with a red box should be entered.
2. The fields with a red dot at the end of the field, such as Type, are considered a required field and the request will not be created without all of them filled in.
3. Property: select the building or land entity where the work is to be done.
4. Floor: if the request is being entered for a building select the floor in the building.
5. Space: if the request is being entered for a building select the room where the work is to be done.
6. Type: type is the classification for the type of work performed
7. Sub-Type: this is a more granular classification of the work to be performed
8. Priority: how urgent is the work
9. Describe your Request: description of the work that needs to be done
10. OK – select this button to save your record and a Request ID will appear (see below for the example). There are a few things to note of this page:
   a. The Request ID is a hyperlink so you can click on it to take you to the work order.
   b. It tells you where the request has been assigned – all requests will be assigned to the UND Team, which is the Operations Center and they will assign the applicable crew.
   c. Print Work Order can be selected.
   d. Attachments can be done by uploading a file.
Your Request has been recorded.
The Request ID is **39619**

This request has been assigned to **UND Team**
To reassign this request, please click on the Request ID shown above.

If you would like to attach a file to this request, follow the instructions below:

Click Browse to select a file.
Click Upload File to upload.
5 **MY REQUESTS**

The My Requests page lets you search for requests that are associated with you:

- Created By Me: Requests that you have created
- Assigned to Me: Requests assigned to you
- In My Regions: Requests assigned to one of your regions
  - UND-Property Type-Academic
  - UND-Property Type-Academic Support
  - UND-Property Type-Auxiliary
  - UND-Property Type-Private
- My Crews: Requests assigned to someone in your crew(s)

Click the links at the top to access each search.

6 **FIND REQUEST**

The Find Request page allows you to search for requests based on a complex set of criteria you define.

6.1 **ENTER SEARCH CRITERIA**

1. Enter the Request ID and click FIND or,
2. You can enter more search criteria, such as, Crew, Open/Closed, Status, etc.
3. The Date Requested defaults to a range of the last 7 days from the date the request was submitted; you can change this date range.
Once you’ve selected you’re criteria, you can save the values as a saved search so you can reuse them later.

To save a search, follow these steps:

1. Define the search criteria.
   - You can either define the criteria from scratch or select an existing saved search and modify the criteria as needed.
   - If you include Date Requested/Closed criteria in your search, you should select a dynamic date range (such as Next Month) instead of entering an exact date (such as 6/27/2014). This will prevent your saved search from becoming invalid once the exact dates have passed.

2. Click the Save As link.
   - A dialog box opens allowing you to name the search.

3. In the Description field, enter a name for the saved search.

4. Click ADD.
   - The search is saved and added to the Saved Search drop-down menu. Only you can access your personal saved searches.

Once you have selected a saved search, the following links are displayed:

- **Save As** – Clicking this link saves the displayed search criteria under a new name, creating a new saved search.
- **Save** – Clicking this link saves the displayed search criteria to the selected search, permanently modifying it.
- **Edit** – Clicking this link allows you to change the saved search’s name.

6.2 **SORTING THE RESULTS**
   - The column heading such as **Date, Property, Crew**, etc. can each be used to sort the results. Simply click any of the column heading links and the list will be sorted by the field you have selected.
There are several options for printing work requests.

1. Under **My Request(s)/Find Request(s)** you can print a list of all of the work orders based on the results of the criteria selected.
   a. In the example below my Search Results returned 24 records. By clicking on **Print WOs** a new tab will pop up and ALL 24 work orders will print together (regardless of if you checked only certain work orders in the boxes to the right)

2. To print just a single work request you will want to click on the Work Request **ID** to view the details. From there click on **Print Work Order**.
The Update Request panel contains a set of fields that can be changed to update the request in the course of working on it. The values in these fields can be changed as often as required to keep the request up-to-date.

3. Print Preview:

**This is where you will put your comments of the work you've done – instead of on the time card like in the past.**

1. Within the applicable work request scroll to the middle of the page to **Update Request**.
2. **General Comments** – Enter a value to update the request with comments about the work in progress. Values entered here will be displayed in the Request History panel and can be viewed by all users.
   - Comments will be displayed in the above section – **REQUEST HISTORY**.
3. **Internal Comments** – Enter a value to update the request with comments about the work in progress that can only be seen by Facilities Management Users.

4. **Notify Assigned To** - Select this check box to send a notification email to the user the request was assigned to informing him or her of any changes made to the request. If you do not want a notification sent, you should clear the check box.

   *Note: If a request is closed by the user it is assigned to, any comments added or changes made to the request after it was closed (other than status changes) do not generate notification emails to the assigned user, even if the Notify Assigned To check box is selected.*

5. **Notify Requestor** – Select this check box to send a notification email to the user who made the request informing him or her of any changes made to the request.

6. **Status** – Select a value to change the status of the request.
   - Statues most commonly used by Technicians:
     - **Parts on Order** – Use this status if the work order is waiting on parts to be received.
     - **Assigned to Tech** – Supervisors will change the status of the work order to **Assigned to Tech** after its created. If a Technician changes the status because the work is on hold (such as parts on order) once the work can begin again, the technician should change the status back to this.
     - **Completed** – Use this status once the work is completed and appropriate comments are added.
   - Commonly used statuses by Work Control:
     - Open
     - Assigned to Supervisor
     - Closed
     - Canceled
Commonly used statuses by Supervisors/Technicians
- Assigned to Tech
- Parts on Order
- Completed

Statuses most commonly used for Projects
- Estimating
- Estimate Complete
- Admin Approval Required
- Customer Approval Required
- Approved
- Canceled
- Closeout

Other Statuses
- Long Term

9 WORK ORDER FINANCIALS

The Work Order Financial displays costs that have been charged to a work order such as labor, materials, services and miscellaneous costs.

The Work Order Financial page is opened by clicking the Work Order – Financial link at the top of the Request Details page.

At the top of the Work Order Financial page:
- **Shopping Cart** – (Advanced Inventory Only) Click this link to place inventory items in a shopping cart for this work order.
- **Print Work Order** – Click this link to print the work order.
- **Request Details** – Click this link to return to the Request Details page.
9.1 **GENERAL INFORMATION**

The General Information panel contains a brief summary of the work order details. This panel may appear either at the top of the page or in a panel on the left side of the page, depending on the size of your browser window. The contents of the General Information panel cannot be modified.

It contains the following information:

- **Request ID** – the identification number assigned when the request was created
- **Property** – the name of the property at which the request was made
- **Location** – the location within the property where the work will be done, including one or more of the following fields:
  - **Space/Floor** – the space or floor where work should be done; some systems group spaces and floors together and some use separate space and floor values.
  - **Floor** – the floor within the property where the work should be done
  - **Space** – the space within the property where the work should be done
- **Priority** – a value indicating how high of a priority it is to complete the work
- **Status** – a value indicating the current status of the work request, for example, Open, Waiting Approval
- **Type** – the top-level classification of the type of work to be done
- **SubType** – the secondary classification of the type of work to be done
- **Requested By** – the name of the user who made the request, which may or may not be the same as the Created By user
- **Date Requested** – the date on which the request was created
- **Estimated Amount** – the estimated costs required to complete this request
- **NTE Amt** – the cost limit or Not To Exceed amount for this request
- **Estimated Labor Hours** – the estimated number of labor hours required to complete this request

9.2 **WORK ORDER CHARGES**

The Work Order Charges tab displays information about the labor, materials, and other costs charged to the work order.

9.2.1 **Labor Cost Summary**

The Labor Cost summary panel displays costs associated with the hourly labor performed when completing the request.

For each labor entry, the following information is displayed:
• Line – the line number of the labor entry
• Crew – crew of the employee that completed the work
• Employee – the name of the employee who did the work
• Labor Date – the date and time when the labor entry was made
• Activity – the type of work performed
• Description – a detailed description of the work performed
• Export Date - the date when this extracted labor cost was exported to the general ledger
• Account – the account the labor costs will be allocated to
• Hours – the number of hours worked
• Rate – the hourly rate for the work
• Cost – the total cost of the labor entry (hours multiplied by rate)

**NEVER add labor entries in this section. Use the TimeCard module!

9.2.2 Material Cost Summary
The Material Cost Summary panel displays the costs of the stock parts, non-stock materials and services needed to complete a work request.

For each item, the following information is displayed:

• Line – the line number of the item
• Item – the name of the item
• Date – the date and time when the item was added to the work order
• Item Description – a description of the item as stored in the inventory module
• Vendor – the name of the vendor that supplies the item
• Description – the description of the item that was entered when the item was added to the work order
• Export Date - if NPFA is enabled, the date when this extracted material cost was exported to the general ledger
• Quantity – the number of items needed
• Unit Cost – the cost of the item
• Tax – the cost of any tax applied to the item
• S&H – the cost of any shipping and handling charges applied to the item
• Cost – the total cost of the item (quantity multiplied by unit cost, plus tax and shipping and handling)
• PO# – the purchase order number of any purchase order associated with this work order

9.2.3 Other Cost Summary
The Other Costs Summary panel displays any other type of cost incurred when completing the work order.

**Services or Direct Part Orders need to be made through a PR (Purchase Requisition) under the Purchasing Module. Only the costs will be displayed here.

**Central Stores Stock Item Orders need to be made through the Shopping Cart. Only the costs will be displayed here.
For each item, the following information is displayed:

- **Line** – the line number of the item
- **Name** – the type of other cost
- **Date** – the date and time when the cost was added to the work order
- **Vendor/Payee** – Not applicable
- **Description** – a description of the other cost
- **Export Date** - the date when this extracted other cost was exported to the general ledger
- **Quantity** – the number of other cost items needed
- **Unit Cost** – the per unit item cost
- **Tax** – the cost of any tax applied
- **S&H** – the cost of any shipping and handling charges applied
- **Cost** – the total cost of the item (quantity multiplied by unit cost, plus tax and shipping and handling)
- **PO#** – the purchase order number of any purchase order associated with this work order

### 9.2.4 Totals Summary

All costs that have been associated with the work order are summarized in the Totals Summary panel. Costs of a specific type are grouped together—labor costs, material costs, then other costs. A grand total of all costs is displayed at the bottom of the panel.

Each time a cost is added to the work order, it is added to the appropriate category and the total is updated. The following values are displayed:

- **Total Labor** – This value reflects the total cost of all labor entries made, including taxes.
- **Total Materials** – This value reflects the total cost of all material items added, including taxes and shipping/handling. This value reflects items added directly from the Work Order Financial page as well as any items added to the work order through an Inventory Item Issue transaction.
- **Total Other Costs** – This value reflects the total cost of all other cost items added, including taxes and shipping/handling.
- **Work Order Charges Total** – This value is the sum of the total labor, material, and other costs.

### 9.2.5 Rollup Totals Summary

If your installation is using parent/child work orders, the Rollup Totals Summary panel displays a total of the costs from both the parent and all child work orders. Costs of a specific type are grouped together—labor costs, material costs, then other costs. A grand total of all costs is displayed at the bottom of the panel.

Each time a cost is added to the work order, it is added to the appropriate category and the total is updated. The following values are displayed:

- **Total Labor** – This value reflects the total cost of all labor entries made, including taxes.
• Total Materials – This value reflects the total cost of all material items added, including taxes and shipping/handling. This value reflects items added directly from the Work Order Financial page as well as any items added to the work order through an Inventory Item Issue transaction.

• Total Other Costs – This value reflects the total cost of all other cost items added, including taxes and shipping/handling.

• Work Order Charges Total – This value is the sum of the total labor, material, and other costs.

Click the View Itemized Charges link to examine a detailed list of all of the charges associated with a work order and all children of the work order in the parent/child hierarchy.

### 9.3 RECEIPTS

The receipts panel displays all items that have been received on purchase orders that are associated with this request.

#### 9.3.1 Material Cost Summary

The Material Cost Summary panel displays a list of all materials received on purchase orders associated with the request. For each item, the following information is displayed:

- Line – the line number of the item
- Item – the name of the item
- Date – the date and time when the item was received
- Item Description – a description of the item as stored in the inventory module
- Vendor – the name of the vendor that supplies the item
- Description – the description of the item that was entered when the item was added to the work order
- Export Date - if NPFA is enabled, the date when this extracted material cost was exported to the general ledger
- Account – the account the item cost will be allocated to
- Quantity – the number of items needed
- Unit Cost – the cost of the item
- Tax – the cost of any tax applied to the item
- S&H – the cost of any shipping and handling charges applied to the item
- Cost – the total cost of the item (quantity multiplied by unit cost, plus tax and shipping and handling)
- PO# – the purchase order number where the item was received
9.3.2 Other Costs Summary
The Other Costs Summary panel displays a list of all other costs that were received on purchase orders associated with the request. **This section is not applicable as we do not receive other costs.**

9.3.3 Totals Summary
The Totals Summary panel displays a list of all materials and other costs received on purchase orders associated with the request. Costs of a specific type are grouped together—material costs and then other costs. A grand total of all costs is displayed at the bottom of the panel. The following values are displayed:

- **Total Materials Received** – This value reflects the total cost of all material items received, including taxes and shipping/handling.
- **Total Other Costs Received** – This value reflects the total cost of all other cost items received, including taxes and shipping/handling.
- **Total Received Costs** – This value is the sum of the total materials received and total other costs received.

<table>
<thead>
<tr>
<th><strong>TOTALS SUMMARY</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Materials Received:</td>
</tr>
<tr>
<td>Total Other Costs Received:</td>
</tr>
<tr>
<td>Total Received Costs:</td>
</tr>
</tbody>
</table>

9.3.4 Rollup Totals Summary
The Rollup Totals Summary panel displays a list of all materials and other costs received on purchase orders associated with the parent and all child work orders. Costs of a specific type are grouped together—material costs and then other costs. A grand total of all costs is displayed at the bottom of the panel. The following values are displayed:

- **Total Materials Received** – This value reflects the total cost of all material items received, including taxes and shipping/handling.
- **Total Other Costs Received** – This value reflects the total cost of all other cost items received, including taxes and shipping/handling.
- **Total Received Costs** – This value is the sum of the total materials received and total other costs received.

Click the **View Itemized Charges** link to examine a detailed list of all of the charges associated with a work order and all children of the work order in the parent/child hierarchy.

<table>
<thead>
<tr>
<th><strong>ROLLUP TOTALS SUMMARY</strong></th>
<th><strong>View Itemized Charges</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Materials Received:</td>
<td>$183.75</td>
</tr>
<tr>
<td>Total Other Costs Received:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Total Received Costs:</td>
<td>$183.75</td>
</tr>
<tr>
<td>Request Total Charges and Costs:</td>
<td>$827.46</td>
</tr>
</tbody>
</table>

9.4 Summary
The Summary tab displays a summary of all the costs and purchase order receipts associated with the work order.
9.4.1 Totals Summary

Costs of a specific type (labor costs, material costs, then other costs) are grouped together. Receipts of a specific type (material costs, and other cost) are grouped together. A grand total of all charges and costs is displayed at the bottom of the panel.

Each time a cost is added to the work order or a receipt is made on an associated purchase order, it is added to the appropriate category and the total is updated.

The following values are displayed:

- **Total Labor** – This value reflects the total cost of all labor entries made, including taxes.
- **Total Materials** – This value reflects the total cost of all material items added, including taxes and shipping/handling. This value reflects items added directly from the Work Order Financial page as well as any items added to the work order through an Inventory Item Issue transaction.
- **Total Other Costs** – This value reflects the total cost of all other cost items added, including taxes and shipping/handling.
- **Total Materials Received** – This value reflects the total cost of all material items received on purchase orders associated with the request, including taxes and shipping/handling.
- **Total Other Costs Received** – This value reflects the total cost of all other cost items received on purchase orders associated with the request, including taxes and shipping/handling.
- **Work Order Charges Total** – This value is the sum of the total labor, material, and other costs.
- **Total Received Costs** – This value is the sum of the total materials and other costs received.
- **Request Total Charges and Costs** – This value is the sum of the total work order charges and the total received costs.

Click the **Detailed Summary Report** link to generate an HTML report containing a consolidated view of all of the charges associated with the work order – both purchase order charges and work order charges.

9.4.2 Rollup Totals Summary

The Rollup Totals Summary panel displays all the costs and purchase order receipts associated with the parent and all child work orders.

Costs of a specific type (labor costs, material costs, then other costs) are grouped together. Receipts of a specific type (material costs, and other cost) are grouped together. A grand total of all charges and costs for all parent and child work orders is displayed at the bottom of the panel.
Each time a cost is added to any of the parent/child work orders or a receipt is made on an associated purchase order, it is added to the appropriate category and the total is updated.

The following values are displayed:

- **Total Labor** – This value reflects the total cost of all labor entries made, including taxes.
- **Total Materials** – This value reflects the total cost of all material items added, including taxes and shipping/handling. This value reflects items added directly from the Work Order Financial page as well as any items added to the work order through an Inventory Item Issue transaction.
- **Total Other Costs** – This value reflects the total cost of all other cost items added, including taxes and shipping/handling.
- **Total Materials Received** – This value reflects the total cost of all material items received on purchase orders associated with the request, including taxes and shipping/handling.
- **Total Other Costs Received** – This value reflects the total cost of all other cost items received on purchase orders associated with the request, including taxes and shipping/handling.
- **Work Order Charges Total** – This value is the sum of the total labor, material, and other costs.
- **Total Received Costs** – This value is the sum of the total materials and other costs received.
- **Request Total Charges and Costs** – This value is the sum of the total work order charges and the total received costs.

Click the **View Itemized Charges** link to examine a detailed list of all of the charges associated with a work order and all children of the work order in the parent/child hierarchy.

<table>
<thead>
<tr>
<th>ROLLUP TOTALS SUMMARY</th>
<th>View Itemized Charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Labor:</td>
<td>$257.60</td>
</tr>
<tr>
<td>Total Materials:</td>
<td>$88.21</td>
</tr>
<tr>
<td>Total Other Costs:</td>
<td>$300.00</td>
</tr>
<tr>
<td>Total Materials Received:</td>
<td>$183.75</td>
</tr>
<tr>
<td>Total Other Costs Received:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Work Order Charges Total:</td>
<td>$543.71</td>
</tr>
<tr>
<td>Total Received Costs:</td>
<td>$183.75</td>
</tr>
<tr>
<td>Request Total Charges and Costs:</td>
<td>$827.48</td>
</tr>
</tbody>
</table>

10 FAMIS CLOUD TIME CARD/LABOR ENTRY

Access the TimeCard module by clicking the **TimeCard** link at the top of the page.

10.1 **CREATE A TIME ENTRY**

1. From the **Labor Date** drop-down menu, select the date you want to enter time for.
2. From the **Request** drop-down menu, select a work request if you want to associate with this time entry with a work request.
   - Only work requests that are open and assigned to the selected user display in the drop-down menu.
   - If you want to associate hours with a work request that is not in the drop-down menu, for example, a work request assigned to another user, you can click the **Find a Request** link to search for and select a work request.

   ![Request Search](image)

   o The most common searches:
     1. **Request ID** – if you know the exact work order number enter it here.
     2. **Activity** – Each work order is assigned a specific Activity Group based on the nature of the work. You can search for all work orders assigned to a specific Activity Group to narrow search results. **Service Requests** (campus maintenance requests) and **SW Time** (Leave Time) are the two most common.
     3. **Crew** – this drop down will only show you a list of the crews you are assigned to.

![Search Criteria](image)

3. Enter the number of **Hours** you want to record.
   - You can enter hours by:
     o In the Hours field, enter the number of hours worked, for example, 3.5.
     o From the Started and Ended drop-down menus, select time you started and the time you ended working and the system will calculate the number of hours.

4. **Activity** – You only need to change this field if you earned Over-time, Comp-time or Call-back pay. Otherwise, leave this field as is.
5. **Crew** – This will default to the user’s crew. If the user is assigned to more than one crew selected the applicable crew from which the work was performed.

6. **Position** – Not applicable.

7. **Task Code** – Not applicable.

![Time Entry Form](image)

### 10.2 **Edit a Time Entry**

Time entries can be modified as needed (as long as the timecard hasn’t been submitted for Supervisor Approval). Click Update.

![Time Entry Table](image)

### 10.3 **Submit a Time Entry**

All time entries will be displayed for the selected pay period.

Once you have entered all of your hours, made all of the necessary edits, and are sure the time entries are accurate, you can submit them. Submitting a time entry locks it down so that no further changes can be made and then sends it to your manager for approval. **The status of submitted time entries changes from Ready to Pending Approval.**
Now you can see the status of the entries has changed and have been sent to your manager to review and approve.

10.4 **TIME CARD APPROVAL**
1. Simply select the employee from the drop down menu to approve their time for the designated pay period.
2. All of the labor entries for the selected Pay Period will display.
3. If the employee is on more than one crew then you will need to switch the crew via the **Crew** dropdown to display those entries for approval.
4. Select the applicable entries to approve or reject with the check box.
5. Make an applicable Comments.
6. Click Approve or Reject.

10.5 Approval History
The Approval History panel maintains an audit trail of everything that has happened to your time entries. For example, a new entry might be made if the time entry was submitted, approved, or rejected. Updates are listed in chronological order with the initial updates at the top of the list and the most recent updates are at the bottom.

<table>
<thead>
<tr>
<th>Date</th>
<th>Labor Date</th>
<th>Hours</th>
<th>Activity</th>
<th>Position</th>
<th>Request</th>
<th>Status</th>
<th>Updated By</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/11/2018</td>
<td>9/1/2018</td>
<td>8 REG</td>
<td>HRS-Regular Earnings</td>
<td>1095</td>
<td>Pending Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/4/2018</td>
<td>2 REG</td>
<td>2 REG</td>
<td>HRS-Regular Earnings</td>
<td>37283</td>
<td>Approved</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/11/2018</td>
<td>9/1/2018</td>
<td>6 REG</td>
<td>HRS-Regular Earnings</td>
<td>37287</td>
<td>Submitted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/4/2018</td>
<td>2 REG</td>
<td>2 REG</td>
<td>HRS-Regular Earnings</td>
<td>37283</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10.6 Run Report
There are several types of reports that can be run to review labor entry. Below is an example of the criteria and output that could be entered.

1. Timecard Print Timesheet

Select a report: Timecard Print Timesheet
Select your report criteria:
Date Range: 10/15/2018 to 10/21/2018
Employee: Coulter, Troy Aaron 00014027
2. TimeCard Hours Detail

Select a report: TimeCard Hours Detail

Select your report criteria:
- Region:
- Property:
- Company:
- Employees: Coulter, Troy Aaron 00614027
- Cost Center:
- Date Range: 10/15/2018 to 10/21/2018
- Include Manager Details?: No
- Report Type: Excel

The output will go to Excel and then you’ll need to add a quick total to ensure the correct hours were in the report.

3. TimeCard Hours By Employee
A report that summarizes Timecard hours for a user for a range of dates. The report can be run in Update Mode which is used to lock the TimeCard entries for the date range provided.

**Select a report:** TimeCard Hours by Employee

**Select your report criteria:**

- **Region:** Select...
- **Property:** None Selected Select, Clear
- **Employee:** Coulter, Troy Aaron 00014027
- **Date Range:** 10/15/2018 to 10/21/2018
- **Run in Update Mode:** No

**Note:** Update Mode locks the time entered for the date range selected.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Employee ID</th>
<th>REG Hours</th>
<th>OT Hours</th>
<th>DT Hours</th>
<th>PTO Hours</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Troy Aaron Coulter</td>
<td>14027</td>
<td>14</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>14</td>
</tr>
</tbody>
</table>

### 4. TimeCard Cost Detail

**Select a report:** Timecard Cost Detail

**Select your report criteria:**

- **Region:** Select...
- **Property:** None Selected Select, Clear
- **Employee:** Coulter, Troy Aaron 00014027
- **Date Range:** 10/15/2018 to 10/21/2018
- **Display Rates as:** Internal Rates

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Work Order</th>
<th>Property</th>
<th>Comments</th>
<th>Date</th>
<th>Activity</th>
<th>Billable?</th>
<th>Cost Center</th>
<th>Service Type</th>
<th>Type</th>
<th>Sub Type</th>
<th>Statement of Work</th>
<th>Origin Code</th>
<th>Failure Code</th>
<th>REG Hours</th>
<th>OT Hours</th>
<th>DT Hours</th>
<th>PTO Hours</th>
<th>Total Hours</th>
<th>Sorted Hours</th>
<th>Sorted Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coulter Troy Aaron</td>
<td>14027</td>
<td>33540</td>
<td>Denver Alumni Center</td>
<td>10/27/2013</td>
<td>ME - Regular Earnings</td>
<td>Yes</td>
<td>NA</td>
<td>UND - Elevator</td>
<td>Elevator Maintenance</td>
<td>Task of AR</td>
<td>2</td>
<td>0</td>
<td>Self Service</td>
<td>NA</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Coulter Troy Aaron</td>
<td>14027</td>
<td>33540</td>
<td>Denver Alumni Center</td>
<td>10/27/2013</td>
<td>ME - Regular Earnings</td>
<td>Yes</td>
<td>NA</td>
<td>UND - Elevator</td>
<td>Elevator Maintenance</td>
<td>Task of AR</td>
<td>2</td>
<td>0</td>
<td>Self Service</td>
<td>NA</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Coulter Troy Aaron</td>
<td>14027</td>
<td>33540</td>
<td>University Hall</td>
<td>10/27/2013</td>
<td>ME - Regular Earnings</td>
<td>Yes</td>
<td>NA</td>
<td>UND - Elevator</td>
<td>Elevator Maintenance</td>
<td>Task of AR</td>
<td>2</td>
<td>0</td>
<td>Self Service</td>
<td>NA</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Coulter Troy Aaron</td>
<td>14027</td>
<td>33540</td>
<td>UND Miscellaneous</td>
<td>10/27/2013</td>
<td>ME - Regular Earnings</td>
<td>Yes</td>
<td>NA</td>
<td>UND - Elevator</td>
<td>Elevator Maintenance</td>
<td>Task of AR</td>
<td>2</td>
<td>0</td>
<td>Self Service</td>
<td>NA</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>Coulter Troy Aaron</td>
<td>14027</td>
<td>33540</td>
<td>HLL - Call Back Key</td>
<td>10/27/2013</td>
<td>ME - Regular Earnings</td>
<td>Yes</td>
<td>NA</td>
<td>UND - Elevator</td>
<td>Elevator Maintenance</td>
<td>Task of AR</td>
<td>2</td>
<td>0</td>
<td>Self Service</td>
<td>NA</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>2</td>
</tr>
</tbody>
</table>
6. **TimeCard Detailed Print**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Property</th>
<th>Project</th>
<th>Charge To</th>
<th>Work Order</th>
<th>10/15/2018 - 10/21/2018</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Troy Aaron Coulter</td>
<td>Und Memorial Union</td>
<td>NA</td>
<td>39552</td>
<td>4</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Troy Aaron Coulter</td>
<td>Wither Hall</td>
<td>NA</td>
<td>39551</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Troy Aaron Coulter</td>
<td>Gorecki Alumni Center</td>
<td>NA</td>
<td>39545</td>
<td>8</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>
## TIMESHEET

Employee: Coulter, Troy Aaron  
Time Sheet for Pay Period: 10/15/2018 to 10/21/2018

<table>
<thead>
<tr>
<th>WEEK 1</th>
<th>REG</th>
<th>OT</th>
<th>DT</th>
<th>PTO</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>MONDAY 10/15/2018</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>TUESDAY 10/16/2018</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>WEDNESDAY 10/17/2018</td>
<td>14.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>14.00</td>
</tr>
<tr>
<td>THURSDAY 10/18/2018</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>FRIDAY 10/19/2018</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>SATURDAY 10/20/2018</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>SUNDAY 10/21/2018</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Grand Total:** 14.00  0.00  0.00  0.00  14.00

## ACTIVITY SUMMARY

<table>
<thead>
<tr>
<th>Activity</th>
<th>Hours</th>
<th>Activity</th>
<th>Hours</th>
<th>Activity</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>H01-Regular Earnings</td>
<td>8.00</td>
<td>H03-Overtime</td>
<td>2.00</td>
<td>H12-Callback Pay</td>
<td>2.00</td>
</tr>
<tr>
<td>H14-/Workstudy</td>
<td>0.00</td>
<td>H16-Separation Pay</td>
<td>0.00</td>
<td>H20-Salaried-Sick Leave</td>
<td>0.00</td>
</tr>
<tr>
<td>H21-Salaried-Dependent Sick Leave</td>
<td>0.00</td>
<td>H22-Salaried-Annual Leave</td>
<td>0.00</td>
<td>H23-Salaried-Comp Time Taken</td>
<td>0.00</td>
</tr>
<tr>
<td>H24-Salaried-Holiday</td>
<td>2.00</td>
<td>H25-Salaried-Funeral Leave</td>
<td>0.00</td>
<td>H26-Salaried-Military Leave</td>
<td>0.00</td>
</tr>
<tr>
<td>H27-Salaried-Jury Duty</td>
<td>0.00</td>
<td>H30-Hourly-Sick Leave</td>
<td>0.00</td>
<td>H31-Hourly-Dependent Sick Leave</td>
<td>0.00</td>
</tr>
<tr>
<td>H32-Hourly-Annual Leave</td>
<td>0.00</td>
<td>H33-Hourly-Comp Time Taken</td>
<td>0.00</td>
<td>H34-Hourly-Holiday</td>
<td>0.00</td>
</tr>
<tr>
<td>H35-Hourly-Funeral Leave</td>
<td>0.00</td>
<td>H36-Hourly-Military Leave</td>
<td>0.00</td>
<td>H37-Hourly-Jury Duty</td>
<td>0.00</td>
</tr>
<tr>
<td>H38-Salaried-Admin Leave Paid</td>
<td>0.00</td>
<td>H48-Hourly-Admin Leave Paid</td>
<td>0.00</td>
<td>H53-Comp Time Earned</td>
<td>0.00</td>
</tr>
<tr>
<td>H67-Official Closure</td>
<td>0.00</td>
<td>HP1-Overtime Paid at 1.0</td>
<td>0.00</td>
<td>NDUS-Leave without pay</td>
<td>0.00</td>
</tr>
<tr>
<td>WO Labor</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Shopping Cart allows you to request/reserve the inventory items that are needed to complete a work order.

11.1 SHOPPING CART LIFE CYCLE
As a shopping cart progresses from creation to completion, the following functions can be performed on it.

- **Create** – When you first create a shopping cart, it is empty and remains only visible to you. You can put things into it or take things out of it, and you can specify the date on which the items are needed. After creating it, the status of the shopping cart is Open.
• **Check Out** – When everything you need to complete a work order has been added to an Open shopping cart, you can check it out and reserve the items. Once you check a shopping cart out, you can no longer change what is in it, unless you undo the check out. After check out, the status of the shopping cart is None Issued.

• **Undo** – If an error is found in a Checked Out shopping cart (for example, an important item was left out), you can undo the check out and make changes to the cart, but only if no items have been issued. When you undo a check out, the status of the shopping cart is returned to Open. You must check it out again after the changes are made.

• **Issue** – Once a shopping cart has been checked out, users with Inventory Item Issue permissions can start issuing the items from the cart to the work order. If some, but not all of the items are issued, the status of the shopping cart is Partially Issued. Once all items have been issued, the status of the shopping cart is Closed.

• **Close** – You can close a checked out shopping cart at any time. Doing so releases all of the un-issued items back into inventory, making them available to other users. If a shopping cart is closed, the status changes to Closed. If the work order associated with a shopping cart is closed, the shopping is automatically closed as well.

### 11.2 FIND CART

The Shopping Cart page opens. At the top if the page are fields that allow you to define criteria to search for a particular shopping cart and a link that allows you to create a new shopping cart. *Note all shopping carts will display based on the selected criteria regardless of who originally created the cart. Unfortunately you cannot search for carts that only you have created.*

![Shopping Cart Page Screen Shot](image)

1. Specify any of the following criteria to define the set of shopping carts you want to find:
   - **Cart #** – Enter a cart number to locate a single shopping cart.
   - **Request ID** – Enter a request ID to locate all shopping carts associated with a particular work request.
   - **Description** – Enter a value to search for shopping carts based on name the user entered for the cart created.
   - **Status** – Select a value to find shopping carts that have a particular status value, for example, Open,
   - **Create Date** – Specify two date values to find shopping carts that were created within the specified date range.

2. **Click FIND.**
   
   A list of all shopping carts that match the criteria appears. Above the result list, the total number of results is displayed. Shopping carts are displayed in ascending cart number order; however, you can re-sort the list by clicking any of the column headings. The following columns of data are displayed:
   - **Cart #** – the unique shopping cart number; click the ID to add or delete items or edit the cart
   - **Request ID** – the ID of the request the shopping cart is associated with
   - **Description** – a description of the shopping cart
   - **Status** – the status of the shopping cart
   - **Date Required** – the date on which the items are needed
   - **Created By** – the name of the user who created the shopping cart
   - **Links** – links to the operations you can perform on the shopping cart which will vary depending on the status of the cart

3. **Select the Show Details check box.**

   Additional information about each cart appears.
   - **Last Update Date** – the date on which the last change to the shopping cart was made
   - **Create Date** – the date on which the cart was created
Delivery Instructions – any delivery instructions associated with the cart

11.3 **CREATE A SHOPPING CART**

1. Click the **Shopping Cart** module link, or From the Request Details page of a work order, click the **Shopping Cart** link.
2. From the **SHOPPING CART – FIND CART** screen, click **Create New Cart**.

   ![Shopping Cart module link](image)

3. In the **CREATE CART** pop-up, enter a **Cart Name**. A good naming convention is your first and last name followed by the Request ID of the work order.
4. In the **Request ID** field, enter the work order number of the request for which these items will be used. **NOTE:** This will already be filled in if you created the cart from the Request Details page.
5. Click **OK** to create the cart.

11.4 **ADD ITEMS TO A SHOPPING CART**

6. Click the **Cart #** link to open the cart so you can begin selecting items.

   ![Cart # link](image)

7. Click **Select** to add the first item.
8. In the pop-up window, use any of the criteria listed to search for your item. Once you have identified the item, click the link for Part # displayed in your search results, to select the item. **All UND Shopping Carts should use the Warehouse of UND-CENT.**

9. Enter the **Quantity** you require for the work order.

10. Click **ADD**.

11. Continue adding additional items as needed for this work order.

11.5 **CHECK OUT**

12. When all items are added, click **Check Out**. This action will reserve your items and make your cart visible to the warehouse, so they can begin pulling your item(s).
13. In the CHECKOUT pop-up, enter a **Date Required** and **Delivery Instructions**. The delivery instructions could be that you plan to pick up the items at the storeroom window. Click **OK**.

![Shopping Cart - Check out](image)

11.6 **UNDO A CART**

14. You may view your cart by clicking the Shopping Cart link from the Request Details of the work order, or by clicking the Shopping Cart module link and searching for your cart.

15. On the **FIND CART** screen, you may click **Undo** if you would like to reverse your check out and continue adding items or make other changes. After clicking Undo, click the **Cart #** to open the cart, make any changes to the items or quantities, and then do a new check out.

![Shopping Cart - Find Cart](image)

11.7 **CLOSE A CART**

16. If you click **Close**, any items that have not yet been issued will be released and the cart will be closed.

12 **CREATING A SERVICE PURCHASE REQUISITION (PR)**

1. Find the **Request** in the Work Order module. Follow steps in sections 2 & 3 to find your applicable work request.

2. Click **Create PR**. The PURCHASE REQUISITION – CREATE page opens.

   **NOTE:** Create PR changes to **View PR** after a PR has been created – you can still click the **View PR** link and a pop-up opens providing the ability to create another PR if needed.
12.1 **CREATE SERVICE PR**

1. The **CREATE PR PAGE** is used to create a purchase requisition, which specifies a list of items you need and the timeframe in which they are needed.

2. **NTE field (Not to Exceed)** enter **TOTAL PRQ AMOUNT**.

3. In the **PR Date** field, enter the date on which the PR is being created. This value defaults to today's date.

4. The **Requestor Name** field auto-populates from the logged in user.

5. In the **Attention** field you can select an alternate requestor.

6. The **Property** field auto-populates from the WO. If this PR is not being entered off the WO, you’ll need to select the building of the WO, or the Facilities building (building 107).

7. The **Ship to** field auto-populates from Property. It should always be the address of the warehouse.

8. In the **Description** field, enter a description of the WO. Include ‘Do Not Send’ if buyer does not need to send PO to vendor.

9. **PR Type** for all purchase will stay as Inventory.

10. The **Request Id** field auto-populates form WO.
11. Click **OK** to save changes & create the PR. (This opens the **PURCHASE REQUISITION DETAILS** page.) From here, you can add lines to the Purchase Requisition.

### 12.2 **PURCHASE REQUISITION DETAILS**

The Purchase Requisition Details page opens after you create a new PR or when you click a PR number link on the VIEW PR results list. The Purchase Requisition Details page contains general information about the purchase requisition and allows you to add material and service items to the PR, define PR approvals and attach files.

### 12.3 **ADD SERVICE ITEM**

Click the **ADD MATERIAL/SERVICE** button to add the service items you need to the purchase requisition.
1. Click “select” next to the MATERIALS-Item box
   a. The below search box will appear: enter “1.(Crew-Code)” and click “Find” only (example: 1.AM for academic maintenance). 1.AMS and 1.AMD should appear below the search box. Select the Part # ending in “S” for Service Purchases and “D” for Material Purchases. Note, this will populate the correct warehouse.

   b. DESCRIPTION: auto populates the name of your crew. Clear it out.
      Enter the following mandatory description: LP (if local purchase request only), Request ID, Initials/Crew of Requester, Part name of item(s) requested, Manufacture or Vendor Part #, location of work, crew picking up or item being delivered, and quoted or estimated price.
      NOTE: LP, only if local purchase request - come back, remove “LP” and update PRQ information and submit invoice to warehouse.

   c. DATE REQUIRED: enter or select the date the item is required by.

   d. VENDOR: MANDITORY for each line, vendors might have multiple pay sites, they will appear on the list multiple times, search and select the vendor address in the following order when available, 1. SUA, 2. PRIMARY, 3. FMS at the end. These are UND vendors, if you don’t see an FMS address, select the vendor address you are receiving the item from.

   e. QUANTITY: For Materials Warehouse enter the quantity of material purchased
      For Services Warehouse enter the TOTAL COST of each service line needed.

   f. UNIT COST: For Materials Warehouse enter the price of each item purchased
      For Service Warehouse enter “1” on each line needed

   g. Click “ADD” to save item. The ITEM is now listed on the PURCHASE REQUISITION DETAILS (PR) page.

   h. ENTER NTE AMOUNT: Go to the top right hand side of the PURCHASE REQUISITION DETAILS (PR) page and click on the EDIT PURCHASE REQUISITION LINK. Enter the NTE which is the total $ value of the Materials or Services requested and click update.

   I. Click the “APPROVALS” box to submit and you are done.

***NOTE: PR Approvals are automated based on your level of approval. If the total cost of the PR exceeds your authorized purchase level the PRQ will require your supervisor’s approval. Please make note of all PRQ’s that are over your authorization level to ensure they get approved.
NOTES:
1. All service PR’s require a Crew Terms & Conditions to be sent to UND.Facilities.Purchasing@und.edu mail box.
2. Service PR’s will have two lines if parts and labor are included in the service. 1 line for parts, and 1 for labor.
3. Freight lines: If you are adding freight cost to a PR, use “1.FRTM” on material requests and “1.FTRS” for service requests. If you are not sure if freight will be charged add the line anyway with an estimated cost. We can cancel the line if not needed.
4. NTE: Go back into the EDIT PURCHASE REQUISITION link at the top right hand side of the page. Click on link to open the page and enter the total $ value of the Materials or Services requested and click update.

2. You will notice the line of the PRQ says “APPROVAL REQUIRED”. This will ALWAYS show “APPROVAL REQUIRED” until you step 11.

3. CLICK REQUEST APPROVALS

If the total amount of the PRQ is within your purchasing limit, it will self approve and the PR LINE STATUS will change to “APPROVED”.
If the total amount of the PRQ is above your purchasing limit it will automatically route to your purchasing approver and notify them accordingly for approval. The PR LINE STATUS will change to “WAITING APPROVAL”.

4. **DONE.** (There is no final submit button to click, exit off the screen)

### 12.4 PR APPROVAL

Approving a Purchase Requisition allows you to approve or decline the individual items associated with a purchase requisition.

To approve or decline the items on a purchase requisition, follow these steps:

1. Once logged in the Approvals page will automatically open. If not, click Approvals>>My Approvals in the left hand navigation.

2. Click on the PR#.
3. Click on the Approve or Decline for each line or click “Approval All” or “Decline All”.
4. Click **SUBMIT**.
5. Click **OK**.

### 12.5 CREATE MATERIAL PR

1. Clicking the **ADD MATERIAL/SERVICE** button allows you to add the material items you need to the purchase requisition.
2. Select the **MATERIALS-ITEM** box
3. Find the UND-MATERIALS warehouse and select **FIND**

![Image of Materials and Finder](image)

4. The DESCRIPTION field will populate the name of your crew. **Clear it out and enter:**
   a. The work order number
   b. Your initials and Crew initials
   c. Description of the work to be done
   d. Vendor part number, if applicable

5. In the **DATE REQUIRED** field, enter or select the date the item is required by.
6. Select the **VENDOR**. If a vendor has multiple sites for payment, they will display in the list multiple times. As long as the overall vendor is correct, select the vendor address that you are receiving the item from.
7. In the **QUANTITY** field, enter what you need.
8. In the **UNIT COST** field, enter cost per quote.
9. Click ADD to save the item.
10. This creates an ITEM LINE on the **PURCHASE REQUISITION DETAILS** page.

   **IF YOU ARE ORDERING MORE THAN ONE ITEM, RETURN TO ADD MATERIAL/SERVICE AND FOLLOWING THE ABOVE STEPS.**

![Image of Material Add](image)

11. If **NTE** and total **PRQ** valued do not match, you will receive the below error message.

   ![Image of Error Message](image)

   a. To fix, check PRQ amount total with **NTE** entered. If values differ, verify PR values with NTE. Update **NTE**, if needed by selecting **Edit Purchase Requisition** link in upper right corner.
b. The **NTE** box will be located in the bottom left. Update your amount and click **Update**

12. You will notice the line of the PRQ says “APPROVAL REQUIRED”. This will ALWAYS show “APPROVAL REQUIRED” until you step 13.

13. **CLICK REQUEST APPROVALS**

If the total amount of the PRQ is within your purchasing limit, it will **self approve** and the PR LINE STATUS will change to “APPROVED”.

If the total amount of the PRQ is above your purchasing limit it will **automatically route to your purchasing** approver and notify them accordingly for approval. The PR LINE STATUS will change to “WAITING APPROVAL”.

---

**PURCHASE REQUISITION**

<table>
<thead>
<tr>
<th>Description</th>
<th>Date Req</th>
<th>Warehouse</th>
<th>Qty/Unit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>NDSU Service Administration</td>
<td>7/20/2021</td>
<td>NDSU-SERVICES</td>
<td>30000.00 EACH</td>
<td>32000.00</td>
</tr>
</tbody>
</table>

**ITEM SUMMARY**

<table>
<thead>
<tr>
<th>Line</th>
<th>Item</th>
<th>Date Req</th>
<th>Warehouse</th>
<th>Qty/Unit</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NDSU Services Administration</td>
<td>7/20/2021</td>
<td>NDSU-SERVICES</td>
<td>30000.00 EACH</td>
<td>30000.00</td>
</tr>
</tbody>
</table>
14. **DONE.** (There is no final submit button to click, exit off the screen)

12.6 **PR Approval Process**
Approving a Purchase Requisition allows you to approve or decline the individual items associated with a purchase requisition.

To approve or decline the items on a purchase requisition, follow these steps:

1. Once logged in the **Approvals** page will automatically open. If not, click **Approvals>>My Approvals** in the left hand navigation.
2. Click on the **PR#**.
3. Click on the Approve or Decline for each line or click “Approval All” or “Decline All”.
4. Click **SUBMIT**.
5. Click **OK**.

13 **Other Menu Items**

1. **Approvals**
   i. This will automatically open if there is a Purchase Requisition that you need to approve.
2. **Space**
   i. Space records can be viewed to get information about campus property.
3. **Dashboard**
   i. Minimal information exists on the Dashboard now, but this will be built out further in the future.
4. **Purchasing**
   i. You can view Purchase Orders and Invoice information from this menu item.
5. **Inventory**
i. You can the list of parts that are stored in the warehouse. Also, there are pictures of parts that can be viewed, and if applicable SDS sheets and other attachments will be stored on the part.

6. Asset
   i. This menu item will allow you to view Asset (equipment) records.

7. Schedules
   i. This menu item is related to preventive maintenance information for property records and assets.

8. Procedures
   i. This menu item is related to preventive maintenance information for property records and assets.

9. Company
   i. This menu item displays are active companies and their locations.

10. Projects
    i. Information related to projects.

11. Inspections
    i. This information will be implemented at a future time.

12. Property
    i. This is another way to access property information.