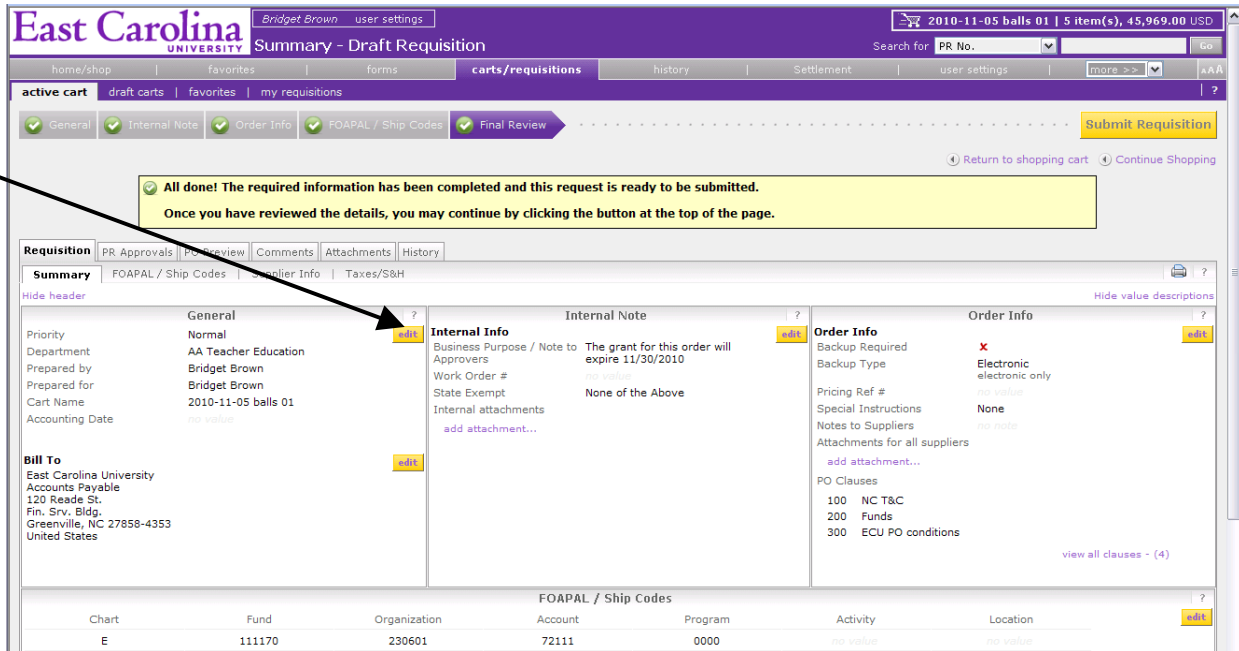


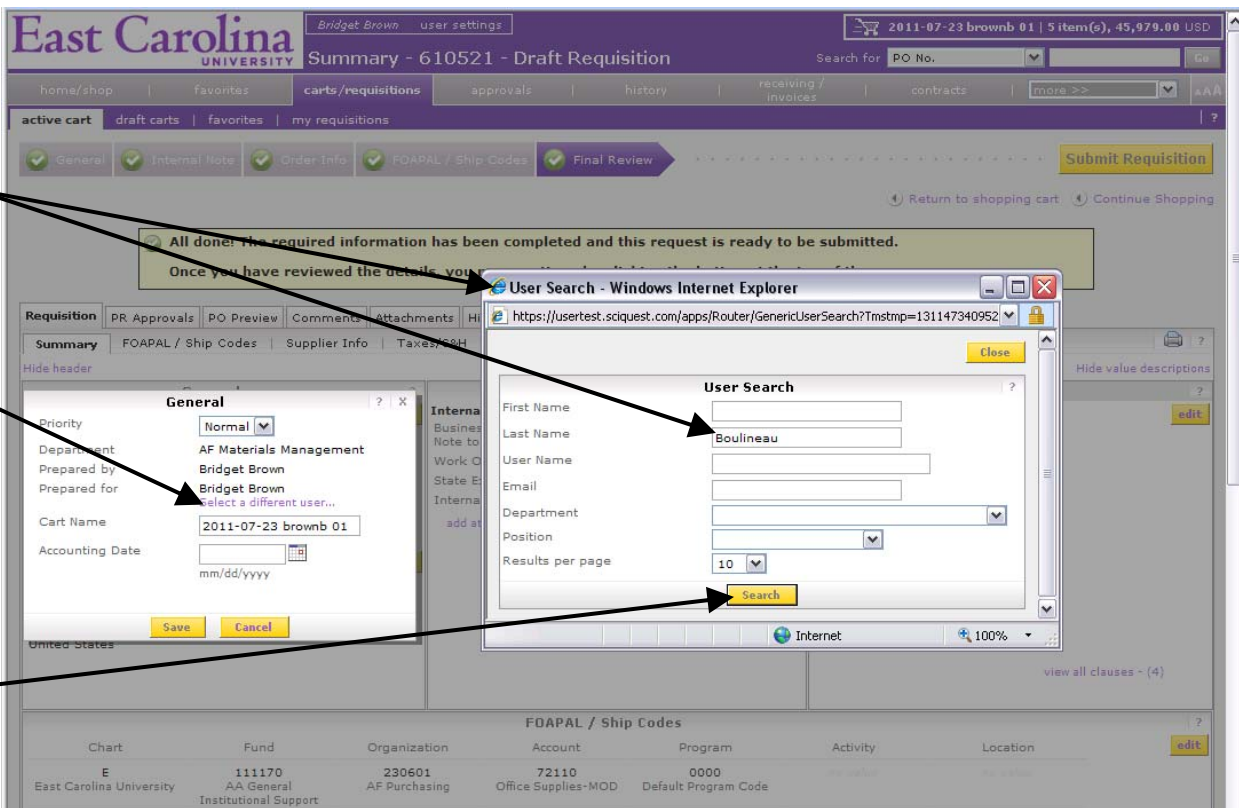
# IMPROVED PREPARED BY / PREPARED FOR ORDER PROCESS

Last Updated on: 7/22/2011



1.

1. Click the **Edit** button. These steps will demonstrate the prepared by / prepared for feature and the improvements to order processing.



3.

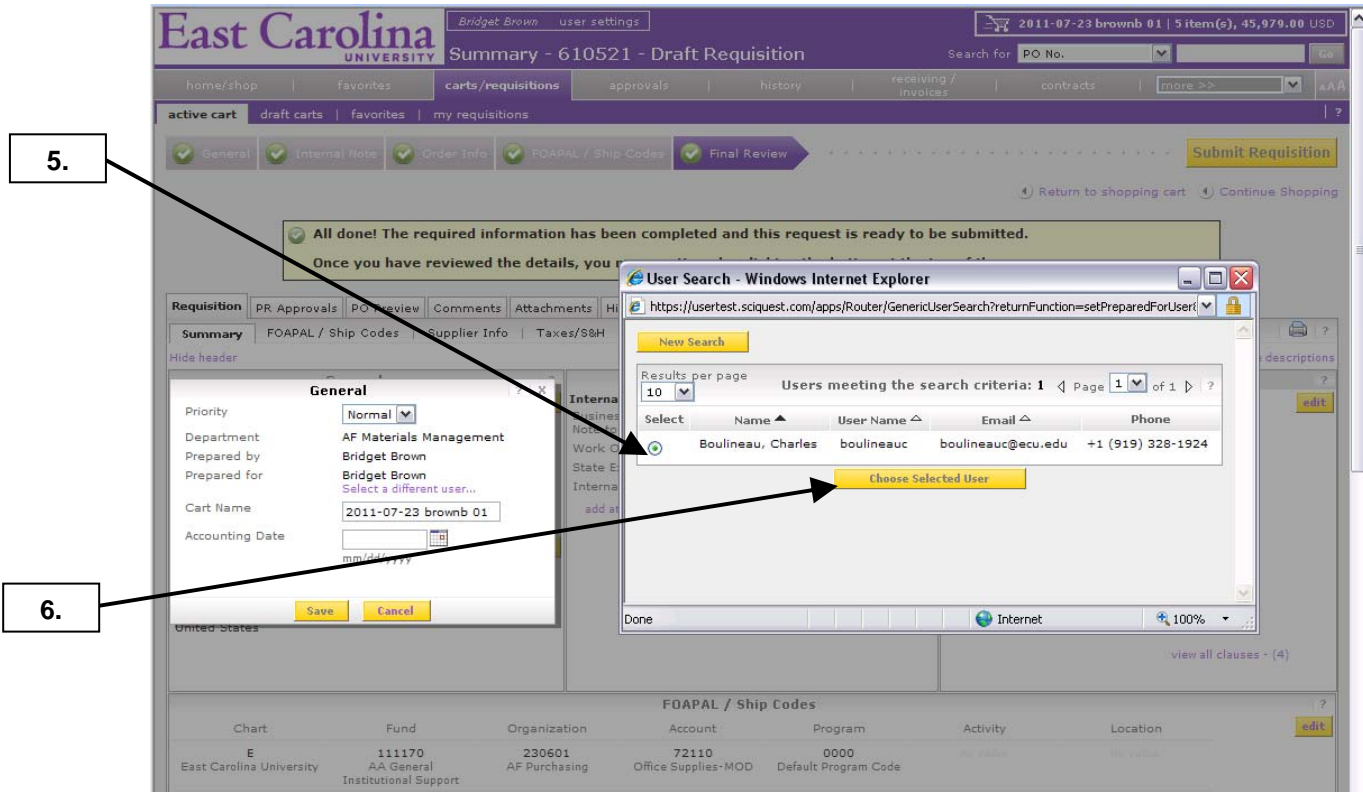
2.

4.

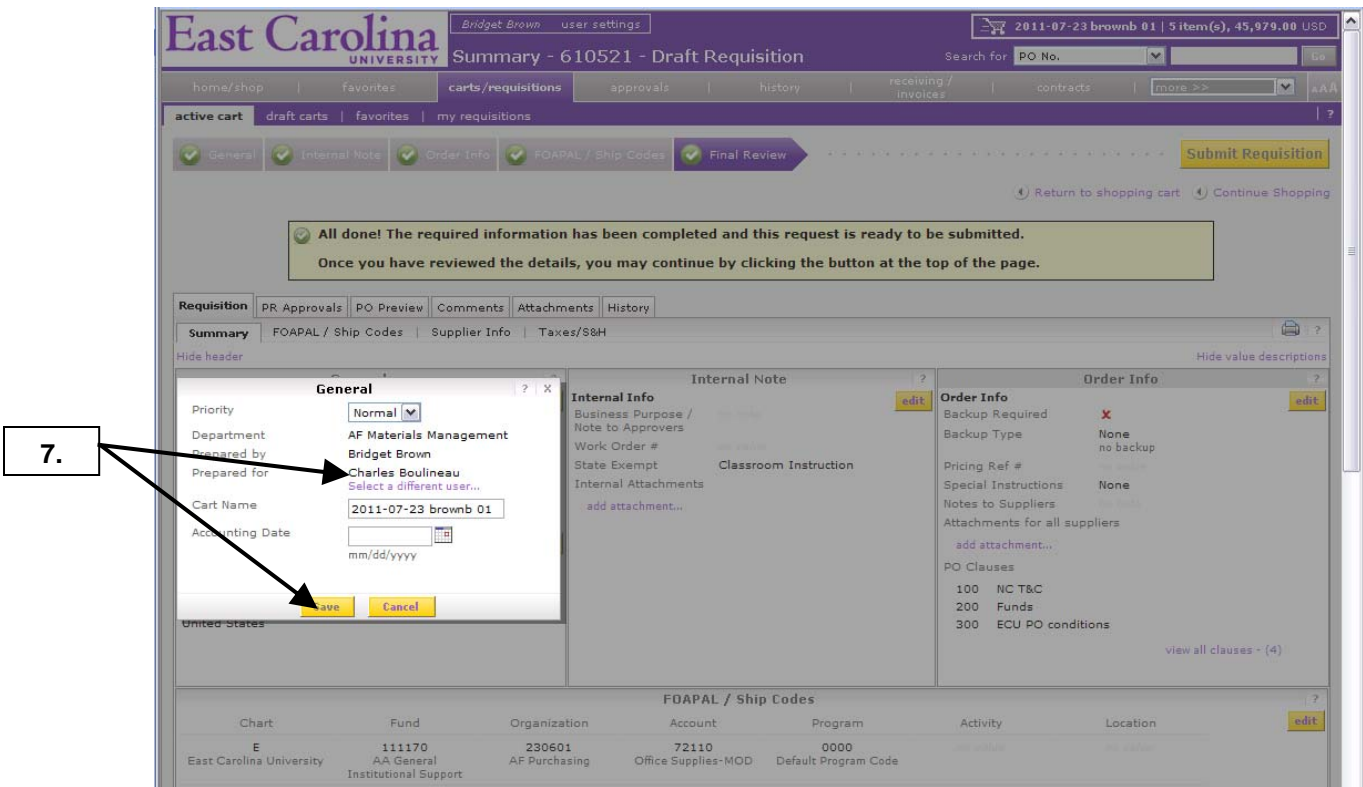
2. Click on the **Select a different user** link.
3. Note that the User Search pop-up is now displayed. Enter the last name of the user for whom you will prepare the requisition.
4. Click the **Search** button.

# IMPROVED PREPARED BY / PREPARED FOR ORDER PROCESS

Last Updated on: 7/22/2011



- 5. Select the radio button for the desired user.
- 6. Click the **Choose Selected User** button.



- 7. Click the **Save** button. **Note:** Prepared for user has been updated to the desired PORT user.

# IMPROVED PREPARED BY / PREPARED FOR ORDER PROCESS

Last Updated on: 7/22/2011

East Carolina UNIVERSITY Summary - 610521 - Draft Requisition

2011-07-23 brownb 01 | 5 item(s), 45,979.00 USD

home/shop | favorites |  **carts/requisitions**  | approvals | history | receiving / invoices | contracts | more >> | AAA

active cart | draft carts | favorites | my requisitions

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary PR Approvals PO Preview Comments Attachments History

FOAPAL / Ship Codes Supplier Info Taxes/S&H

| General                                | Internal Note                        | Order Info                    |
|--|--------------------------------------|-------------------------------|
| Priority: Normal                       | Business Purpose / Note to Approvers | Backup Required: X            |
| Department: Administration and Finance | Work Order #                         | Backup Type: None             |
| Prepared by: Bridget Brown             | State Exempt: Non State Funds        | Pricing Ref #                 |
| Prepared for: Charles Boulineau        | Internal Attachments                 | Special Instructions: None    |
| Cart Name: 2011-07-23 brownb 01        |                                      | Notes to Suppliers            |
| Accounting Date                        |                                      | Attachments for all suppliers |
|  |                                      | add attachment...             |
|  |                                      | PO Clauses                    |
|  |                                      | 100 NC T&C                    |
|  |                                      | 200 Funds                     |
|  |                                      | 300 ECU PO conditions         |
|  |                                      | view all clauses - (4)        |

FOAPAL / Ship Codes

| Chart                    | Fund                             | Organization  | Account             | Program              | Activity | Location |
|--------------------------|----------------------------------|---------------|---------------------|----------------------|----------|----------|
| E                        | 111170                           | 230601        | 72110               | 0000                 | no value | no value |
| East Carolina University | AA General Institutional Support | AF Purchasing | Office Supplies-MOD | Default Program Code |          |          |

8. Note: The default FOAP values and ship to are the Prepared for user's default values.

9. Click the **Edit** button.

East Carolina UNIVERSITY Summary - 610521 - Draft Requisition

2011-07-23 brownb 01 | 5 item(s), 45,979.00 USD

home/shop | favorites |  **carts/requisitions**  | approvals | history | receiving / invoices | contracts | more >> | AAA

active cart | draft carts | favorites | my requisitions

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

Return to shopping cart Continue Shopping

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition Summary PR Approvals PO Preview Comments Attachments History

FOAPAL / Ship Codes Supplier Info Taxes/S&H

| General                                | Internal Note                        | Order Info                 |
|--|--------------------------------------|----------------------------|
| Priority: Normal                       | Business Purpose / Note to Approvers | Backup Required: X         |
| Department: Administration and Finance | Work Order #                         | Backup Type: None          |
| Prepared by: Bridget Brown             | State Exempt: Non State Funds        | Pricing Ref #              |
| Prepared for: Charles Boulineau        | Internal Attachments                 | Special Instructions: None |
| Cart Name: 2011-07-23 brownb 01        |                                      | Notes to Suppliers         |
| Accounting Date                        |                                      |                            |

FOAPAL Codes

Select from your code favorites

| Chart  | Fund   | Organization   | Account  | Program  | Activity                  | Location                  |
|--|--|--|--|--|---------------------------|---------------------------|
| E  | 111170   | 230601   | 72110  | 0000   |                           |                           |
| Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from profile values...<br>Select from all values... | Select from all values... | Select from all values... |

Save Cancel

| Chart                    | Fund                             | Organization  | Account             | Program              | Activity | Location |
|--------------------------|----------------------------------|---------------|---------------------|----------------------|----------|----------|
| E                        | 111170                           | 230601        | 72110               | 0000                 | no value | no value |
| East Carolina University | AA General Institutional Support | AF Purchasing | Office Supplies-MOD | Default Program Code |          |          |

10. Click the **Select from profile values** link.

# IMPROVED PREPARED BY / PREPARED FOR ORDER PROCESS

Last Updated on: 7/22/2011

East Carolina UNIVERSITY Summary - 610521 - Draft Requisition

2011-07-23 brownb 01 | 5 item(s), 45,979.00 USD

home/shop | favorites | carts/requisitions | approvals | history | receiving/invoices | contracts | more >> | AAA

active cart | draft carts | favorites | my requisitions

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Return to shopping cart Continue Shopping

Requisition PR Approvals PO Preview Comments Attachments History

Summary FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

| General                                | Internal Note                        | Order Info                 |
|--|--------------------------------------|----------------------------|
| Priority: Normal                       | Business Purpose / Note to Approvers | Backup Required: X         |
| Department: Administration and Finance | Work Order #                         | Backup Type: None          |
| Prepared by: Bridget Brown             | State Exempt: Non State Funds        | Pricing Ref #              |
| Prepared for: Charles Boulineau        | Internal Attachments                 | Special Instructions: None |
| Cart Name: 2011-07-23 brownb 01        | add attachment...                    | Notes to Suppliers         |
| Accounting Date                        |                                      |                            |

FOAPAL Codes

Select from your code favorites

| Chart | Fund   | Organization | Account | Program | Activity |
|-------|--------|--------------|---------|---------|----------|
| E     | 111170 | 230601       | 72110   | 0000    |          |

Select from profile values... Select from all values... Hide profile values... Select from profile values... Select from all values... Select from all values... Select from all values...

- 230601 - AF Purchasing
- 591300 - AA Chemistry Admin
- 591801 - AA Physics
- 611501 - HS Faculty Support Service
- 619001 - HS DHS Al Hlth And Nursing Res...
- 643501 - HS Al Hlth Occupational Therap...
- 662701 - HS Non Operating Admin
- 665265 - HS FM Clin Serv Physical Thera...

Save Cancel

11.

12.

11. **Note:** For each element, the profile value list is populated with both your values and the prepared for user's values.

12. Select the appropriate values for each element of FOAP.

East Carolina UNIVERSITY Summary - 610521 - Draft Requisition

2011-07-23 brownb 01 | 5 item(s), 45,979.00 USD

home/shop | favorites | carts/requisitions | approvals | history | receiving/invoices | contracts | more >> | AAA

active cart | draft carts | favorites | my requisitions

General Internal Note Order Info FOAPAL / Ship Codes Final Review Submit Requisition

All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Return to shopping cart Continue Shopping

Requisition PR Approvals PO Preview Comments Attachments History

Summary FOAPAL / Ship Codes Supplier Info Taxes/S&H

Hide header Hide value descriptions

| General                                | Internal Note                        | Order Info                 |
|--|--------------------------------------|----------------------------|
| Priority: Normal                       | Business Purpose / Note to Approvers | Backup Required: X         |
| Department: Administration and Finance | Work Order #                         | Backup Type: None          |
| Prepared by: Bridget Brown             | State Exempt: Non State Funds        | Pricing Ref #              |
| Prepared for: Charles Boulineau        | Internal Attachments                 | Special Instructions: None |
| Cart Name: 2011-07-23 brownb 01        | add attachment...                    | Notes to Suppliers         |
| Accounting Date                        |                                      |                            |

FOAPAL Codes

Select from your code favorites

| Chart | Fund   | Organization | Account | Program | Activity | Location |
|-------|--------|--------------|---------|---------|----------|----------|
| E     | 111170 | 591801       | 72110   | 0000    |          |          |

Select from profile values... Select from all values... Select from profile values... Select from all values... Select from profile values... Select from all values... Select from all values... Select from all values...

Save Cancel

13.

13. Click the **Save** button to complete the desired changes.

# IMPROVED PREPARED BY / PREPARED FOR ORDER PROCESS

Last Updated on: 7/22/2011

**East Carolina UNIVERSITY** Summary - 610521 - Draft Requisition

2011-07-23 brownb 01 | 5 item(s), 45,979.00 USD

home/shop | favorites | **cars/requisitions** | approvals | history | receiving / invoices | contracts | more >>

active cart | draft carts | favorites | my requisitions

General Internal Note Order Info FOAPAL / Ship Codes Final Review **Submit Requisition**

All done! The required information has been completed and this request is ready to be submitted.  
Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition: PR Approvals, PO Preview, Comments, Attachments, History

Summary: FOAPAL / Ship Codes, Supplier Info, Taxes/S&H

| General   | Internal Note   | Order Info   |
|---|---|--|
| <b>Priority</b><br>Normal<br><b>Department</b><br>Administration and Finance<br><b>Prepared by</b><br>Bridget Brown<br><b>Prepared for</b><br>Charles Boulineau<br><b>Cart Name</b><br>2011-07-23 brownb 01<br><b>Accounting Date</b><br>no value<br><b>Bill To</b><br>East Carolina University<br>Accounts Payable<br>120 Reade St.<br>Fin. Srv. Bldg.<br>Greenville, NC 27858-4353<br>United States | <b>Internal Info</b><br>Business Purpose / Note to Approvers<br>Work Order #<br>State Exempt<br>Internal Attachments<br>add attachment... | <b>Order Info</b><br>Backup Required<br>Backup Type<br>Pricing Ref #<br>Special Instructions<br>Notes to Suppliers<br>Attachments for all suppliers<br>add attachment...<br>PO Clauses<br>100 NC T&C<br>200 Funds<br>300 ECU PO conditions<br>view all clauses - (4) |

| FOAPAL / Ship Codes      |                                     |              |                     |                      |          |          |
|--------------------------|-------------------------------------|--------------|---------------------|----------------------|----------|----------|
| Chart                    | Fund                                | Organization | Account             | Program              | Activity | Location |
| E                        | 111170                              | 591801       | 72110               | 0000                 | no value | no value |
| East Carolina University | AA General<br>Institutional Support | AA Physics   | Office Supplies-MOD | Default Program Code |          |          |

14.

14. Scroll down the page to make changes for Ship to code for deliver.

Department: Administration and Finance

Prepared by: Bridget Brown

Prepared for: Charles Boulineau

Cart Name: 2011-07-23 brownb 01

Accounting Date: no value

**Bill To**  
East Carolina University  
Accounts Payable  
120 Reade St.  
Fin. Srv. Bldg.  
Greenville, NC 27858-4353  
United States

Note to Approvers  
Work Order #  
State Exempt  
Internal Attachments  
add attachment...

Backup Type  
None  
no backup

Pricing Ref #  
no value

Special Instructions  
None  
no note

Notes to Suppliers  
Attachments for all suppliers  
add attachment...

PO Clauses  
100 NC T&C  
200 Funds  
300 ECU PO conditions  
view all clauses - (4)

| FOAPAL / Ship Codes      |                                     |              |                     |                      |          |          |
|--------------------------|-------------------------------------|--------------|---------------------|----------------------|----------|----------|
| Chart                    | Fund                                | Organization | Account             | Program              | Activity | Location |
| E                        | 111170                              | 591801       | 72110               | 0000                 | no value | no value |
| East Carolina University | AA General<br>Institutional Support | AA Physics   | Office Supplies-MOD | Default Program Code |          |          |

**Ship To**  
Contact Name: Chuck Boulineau  
Phone: +1 (919) 328-1924  
Email: boulineauc@ecu.edu  
East Carolina University  
Pediatrics  
600 Moye Blvd  
Brody  
Rm 3H-44  
Greenville, NC 27934  
United States

15.

15.

15. Note the default ship code is for the Prepared for user.  
16. Click the **edit** button.

# IMPROVED PREPARED BY / PREPARED FOR ORDER PROCESS

Last Updated on: 7/22/2011

**18.** points to the East Carolina University logo in the top left corner of the page.

**17.** points to the 'Edit current shipping address...' form and the 'Or choose from your addresses...' section.

The screenshot shows the following form fields and options:

- Contact Name:** Chuck Boulineau
- Phone:** +1 (919) 328-1924
- Email:** boulineauc@ecu.edu
- Address Line 1:** East Carolina University
- Address Line 2:** Pediatrics
- Address Line 3:** 600 Moye Blvd
- Address Line 4:** Brody
- Room:** Rm 3N-44
- City:** Greenville
- State:** NC
- Zip Code:** 27834
- Country:** United States

Buttons: [Save Changes](#), [Cancel](#)

**Or choose from your addresses...**

| Ship Code | Name          | Phone             | Email               | Address  |
|-----------|---------------|-------------------|---------------------|--|
| 001       | Bridget Brown | +1 (252) 328-1013 | none@ecu.edu        | East Carolina University<br>Central Receiving Stores<br>Central Receiving<br>Greenville, NC 278584353<br>United States |
| 004       | Bridget Brown | +1 (252) 328-5555 | brownb@mail.ecu.edu | East Carolina University<br>Materials Mgmt<br>200 E First Street<br>Greenville, NC 27858-4353<br>United States         |
| 855       | Tim Allen     | +1 (252) 328-1013 | cbouline@msn.com    | East Carolina University<br>ITCS<br>Austin<br>Rm 107<br>Greenville, NC 27858-4353<br>United States                     |

Buttons for each address: [Use](#), [Edit](#), [Delete](#)

Additional text: **Your current default address**, [Make this your default](#)

- 17. From here, you can either use the default value for the prepared for user or one of your profile ship codes. To search for a new ship code, you can refer to the Review Cart Header procedure: steps 35 – 52.
- 18. This completes the steps for this procedure. Click on the **East Carolina University** icon to return to the home page.