

IMAGINE

COMPRESSED GAS CYLINDERS REQUISITION PROCESS GUIDE



VERSION 1.00

Compressed Gas Cylinder Requisition Template Process

1. Click on the Purchases Worklet



Purchases

2. Ensure the current Cart has 0 Items, if Items are in the Cart, they need to be deleted otherwise these will be added as part of the Gas Cylinder Order. Refer to deleting Items in the Cart QRG. Select **Add from Templates/Requisitions**

The screenshot displays a procurement system interface. It is divided into three main sections: 'Actions', 'View', and 'Cart'.
The 'Actions' panel on the left contains several buttons: 'Create Requisition', 'Connect to Supplier Website', 'Request Non-Catalog Items', 'Add from Templates/Requisitions' (highlighted in yellow), and 'Select from My Procurement Favorites'. A 'More (3)' link is located below these buttons.
The 'View' panel on the right contains buttons for: 'Requisitions', 'Receipts', 'Templates', 'Business Assets', 'Procurement Card Transactions', and 'Procurement Card Transaction Verifications'.
Below these panels is the 'Cart' section, which features a large yellow box with the number '0' and the word 'Items' underneath it. At the bottom of the interface, there is a 'Cart' label.

3. Select Requisition Type: Materials Management Request

Add from Templates and Requisitions

Company * x USC University of Southern California ...

Requester * x Howell Martinez ...

Currency * x USD ...

Requisition Type x Materials Management Request ...

Deliver-To x SCO USC Center Hill Building > SCO 9th Floor > SCO 9th Floor 950 ...

Ship-To * x 1149 S. Hill Street Building: SCO Los Angeles, CA 90015 United States of America ...

4. If the default Deliver-To has been set up, the Deliver-To location will be defaulted in to the Requisition, otherwise select a valid Deliver-To location for the building, floor and room by clicking on  icon and select Deliver-To by Ship-To Locations, select the building, floor and room number from the associated delivery rooms. However, a majority of Material Managements Request for Gas Cylinders will be delivered to Labs/specialty locations. Currently, Lab locations are being identified and will be added once they are validated. To ensure gas cylinders are delivered to the desired location. **You must add the proper delivery location in the Supplier Memo field as shown below (See Step 9).**

Deliver-To x CAL Carole Little Building > CAL 1st Floor > CAL 1st Floor 120 ...

Ship-To * x 3434 S. Grand Ave. Building: CAL Los Angeles, CA 90007 United States of America ...

5. Do not add PPGG tags in this screen, PPGGs tags will added in the Checkout page, for now click **OK**.

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6. From the Template screen, select the Materials Management Gas Cylinder template by clicking on the selection box, **DO-NOT** click Add to Cart. If by accident, the Add to Cart button was clicked, refer to the additional instructions section of this guide. Always, click the **View Items** button

Add from Templates and Requisitions

Company: USC University of Southern California | Requester: Howell Martinez | Requisition Type: Materials Management Request

Requisition Currency: USD

Requisition Templates: 3 items

Select	Name	Owned By
<input checked="" type="checkbox"/>	Materials Management Gas Cylinder Order Process – 1) Select this template and click on View Items 2) Enter the quantity of each item being requested, click Add to Cart 3) Review selected items and click on Checkout 4) In the Checkout screen, enter business justification in the Internal Memo field 5) The financial tags MUST be updated, click on the related actions icon (...) at the bottom of the screen and select Edit Requisition Defaults 6) Click on Use Default Worktags, enter PPGG tag and ensure Cost Center is correct, click Apply 7) Confirm items, Deliver-To and click on Submit	Howell Martinez
<input type="checkbox"/>	Water Coupons Order Process – 1) Select this template and click on View Items 2) Enter the quantity of water coupons being requested, click Add to Cart 3) Click on Checkout 4) In the Checkout screen, enter business justification in the Internal Memo field 5) The financial tags MUST be updated, enter a PPGG tag and ensure Cost Center is correct, if applying a default PPGG, the correct Cost Center must be used 6) Confirm item, Deliver-To and click on Submit	Howell Martinez
<input type="checkbox"/>	Managed Print Services - Xerox - Use this template to engage Xerox Business Services to provide managed print services or equipment. For questions and to learn more about TrojanPrint services go to https://services.usc.edu/xerox-print-services/ or contact TrojanPrint@usc.edu. You may also contact our Xerox representative: Daria Lewis 714-564-1650 daria.lewis@xerox.com	Howell Martinez

Buttons: Add to Cart, Continue Shopping, View Items, Cancel

7. Find/Search the cylinders that need to be ordered, click on the Quantity field for that cylinder, enter the desired quantity, the system will auto fill the Select box. Once, the desired line item quantities have been entered, click **Add to Cart**

Add from Templates and Requisitions

Company: USC University of Southern California

Selected Templates/Requisitions: Materials Management Gas Cylinder Order Process – 1) Select this template and click on View Items 2) Enter the quantity of each item being requested, click Add to Cart 3) Review selected items and click on Checkout 4) In the Checkout screen, enter business justification in the Internal Memo field 5) The financial tags MUST be updated, click on the related actions icon (...) at the bottom of the screen and select Edit Requisition Defaults 6) Click on Use Default Worktags, enter PPGG tag and ensure Cost Center is correct, click Apply 7) Confirm items, Deliver-To and click on Submit

Goods Lines: 25 items

Select	Quantity	Unit of Measure	Item	Item Description	Unit Cost	Extended Amount	Supplier	Order-From Connection	Manufacturer Part Number	Manufac
<input checked="" type="checkbox"/>	1	Each	00001 - AEROBIC2001	5%CARBON DIOXIDE 95%OXYGEN 200 CF	115.00	115.00				
<input checked="" type="checkbox"/>	2	Each	00012 - MEDCDX50	MEDICAL CARBON DIOXIDE 50 LBS	26.00	52.00				
<input checked="" type="checkbox"/>	2	Each	00019 - NITHYD206	95%NITROGEN 5%HYDROGEN 200 CF	92.00	184.00				
<input checked="" type="checkbox"/>	1	Each	00020 - NITPP200	NITROGEN PREPURIFIED 99.998% 200 CF	40.00	40.00				
<input type="checkbox"/>		Each	00021 - NITPP300	NITROGEN PREPURIFIED 99.998% 300 CF	46.00	0.00				

Buttons: Add to Cart, Continue Shopping, Cancel

8. The Cart will list the line Items selected from the template. These will be listed on the left side of the screen. To delete/add an item from the Cart or to provide additional instructions for Specialty Mixes refer to the additional instructions section of this guide. Confirm the selected Items and click **Checkout**

Cart

Company: USC University of Southern California | Requester: Howell Martinez | Requisition Type: Materials Management Request | Total Amount: \$391.00 | Currency: USD

5 Items | Sort By: [dropdown]

AEROBIC2001	1	\$115.00
MEDCDX50	2	\$52.00
NITHYD206	2	\$184.00
NITPP200	1	\$40.00
Specialty Mix	1	\$115.00

Edit

Image: [cloud icon]

Item: [00001 - AEROBIC2001](#)

Description: 5%CARBON DIOXIDE 95%OXYGEN 200 CF

Spend Category: Material Management (SC0826)

Quantity:

Unit of Measure: Each

Unit Cost: 115.00

Extended Amount: 115.00

Checkout | Continue Shopping [dropdown]

9. In the Checkout page, start by entering the proper **delivery location** for the Gas Cylinders being ordered, enter the location in the Memo To Suppliers field: **Mail Code, 3 Letter Building Code and Room Number**. Then, in the Internal Memo field enter the business justification

Memo to Suppliers

Internal Memo *

10. Scroll down to the Goods lines, each line Item must have a PPGG finance tag. When ordering 2 or 3 Items, scroll to the right to view the PPGG fields, the desired PPGG can be entered directly in each line Item. Once a valid PPGG is selected the Cost Center, Fund and Function will be updated. Click **Submit** - For Requisition with 3 or more items, it is recommended to use Requisition Defaults, see steps below

Program	Project	*Cost Center	*Fund
<input type="text" value="Search"/> <ul style="list-style-type: none"> PG1006859 Electrophysics Undergraduate Lab 	<input type="text"/>	<ul style="list-style-type: none"> CA101522 Viterbi ECE Electrophysics 	<input type="text"/>

Edit Requisition Defaults – From the Checkout screen, click on the related action icon (...) and select Edit Requisition Defaults

	Image	Company	Item	Item Description	*Spend Category	*Quantity	Unit Cost
-		<ul style="list-style-type: none"> USC University of Southern California 	Item 00001 - AEROBIC2001 Purchase Item	5%CARBON DIOXIDE 95%OXYGEN 200 CF	Material Management (SC0826)	Quantity * <input type="text" value="1"/> Unit of Measure * Each	115.00
-		<ul style="list-style-type: none"> USC University of Southern California 	Item 00012 - MEDCDX50 Purchase Item	MEDICAL CARBON DIOXIDE 50 LBS	Material Management (SC0826)	Quantity * <input type="text" value="2"/> Unit of Measure * Each	26.00
-		<ul style="list-style-type: none"> USC University of Southern California 	Item	NITROGEN	Material Management (SC0826)	Quantity *	Unit Cost

Edit Requisition Defaults

Edit Address

Cancel

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In the Requisition Defaults screen, click on Use Default Worktags, enter the desired PPGG to be defaulted for all line Items and click Apply

Default Worktags and Splits Select worktags to use for all requisition lines. Keep Current Worktags leaves your current selections unchanged. Use Default Worktags replaces all values on existing lines and uses the default worktags for new lines. Use Default Splits applies once to all lines.

- * Keep Current Worktags
- Use Default Worktags
- Use Default Splits

1 item

Work Order (WO)	Gift	Grant	Program	Project	*Cost Center
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Search"/> <ul style="list-style-type: none"> × PG1006859 Electrophysics Undergraduate Lab 	<input type="text"/>	<input checked="" type="text" value="CA101522 Viterbi ECE Electrophysics"/>

All line Items will be updated with the PPGG entered, confirm the PPGG was added and click **Submit**

5 items

Project	*Cost Center	*Fund	Function
<input type="text"/>	× CA101522 Viterbi ECE Electrophysics	× FD010 Unrestricted Operating without Donor	× FN18 Instruction, Departmental Research or Organized Research
<input type="text"/>	× CA101522 Viterbi ECE Electrophysics	× FD010 Unrestricted Operating without Donor	× FN18 Instruction, Departmental Research or Organized Research

11. Once the Requisition is submitted, the system will generate a REQ # for tracking purposes. After the Cost Center Manager approves it, the Material Management team will process the REQ.

You have submitted Requisition: REQ-00000710, Requester: Howell Martinez, Date: 07/05/2021, Amount: \$756.65

Up Next



Leena Mathew

Approval by Cost Center Manager

> **Details and Process**

Additional Instructions

Ordering Specialty Mixes - To order a Specialty Mix, click the quantity field and enter the desired quantity. Once the Item(s) have been added to the Cart

<input type="checkbox"/>	<input type="text" value="1"/>	Each	MIX001 - Specialty Mixes	Enter desire mix in the Memo field in the Cart	0.00	0.00
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Locate and click on the Specialty Mix line Item from the list of Items, click in the Memo field and enter the desired mix, when done continue to Checkout

Items

AEROBIC2001	1	\$115.00
MEDCDX50	2	\$52.00
NITHYD206	2	\$184.00
NITPP200	1	\$40.00
Special Mixes	1	\$0.00

Edit

Image

Item MIX001 - Specialty Mixes

Description Enter desire mix in the Memo field in the Cart

Spend Category Material Management (SC0826)

Quantity

Unit of Measure Each

Unit Cost 0.00

Extended Amount 0.00

Manufacturer Part Number (empty)

Manufacturer (empty)

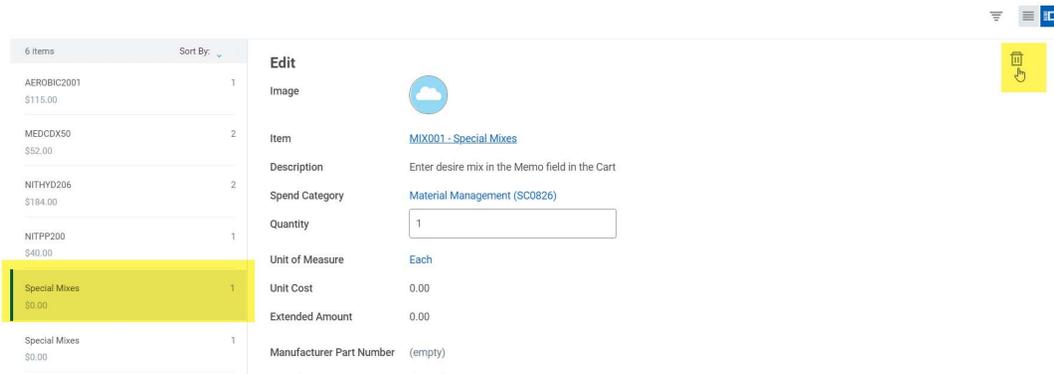
UNSPSC (empty)

Additional Item Identifiers (empty)

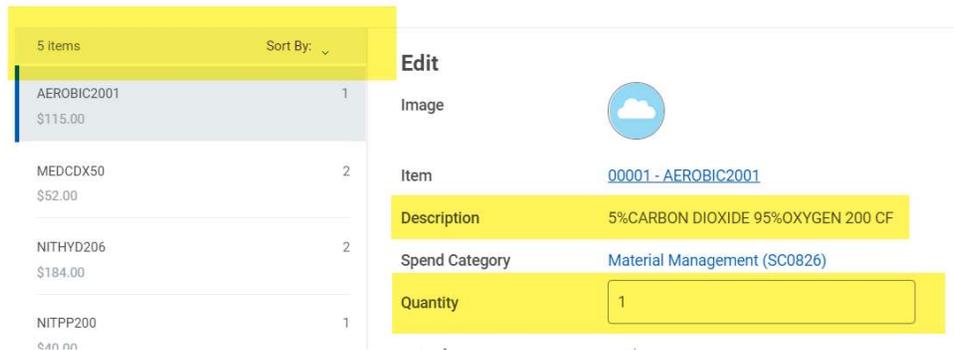
Item Tags (empty)

Memo

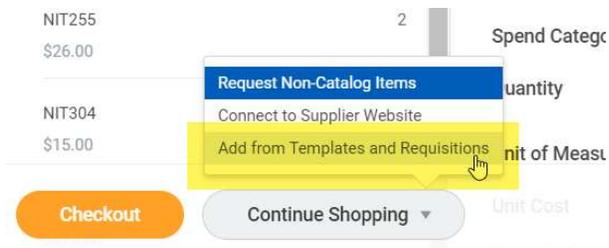
Deleting or Adding a new Gas Cylinder Line item from the Cart – If a line Item was added by error, select the line Item and click on the Trash icon, the line item will be removed from the Cart.



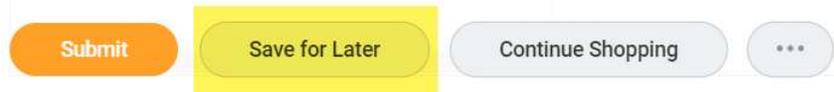
To change the quantity of a line Item, click on the line Item and in the Quantity field in the Cart update the desired Quantity



To add additional Gas Cylinders to the Cart click on Continue Shopping and select Add from Templates and Requisitions. Follow the speps outlined in this guide, start from Step 6



Saving and Editing a Requisition - To save a Requisition with line Items from the Checkout page, click on Save for Later. The system will generate a REQ #



To edit the saved REQ, a REQ in “Draft” status

Click on My Requisitions worklet



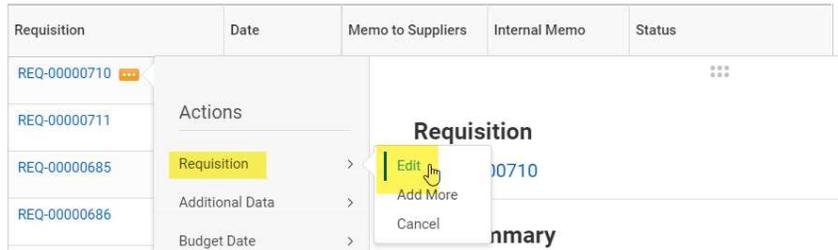
My Requisitions

Assume your REQ was part of the last 5 REQs submitted, otherwise click View More Details

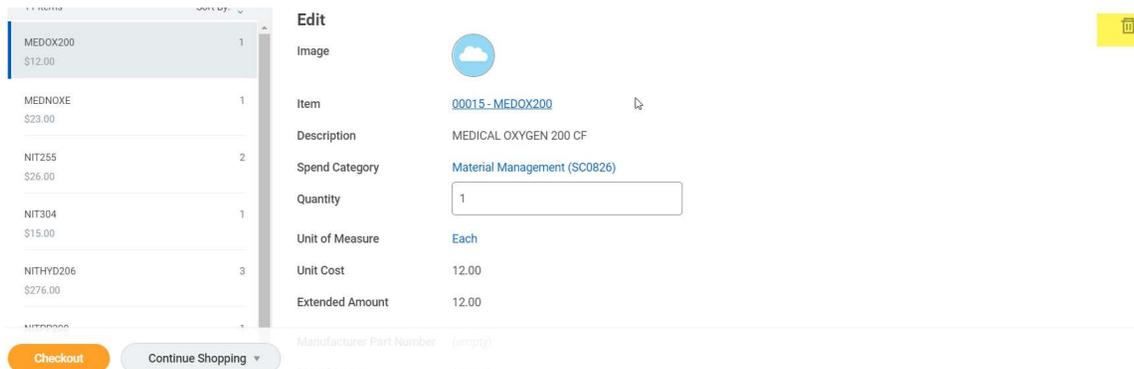
Requisition	Date	Memo to Suppliers	Internal Memo	Status
REQ-0000710 	07/05/2021		Test	Draft
REQ-0000711	07/05/2021		test	In Progress
REQ-0000685	06/30/2021		Test SINV CH 2	Successfully Completed
REQ-0000686	06/30/2021		Test CH 4	Successfully Completed
REQ-0000688	06/30/2021		test 5	Successfully Completed

View More Details...

Click on the REQ # related actions icon select Requisition, select Requisition and click Edit, the REQ Checkout page will be displayed, make the necessary edits and Submit for approval.



Accidentally clicked on Add to Cart form the Template screen – If the Add to Cart button was clicked in error, all 25 Items from the Template will be added to the Cart, it is recommended to delete all line Items from the Cart. All 25 items should be deleted unless you can keep the desired items for the request. To delete all line Items continue to click on the **Trash** icon until the Cart is empty



Once the Cart is empty, click on the Workday home icon and restart the Requisition process (See Step 1).

