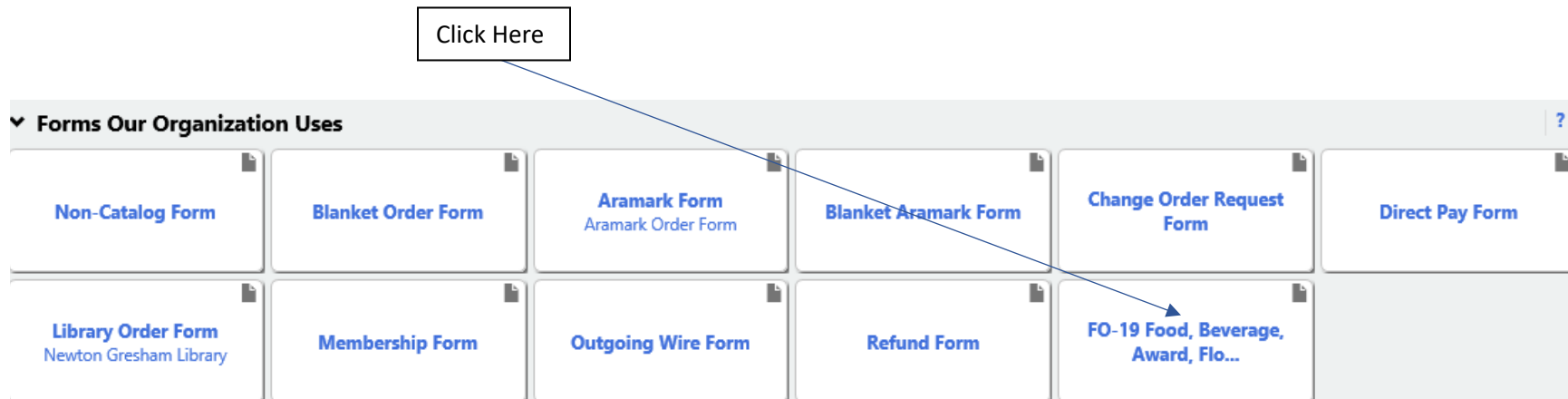


Creating a FO-19 Food, Award, Flowers, Gifts, and Promotional Items Request

The FO-19 Food, Beverage, Award, Flowers, Promotional Items Request form on BearKatBuy has been developed to take the place of the current FO-19 PerfectForm. This form will now be completed and approved within BearKatBuy. The form in BearKatBuy is a zero-dollar requisition that does not look at budget or encumber funds. The form will need to be saved as a PDF and attached to the corresponding Purchase Requisition or Direct Pay Requisition in BearKatBuy or attached to the P-Card Expense Report in Chrome River.


The FO-19 form can be found on BearKatBuy under Forms Our Organization Uses. To open the form simply click on the tab titled FO-19 Food, Beverage, Award, Flowers Promotional Items Request.



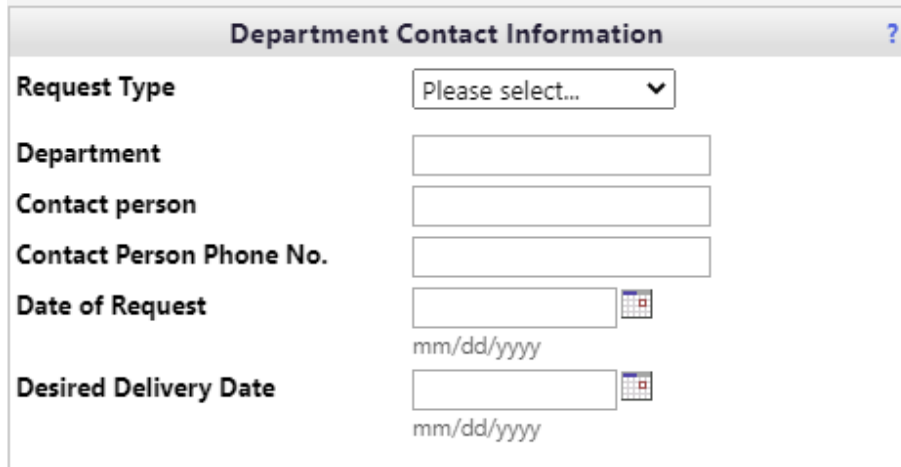
The FO-19 Food, Beverage, Award, Flowers Promotional Items Request will then open. Complete the information requested. All bolded fields are required.

FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request - Google Chrome
 userstest.sciquest.com/apps/Router/FavoritesFormEdit?&FavoriteProductId=324845&wantReloadOnClose=324845&FavoriteProductContext=2&tmstmp=1618845870887873

FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request Available Actions: Add and go to Cart

FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request ?	Department Contact Information ?	Supplier Information ?
 <p>Once approved print and attach this form to the appropriate Purchase Requisition or Direct Pay Requisition in BearKatBuy, or P-Card Expense Report in Chrome River. Form is used for Food, Beverage, Award, Flowers, and Promotional Items.</p>	<p>Request Type <input type="text" value="Please select..."/></p> <p>Department <input type="text"/></p> <p>Contact person <input type="text"/></p> <p>Contact Person Phone No. <input type="text"/></p> <p>Date of Request <input type="text" value="mm/dd/yyyy"/></p> <p>Desired Delivery Date <input type="text" value="mm/dd/yyyy"/></p>	<p>Supplier FO19 Form Request</p> <p>Fulfillment Address BU Business 1: 1 Financial Plaza Ste 260 Huntsville, Texas 77340 United States</p>
Items Requested ?		
<p>Product Description</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>500 characters remaining expand clear</p>	<p>Estimated Price</p> <input type="text"/>	
Reason for Purchase ?		
<p>Reason for Purchase</p> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <p>500 characters remaining expand clear</p> <p>Food/Beverage/Award approval required per Finance & Operations Policy FO-19</p> <p>Direct Purpose <input type="text" value="Please select..."/></p> <p>Specific Limitations <input type="text" value="Please select..."/></p> <p>I certify this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules & Regulations <input type="text" value="Please select..."/></p> <p>Link to TSUS Guidelines TSUS Guidelines</p>		
Attachments ?		
<p>Internal Attachments</p> <input type="button" value="Add Attachments"/>		
		<p>Total 0.00</p> <p>See configuration for this form</p>

Within the Department Contact Information section, there are six fields that must be completed. They are Request Type, Department, Contact person, Contact Person Phone Number, Date of Request, and Desired Delivery Date.




Department Contact Information ?


Request Type Please select... ▾

Department

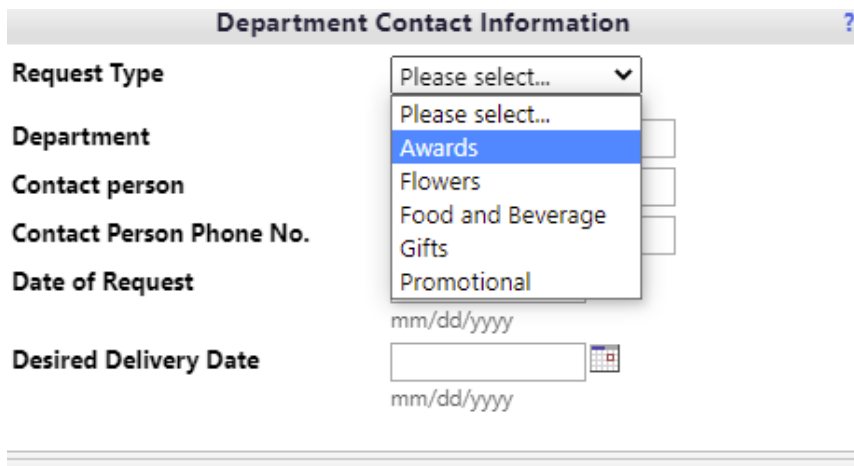
Contact person

Contact Person Phone No.

Date of Request 
mm/dd/yyyy

Desired Delivery Date 
mm/dd/yyyy

The Request Type field contains a dropdown menu where the type of request is selected for the form that is being completed. The options are Awards, Flowers, Food and beverage, Gifts, and Promotional.




Department Contact Information ?


Request Type Please select... ▾
Please select...
Awards
Flowers
Food and Beverage
Gifts
Promotional

Department

Contact person

Contact Person Phone No.

Date of Request 
mm/dd/yyyy

Desired Delivery Date 
mm/dd/yyyy

The next items to be filled in are the Department, Contact Person, Contact Person Phone Number, Date of Request, and Desired Delivery Date.

Department Contact Information ?	
Request Type	Awards 
Department	Procurement
Contact person	Jeremy
Contact Person Phone No.	4-4669
Date of Request	04/12/2021  mm/dd/yyyy
Desired Delivery Date	04/20/2021  mm/dd/yyyy

The Supplier is hard coded into the form as FO19 Form Request.

Supplier Information	
Supplier	FO19 Form Request
Fulfillment Address	BU Business 1: 1 Financial Plaza Ste 260 Huntsville, Texas 77340 United States

The Items Requested section will need to be completed with the Product Description and an Estimated Price. The Product Description will need to include all the items that will be ordered using this FO-19. The estimated price will need to be the total amount of all items requested to include any shipping, handling, or other charges.

Items Requested	
Product Description	Estimated Price
<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">Trophy Model 123 Trophy Model 851 Navy Polo Shirts with inscription of SHSU Procurement and Business Services SHSU Orange Polo Shirts with inscription of SHSU Procurement and Business Services Trophy Model 843</div>	<input type="text" value="500.00"/>
287 characters remaining	expand clear


Complete the Reason for Purchase section by completing the Reason for Purchase field and using the dropdown menus for the Direct Purpose, Specific Limitations, and the certification statement that this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules and Regulations. This section also includes links to the current SHSU FO-19 Policy and the TSUS Guidelines.

Reason for Purchase	
Reason for Purchase	<div style="border: 1px solid #ccc; min-height: 100px;"></div>
500 characters remaining	expand clear
Food/Beverage/Award approval required per Finance & Operations Policy FO-19	FO-19
Direct Purpose	<input type="text" value="Please select..."/>
Specific Limitations	<input type="text" value="Please select..."/>
I certify this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules & Regulations	<input type="text" value="Please select..."/>
Link to TSUS Guidelines	TSUS Guidelines

The Reason for Purchase field will need to be filled in with the reason the items are being purchased.

Reason for Purchase	
Reason for Purchase	<div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">Awards and staff shirts to be given out at the Annual Procurement and Business Services end of Fiscal Year award ceremony.</div>
378 characters remaining	expand clear

The Direct Purpose and Specific Limitation will be chosen using the two corresponding dropdown menus. Please refer to the TSUS and SHSU policy links to ensure the correct information is chosen for you specific purchase

Food/Beverage/Award approval required per Finance & Operations Policy FO-19 FO-19 

Direct Purpose

Specific Limitations

I certify this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules & Regulations

[Link to TSUS Guidelines](#)

Please select...

6.811

6.812

6.813


6.814

6.815

6.816

6.817

Attachments


Food/Beverage/Award approval required per Finance & Operations Policy FO-19 FO-19 

Direct Purpose

Specific Limitations

I certify this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules & Regulations

[Link to TSUS Guidelines](#)

Please select... 

Please select...

6.821

6.822

6.823

6.824

Choose Yes from the dropdown for the I certify that this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules and Regulations.

I certify this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules & Regulations

[Link to TSUS Guidelines](#)

Please select...

Yes

[TSUS Guidelines](#) 

Completed Reason for Purchase Section Example:

Reason for Purchase	
Reason for Purchase	Awards and staff shirts to be given out at the Annual Procurement and Business Services end of Fiscal Year award ceremony.
Food/Beverage/Award approval required per Finance & Operations Policy FO-19	378 characters remaining expand clear
Direct Purpose	FO-19 FO-19
Specific Limitations	6.812 6.812
I certify this purchase meets the guidelines of Chapter 3, Section 6.8 of TSUS Rules & Regulations	6.823 6.823
Link to TSUS Guidelines	Yes Yes
	TSUS Guidelines TSUS Guidelines

Under the Attachments section upload any internal attachments that need to be included for the FO-19 will need to be attached such as memos and/or quotes. Click on the grey Add Attachments button.

Attachments	
Internal Attachments	?
Add Attachments	Size Date

The following box will then appear. Click on the white Select files button and add the appropriate attachments.

Add Attachments

Attachment Type File Link

File *****

Select files... *Drop files to attach, or browse.*

Maximum upload file size: 28.61 MB

***** Required [Save Changes](#) [Close](#)

This now completes the FO-19 form and it can be added to the active cart. On the top right of the screen is the Available Actions dropdown menu. Make sure "Add and go to Cart" is selected and click on the blue Go button.



The end user can Name the Cart, Assign Cart, or Proceed to Checkout. The document will come across as a zero-dollar requisition. Click the blue Proceed to Checkout button.

Sam Houston State University

Shop ▶ My Carts and Orders ▶ Open My Active Shopping Cart ▶ Cart - 3245809 - Draft Requisition

Shopping Cart for Jeremy (Admin) Barrett

Name this cart:

Continue Shopping


1 Item(s) for a total of **0.00** USD
 subtotal: 0.00 USD
 estimated tax, shipping & handling: 0.00 USD

[Proceed to Checkout](#) or [Assign Cart](#)

Have you made changes? [Update](#)

[Empty Cart](#) [Create New Cart](#) Perform an action on (0 items selected)... [Select All](#)

FO19 Form Request [more info...](#)

Product Description	Unit Price	Quantity	Total
 FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request open form... Direct Purpose 6.812 Estimated Price 500.00 Product Description Trophy Model 123 Trophy Model 851 Navy Polo Shirts with inscription of SHSU Procurement and Business Services SHSU Orange Polo Shirts with inscription of SHSU Procurement and Business Services Trophy Model 843 Specific Limitations 6.823	0.00	1	0.00
	EA	Shipping	0.00 USD
		Handling	0.00 USD
			Update More Actions
Supplier subtotal			0.00 USD

[See configuration for this requisition](#)
[view carts](#)
[view cart history](#)

The account code will need to be entered to complete the FOAP for the request. To do this click on the blue “Required field” link under the Account field and a box will open.

Requisition | PR Approvals | PO Preview | Comments | Attachments (1) | History

Summary | Shipping | Billing | **Accounting Codes** | Supplier Info | Taxes/S&H

Hide value description?

Accounting Codes

These values apply to all lines unless specified by line item

Fund	Organization	Account	Program	Activity	Location	edit
140100 Designated Tuition	630000 Procurement	no value Required field	60 Institutional Support	no value	no value	

For selected line items: Add to Favorites Go

FO19 Form Request

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1 FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request more info...		EA	0.00	1 EA	0.00 USD	<input type="checkbox"/>

Accounting Codes (same as header) [edit](#)

Fill in the appropriate Account code for the items being requested and click the blue Save button.

Accounting Codes

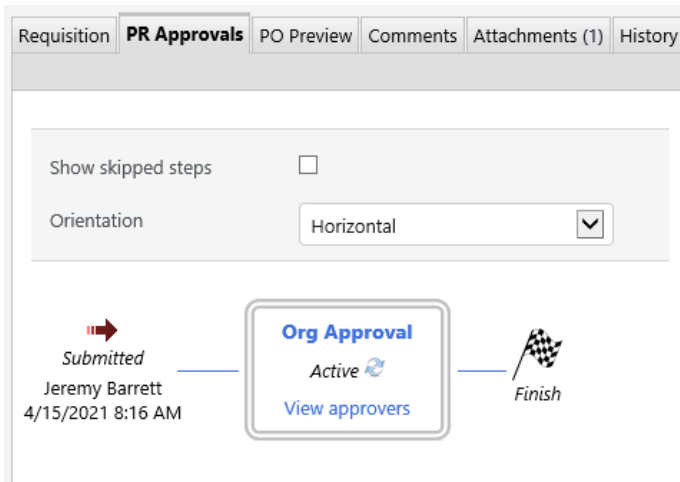
Fund	Organization	Account	Program	Activity	Location
140100 Select from profile values... Select from all values...	630000 Select from profile values... Select from all values...	721100 Select from all values... Required field	60 Select from profile values... Select from all values...	Select from all values...	Select from all values...

[Save](#) [Cancel](#)

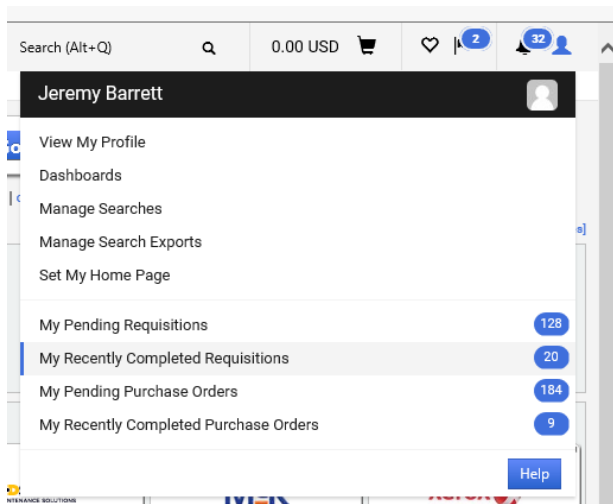
The blue Submit Requisition button at the top right of the screen can be clicked to submit the requisition into the approval process.



The approval for this form will only go through Org Approval to the Financial Manager, as it is not creating a Purchase Order.



Once the FO-19 Form has gone through the Org Approval process, it will show as completed. To find the completed form the person who submitted the form can simply go into the profile at the top right of the screen and choose My Recently Completed Requisitions.



Click on the appropriate requisition number to be opened and the requisition will appear as follows. The status in the General box should show as completed.



Sam Houston State University | Purchase Order Number | Search (Alt+Q) | 0.00 USD | | | | |

Orders > Search > Requisitions > Summary - Requisition 3245721


General ?		Shipping ?		Billing ?	
Status	✓ Completed (4/15/2021 8:25 AM)	Ship To		Bill To	
Submitted	4/15/2021 8:16 AM	Attn: Jeremy Barrett		Disbursements	
Cart Name	2021-04-14 jeb037 01	Floor/Bldg: BSB		PO Box 2185	
Description	<i>no value</i>	2432 Sam Houston Ave.		Huntsville, TX 77341	
Prepared by	Jeremy Barrett	Huntsville, TX 77340		United States	
Department	Procurement (Procurement)	United States		Billing Options	
		Delivery Options	Best Carrier-Best Way	Accounting Date	<i>no value</i>
		Ship Via		PO Clauses	<i>no clause</i>
					View/edit by line item...
					View/edit by line item...
Accounting Codes ?					
Fund	Organization	Account	Program	Activity	Location
140100 Designated Tuition	630000 Procurement	721100 Awards	60 Institutional Support	<i>no value</i>	<i>no value</i>
					View/edit by line item...
Internal Notes and Attachments ?			External Notes and Attachments ?		
Internal Note	<i>no note</i>		Note to all Suppliers	<i>no note</i>	
Internal Attachments			Attachments for all suppliers		
	Size	Date		Size	Date
Supplier / Line Item Details ?					
Hide line details			For selected line items <input type="text" value="Add to Favorites"/> <input type="button" value="Go"/>		
FO19 Form Request more info...			Contract	<i>no value</i>	
			PO Number	N/A	
				View/edit by line item...	
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 ✓ FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request more info...		EA	0.00	1 EA	0.00 USD <input type="checkbox"/>
Direct Purpose 6.812		Internal Note	<i>no note</i>		

At this time the FO-19 can be saved as a PDF and attached to the corresponding Purchase Requisition or Direct Pay Requisition in BearKatBuy, or P-Card Expense Report in Chrome River. To do this click on the printer icon on the right side of the screen.

Available Actions:

[Hide value descriptions](#)

Billing 

Bill To
Disbursements
PO Box 2185
Huntsville, TX 77341
United States

Billing Options
Accounting Date *no value*
PO Clauses
no clause

[View/Edit Billing Info](#)

Click Here

The form will appear in the box. Next click on the grey Print button.

Summary - Requisition 3245721

General	Shipping	Billing
Status ✓ Completed (4/15/2021 8:25 AM)	Ship To Attn: Jeremy Barrett Floor/Bldg: BSB 2432 Sam Houston Ave. Huntsville, TX 77340 United States	Bill To Disbursements PO Box 2185 Huntsville, TX 77341 United States
Submitted 4/15/2021 8:16 AM	Delivery Options Ship Via Best Carrier-Best Way	Billing Options Accounting Date PO Clauses <i>no clause</i>
Cart Name 2021-04-14 jeb037 01		
Description		
Prepared by Jeremy Barrett		
Department Procurement (Procurement)		

Accounting Codes					
Fund	Organization	Account	Program	Activity	Location
140100 Designated Tuition	630000 Procurement	721100 Awards	60 Institutional Support	<i>no value</i>	<i>no value</i>

Internal Notes and Attachments		External Notes and Attachments	
Internal Note <i>no note</i>		Note to all Suppliers <i>no note</i>	
Internal Attachments		Attachments for all suppliers	

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Click Here

From here, "Microsoft Print to PDF" can be chosen to save the document as a PDF to be uploaded to the corresponding Purchase Requisition, Direct Pay Requisition, or P-Card Expense Report. Click the grey Print button.

Print

General Options

Select Printer

- Fax
- Microsoft Print to PDF
- Microsoft XPS Document Writer
- OneNote (Desktop)
- OneNote for Windows 10
- Send To OneNote 16

Status: Ready Print to file Preferences

Location: Find Printer...

Comment: Find Printer...

Page Range

All Selection Current Page

Pages: 1

Enter either a single page number or a single page range. For example, 5-12

Number of copies: 1

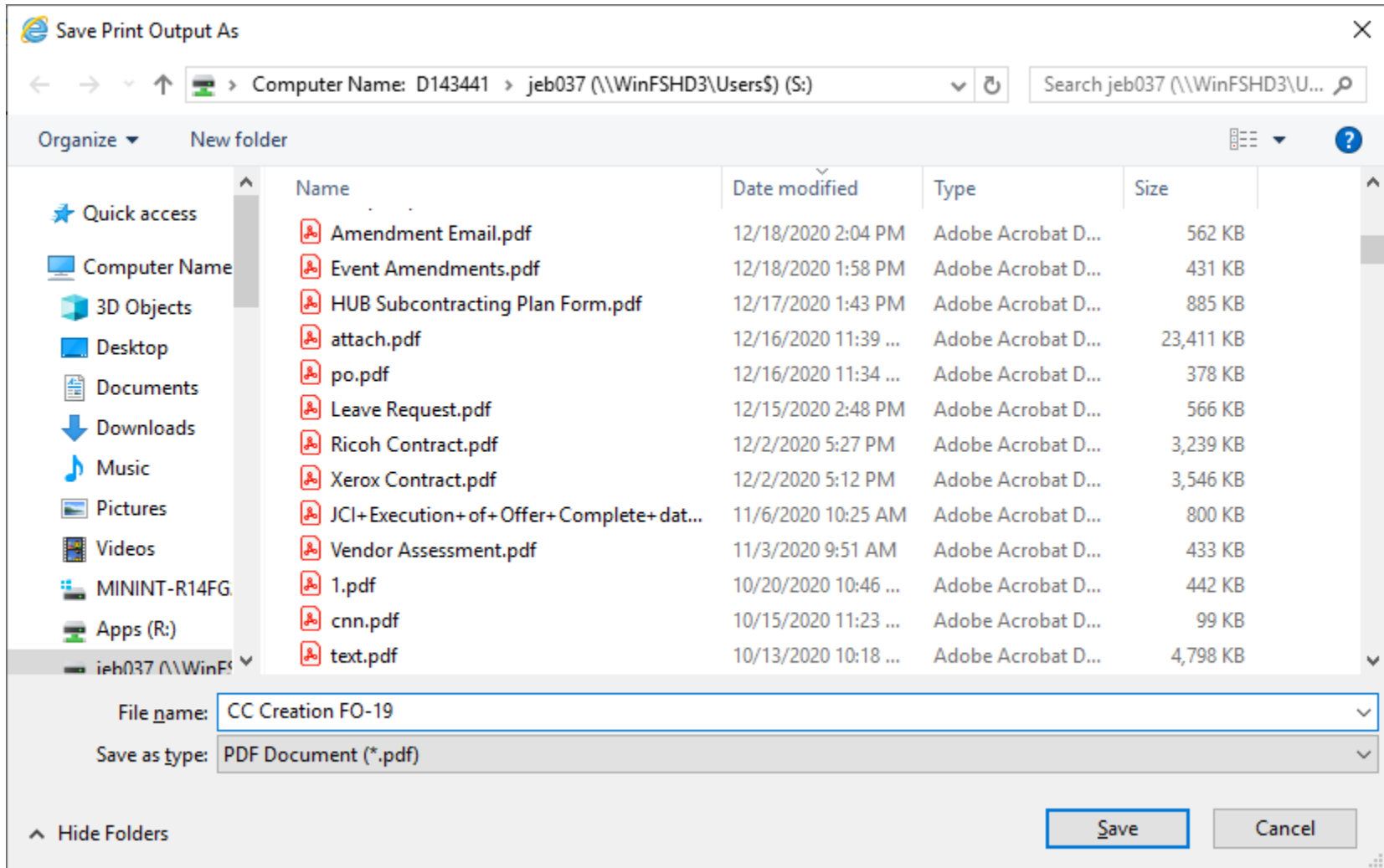
Collate

1 1 2 2 3 3

Print Cancel Apply

Click Here

From here name and save the file in the correct files folder to be able to pull from and attach to the appropriate Purchase Requisition, Direct Pay Requisition, or P-Card Expense Report.



Approval of FO-19 Food, Award, Flowers, Gifts, and Promotional Items Request

Notation: On the email that is recived by the approver, the form type will be labled as a Change Order. The Change Order Form type is the only Jaggaer Form Type that will not create a Purchase Order and just captures information for manual processing or documentation. Even though this is labled as a Change Order Form Type, no changes will be made to any Purchase Orders. The Request will also come across as a zero dollar requisition to process in BearKatBuy. **The price that is being approved will come across in the Estimated Price field.**

Organization: 630000 (Procurement): (All Values) Approval Request for Requisition# 3245721

Dear Jeremy Barrett,

The requisition listed below has been submitted for your approval.

Summary

Folder: Organization: 630000 (Procurement): (All Values)
Prepared by: Jeremy Barrett
Cart Name: 2021-04-14 jeb037 01
Requisition No.: 3245721
No. of line items: 1

TOTAL: 0.00 USD

Details

FO19 Form Request

~~FO 19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request~~

Form Type: Change Order

Item 1

Description: FO-19 Food, Beverage, Award, Flowers, Gifts, Promotional Items Request
Direct Purpose: 6.812
Specific Limitations: 6.823
Product Description: Trophy Model 123 Trophy Model 851 Navy Polo Shirts with inscription of SHSU
Procurement and Business Services SHSU Orange Polo Shirts with inscription of SHSU
Procurement and Business Services Trophy Model 843

Estimated Price: 500.00

Catalog Number:
Quantity: 1
Unit Price: 0.00 USD
Ext. Price: 0.00 USD
Size/Packaging: EA

Form Attachments

Internal Attachments: Quote.pdf

FORM TOTAL: 0.00 USD


TOTAL: 0.00 USD


The FO-19 Request will only go through Org. Approval to the Financial Manager (approvers with \$0-\$20,000 authority in Banner and BearKatBuy).


Requisition **PR Approvals** PO Preview Comments Attachments (1) History

Show skipped steps

Orientation Horizontal

 Submitted
Jeremy Barrett
4/15/2021 8:16 AM

Org Approval
Active 
[View approvers](#)

 Finish