

## BU Requisition Forms with FileMaker Pro

This protocol explains how to use the FileMaker Pro Purchase Orders Database (located in the Lab Folder) to order items through the BUMP Office.

1. Open database.
2. Create a new record. Records→New Record (or use shortcut --apple N).  
NOTE: It is important that you create a new record and that you don't overwrite an existing record. Filemaker automatically saves everything as you type, so when you overwrite a file it is gone FOREVER!
3. Toggle to the Short Form layout using rectangular button in upper left hand corner.
4. Set status of order to Pending.
5. Set P.O. Number to today's date.
6. Select Grant to Charge from Grants Pull Down Menu.
7. Enter in Vendor Lookup Code in the Vendor Lookup window. To find the correct vendor code open the Vendors FileMaker database. To do this go to Window Menu Option at top of file and select (Vendor) this will open the vendor database that is link to the purchase orders database. Go to the View Menu and select Find Mode (apple F). Type the name of the vendor you are looking for into the Vendor window and hit return. If that vendor has been added to the database its record will appear. The vendor lookup code will be on the top center of the record in red. Enter this code into the vendor code box on the Purchase order's short form. Hit Tab. All the vendor information should magically appear. If the vendor is not there enter the vendor's information into a new record and assign it a vendor code.
8. Enter quantity, catalog number, description and price for each item into the appropriate fields.
9. Enter in a detailed justification as to why you need this item into the justification field. Be sure to emphasize its importance and provide a justification that can be understood by someone who may not be familiar with molecular biology. Look through old records to see previous justifications. It may also be helpful to describe the items you are purchasing in terms of: consumable reagent, consumable single use item, permanent lab equipment. Doing this may expedite the purchasing process.
10. Once everything is filed out toggle to the Print PO Layout using rectangular button in the upper left hand corner. This enters all the information into the BU requisition form.
11. Enter in a need by date for the items you are purchasing.
12. Select if you want the order to be purchased through BU or through MBL.
13. Look over everything to make sure it is correct.
14. Print on Pink Paper. File->Print->Paper Feed->All pages from Tray 2.
15. Have Paul sign the Req and bring to BUMP Office.