UNIVERSITY OF SOUTH CAROLINA

OneCarolina

Requisition and Receiving Course

PeopleSoft eProcurement
Requisition and Receiving Training
USC Purchasing Department
Revised July 2016

Welcome

- Overview
- Housekeeping
- Introduction of Presenters
- Introduction of Attendees

Today's Agenda

- Chart of Accounts/Crosswalk
- Purchase Methods
- Creating Requisitions
- Creating a Purchase Requisition
    - Item Descriptions
    - Categories
    - Suppliers
    - Adding Comments and Attachments
- Types of Purchase Requisitions
- Reviewing a Purchase Order
- Exercise 1
- Managing Requisitions
- Add to Favorites
- Receiving
- Exercises 2 thru 6
- Follow- Up Activities

Purchase Methods

Purchase Requisition

P-Card Purchase

Payment Request

Creating Requisitions

To use a requisition for purchase:

- The requisition must be equal to or greater than $10,000.

Exceptions:

- All assets must use a purchase order ($5,000 or greater).
- All radioactive material must use a purchase order (no dollar limit).
- Suppliers that require a Purchase Order.
- Department requires a Purchase Order for validation of terms and conditions associated with the purchase.
- SC State Contract Items
- Any Construction related procurements

USC Chartfield Mapping

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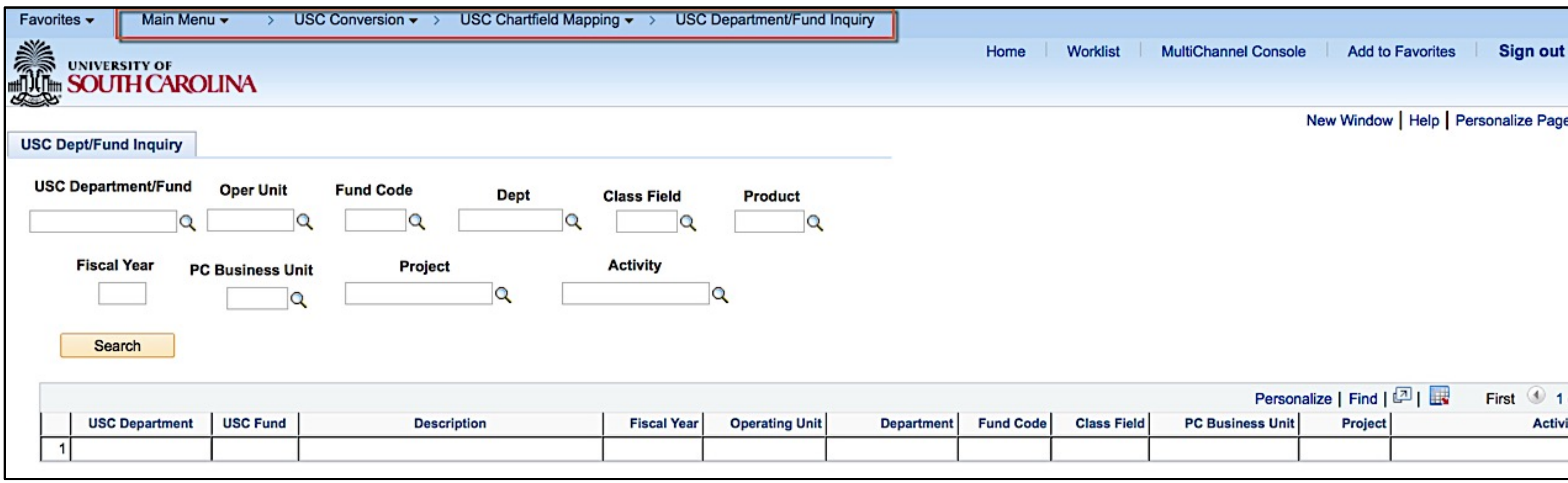
Use the "Crosswalk" page to enter legacy system Department and Fund codes to identify your current PeopleSoft Chartfield strings.

Navigation Path: Main Menu → USC Conversion → USC Chartfield Mapping → USC Department/Fund Inquiry



USC Chartfield Mapping

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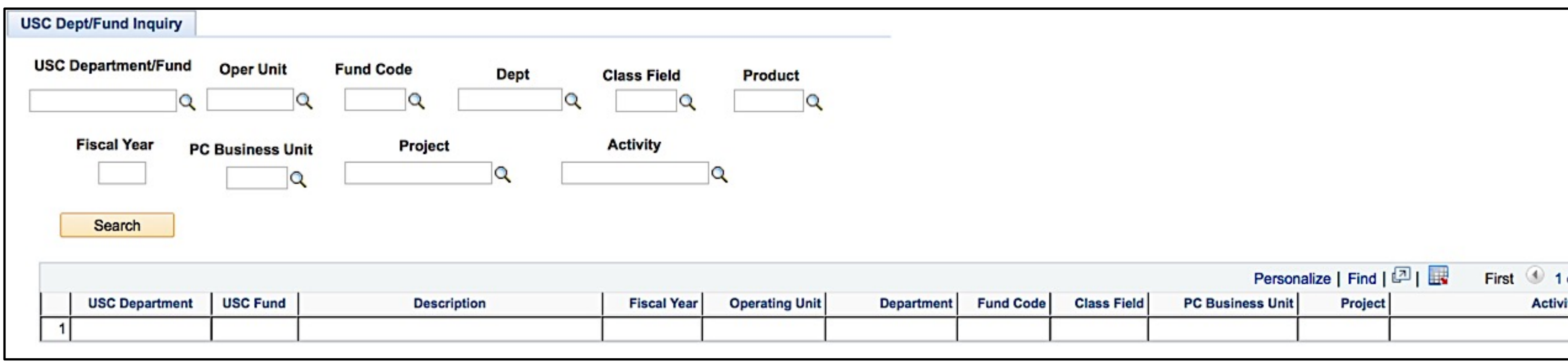
- When using the Crosswalk be sure to enter the current fiscal year to ensure you are using the correct chartfield string.
- You can perform a search using any of the fields at the top of the page to further refine your results.
- For example, if you were interested in seeing a complete listing of all **Department** and **Fund Codes** that belonged to a specific **Operating Unit**, you would enter that **Operating Unit** and click **Search**.



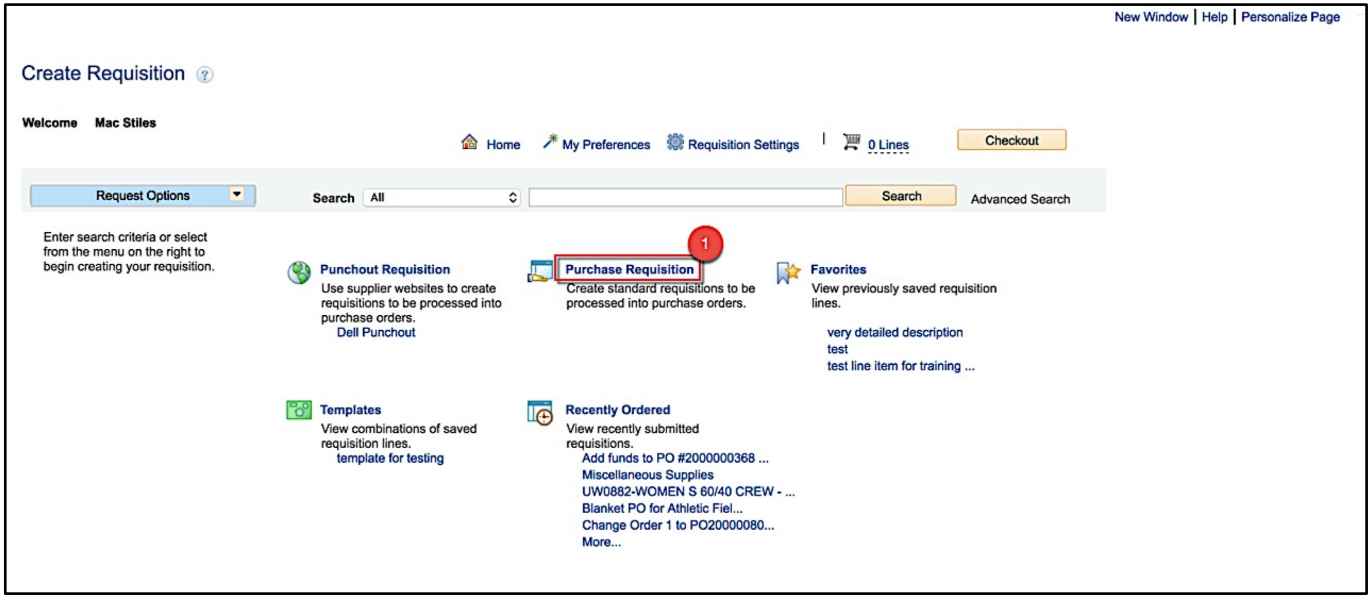
Purchase Requisition

Most of your requests for purchase will start with creating a Purchase Requisition. To create a requisition for goods or services, use the Purchase Requisition link.

To begin creating a requisition:

Navigation Path: Main Menu → eProcurement → Requisition

1. Click the **Purchase Requisition** link.



Item Description

Use the Item Description field to identify your requisition when it is submitted / approved.

- Item Descriptions should include a detailed description of what you are buying from the supplier. These specific details should come from the quote you received from the Supplier.

- An example of a line description:

  Incomplete description: 2-Ply Jumbo Rolls

  Complete description: Toilet Paper, 2 Ply, Jumbo Roll, white, 1000 per roll, Roll width 3.50”, roll diameter 8.8 core, 3.3” diameter

- For the following requests add the bolded information in the Item Description field:

  - Blanket Purchase Order: “**BPO”**

  - Some Bid examples you can begin with are: “**Bid Waste Contr”**, “**Bid HVAC Repl”**, or “**CS Bid”** (Construction)

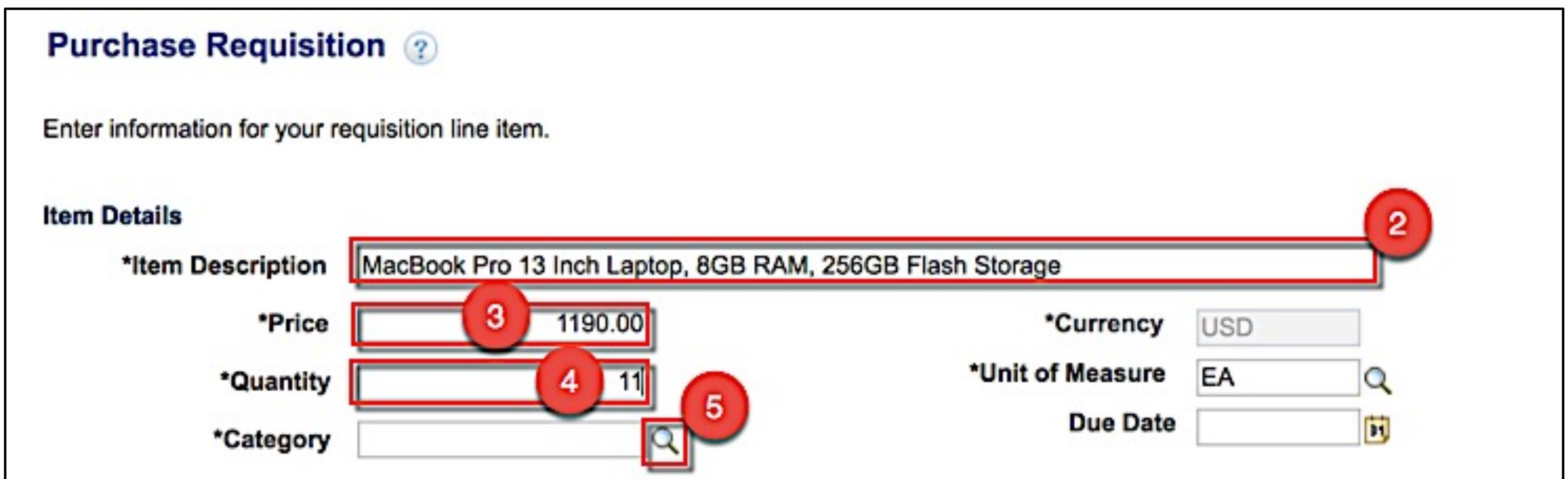
Purchase Requisition Details

2. Click in the **Item Description** field and add a detailed description of the item you are requesting.

3. Click in the **Price** field and enter the unit price of the item.

4. Click in the **Quantity** field and enter how many of that item you need.

5. Click the **Category Lookup** button to find an appropriate category.



Selecting a Category

Use the Category Lookup button to search for a description of the item you are purchasing.

Selecting the correct **Category** is important because it:

- Provides the correct expense account number, asset profile, and determine taxation and receipting for your purchases;
- Provides spending trend information to the Purchasing Department;
- They are used to identify a capital asset.
  - All Asset Categories can be selected within the sub-catalog containing the description "…>5K".
  - All Asset Category descriptions include the word "Asset", making it easier to select the appropriate one.
  - All Asset Category codes are 5-digits and the letter A. For example, Laboratory Equipment (Asset), 49000A.

Selecting a Category

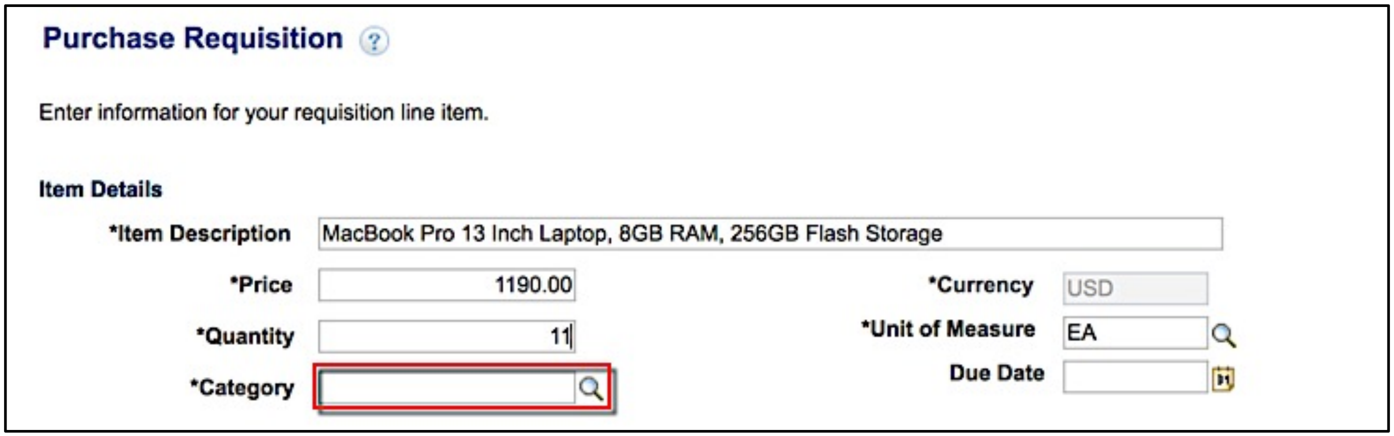
You can select a Category two ways:

- Category Tree
- “Find” button

Selecting a Category

Using the Category Tree:

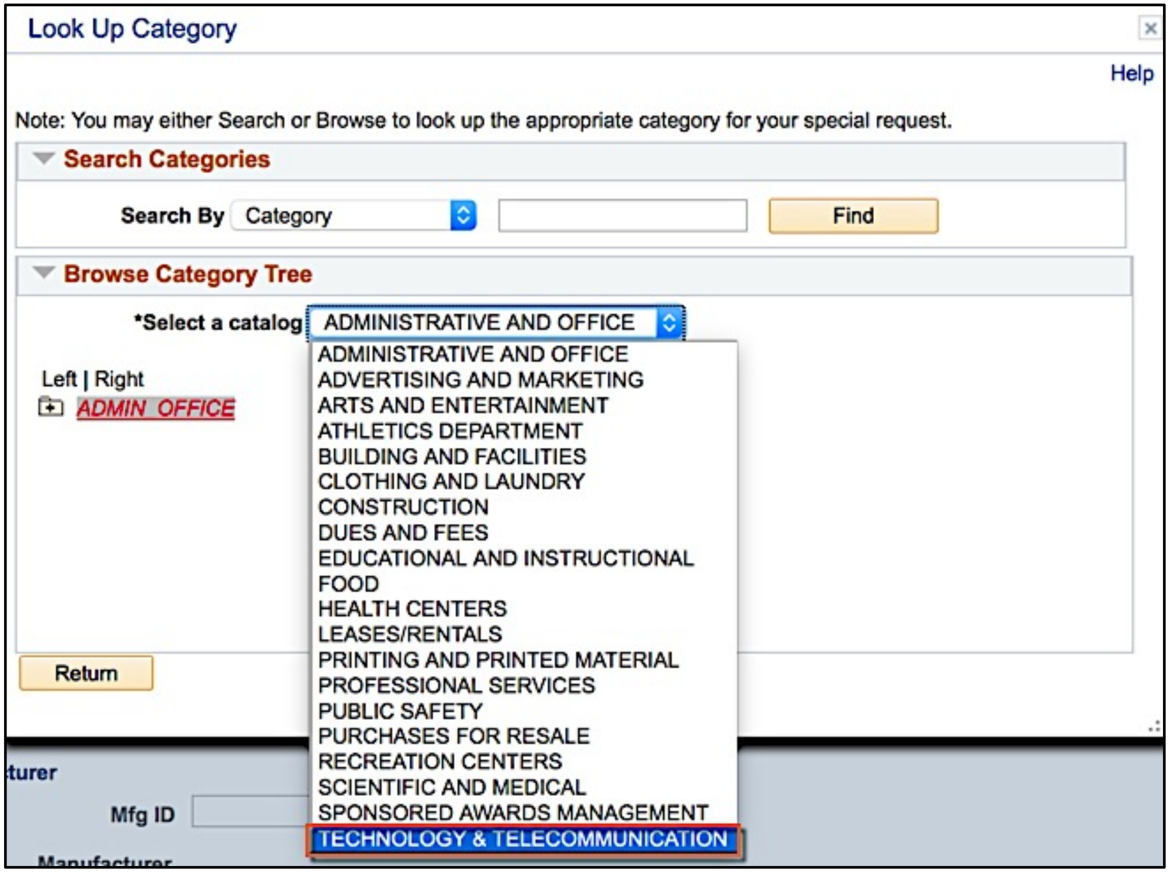
- Click the **Category Lookup** icon.



- Click the **Browse a Category Tree** expand arrow.

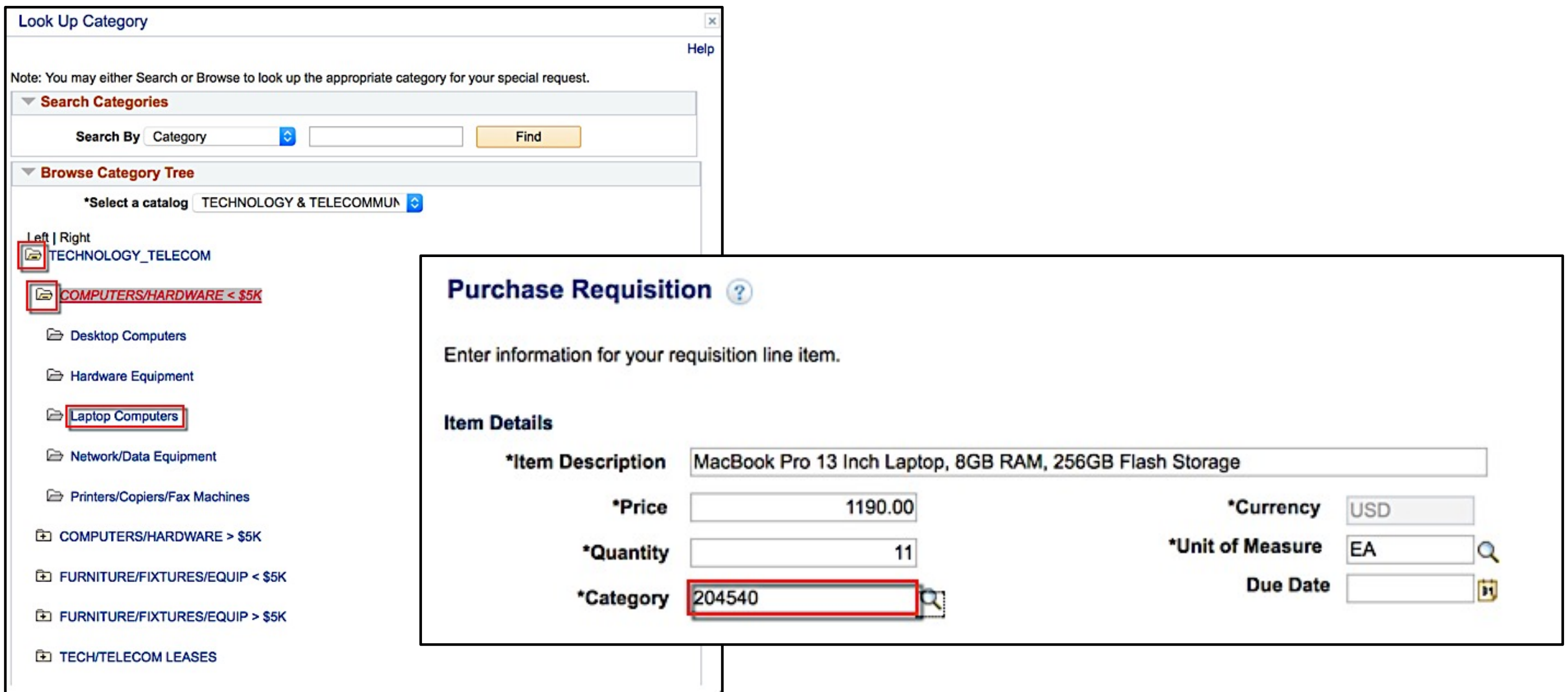
Selecting a Category

- To view all of the Catalogs, click the **Select a Catalog** dropdown arrow and make your selection.



Selecting a Category

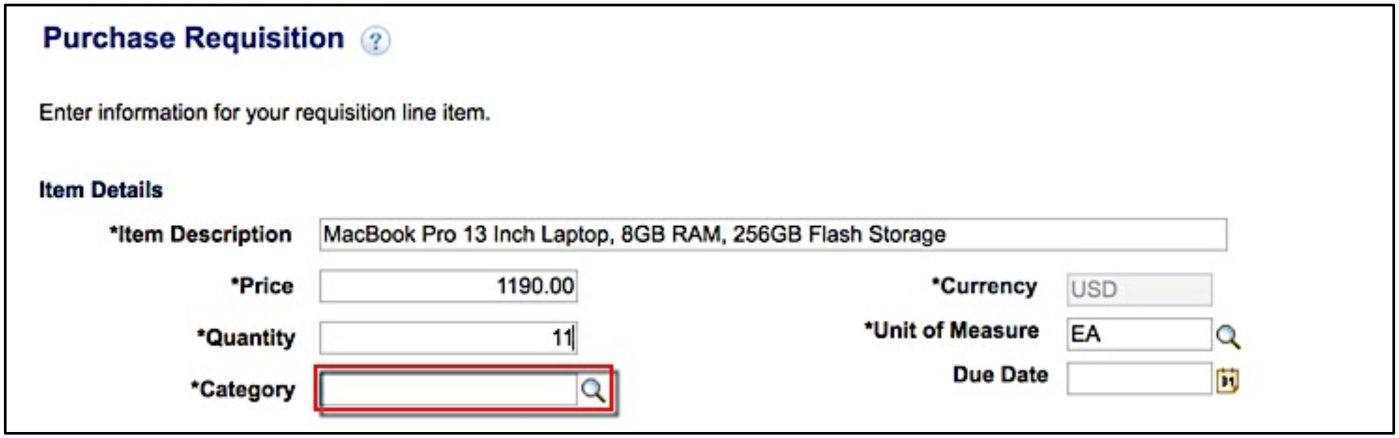
- To view the Sub Catalogs, click the **Plus** sign in the file. (Note: It is important *not* to select any descriptions in all CAPS, as these are catalogs, only select mixed case descriptions which are categories, the lowest level.)
- Click the **Category** link to populate the Category field.



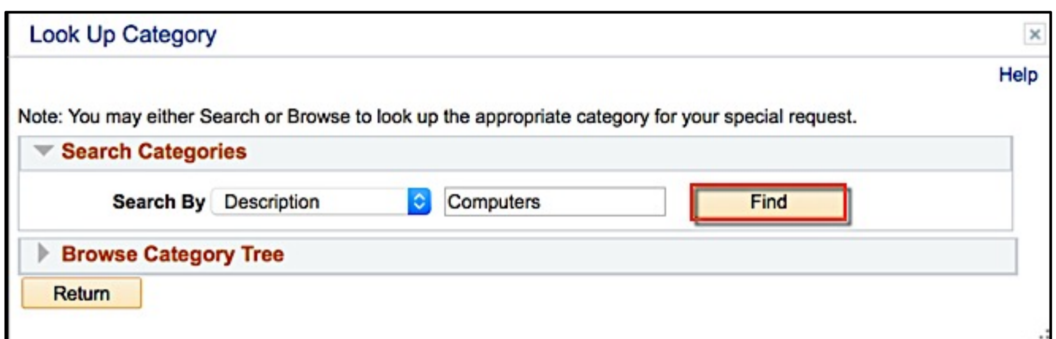
Selecting a Category

Using the Find option:

- Click the **Category Lookup** icon.

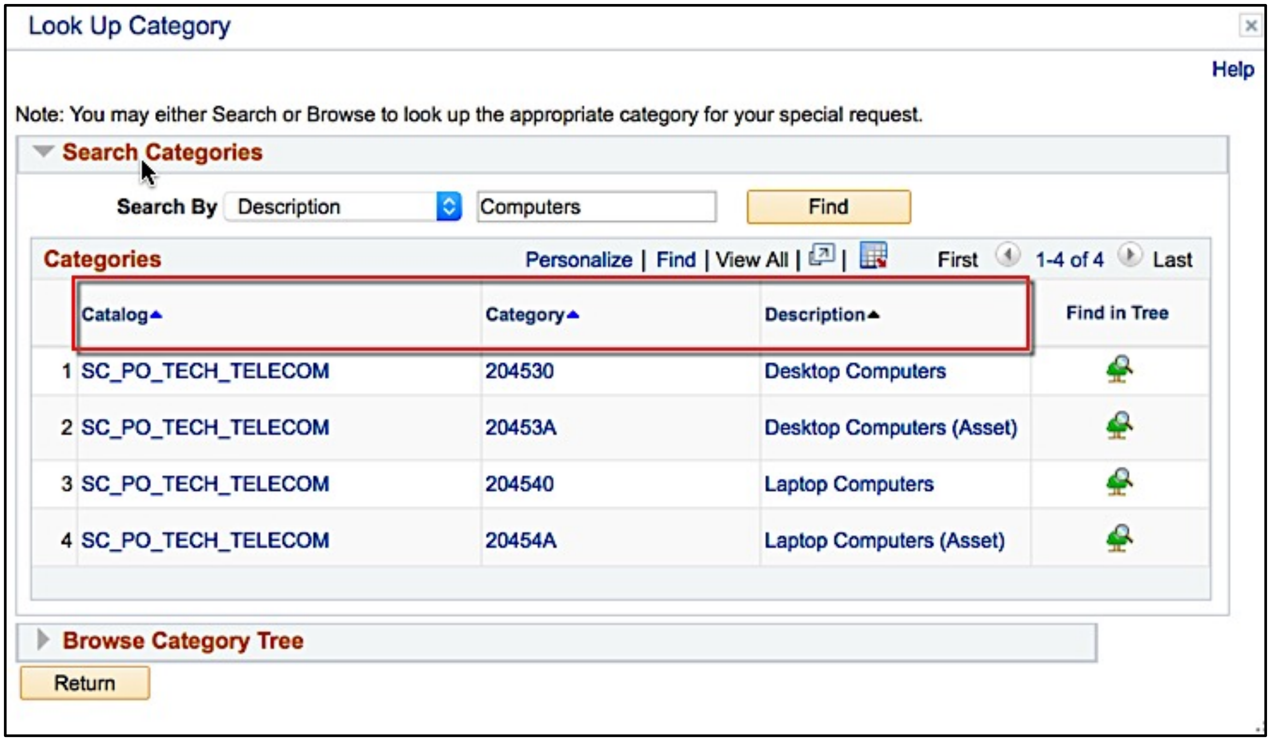


- Click the **Find** button.



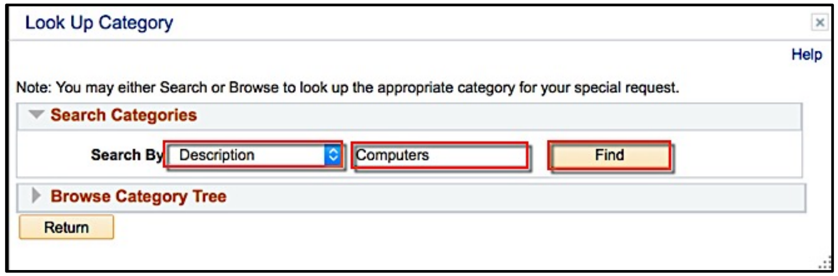
Selecting a Category

- To find a category, click the **Catalog**, **Category**, or **Description** headings to sort the list in ascending and descending order. Be sure to click the arrow twice to alphabetize.

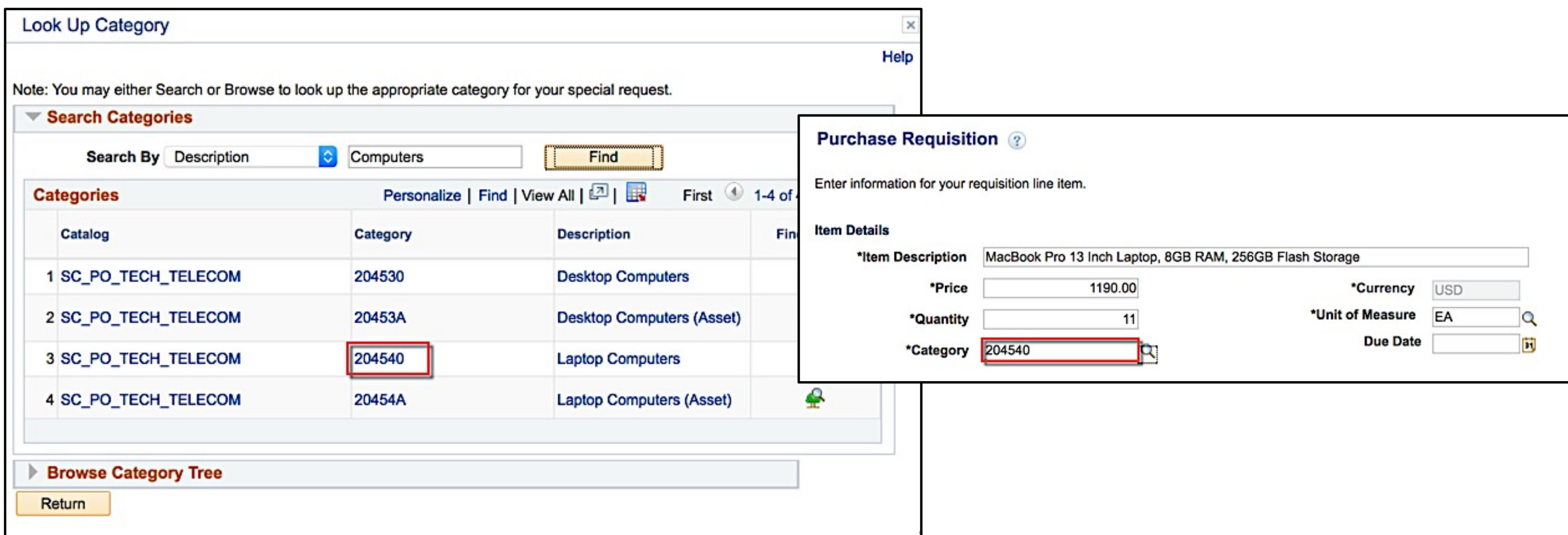


Selecting a Category

- Or Search by Description by typing key words in the field, then click **Find**.



- Click the **Category** link to populate the Category field.



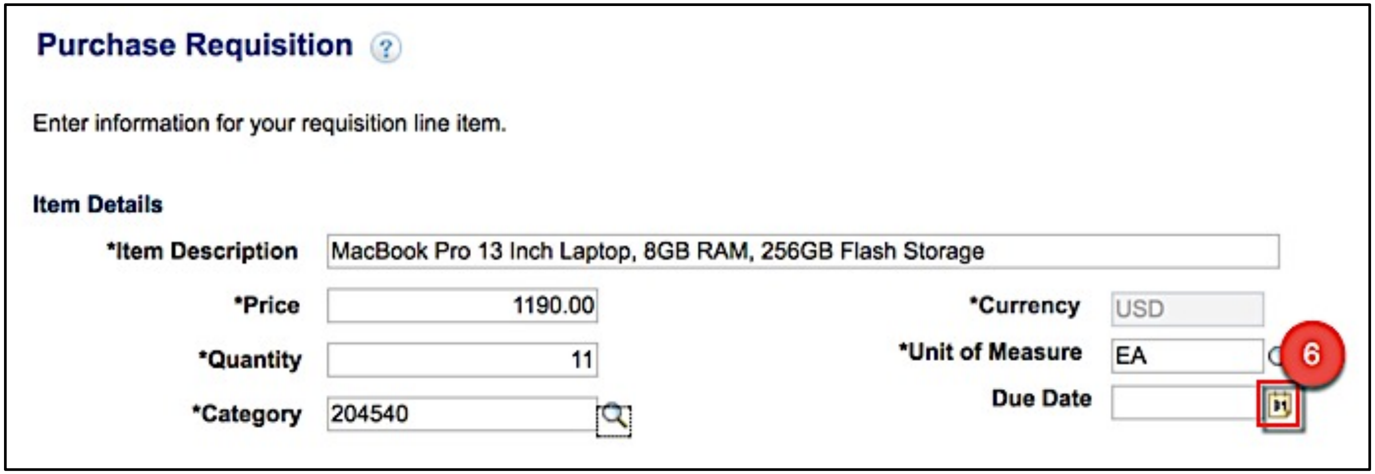
Selecting a Due Date

Use the Due Date on a requisition to indicate either:

- the delivery date expected to receive goods or services.
- the last effective date of the purchase order - especially blanket orders or grant-related procurement that have a finite expiration.

Selecting a Due Date

6. Click the **Choose a Date** icon to select a date.

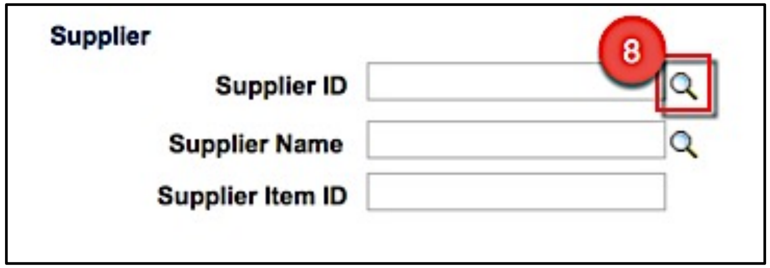


7. Click the **Day** you would like to receive the item.

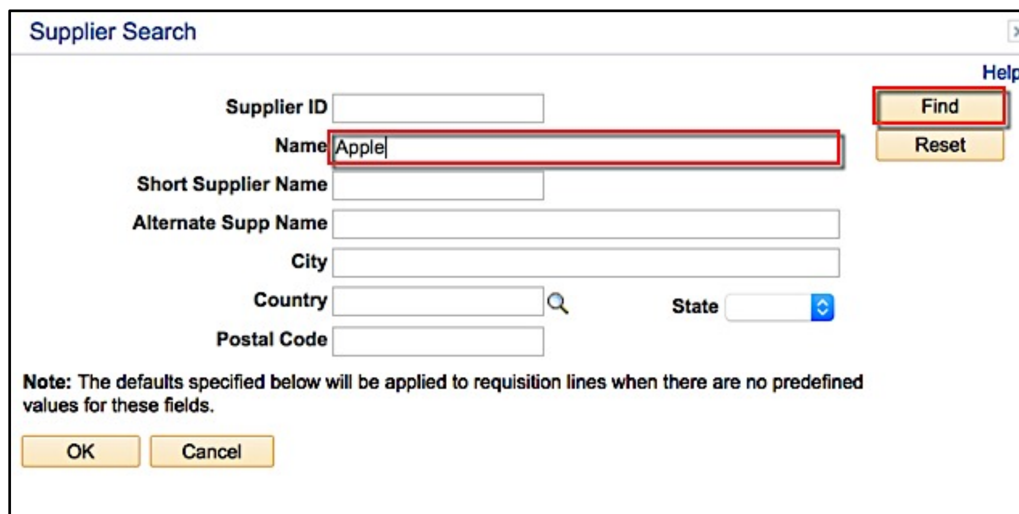
Note: You can use the dropdown arrows to select a different month and year.

Selecting a Supplier

8. Click the **Supplier Lookup** button to select a supplier.

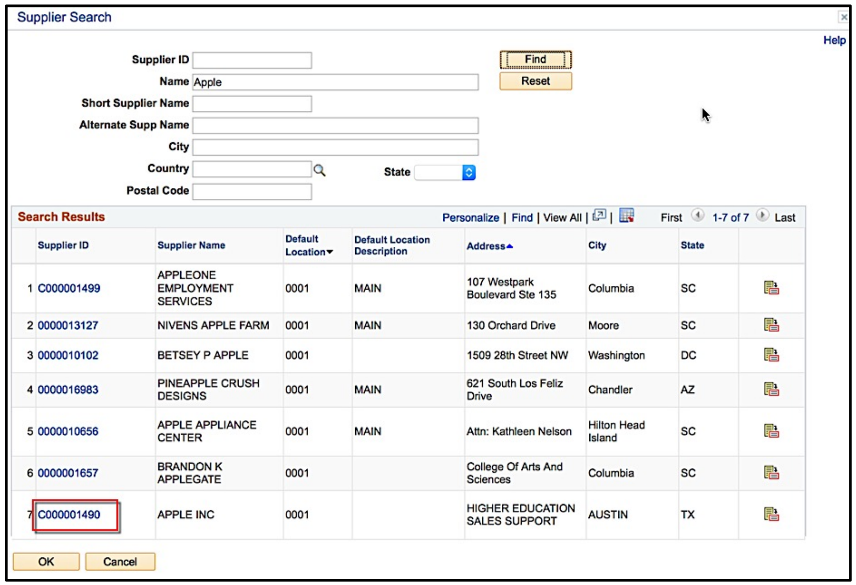


- Click in the **Name** field and enter any number of letters relating to the suppliers full name.
- Click the **Find** button.



Selecting a Supplier

- Click the **Supplier ID** link to select a supplier.(**Note**: When selecting a Supplier it is important to make sure you are selecting the correct location as many Suppliers have more than one.)


Supplier Search

Help

Supplier ID
Name Apple
Short Supplier Name
Alternate Supp Name
City
Country
State
Postal Code
Find
Reset

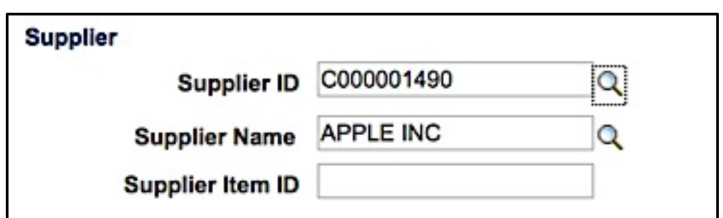
Search Results

Personalize | Find | View All | First 1-7 of 7 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
1	C000001499	APPLEONE EMPLOYMENT SERVICES	0001	MAIN	107 Westpark Boulevard Ste 135	Columbia	SC
2	0000013127	NIVENS APPLE FARM	0001	MAIN	130 Orchard Drive	Moore	SC
3	0000010102	BETSEY P APPLE	0001		1509 28th Street NW	Washington	DC
4	0000016983	PINEAPPLE CRUSH DESIGNS	0001	MAIN	621 South Los Feliz Drive	Chandler	AZ
5	0000010656	APPLE APPLIANCE CENTER	0001	MAIN	Attn: Kathleen Nelson	Hilton Head Island	SC
6	0000001657	BRANDON K APPLEGATE	0001		College Of Arts And Sciences	Columbia	SC
7	C000001490	APPLE INC	0001		HIGHER EDUCATION SALES SUPPORT	AUSTIN	TX

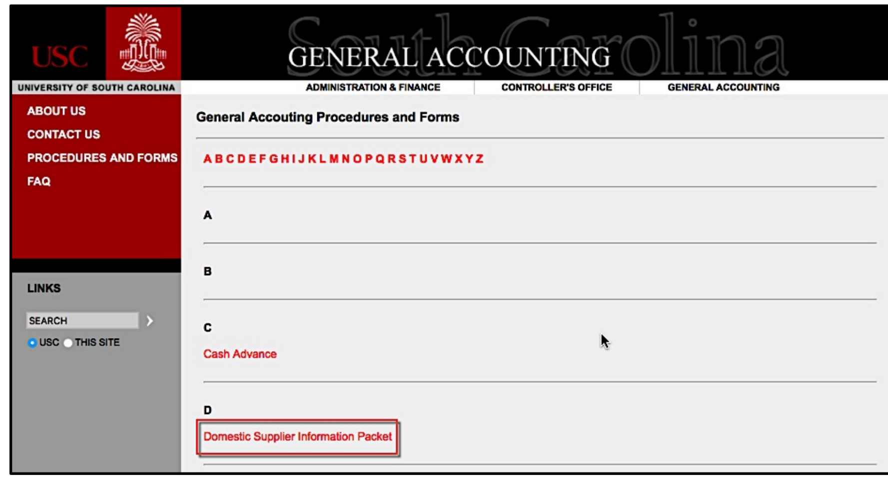
OK Cancel

- As you can see, clicking the Supplier ID link populated the Supplier ID and Supplier Name fields.



Selecting a Supplier

If you can not find the supplier you would like to use contact the Accounts Payable by using the email address apsupplr@mailbox.sc.edu.

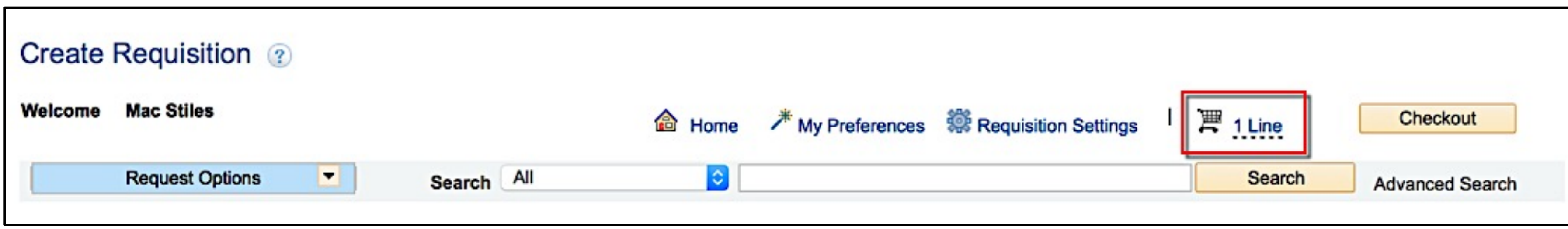


- Use apsupplr@mailbox.sc.edu to:
  - Request a Supplier
  - Update a Supplier
  - Send W-9's
- W-9's and Supplier Packets are located at: http://web.admin.sc.edu/ap/formsindex.php
- Click the **Domestic Supplier Information Packet** link to view all necessary forms.
- Once the supplier has been added and approved then you can complete your requisition.

Checking Out

9. Click the **Add to Cart** button.

- When you click the Add to Cart button, the item is placed in the Shopping cart and all of the fields are cleared. You can add another item to the request by completing steps 6 thru 18 again. Each additional item will add a new line to the request, creating a **Multi-Line Requisition**.



10. Click the **Checkout** button.

Using the Checkout – Review and Submit Page

Use the Checkout – Review and Submit page to save the requisition and submit it for approval immediately or save for later.

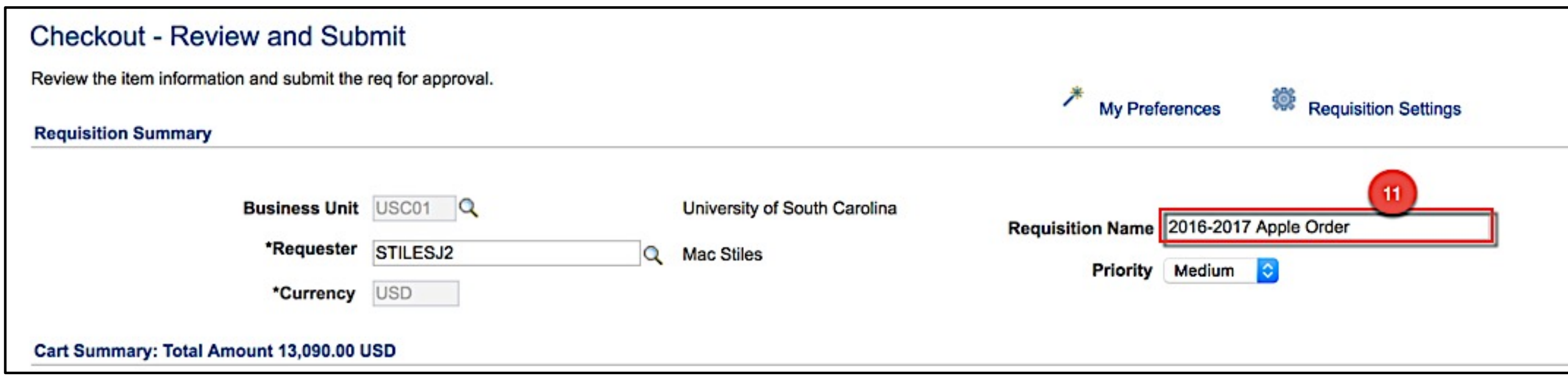
- Naming a Requisition
- Add additional line items to the request
- Edit the quantity
- Add comments and attachments
- Add/Update the Ship To location
- Change accounting line information
- Enter justification for requiring approval for the requisition.

Note: If you need to change the unit price, click the line description to go back to the Purchase Requisition page and make the change. Click Apply.

Naming the Requisition

- Enter a description of the request to help identify this requisition as it flows through the system.

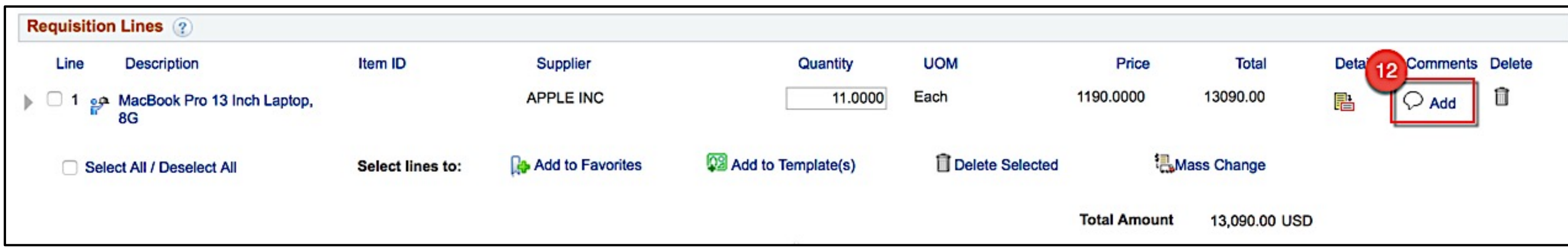
    11. Click in the **Requisition Name** field and enter a name that will help you identify the requisition quickly.



Adding Comments and Attachments

- Add comments and upload attachments to the line item. This allows the approvers to see the attachments as well as the buyers in Purchasing.

12. Click the **Add Comments and Attachments** link.

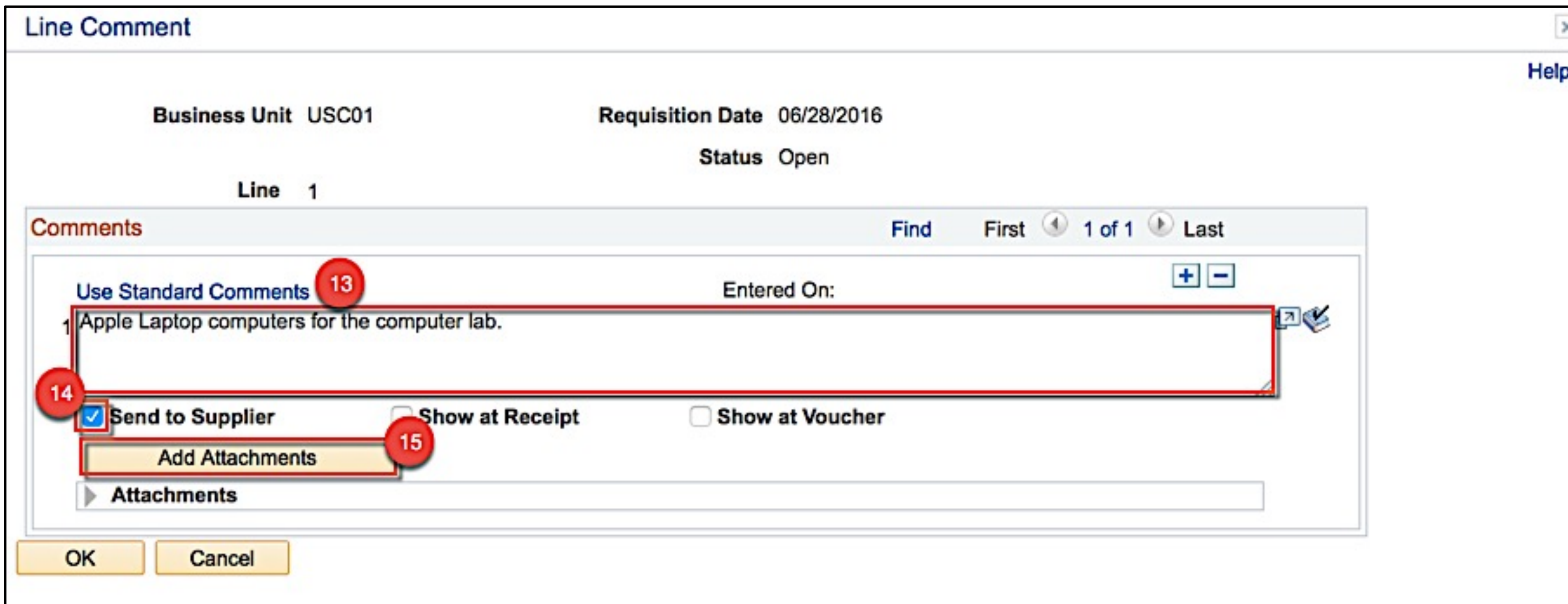


Adding Comments and Attachments

13. Click in the **Use Standard Comments** field and enter a comment you would like supplier, approver, and buyer to see.

14. If you want the supplier to see the comment, click in the **Send to Supplier** box to select it.

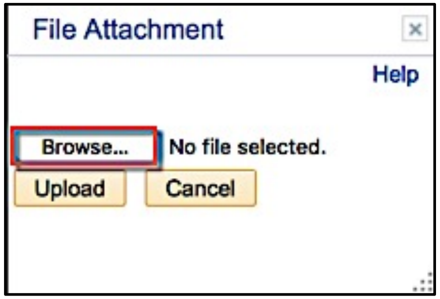
15. Click the **Add Attachments** button.

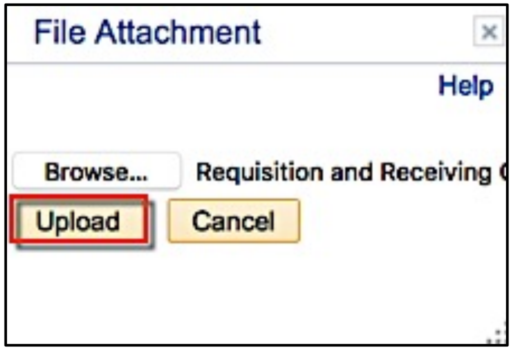


- Use the [+] button to add additional comments/attachments to a line.

Adding Comments and Attachments

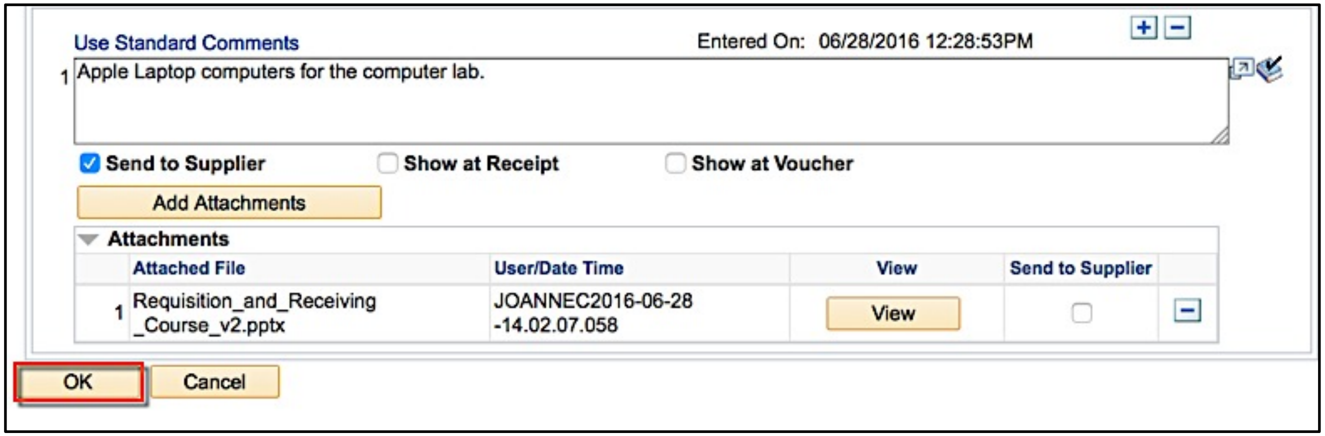
- Click in the **Browse** button.
- Click the **file** you want to attach to the request.
- Click the **Open** button.
- Click the **Upload** button.





Save and Submit the Request

- Click the **OK** button.

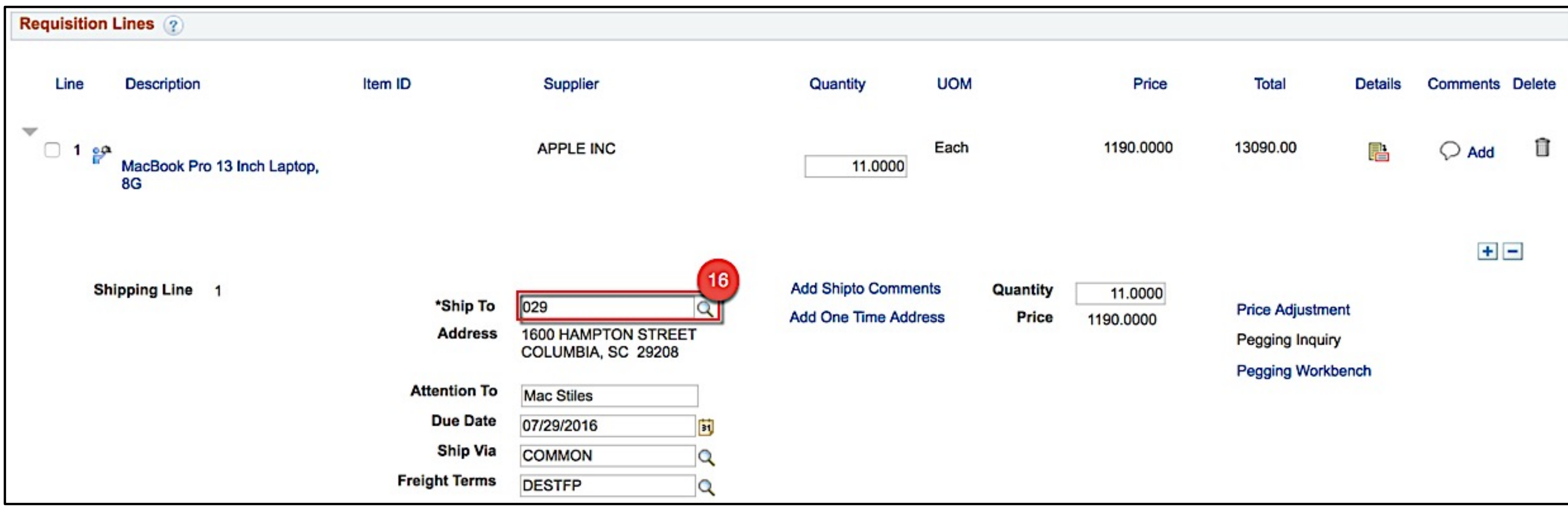


- The squiggle lines appear inside the bubble indicating there is a comment.
- The paperclip indicates there is an attachment.

Save and Submit the Request

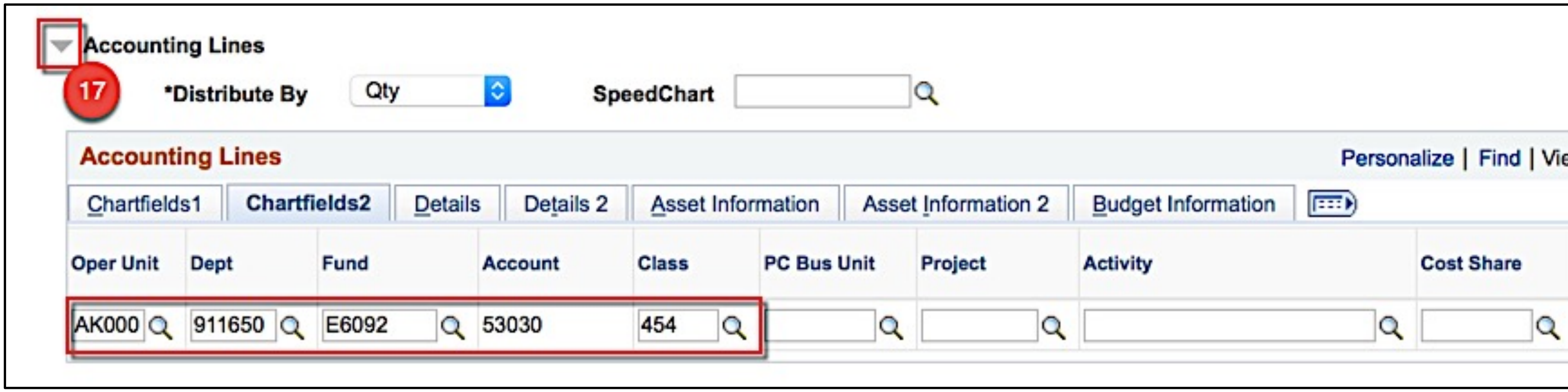
- Use the Ship To to display the organizations ship location that the supplier should use for delivery for this requisition.

  16. If not already defaulted to the correct delivery location, click the **Ship To Lookup** button and select one.



Save and Submit the Request

17. Click the **Expand section Accounting Lines** button.

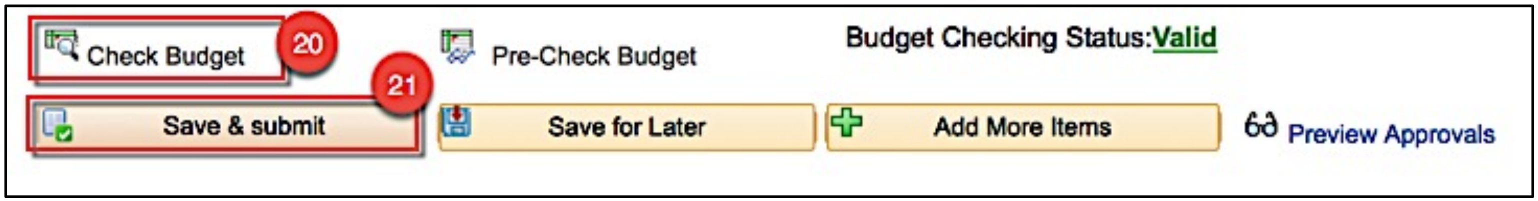


- From here enter the accounting line information, except for the Account.
- For additional Catalog/Category information go to the PeopleSoft Resource Page to find the Category Query Quick Reference.

Save and Submit the Request

18. Click the **Check Budget** link.

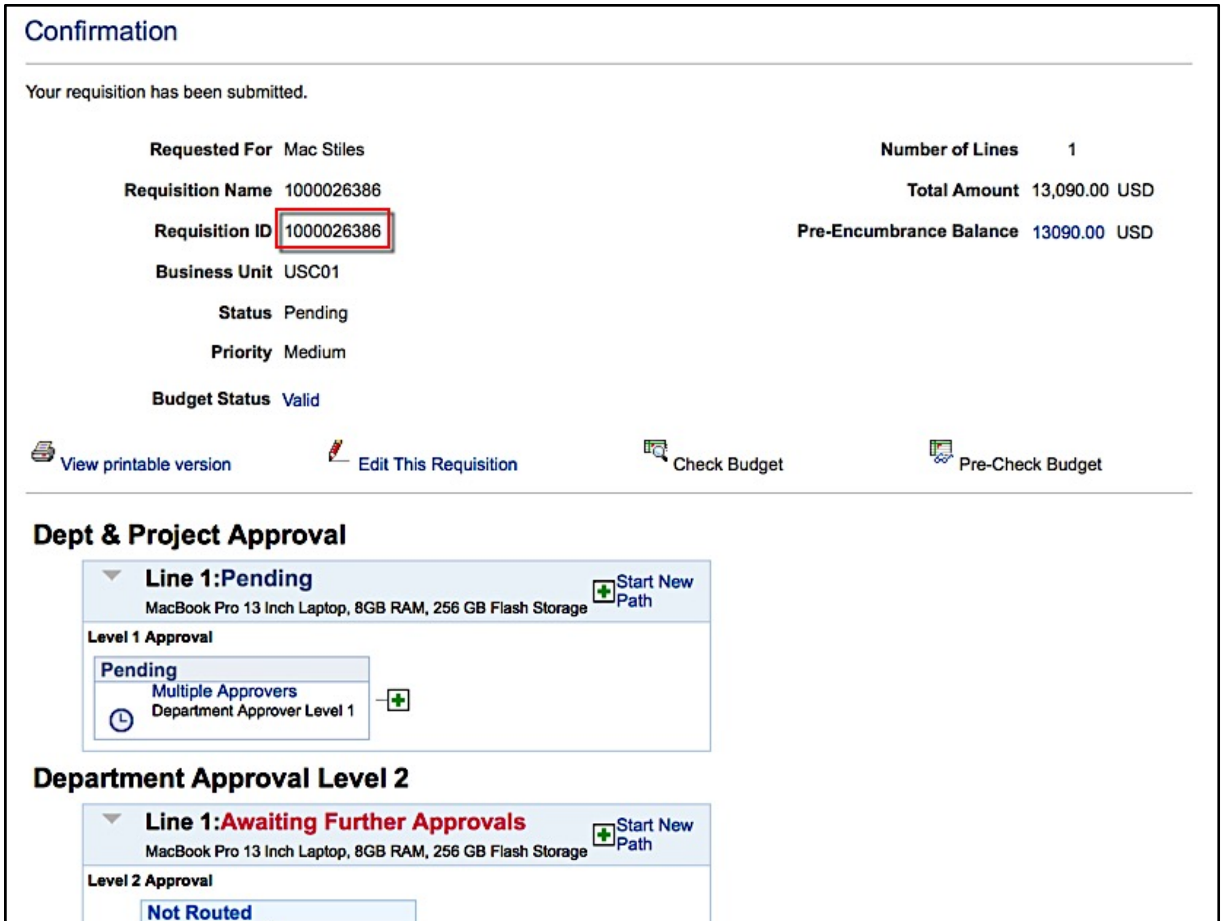
19. Click the **Save & Submit** button.



- When you click the Check Budget link, a Requisition ID will be created. Just scroll to the top of the Checkout- Review and Submit to view it.

Confirmation

A requisition ID has been created and the approval process has started.


Confirmation

Your requisition has been submitted.

Requested For	Mac Stiles	Number of Lines	1
Requisition Name	1000026386	Total Amount	13,090.00 USD
Requisition ID	1000026386	Pre-Encumbrance Balance	13090.00 USD
Business Unit	USC01		
Status	Pending		
Priority	Medium		
Budget Status	Valid		

View printable version Edit This Requisition Check Budget Pre-Check Budget

Dept & Project Approval

Line 1:Pending

MacBook Pro 13 Inch Laptop, 8GB RAM, 256 GB Flash Storage

Start New Path

Level 1 Approval

Pending

Multiple Approvers

Department Approver Level 1

Department Approval Level 2

Line 1:Awaiting Further Approvals

MacBook Pro 13 Inch Laptop, 8GB RAM, 256 GB Flash Storage

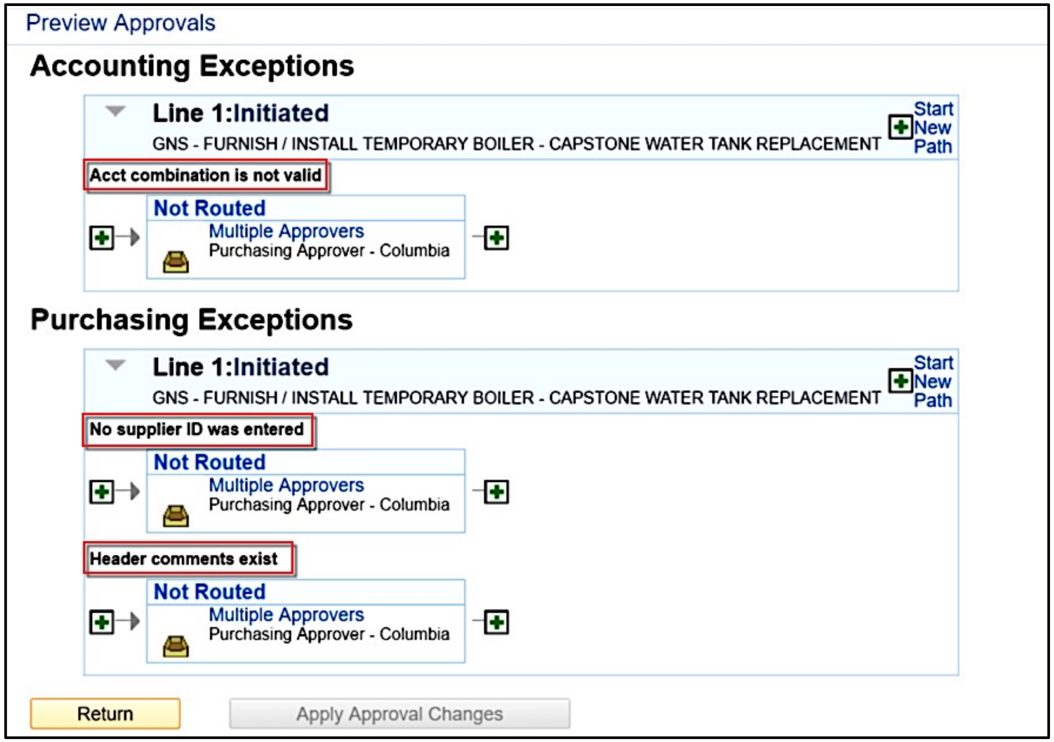
Start New Path

Level 2 Approval

Not Routed

Approval Workflow

Review the Approval Workflow for any Accounting/Purchasing Exceptions.



- Notice this workflow is showing Accounting and Purchasing Exceptions: Acct combination is not valid, No supplier ID is entered, and header comments exist.
- Please take this opportunity to go back and edit the requisition before an Approver denies it and sends it back.

Types of Purchase Requisitions

Today we will create:

- Amount Only Purchase Requisition
- A Blanket Purchase Order
- Asset Purchase Requisition
- Project Funded Purchase Requisition with Cost Share

Amount Only Purchase Requisition

Creating a Purchase Requisition for Amount Only.

- **Scenarios for when to use Amount Only:**
  - Quantity of 1
  - Services such as All Construction Services and Consulting Services
  - All Blanket Purchase Orders
  - SAM Office
- To create a request for Amount only follow Purchase Requisition steps 1 thru 3
- For Step 4, click in the **Quantity** field and enter a quantity of “1”.

Amount Only Purchase Requisition

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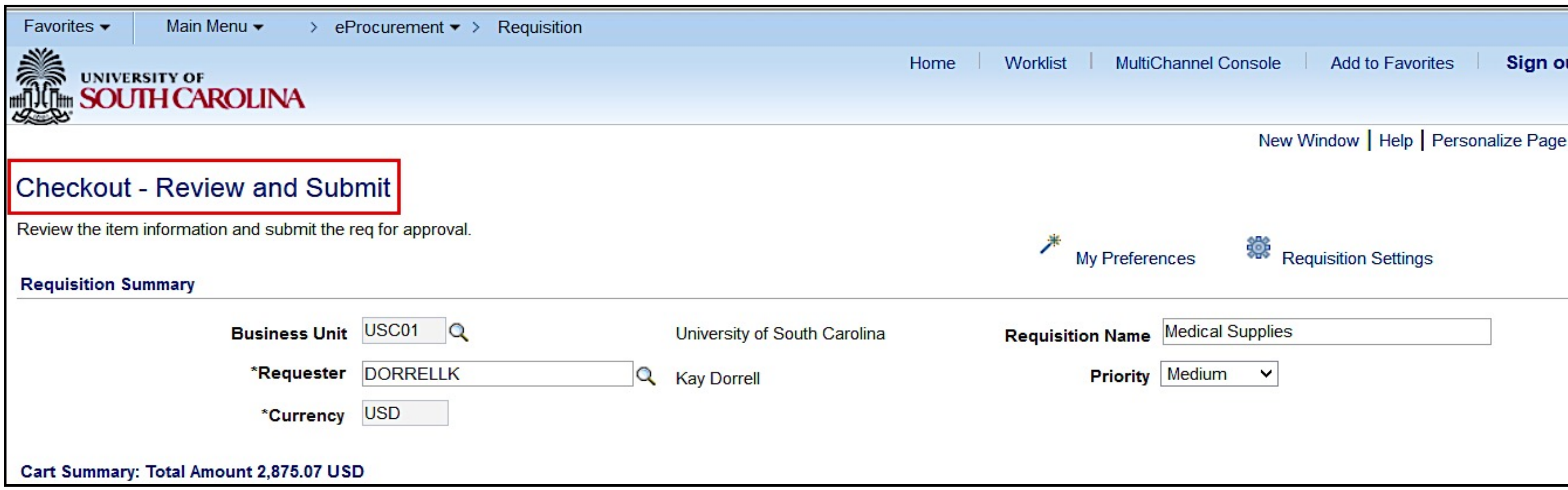
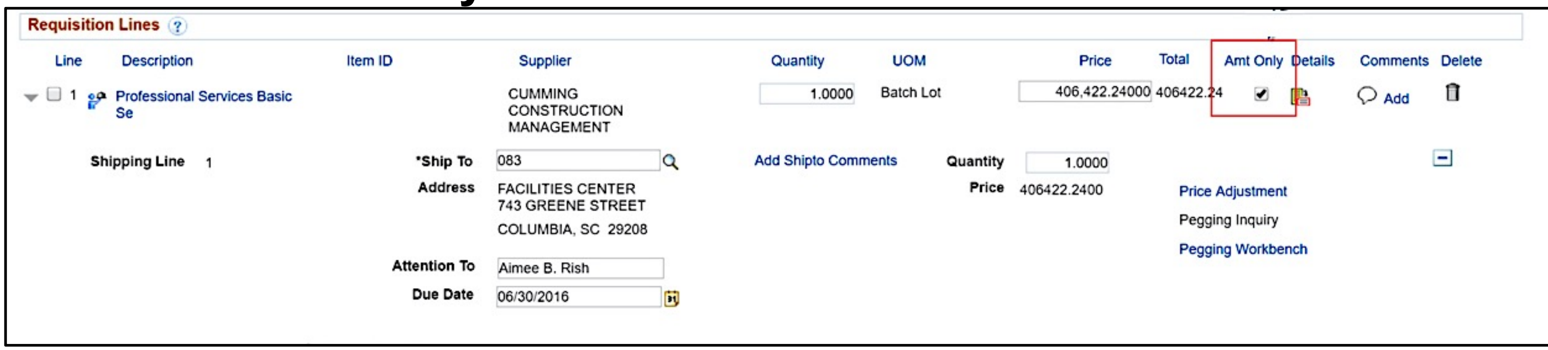
- Continue with Purchase Requisition steps 5 thru 11.
- An Amount Only Request requires additional steps on the **Checkout – Review and Submit** page.



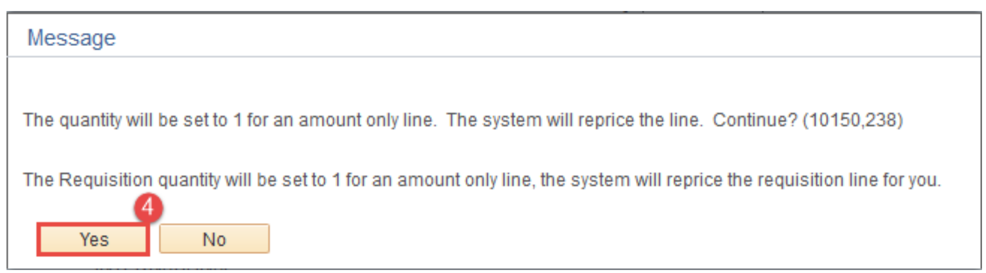
Amount Only Purchase Requisition

- These additional steps are:
    - Click the **Amount Only** box to select it.



- Click the **OK** button.

- Click the **Yes** button to accept that the quantity will be set to a quantity of 1 for an amount only line.



- To complete the request, continue with Purchase Requisition steps 12 thru 19.

Blanket Purchase Orders

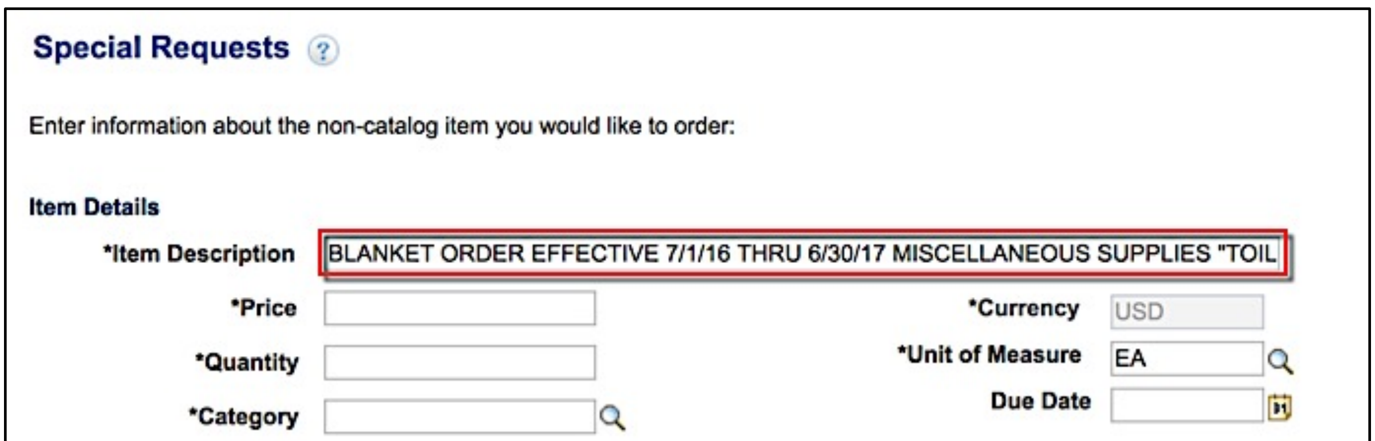
To create a Blanket Purchase Order (BPO) using a Requisition:

- BPOs are valid for 1 year and will be closed out each fiscal year.
- Minimum of $10,000 per year or more.
- Minimum of 12 invoices/vouchers issued per Budget period/year each year.
- When creating the requisition, begin with “Blanket Order” then general description of the goods/services being purchased.
- BPO is to be charged to one Account or one Accounting Distribution line per line item.

Blanket Purchase Order

Creating Blanket Purchase Order using Purchase Requisition.

- To create a request for a Project follow Purchase Requisition step 1.
- For Step 2, when entering the Line Description be sure to add a detailed description. For example, BPO Effective 7/1/16 thru 6/30/17 miscellaneous supplies "toilet paper" authorized requestors Willie ”Teddy" Javis, Aimee Rish, Clarissa Clark state contract #4400007378.



- For Step 3, enter a quantity of 1.
- Continue with steps 4 thru 19.

Asset Purchase Requisition

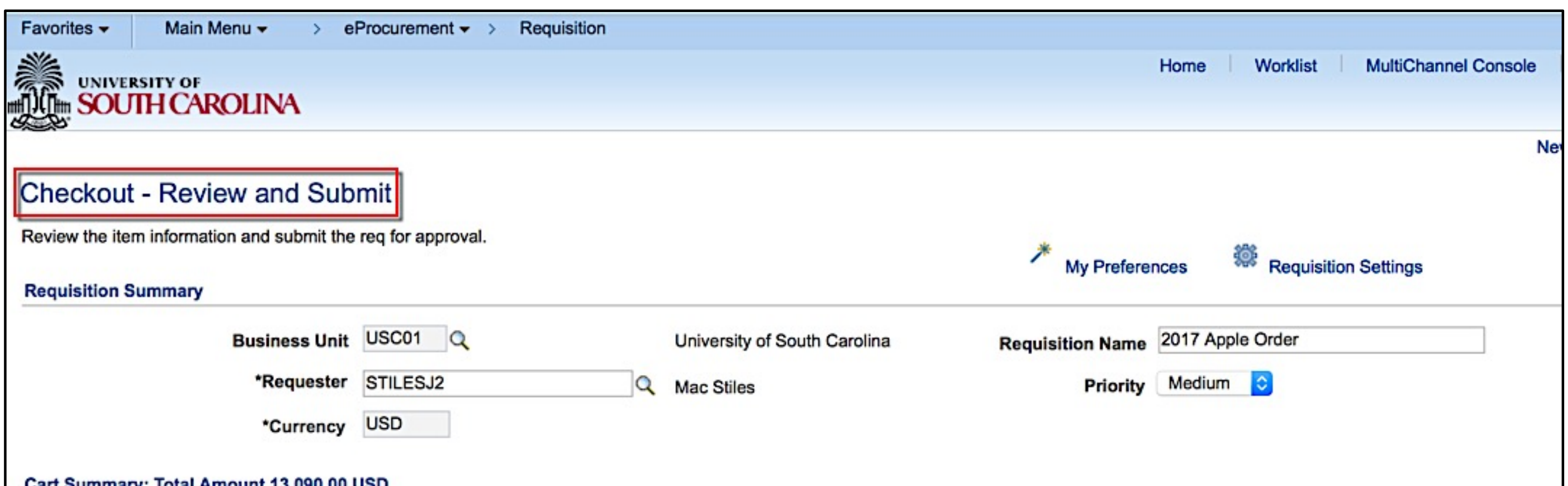
Creating a Purchase Requisition for an Asset.

- A Capital Asset is an item that is individually greater than $5,000, and expected to be depreciated for more than 2 years.
- All Asset Categories can be selected within the sub-catalog containing the description "...>5K".
- All Asset Category descriptions include the word "Asset", making it easier to select the appropriate one.
- To create a request for an Asset follow Purchase Requisition steps 1 thru 4.
- For Step 5, select an Asset Category code that has 5-digits and the letter A. For example, Laboratory Equipment (Asset), 49000A.
- Continue with Purchase Requisition steps 6 thru 19 to complete the request.

Purchase Requisition using Cost Share

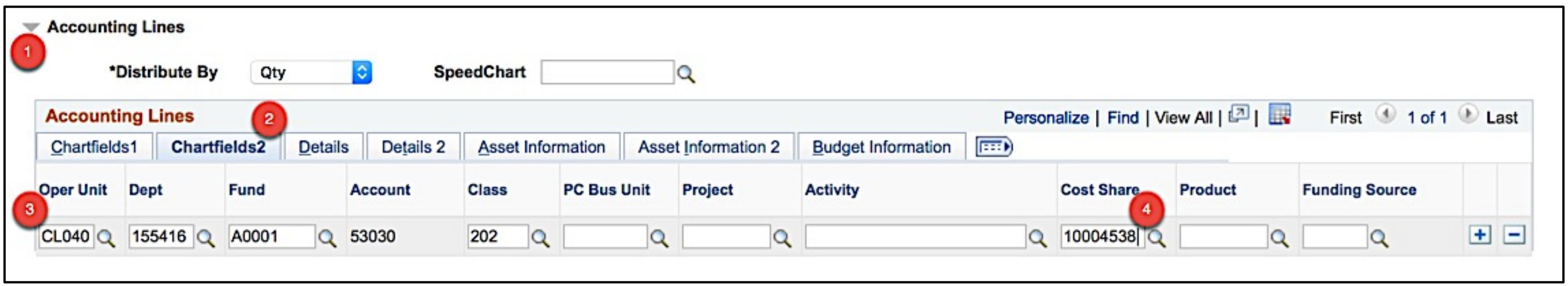
Creating a Purchase Requisition using Cost Share.

- To create a request using Cost Share follow Purchase Requisition steps 1 thru 17.
- A Project Funded Purchase Requisition with Cost Share requires additional steps on the **Checkout – Review and Submit** page.



Purchase Requisition using Cost Share

- These additional steps are:
  - Click the **Expand section Accounting Lines** button.
  - Click the **Chartfields2** tab and add the chartfield string. Be sure to include the Project ID for the project you are sharing the cost of this request with, in the Cost Share field.



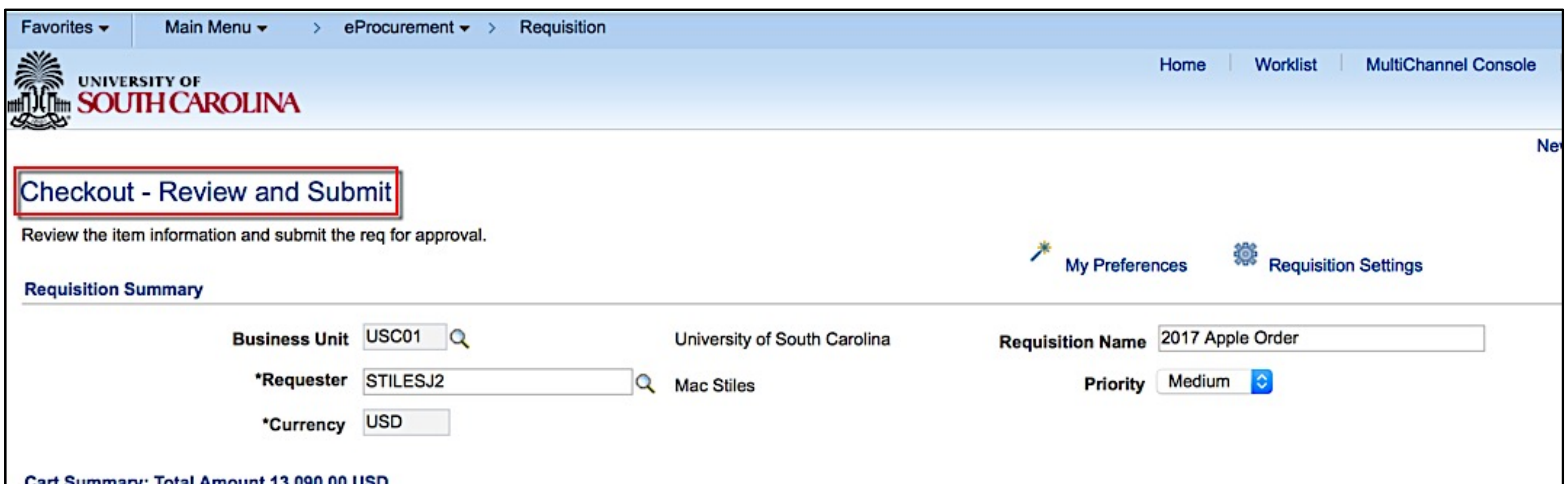
- Continue with Purchase Requisitions steps 18 thru 19 to complete the request.

Note: Cost Share, or Match means the amount Grantee (USC) or a third party will commit as a share of the overall project cost.

Project Funded Purchase Requisition

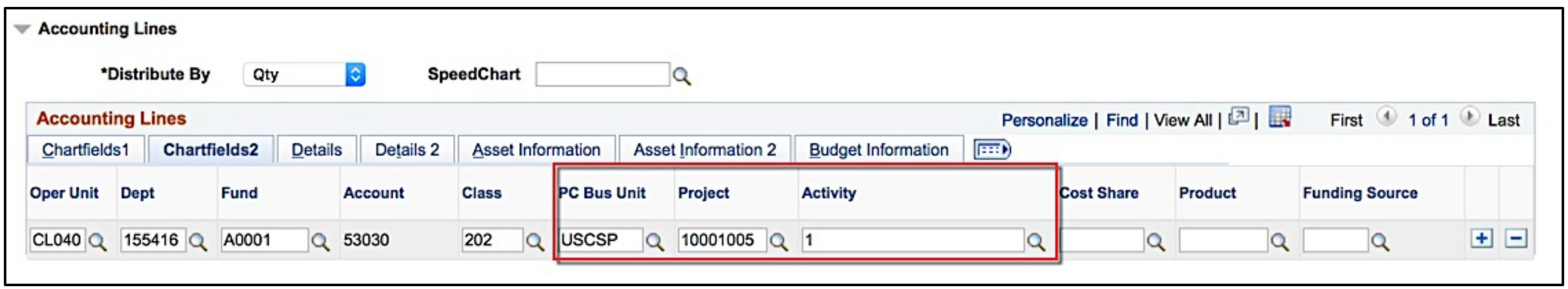
Creating a Project Funded Purchase Requisition.

- To create a project funded purchase requisition follow Purchase Requisition steps 1 thru 17.
- A Project Funded Purchase Requisition with Cost Share requires additional steps on the **Checkout – Review and Submit** page.



Project Funded Purchase Requisition

- These additional steps are:
  - Click the **Expand section Accounting Lines** button.
  - Click the **ChartFields2** tab and add the chartfield string. making sure to enter the three additional Chartfields for projects. These are **PC Business Unit**, **Project** and **Activity**.



- Continue with Purchase Requisitions steps 18 thru 19 to complete the request.

Reviewing a Purchase Order

Here is an example of a Purchase Order. The highlighted data comes from the information entered on a requisition. For example, Line Description, Due Date, Ship To, and Comments.

UNIVERSITY OF SOUTH CAROLINA

Purchase Order

Page: 1 of 2

University of South Carolina
Purchasing Department
1600 Hampton Street
Columbia SC 29208
United States

		Dispatch Via Print
Purchase Order USC01-2000027123	**Date** 07-05-2016	**Revision**
Payment Terms Net 30 Day	**Freight Terms** Destination Freight Prepaid	**Ship Via** COMMON
Buyer Lana Widener	**Phone** 803/777-4115	**Currency** USD

Supplier: C000000088
GRAYBAR ELECTRIC COMPANY INC
745 Sunset Boulevard
West Columbia SC 29169-7347
United States

Ship To: 083
FACILITIES CENTER
743 GREENE STREET
COLUMBIA SC 29208
United States

Attention: Ann G. Derrick

Bill To: Controller's Office
1600 Hampton Street 6th Floor
Columbia SC 29208
United States

Tax Exempt? **Tax Exempt ID:** **Replenishment Option:** Standard

Line-Sch	Item/Description	Mfg ID	Quantity	UOM	PO Price	Extended Amt	Due Date
1 - 1	Fiber Materials as Referenced on Attached Quote #0225292559 Rev-1 dated 6/7/16 TAG: GAMECOCK PARK(BOJANGLES) SITE DEVELOPMENT		1.00	LOT	7,055.77	7,055.77	11/30/2016

FRGTPR	350.00
SUT Code: SC2160 (8%)	592.46
Schedule Total	7,998.23
Item Total	7,998.23
Total SUT Code SC2160 (8%)	592.46
Total PO Amount	7,998.23

Please contact Ann Derrick 24 hours prior to delivery.

Office No. 803-777-5811

Time to Practice

Exercise #1

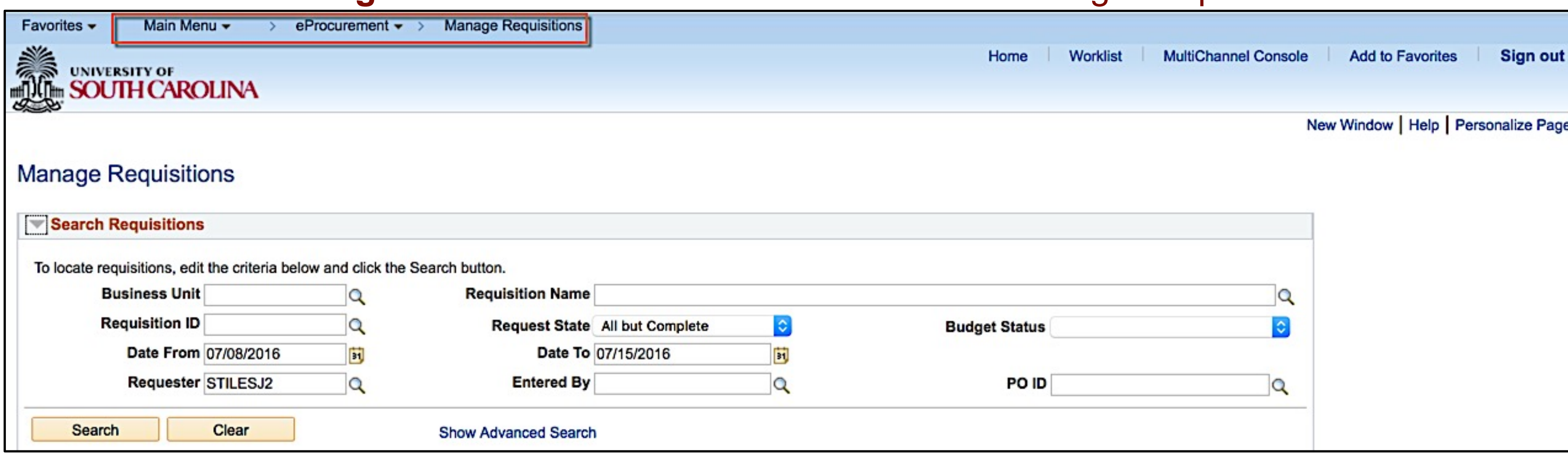
Creating a Quantity Based Requisition Line

Managing Requisitions

Use the Manage Requisitions page to:

- Review Requisition Information
- Budget Check a Requisition
- Cancel a requisition, or line, ***before the PO has been dispatched***
- Reviewing Approval Workflow
- Copy a requisition
- Print a Requisition

Navigation: Main Menu → eProcurement → Manage Requisition



Reviewing Requisition Information

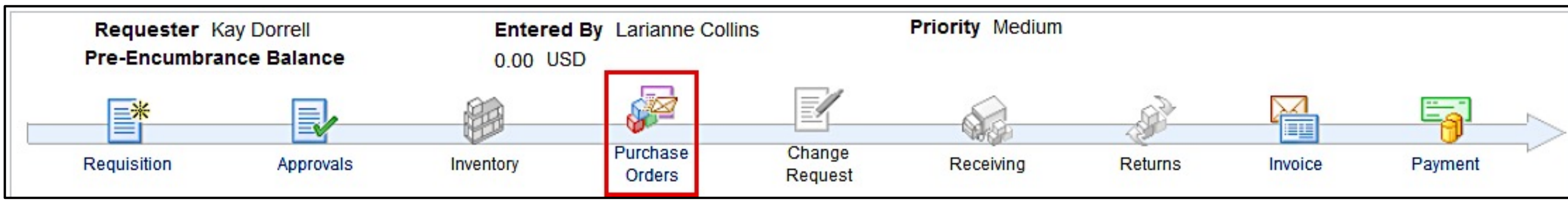
- Below is an example of a Requisition Lifespan.

- The **Requisition Lifespan** section displays the business process flow for requisition with links to various documents. Stages in the requisition lifespan that are complete or in progress are highlighted with active links. Click on an icon to open up detailed pages; for example, when the Purchase Orders icon is enabled, click it to access the Purchase Order Information.

Reviewing Requisition Information

You can click on all of the active icons to see additional information.

- Click on the **Purchase Order** icon to see line one of the requisition.



- On this page you can see the Requisition #, Purchase Order #, and the buyer.

Business Unit USC01

Requisition information — Find | View All First 1 of 1 Last

Requisition ID 1000014012 **Line Number** 1

PO information — Find | View All First 1 of 1 Last

PO Number 2000015759 **Buyer** HULON **Change Order**

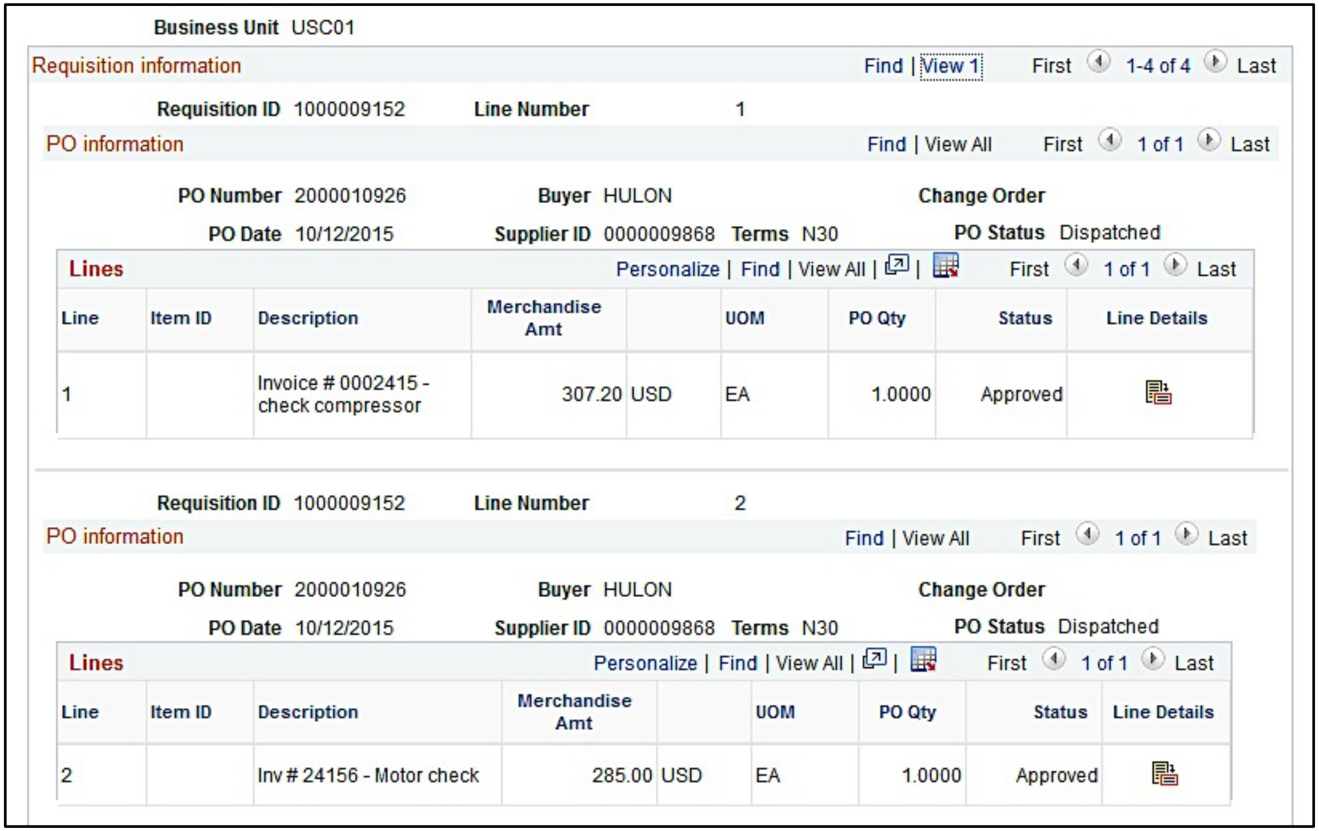
PO Date 12/18/2015 **Supplier ID** 0000011992 **Terms** N30 **PO Status** Dispatched

Lines — Personalize | Find | View All | First 1 of 1 Last

Line	Item ID	Description	Merchandise Amt		UOM	PO Qty	Status	Line Details
1		SCCSS Vending Registration and program ad	350.00	USD	EA	1.0000	Approved	

Reviewing Requisition Information

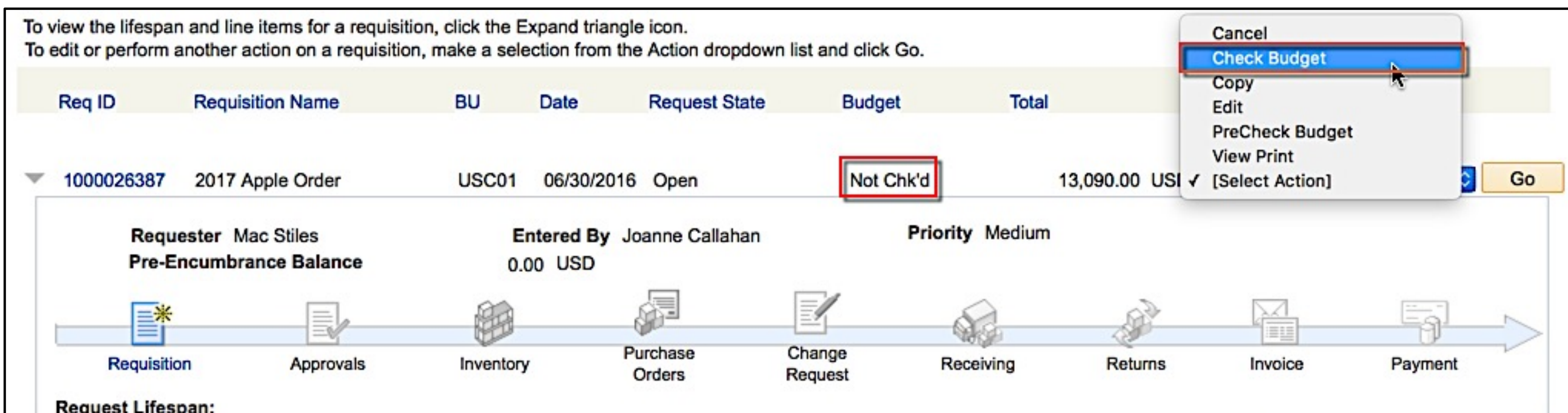
- Use the navigation arrows to cycle through each line individually or click the **View All** link to see the PO information associated with each requisition line.



Budget Checking a Requisition

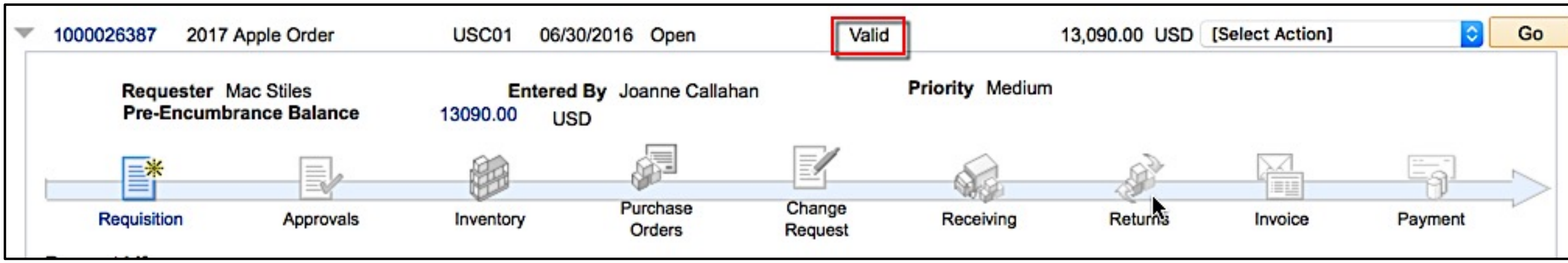
Use the Manage Requisitions page to Budget Check any requisitions that are showing a Budget Status of "Not Chk'd".

1. Enter the **Requestor** or **Requisition ID** in the Search Criteria.
2. Click the **Search** button.
3. Click **Check Budget** in the Select Action dropdown list.
4. Click the **Go** button to open the Requisition Details page.



Budget Checking a Requisition

- Notice the Budget Status is now "**Valid**".



Canceling a Requisition

If you need to cancel a line, you can do that on the Manage Requisition page. To cancel a line on a requisition:

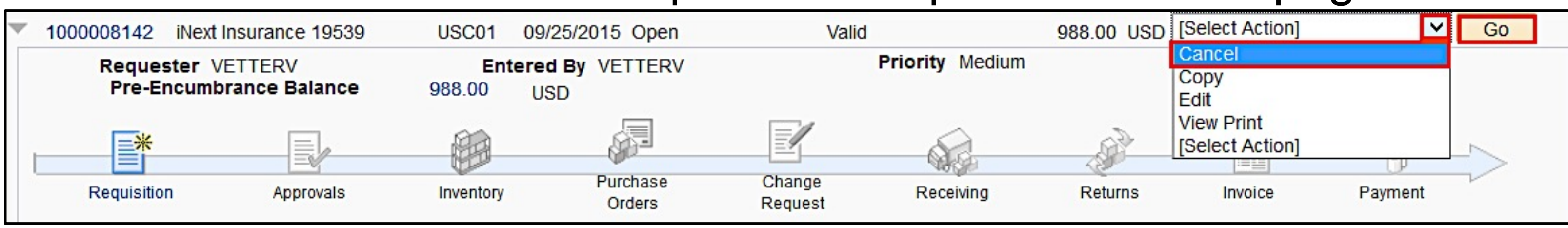
1. Enter your **Requisition ID** in the Search Criteria section of the page. To cancel a requisition it should have a status of Open or Pending.
2. Click the **Search** button.
3. Click the **Expand** button to open the lifespan for the requisition.
4. Click the ✖ for the line you would like to cancel.

- When you cancel a line, you always need to budget check. You can do this by using the Select Action dropdown arrow, select **Check Budget** from the options, and click **Go**.

Canceling a Requisition

To Cancel a Requisition on the Manage Requisition page:

1. Enter the **Requestor** or **Requisition ID** in the Search Criteria.
2. Click the **Search** button.
3. Click **Cancel** in the Select Action dropdown list.
4. Click the **Go** button to open the Requisition Details page.



5. On the Requisition Details page, click the **Cancel Requisition** button.

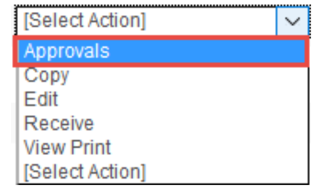
Canceling a Requisition

- Your requisition has been updated and on the Lifespan under Request State it says “Canceled”.
- Be sure to Check the Budget to release the pre-encumbrance.
- Notice the budget is at $0.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
1000008142	iNext Insurance 19539	USC01	09/25/2015	Canceled	Not Chk'd	0.00 USD	[Select Action]	Go

Reviewing Approval Workflow

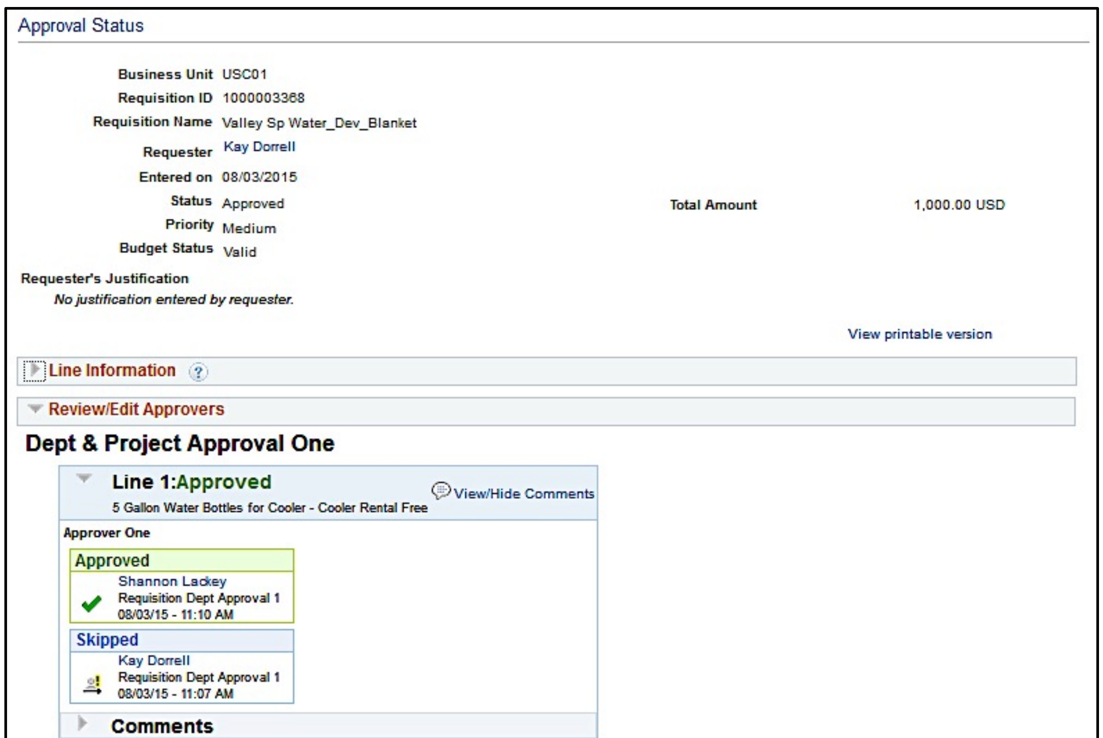
To see the Approval workflow for a requisition:



1. Click the **Dropdown** arrow.

2. Click **Approval** from the dropdown list.

3. Click the **Go** button to open the Approval Status page.

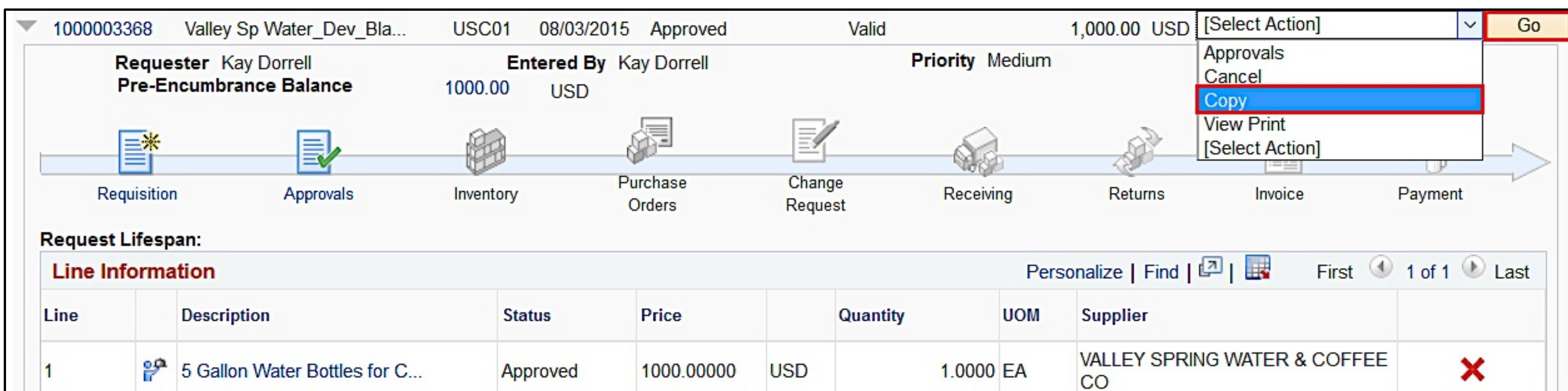


Copying a Requisition

To copy a requisition:

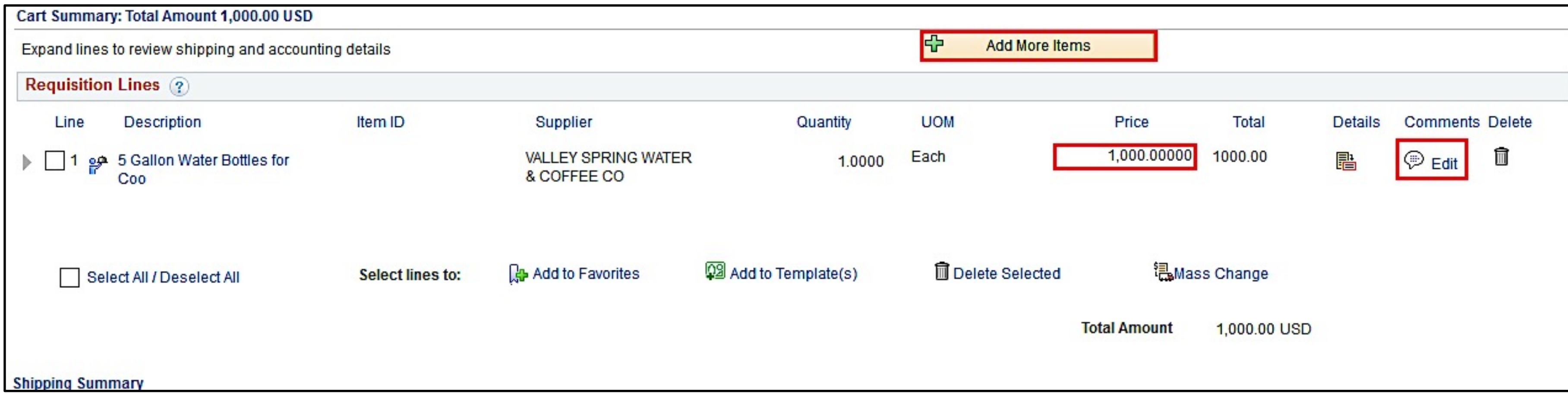
- Copying an existing requisition eliminates redundant data entry by using an existing requisition as a template. You can select and copy any requisition, regardless of its status (Denied, Canceled, Approved, etc.).

1. Click the **Dropdown** arrow.
2. Click **Copy** from the dropdown list.
3. Click the **Go** button.



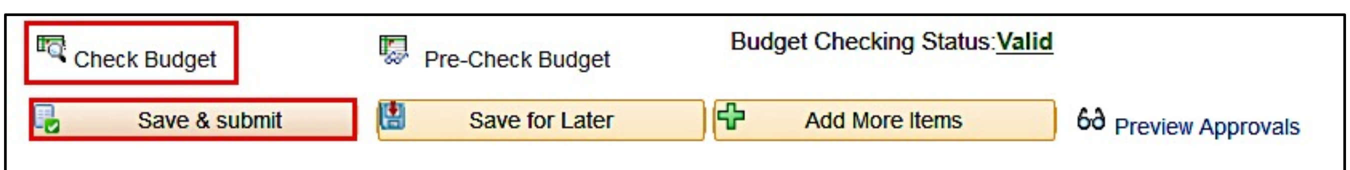
Copying a Requisition

4. On the **Checkout – Review and Submit** page make edits to the requisition by adding additional items, changing the quantity, adding comments and attachments, updating Accounting information.



5. Click the **Check Budget** link.

6. Click the **Save and Submit** button.



Printing a Requisition

To view a printout of requisition information:

[Select Action]
Approvals
Copy
Edit
Receive
View Print
[Select Action]

1. Click the **Dropdown** arrow.
2. Click **View Print** from the dropdown list.
3. Click the **Go** button.

Business Unit: USC01
Requisition: 1000003368
Requisition Name: Valley Sp Water_Dev_Blanket
Requester: DORRELLK
Requested By: Kay Dorrell
Entered Date: 8/3/15
Status: Approved
Currency: USD
Requisition Total: 1,000.00

Line: 1 **Item Description:** 5 Gallon Water Bottles for Cooler - Cooler Rental Free **Quantity:** 1.0000 **UOM:** EA **Price:** 1,000.00 **Line Total:** 1,000.00
Line Status: Approved

Line Comments:
<<**Start Date:2015-07-06**User Comments:TERMS & CONDITIONS OF USC-IFB-2533-MR APPLY
TERMS NET 30
Year 2 of 5 year contract
BLANKET ORDER - SEND PO TO VENDOR>>

Ship Line: 1
Attention: Kay Dorrell
Ship Via: COMMON
Ship To: 173-1A06A
Due Date: 6/30/16
Freight Terms:DESTFP
Address:
COL OF ENGR AND (15500)
315 MAIN STREET RM 1A06A
COLUMBIA SC 29208
United States
Shipping Quantity: 1.0000
Shipping Total: 1,000.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	POBU	1.0000	100.00	1,000.00	USC01	53009

Dept	Oper Unit	Fund	Class
155023	CL040	A0001	456

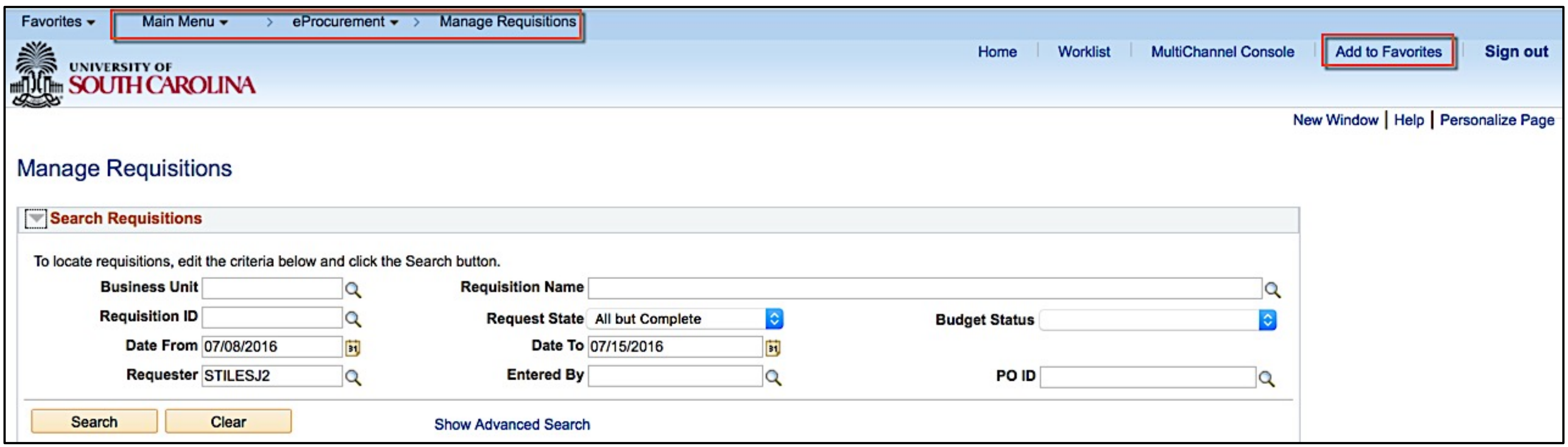
Open QTY	Open Amt
0.0000	1000.000

GL Base Amount	Currency	Sequence
1,000.00	USD	0

Adding Pages to Favorites

The My Favorites Feature in PeopleSoft allows you to store the most frequently used pages where you can access them in one single click.

- Determine the pages you would like to store in Favorites and navigate to each specific page.
- Once you have the page in view on your screen, click the Add to Favorites link.

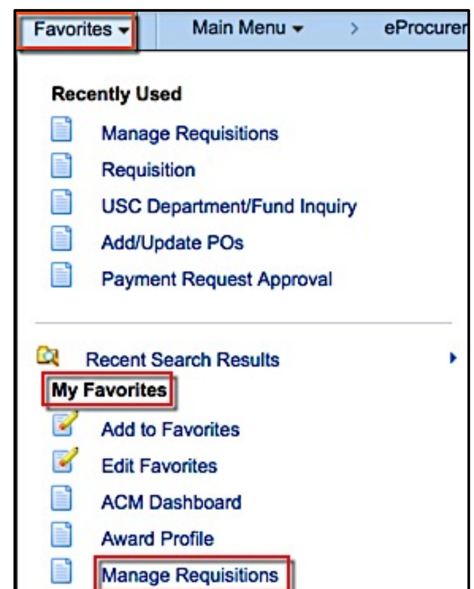


Adding Pages to Favorites

- Click the **OK** button to add this page to your Favorites.

- Click the **OK** button to accept that it has been saved.

- Click **Favorites** to see that the page has been added to the **My Favorites** section. The recently used will always change because it holds the last 5 pages viewed.



Receiving

- Receiving in PeopleSoft is an important part of the 3 Way Matching rule within PeopleSoft. It compares vouchers with purchase orders and receiving documents.

- 3 Way Matching is a control measure used to ensure that you pay for only the goods and services that you order and receive.

- Receiving your requested goods is the trigger for Accounts Payable to pay and how much to pay.

- If the lines on the Purchase Order, Receipt, and Voucher do not match, payment will not be made.

- Receipting is required on all purchases of goods.

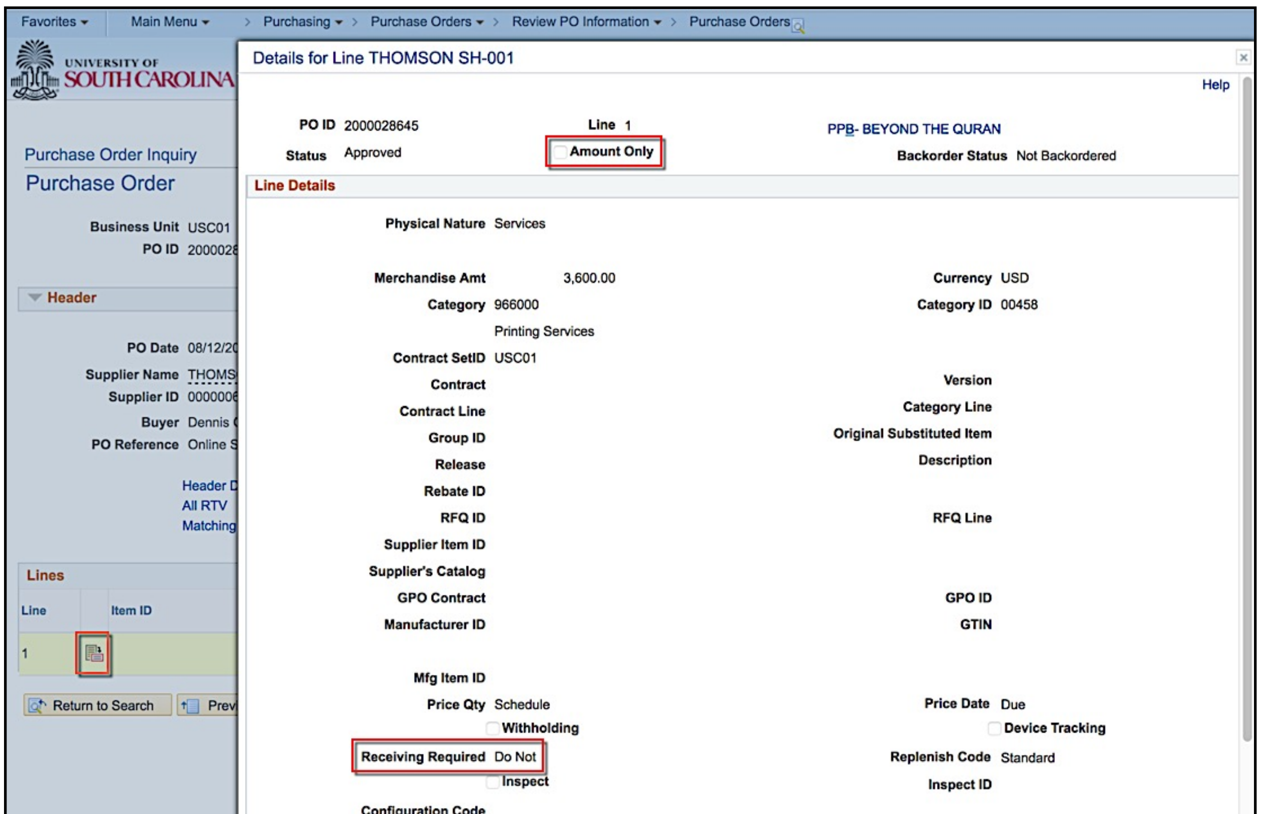
The Effect of a Category on Receiving Required

- Goods require receiving. For example, supplies and equipment.
- Services do not require receiving. For example, maintenance or repair of equipment.
- Sending in the invoice will be Accounts Payable’s cue to make payment.

Receiving

Use the Purchase Order Inquiry page to view purchase order information. This page can help determine the type of PO (Amount or Quantity) you have and whether Receiving is required.

Navigation: Main Menu → Purchase Order → Review PO Information→ Purchase Orders



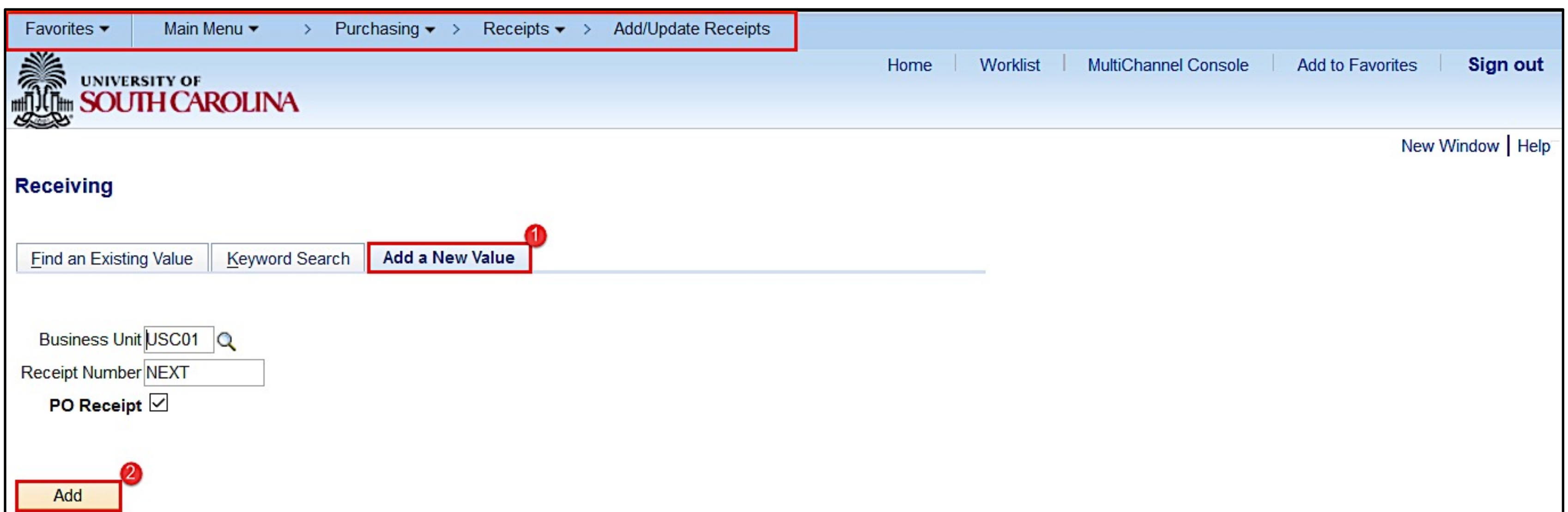
Receiving

If you are the Requisitioner or the individual who received the goods, you need to receive on the Add/Update Receipts page.

Navigation Path: Main Menu → Purchasing → Receipts → Add/Update Receipts

Follow the steps below to receive on this page:

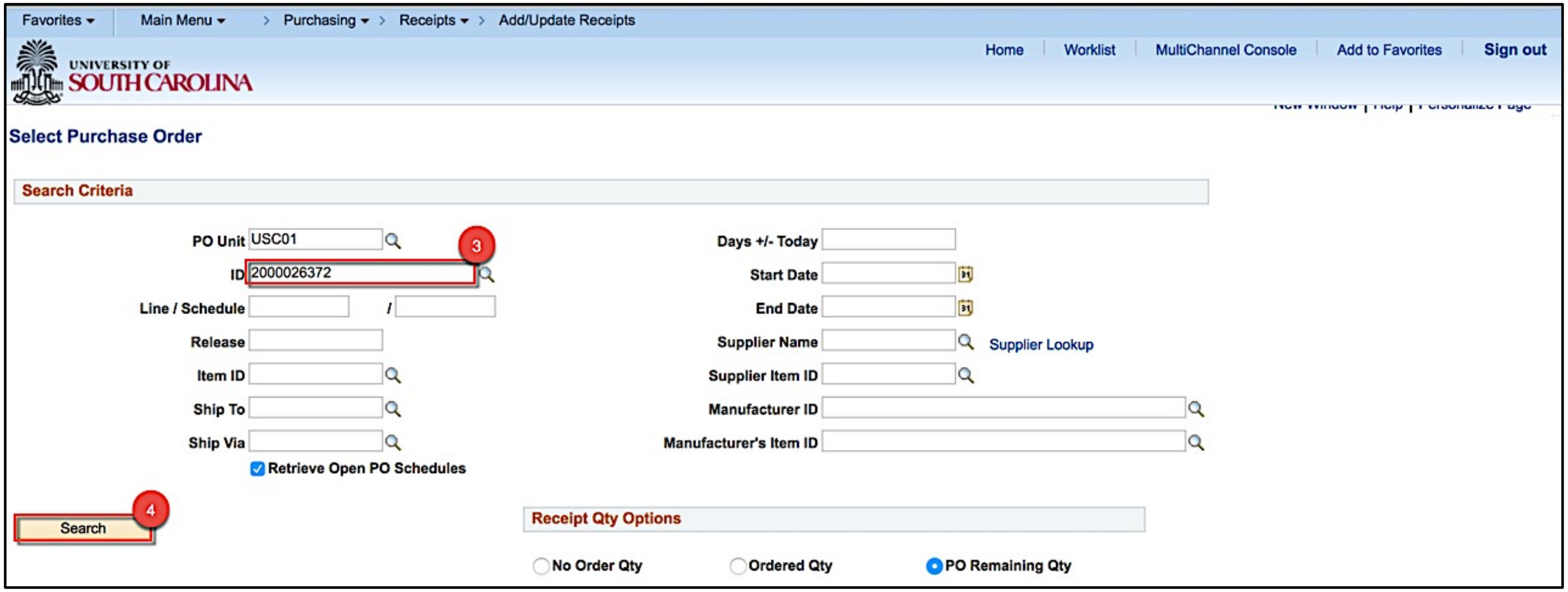
1. Click the **Add a New Value** tab and then click the Add button.
2. Click the **Add** button.



Receiving

3. Click in the **ID** field and type in a PO ID.

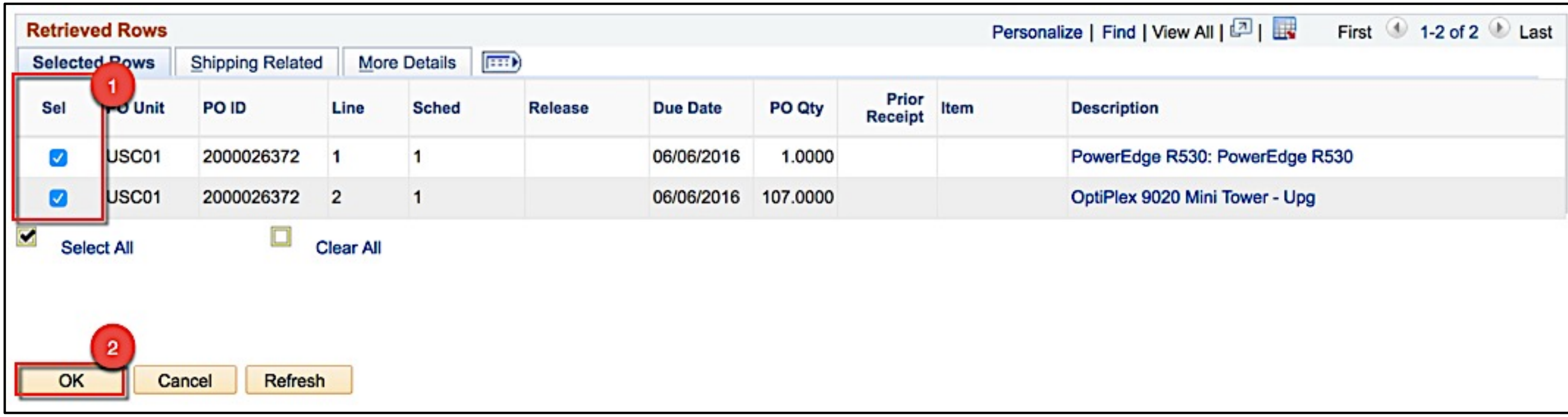
4. Click **Search** button.



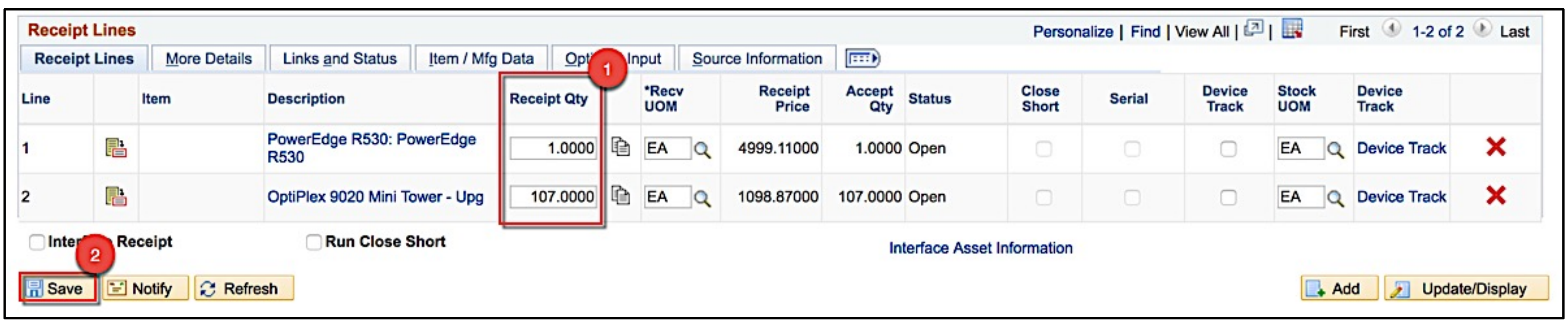
Note: It is important to clear all fields when entering a PO ID.

Receiving

5. Select the lines you want to receive and click OK.



6a. In this example, identify the quantity received and click **Save**. (Note: If you received only 100 of the 107 items be sure to indicate this in the **Receipt Qty** field before clicking the Save button.)

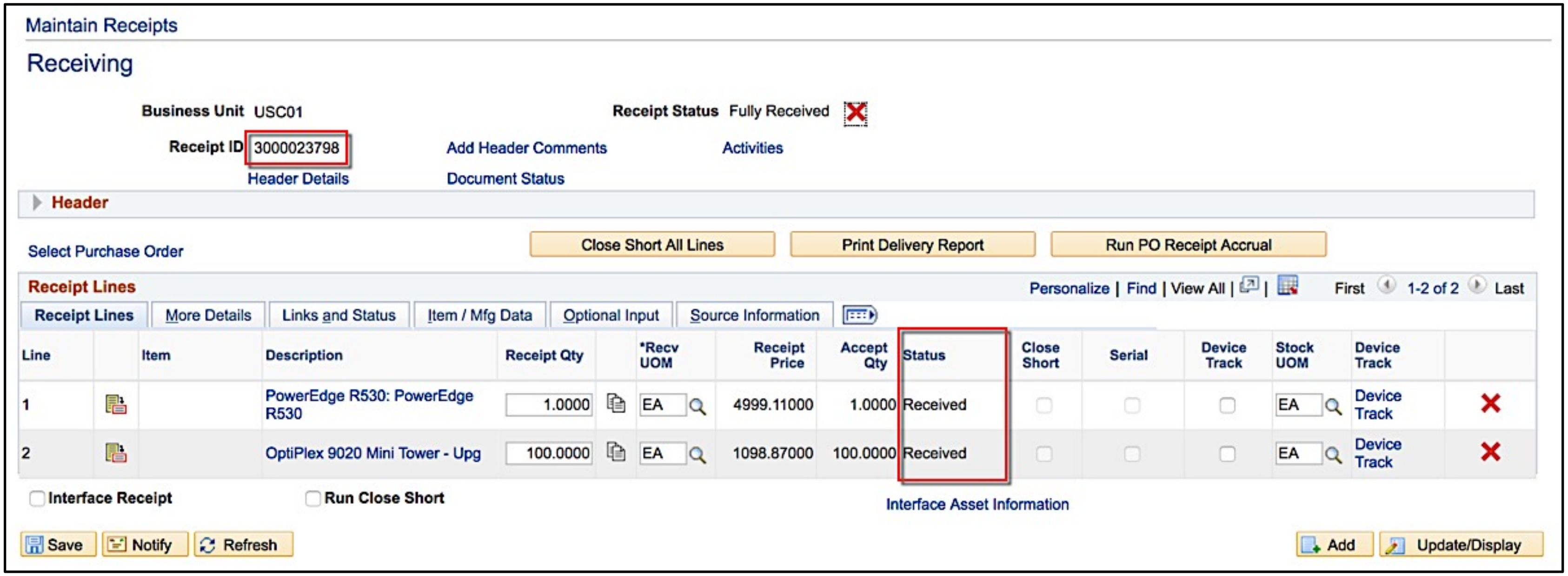


Receiving

6b. As you can see this an Amount Only line. In this example, identify the amount received and click **Save**.

Receiving

7. Review the Receipt. Notice a Receipt ID was generated and the Status is "Received".



Time to Practice

Exercise #2

Editing an Existing Requisition with an Amount Only Line

Time to Practice

Exercise #3

View the Approval Workflow for a Submitted Requisition

Time to Practice

Exercise #4

Copy Existing Requisition into a New Requisition

Time to Practice

Exercise #5

Cancel Original Requisition, Undo Cancel, and Budget Check

Time to Practice

Exercise #6

View Print Details

Time to Practice

Exercise #7

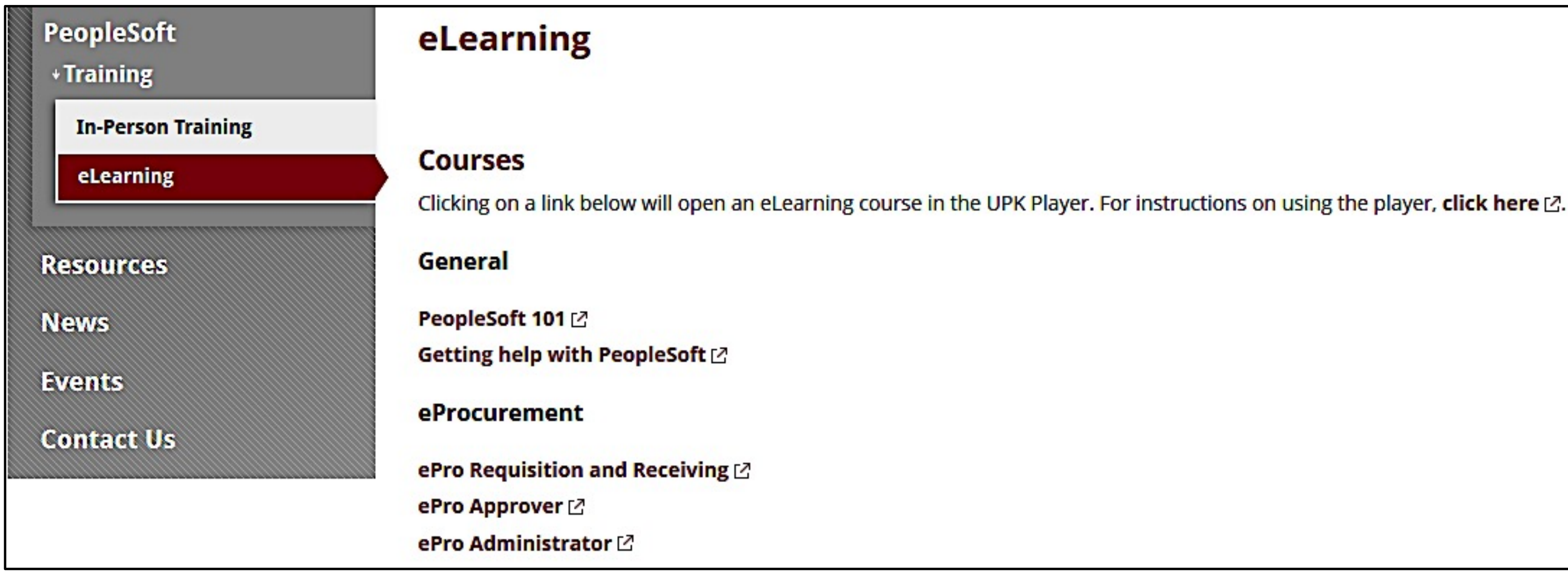
Creating a Receipt

Follow- Up Activities

- Prior to attending the Requisition Follow- Up webinar please complete the following:
  - Review the UPK's for ePro Requisition and Receiving
  - View the Change Request Webinar recording
  - View the Dell Punchout Webinar recording if applicable
  - Prepare and send questions to purchasing@sc.edu prior to the follow- up webinar
- Attend a Requisition Follow- Up webinar

PeopleSoft Resources

- Access the training UPKs on the PeopleSoft website for more practice.
- Make sure your name is on the roster to get credit for attending today's session.



PeopleSoft Resources

OneCarolina

CALENDAR MAP DIRECTORY Search sc.edu GATEWAYS

UNIVERSITY OF SOUTH CAROLINA

The Division of **Information Technology**

SC.edu » Abou » Offic » The [» PeopleSoft » Resources

PeopleSoft Chart of Accounts

- PeopleSoft Chart of Accounts »
- New Code Structure »
- A Quick Reference Guide to Categories »

PeopleSoft Workflow

- ePro Requisition Approval Workflow »
- Workflow Tip 1 »
- Workflow Tip 2 »
- Department Approvers »

Payment Request Information

- Payment Request Matrix »
- Payment Request Guidelines »

eProcurement Information

- Revised Quick Reference for Amount Only vs. Quantity »
- Revised Quick Reference for Receiving in PeopleSoft »
- Quick Reference for a Change Order »
- Requisitioner Hands On Training PPT »
- Receiving in PeopleSoft Webinar Recording »
- Dell Punchout Webinar PPT »
- Chrome Web Browser Update »
- Internet Explorer Web Browser Update »
- Mozilla Firefox Web Browser Update »

Questions…

- If you have questions regarding any specific content from this course or other departmental needs related to eProcurement, Requisitions, Purchase Orders, or Receipts, please e-mail purchasing@sc.edu.

- This presentation is also available to download on OneCarolina's PeopleSoft Training webpage.

- If you have general questions or concerns about PeopleSoft training, please email them to PSTRAIN@mailbox.sc.edu.

Thank You!

Thank
You
Merci
Gracias
TerimaKasih
Hvala
Arigatô
KamSahHamnida
Spacibo
Danke
Mèsi
Xièxie
Chokrane
Dziakuju
Takk
aDank
BarakAllahuFiik
Grazie
Grazzi
Buznyg
ThintKo
TapadhLeat
Köszönöm
Murakoze
WaadMahadsantahay
Blagodaram
Rahmat
Matondo
Mercé
Taiku
Dakujem
Gràcies
Faleminderit
Efharisto
NajisTuke
Grandmercé
Tanemirt
Tenki
Bayarlalaa
Nirringrazzjak
Obrigado
Salamat
Saha
Multumesc
CámOn
Gracie
GratiasAgo
TänanVäga
Tak
Sagolun
Motashakkeram
KopKhunKha
Dankie
Aciū
GratiasAgimus
Barkal
Mauruuru
Kiitos
Chnorakaloutioun
KhobChaiDeu
Gratzias
Dhanyavaad
Aabhar