

USC



UNIVERSITY OF SOUTH CAROLINA



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

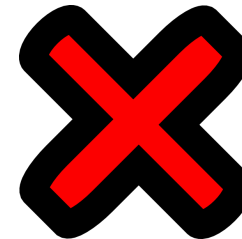
- Chart of Accounts/Crosswalk
- Purchase Methods
- Creating Requisitions
- Creating a Purchase Requisition
 - Item Descriptions
 - Categories
 - Suppliers
 - Adding Comments and Attachments
- Types of Purchase Requisitions
- Reviewing a Purchase Order
- Exercise 1
- Managing Requisitions
- Add to Favorites
- 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.

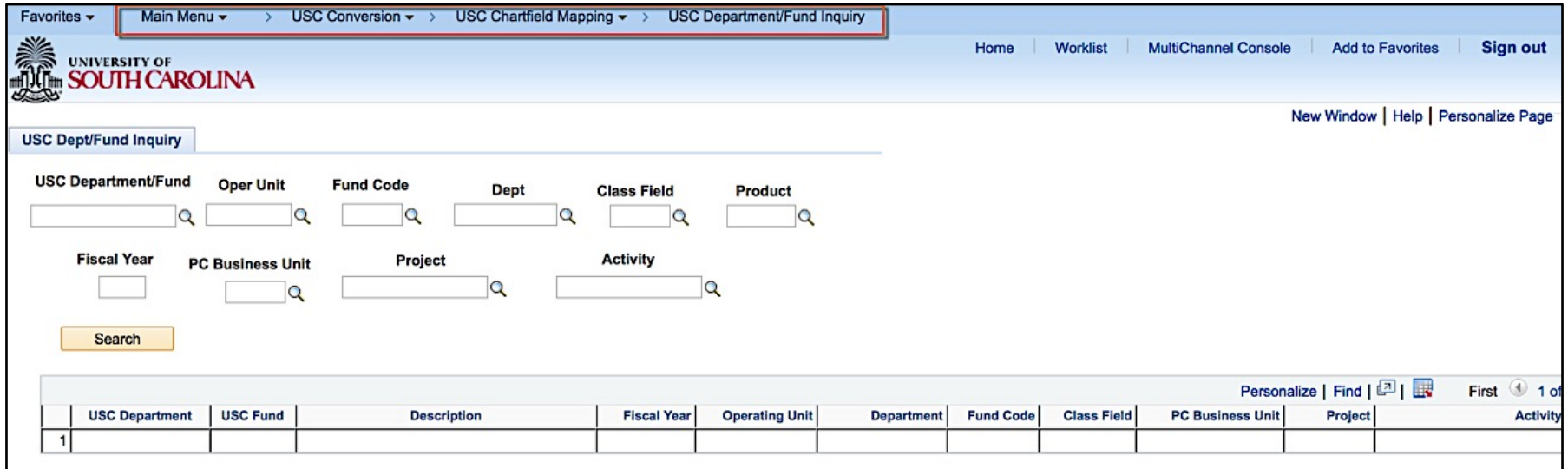
Exceptions:

- 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

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



The screenshot shows the USC Department/Fund Inquiry page. At the top, there is a breadcrumb trail: Main Menu > USC Conversion > USC Chartfield Mapping > USC Department/Fund Inquiry. The University of South Carolina logo is on the left, and navigation links like Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out are on the right. Below the breadcrumb, there are search fields for USC Department/Fund, Oper Unit, Fund Code, Dept, Class Field, and Product. A second row of search fields includes Fiscal Year, PC Business Unit, Project, and Activity. A yellow Search button is located below these fields. At the bottom, a table displays search results with columns for USC Department, USC Fund, Description, Fiscal Year, Operating Unit, Department, Fund Code, Class Field, PC Business Unit, Project, and Activity. The first row shows a '1' in the first column.

USC Department	USC Fund	Description	Fiscal Year	Operating Unit	Department	Fund Code	Class Field	PC Business Unit	Project	Activity
1										

USC Chartfield Mapping

- 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**.

USC Dept/Fund Inquiry

	USC Department	USC Fund	Description	Fiscal Year	Operating Unit	Department	Fund Code	Class Field	PC Business Unit	Project	Activity
1											

Personalize | Find | First 1 of

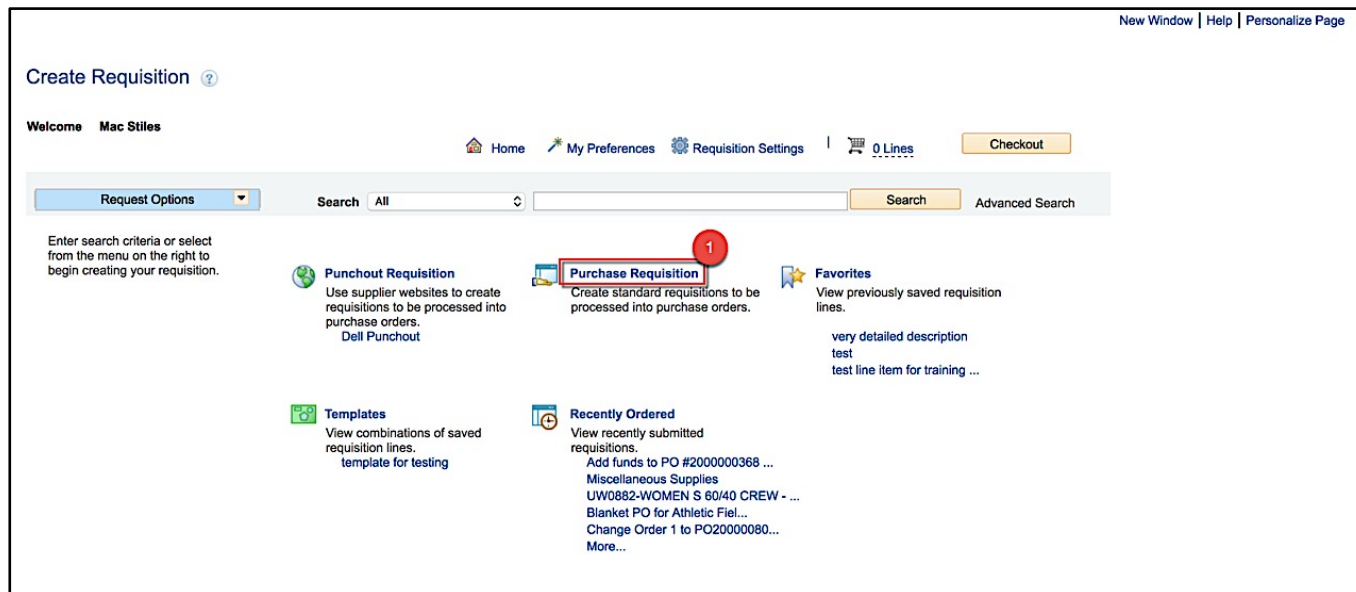
Purchase Requisition

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.

Purchase Requisition 

Enter information for your requisition line item.

Item Details

*Item Description	<input type="text" value="MacBook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage"/>	
*Price	<input type="text" value="1190.00"/>	
*Quantity	<input type="text" value="11"/>	
*Category	<input type="text" value=""/> 	
*Currency	<input type="text" value="USD"/>	
*Unit of Measure	<input type="text" value="EA"/> 	
Due Date	<input type="text" value=""/> 	

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:

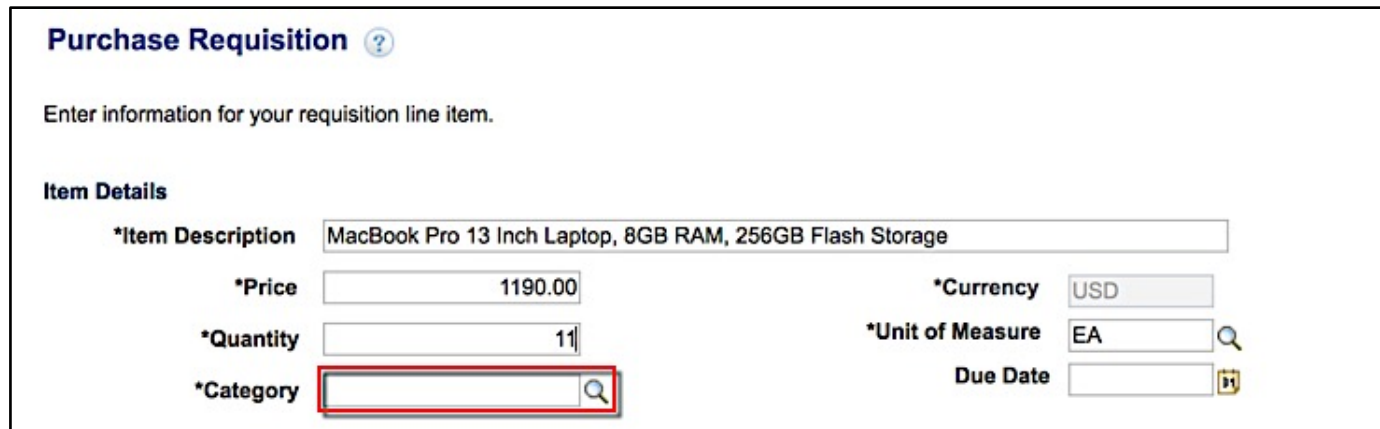
- Category Tree
- “Find” button




Selecting a Category

Using the Category Tree:



- Click the **Category Lookup** icon.



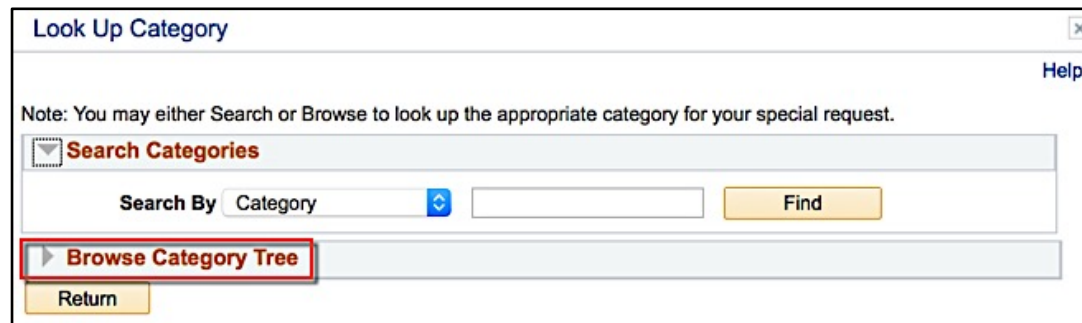
Purchase Requisition 


Enter information for your requisition line item.

Item Details

*Item Description	MacBook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage		
*Price	1190.00	*Currency	USD
*Quantity	11	*Unit of Measure	EA 
*Category	<input type="text" value=""/>	Due Date	<input type="text" value=""/> 

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




Look Up Category 

[Help](#)

Note: You may either Search or Browse to look up the appropriate category for your special request.

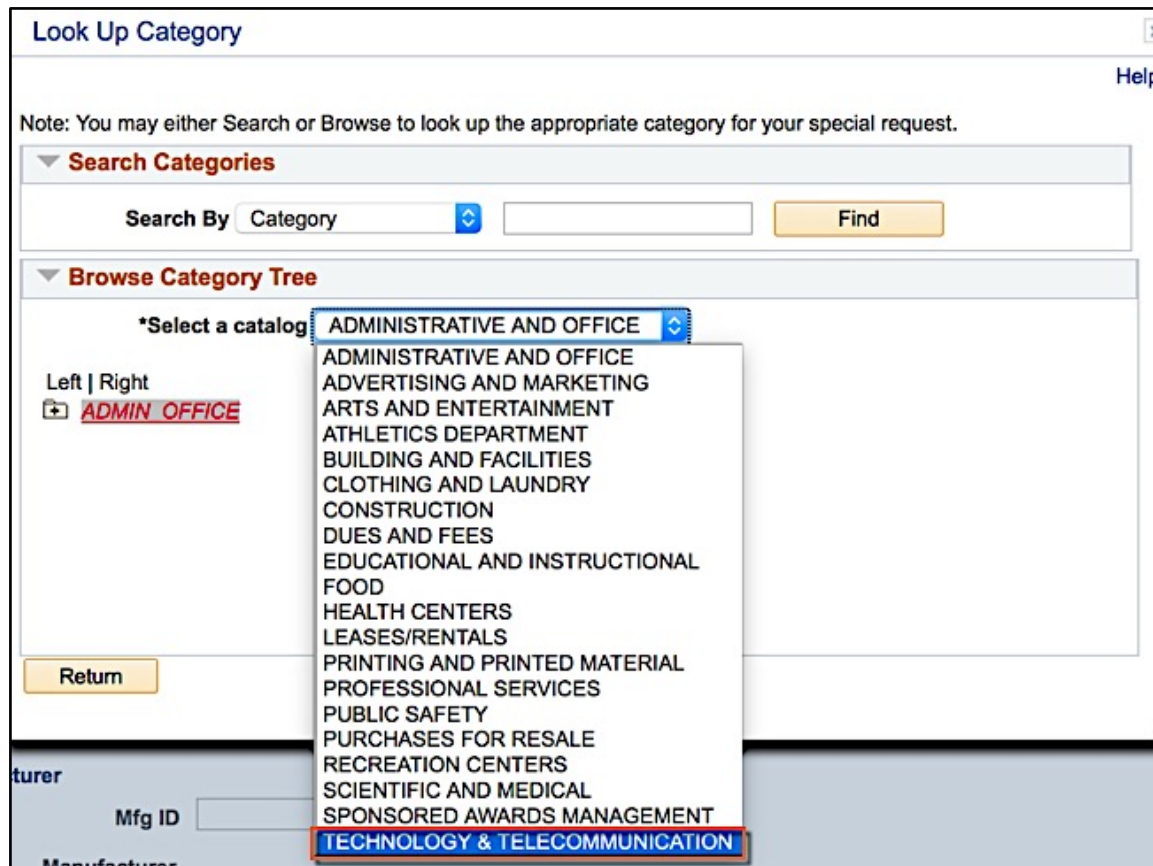
Search Categories

Search By 

Browse Category Tree

Selecting a Category

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



Look Up Category x

[Help](#)

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Browse Category Tree

*Select a catalog

Left | Right

ADMIN OFFICE

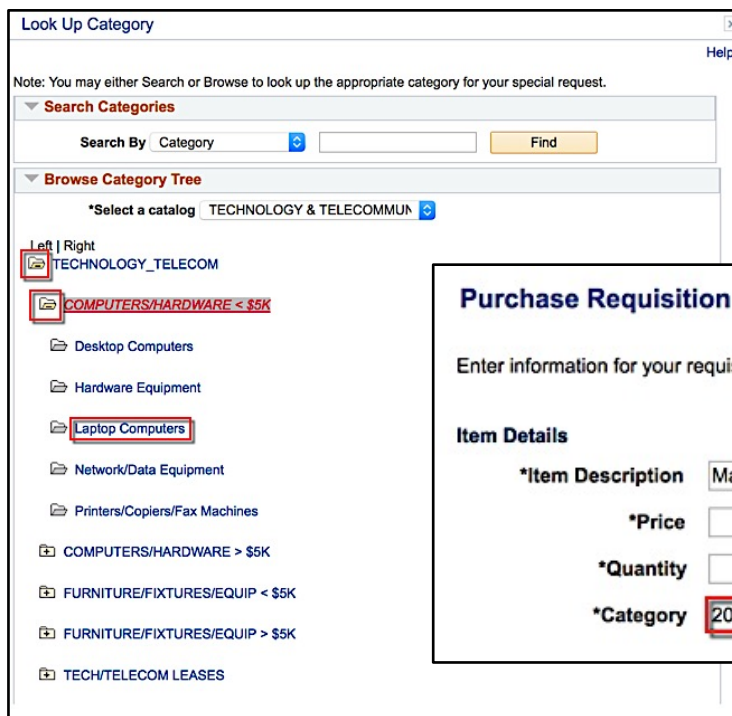
Manufacturer

Mfg ID

TECHNOLOGY & TELECOMMUNICATION

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.



Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

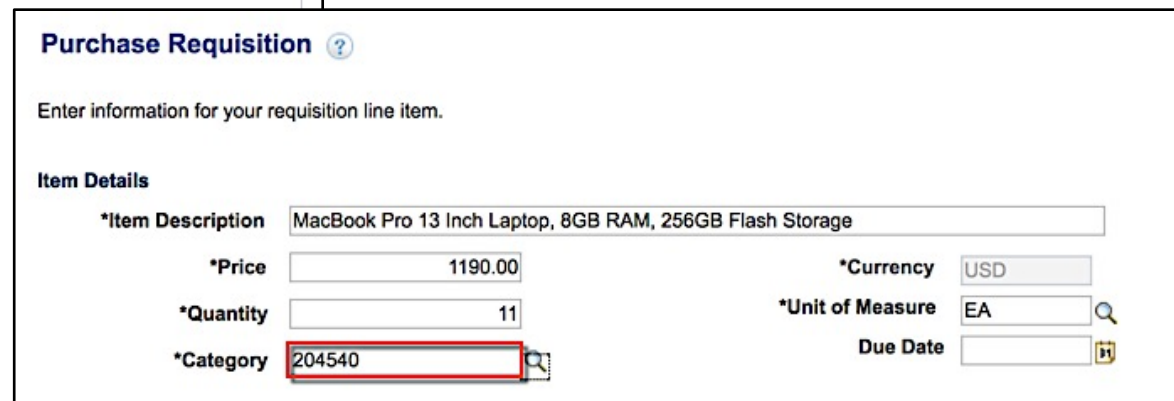
Search By Category Find

Browse Category Tree

*Select a catalog TECHNOLOGY & TELECOMMUN

Left | Right

- TECHNOLOGY_TELECOM
- COMPUTERS/HARDWARE < \$5K**
 - Desktop Computers
 - Hardware Equipment
 - Laptop Computers**
 - Network/Data Equipment
 - Printers/Copiers/Fax Machines
- COMPUTERS/HARDWARE > \$5K
- FURNITURE/FIXTURES/EQUIP < \$5K
- FURNITURE/FIXTURES/EQUIP > \$5K
- TECH/TELECOM LEASES



Purchase Requisition ?

Enter information for your requisition line item.

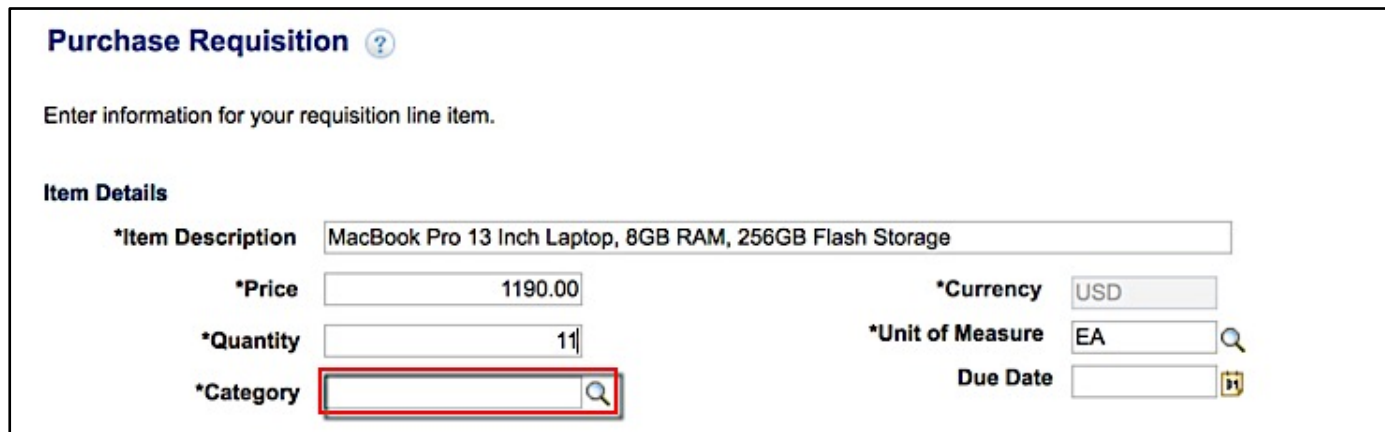
Item Details


*Item Description	MacBook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage		
*Price	1190.00	*Currency	USD
*Quantity	11	*Unit of Measure	EA
*Category	204540	Due Date	

Selecting a Category

Using the Find option:



- Click the **Category Lookup** icon.



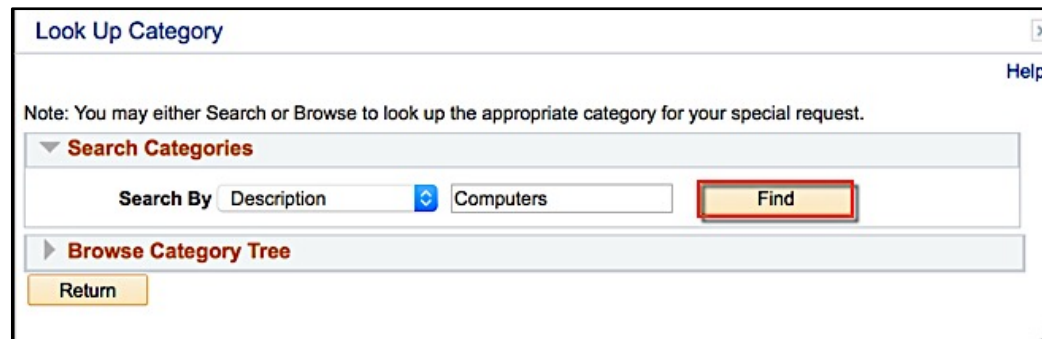
Purchase Requisition 


Enter information for your requisition line item.

Item Details

*Item Description	MacBook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage		
*Price	1190.00	*Currency	USD
*Quantity	11	*Unit of Measure	EA 
*Category	<input type="text" value=""/>	Due Date	<input type="text" value=""/> 

- Click the **Find** button.




Look Up Category 

[Help](#)

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ **Search Categories**

Search By: Description  Computers **Find**

▶ **Browse Category Tree**

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.

Look Up Category Help

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ **Search Categories**

Search By

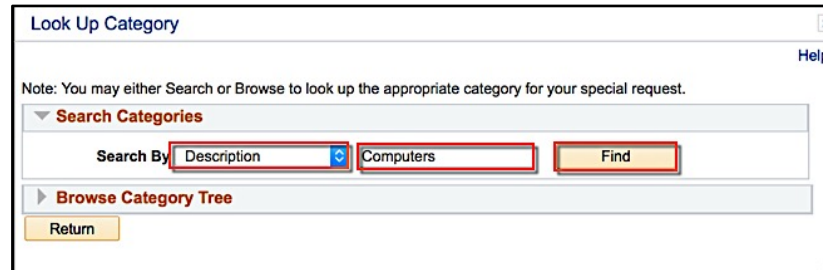
Categories Personalize | Find | View All | First 1-4 of 4 Last

	Catalog▲	Category▲	Description▲	Find in Tree
1	SC_PO_TECH_TELECOM	204530	Desktop Computers	
2	SC_PO_TECH_TELECOM	20453A	Desktop Computers (Asset)	
3	SC_PO_TECH_TELECOM	204540	Laptop Computers	
4	SC_PO_TECH_TELECOM	20454A	Laptop Computers (Asset)	

► **Browse Category Tree**

Selecting a Category

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



Look Up Category

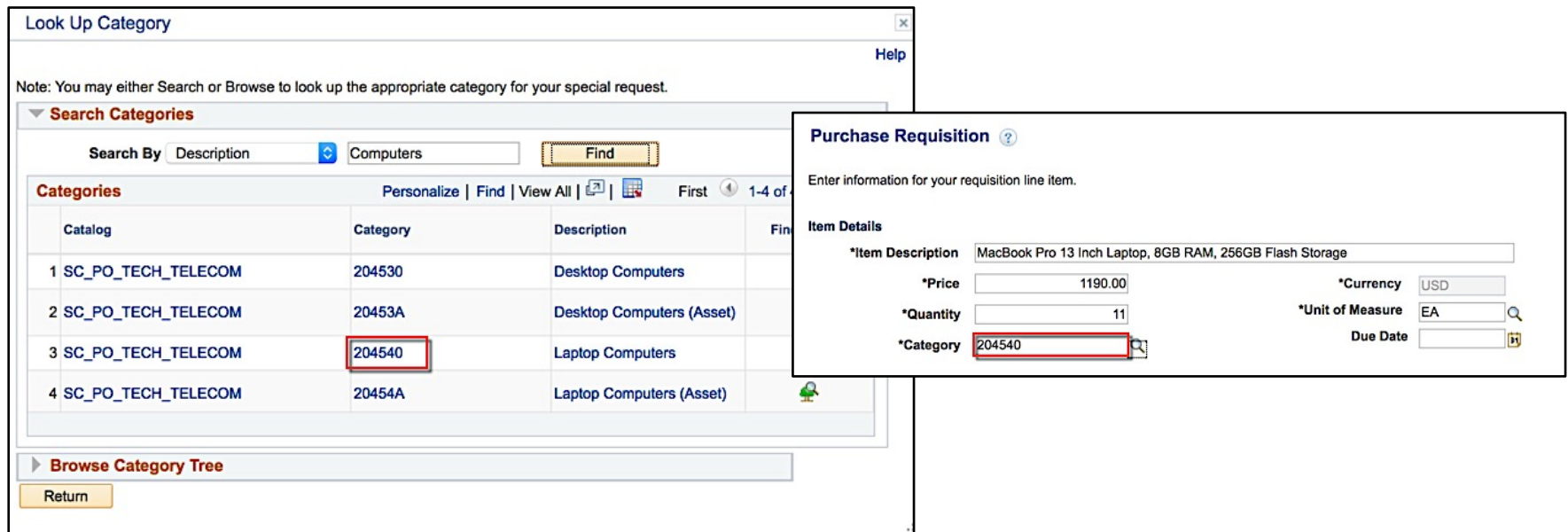
Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Browse Category Tree

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



Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Categories

Catalog	Category	Description	Fin
1 SC_PO_TECH_TELECOM	204530	Desktop Computers	
2 SC_PO_TECH_TELECOM	20453A	Desktop Computers (Asset)	
3 SC_PO_TECH_TELECOM	204540	Laptop Computers	
4 SC_PO_TECH_TELECOM	20454A	Laptop Computers (Asset)	

Browse Category Tree

Purchase Requisition

Enter information for your requisition line item.

Item Details

*Item Description: MacBook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage

*Price: 1190.00

*Quantity: 11

*Category: 204540

*Currency: USD

*Unit of Measure: EA

Due Date:

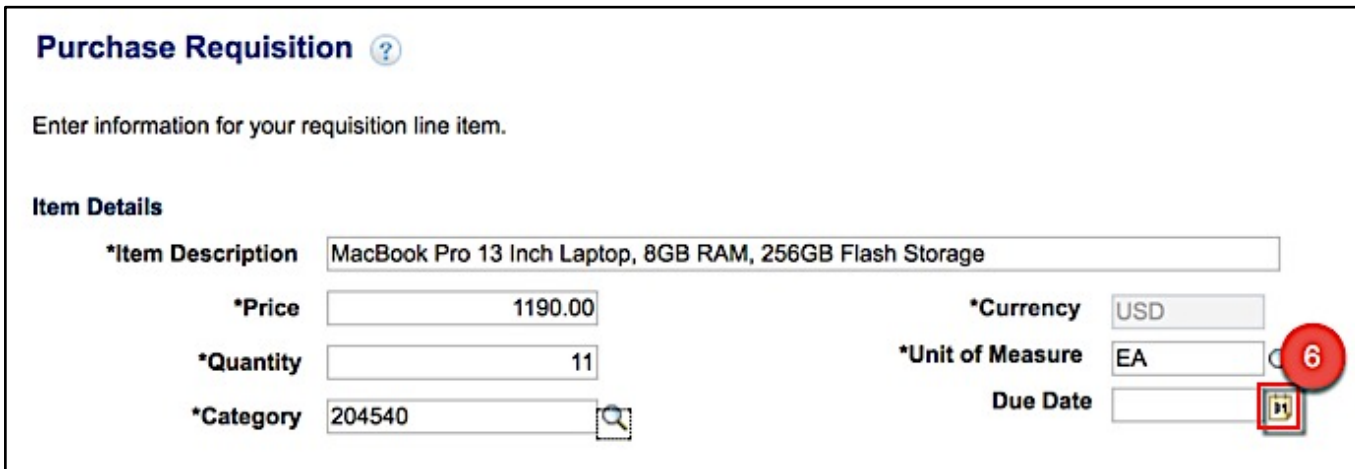
Selecting a Due Date

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.



Purchase Requisition ?

Enter information for your requisition line item.

Item Details

*Item Description	MacBook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage		
*Price	1190.00	*Currency	USD
*Quantity	11	*Unit of Measure	EA
*Category	204540	Due Date	<input type="text"/>

The screenshot shows a 'Purchase Requisition' form. The 'Due Date' field is highlighted with a red box and a red circle containing the number '6', indicating the step to click the 'Choose a Date' icon.

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



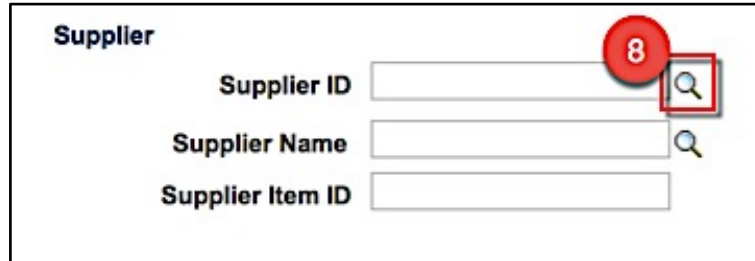
The screenshot shows a date picker calendar for June 2016. The date '28' is highlighted with a red box and a red circle containing the number '7', indicating the step to click the day.

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

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

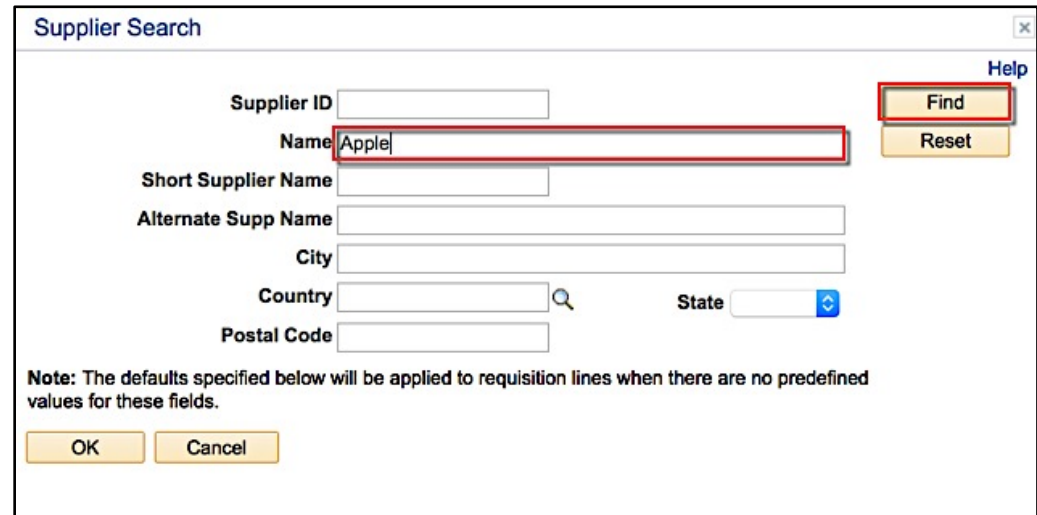
Selecting a Supplier

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



A snippet of a form titled "Supplier" with three input fields: "Supplier ID", "Supplier Name", and "Supplier Item ID". Each field has a magnifying glass icon to its right. A red circle with the number "8" is positioned over the magnifying glass icon for the "Supplier ID" field, and a red box highlights the magnifying glass icon for the "Supplier Name" field.

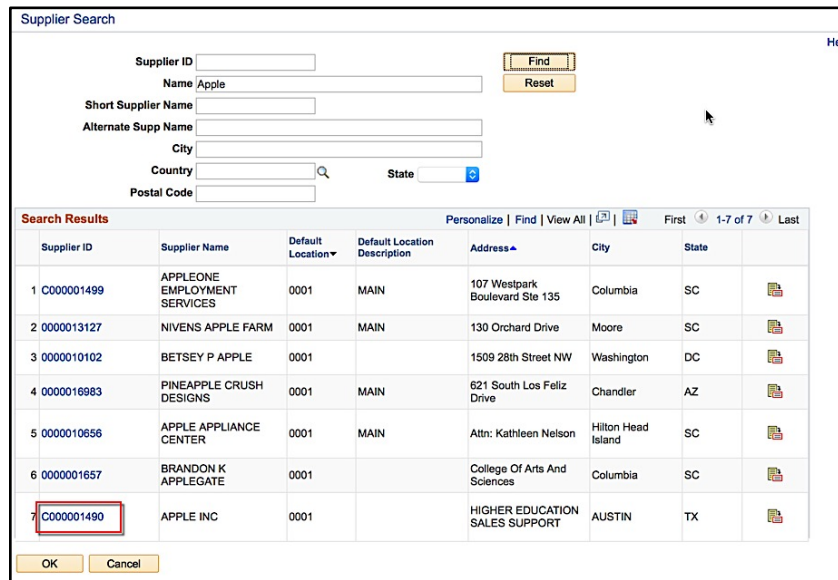
- Click in the **Name** field and enter any number of letters relating to the suppliers full name.
- Click the **Find** button.



A screenshot of a "Supplier Search" dialog box. It contains several input fields: "Supplier ID", "Name" (with "Apple" entered), "Short Supplier Name", "Alternate Supp Name", "City", "Country" (with a magnifying glass icon), "State" (with a dropdown arrow), and "Postal Code". On the right side, there are "Find" and "Reset" buttons. At the bottom, there are "OK" and "Cancel" buttons. A "Note" at the bottom states: "Note: The defaults specified below will be applied to requisition lines when there are no predefined values for these fields." A red box highlights the "Name" field and 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

Supplier ID Find

Name Apple Reset

Short Supplier Name

Alternate Supp Name

City

Country State

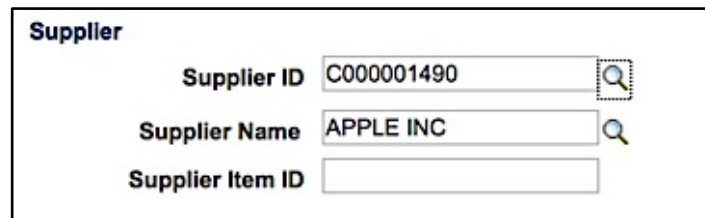
Postal Code

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 APPLGATE	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.



Supplier

Supplier ID C000001490

Supplier Name APPLE INC

Supplier Item ID

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.

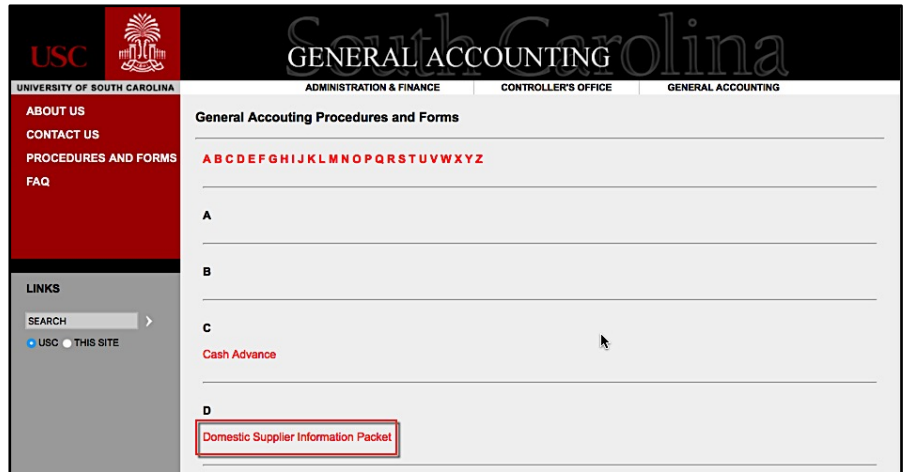
- Use apsupplr@mailbox.sc.edu to:
 - Request a Supplier
 - Update a Supplier
 - Send W-9's

- 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.

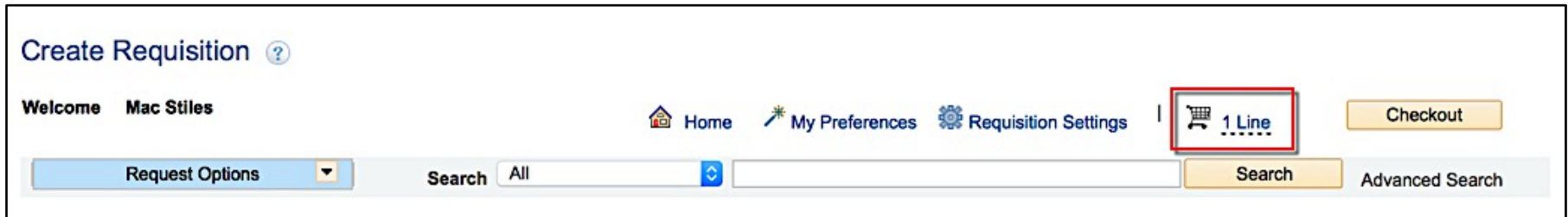


Checking Out

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.

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit	<input type="text" value="USC01"/>	University of South Carolina
*Requester	<input type="text" value="STILESJ2"/>	Mac Stiles
*Currency	<input type="text" value="USD"/>	

Requisition Name

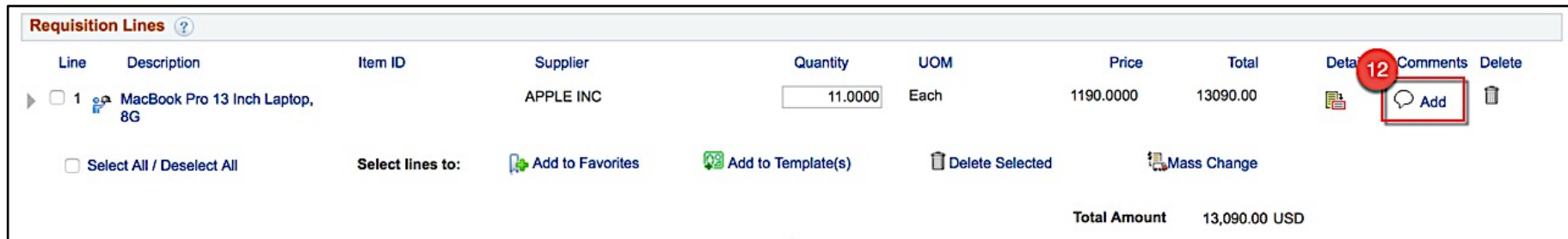
Priority

Cart Summary: Total Amount 13,090.00 USD

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.



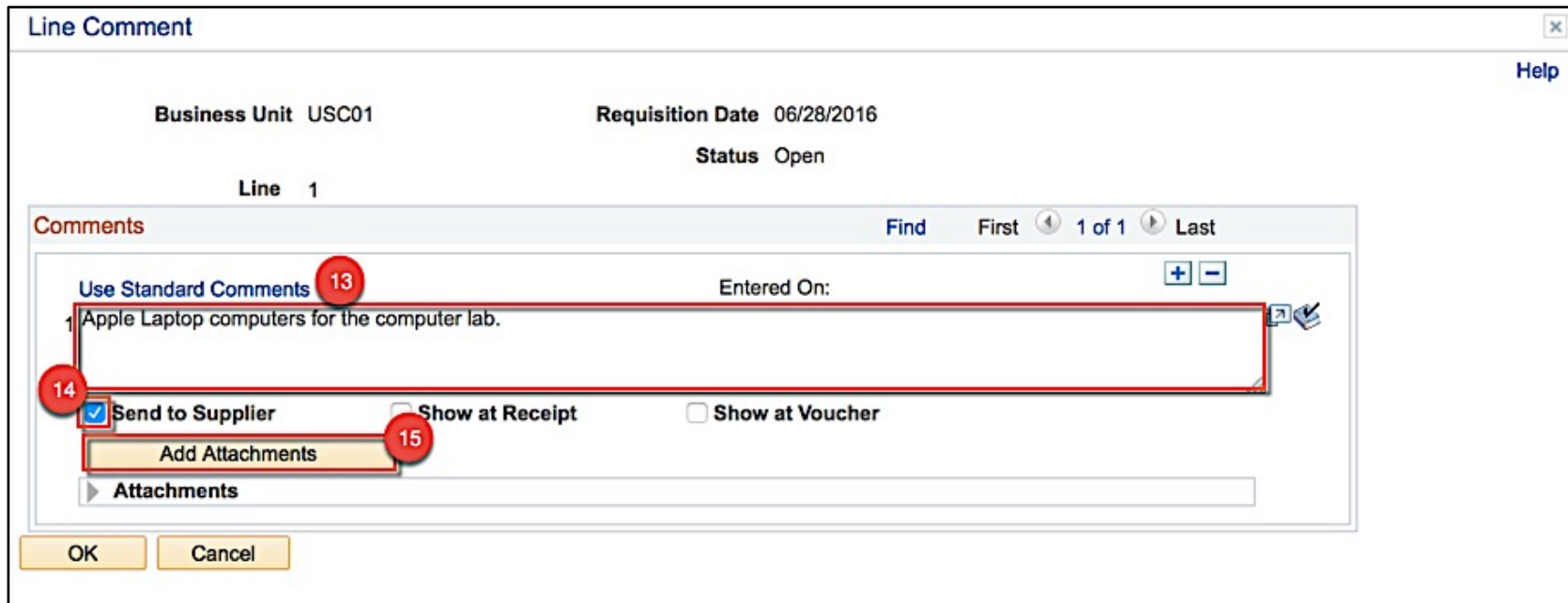
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	MacBook Pro 13 Inch Laptop, 8G		APPLE INC	11.0000	Each	1190.0000	13090.00		12 Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 13,090.00 USD

Adding Comments and Attachments

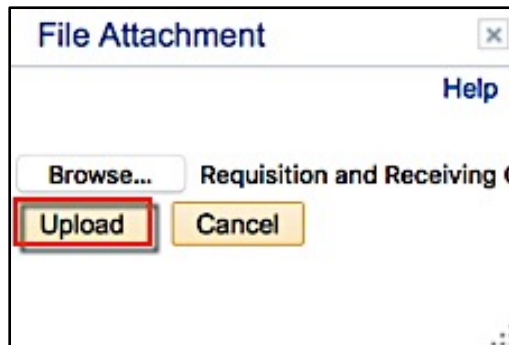
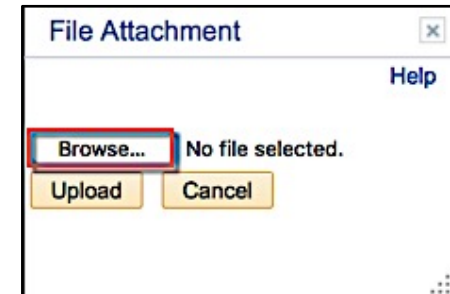
13. Click in the **Use Standard Comments** field and enter a comment you would like supplier, approver, and buyer to see.
14. If you want the supplier to see the comment, click in the **Send to Supplier** box to select it.
15. Click the **Add Attachments** button.



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

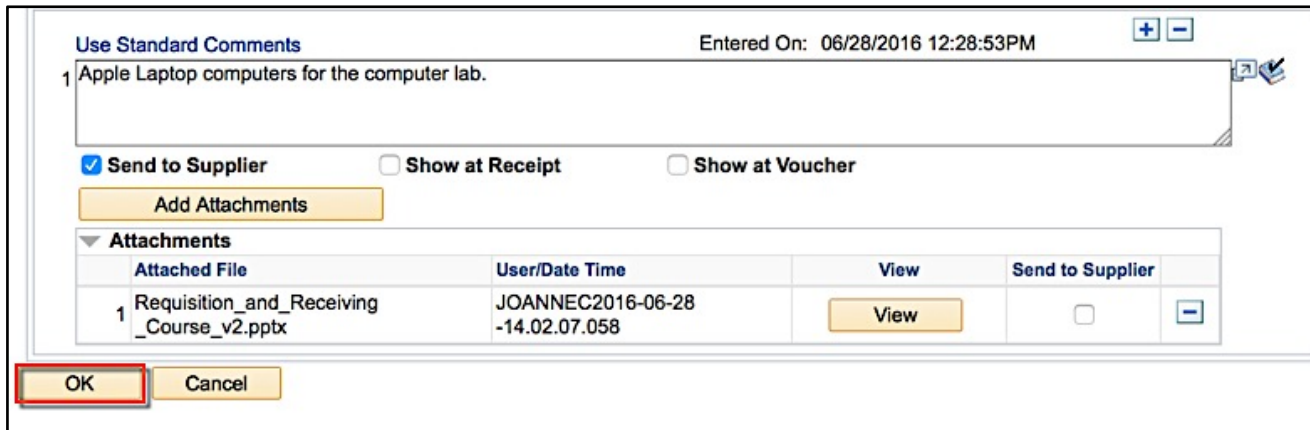
Adding Comments and Attachments

- 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.



Use Standard Comments Entered On: 06/28/2016 12:28:53PM

1 Apple Laptop computers for the computer lab.

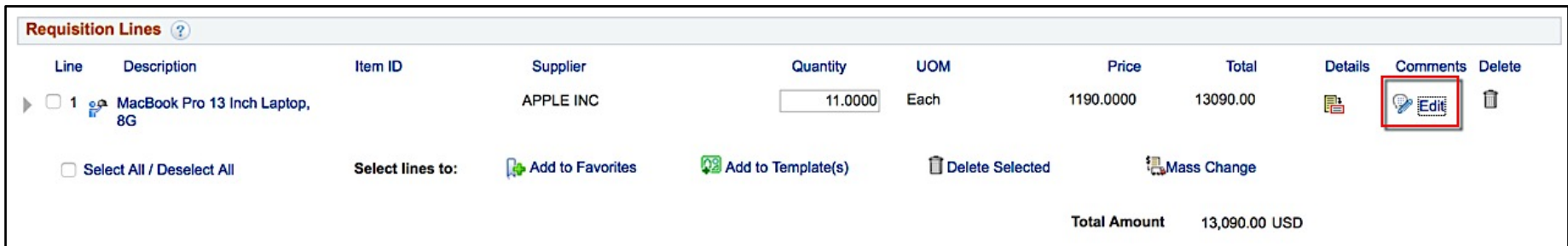
Send to Supplier Show at Receipt Show at Voucher


Add Attachments

Attachments	
Attached File	User/Date Time
1 Requisition_and_Receiving_Course_v2.pptx	JOANNEC2016-06-28 -14.02.07.058

OK Cancel

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



Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	MacBook Pro 13 Inch Laptop, 8G		APPLE INC	11.0000	Each	1190.0000	13090.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 13,090.00 USD

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.

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	MacBook Pro 13 Inch Laptop, 8G		APPLE INC	11.0000	Each	1190.0000	13090.00		Add	

Shipping Line 1

*Ship To 16

Address 1600 HAMPTON STREET
COLUMBIA, SC 29208

Attention To

Due Date 31

Ship Via

Freight Terms

Add Shipto Comments

Add One Time Address

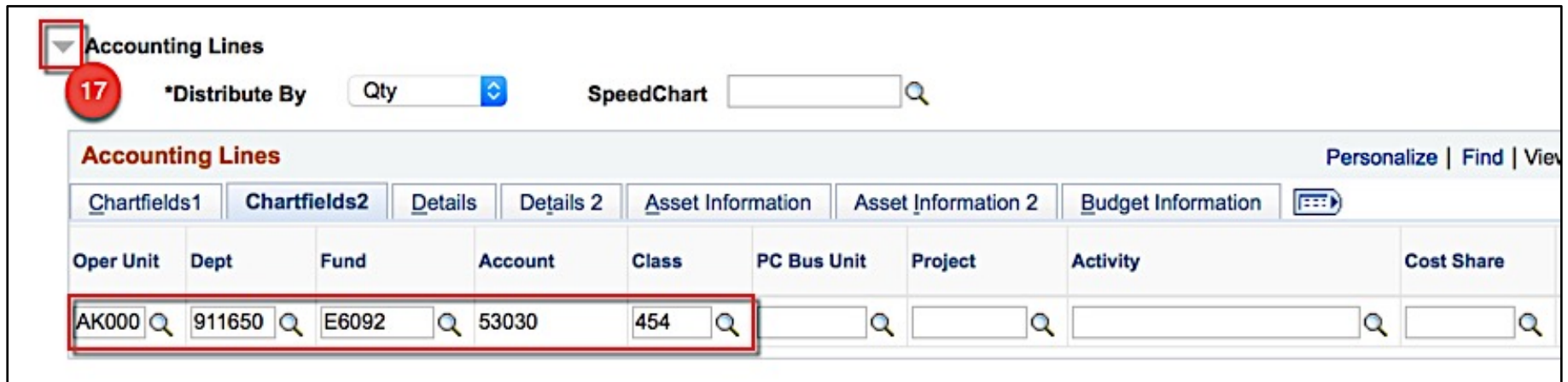
Price Adjustment

Pegging Inquiry

Pegging Workbench

Save and Submit the Request

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

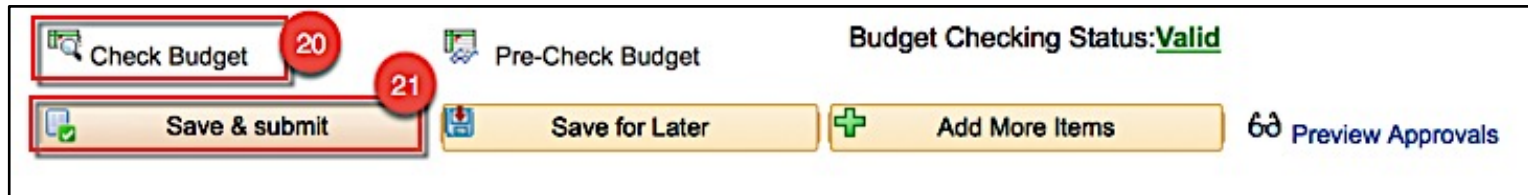


Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Cost Share
AK000	911650	E6092	53030	454				

- 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** [Start New Path](#)
MacBook Pro 13 Inch Laptop, 8GB RAM, 256 GB Flash Storage

Level 1 Approval

Pending
Multiple Approvers
Department Approver Level 1 [+](#)

Department Approval Level 2

▼ **Line 1: Awaiting Further Approvals** [Start New Path](#)
MacBook Pro 13 Inch Laptop, 8GB RAM, 256 GB Flash Storage

Level 2 Approval

Not Routed

Approval Workflow

Review the Approval Workflow for any Accounting/Purchasing Exceptions.

Preview Approvals

Accounting Exceptions

Line 1: Initiated Start New Path
 GNS - FURNISH / INSTALL TEMPORARY BOILER - CAPSTONE WATER TANK REPLACEMENT

Acct combination is not valid

Not Routed
 Multiple Approvers
 Purchasing Approver - Columbia

Purchasing Exceptions

Line 1: Initiated Start New Path
 GNS - FURNISH / INSTALL TEMPORARY BOILER - CAPSTONE WATER TANK REPLACEMENT

No supplier ID was entered

Not Routed
 Multiple Approvers
 Purchasing Approver - Columbia

Header comments exist

Not Routed
 Multiple Approvers
 Purchasing Approver - Columbia

Return Apply Approval Changes

- 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

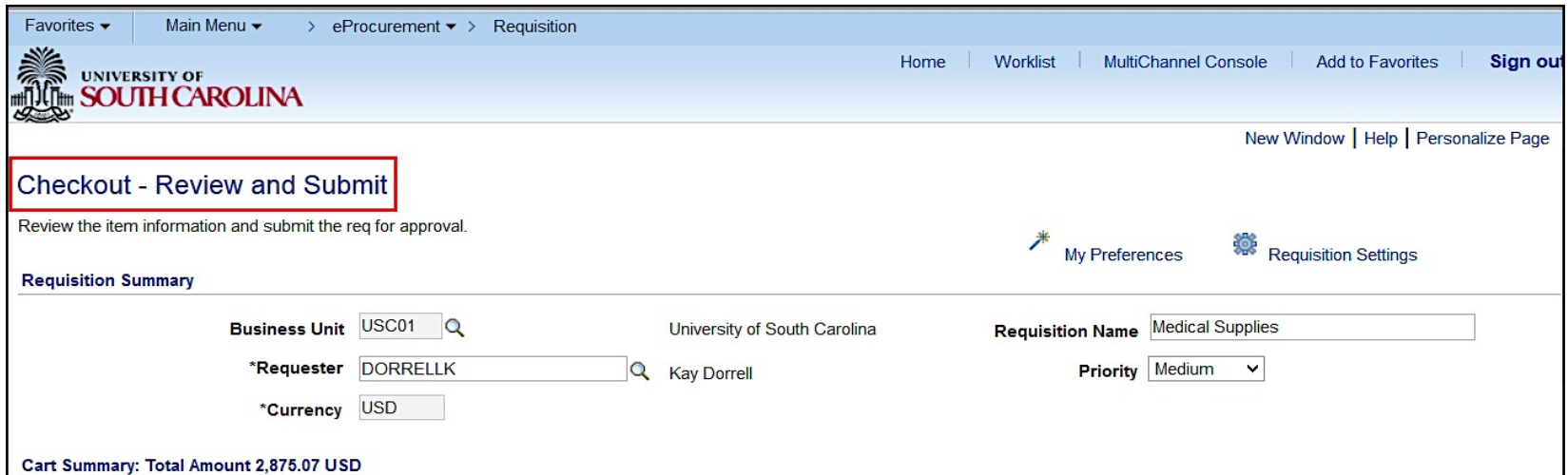
Amount Only Purchase Requisition

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

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



Navigation: Favorites ▾ | Main Menu ▾ > eProcurement ▾ > Requisition

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

UNIVERSITY OF SOUTH CAROLINA

New Window | Help | Personalize Page

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit	<input type="text" value="USC01"/> 🔍	University of South Carolina	Requisition Name	<input type="text" value="Medical Supplies"/>
*Requester	<input type="text" value="DORRELLK"/> 🔍	Kay Dorrell	Priority	<input type="text" value="Medium"/> ▾
*Currency	<input type="text" value="USD"/>			

Cart Summary: Total Amount 2,875.07 USD

Amount Only Purchase Requisition

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



The screenshot shows the 'Requisition Lines' interface. A table lists requisition lines with columns for Line, Description, Item ID, Supplier, Quantity, UOM, Price, Total, Amt Only, Details, Comments, and Delete. The first line is selected, and the 'Amt Only' checkbox is checked. Below the table, shipping details are visible, including the ship-to address and attention to Aimee B. Rish.

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Amt Only	Details	Comments	Delete
1	Professional Services Basic Se		CUMMING CONSTRUCTION MANAGEMENT	1.0000	Batch Lot	406,422.24000	406422.24	<input checked="" type="checkbox"/>		Add	

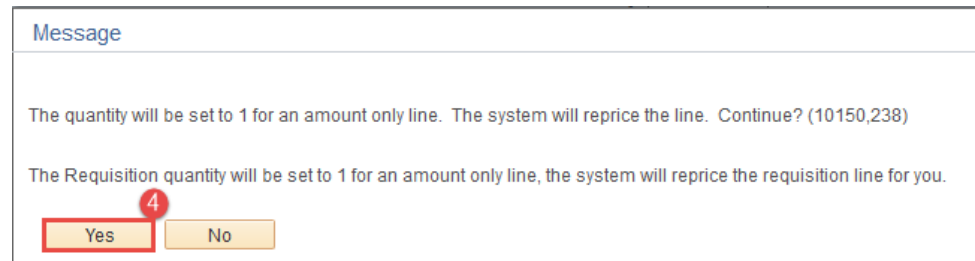
Shipping Line 1

*Ship To 083
Address FACILITIES CENTER
743 GREENE STREET
COLUMBIA, SC 29208
Attention To Aimee B. Rish
Due Date 06/30/2016

- 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.



The screenshot shows two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box and a red circle containing the number 3.



The screenshot shows a 'Message' dialog box with the following text: 'The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)' and 'The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.' At the bottom, there are 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a red box and a red circle containing the number 4.

- 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" Jarvis, Aimee Rish, Clarissa Clark state contract #4400007378.

Special Requests 

Enter information about the non-catalog item you would like to order:

Item Details

*Item Description	<input toil"="" type="text" value="BLANKET ORDER EFFECTIVE 7/1/16 THRU 6/30/17 MISCELLANEOUS SUPPLIES "/>
*Price	<input type="text"/>
*Quantity	<input type="text"/>
*Category	<input type="text"/>
*Currency	<input type="text" value="USD"/>
*Unit of Measure	<input type="text" value="EA"/>
Due Date	<input type="text"/>

- 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.

The screenshot displays the 'Checkout - Review and Submit' page in the University of South Carolina's eProcurement system. The page header includes navigation links for 'Home', 'Worklist', and 'MultiChannel Console'. The main content area is titled 'Checkout - Review and Submit' and contains a sub-header 'Requisition Summary'. Below this, there are several input fields and labels: 'Business Unit' (USC01), 'University of South Carolina', '*Requester' (STILESJ2), 'Mac Stiles', '*Currency' (USD), 'Requisition Name' (2017 Apple Order), and 'Priority' (Medium). A 'Cart Summary' at the bottom left indicates a total amount of 13,090.00 USD. The 'Checkout - Review and Submit' title is highlighted with a red box.

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.

The screenshot shows the "Accounting Lines" interface. At the top, there is a dropdown menu for "Accounting Lines" and a search bar for "SpeedChart". Below this is a table with several tabs: "Chartfields1", "Chartfields2", "Details", "Details 2", "Asset Information", "Asset Information 2", and "Budget Information". The "Chartfields2" tab is selected. The table has columns for "Oper Unit", "Dept", "Fund", "Account", "Class", "PC Bus Unit", "Project", "Activity", "Cost Share", "Product", and "Funding Source". A red circle with the number "1" points to the "*Distribute By" dropdown menu. A red circle with the number "2" points to the "Chartfields2" tab. A red circle with the number "3" points to the "Oper Unit" column. A red circle with the number "4" points to the "Cost Share" column. The table contains one row of data: CL040, 155416, A0001, 53030, 202, [blank], [blank], [blank], 10004538, [blank], [blank].

- 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.

The screenshot displays the 'Checkout - Review and Submit' page in the University of South Carolina's eProcurement system. The page header includes navigation links for 'Home', 'Worklist', and 'MultiChannel Console'. The main content area is titled 'Checkout - Review and Submit' and contains a sub-header 'Review the item information and submit the req for approval.' Below this, there are links for 'My Preferences' and 'Requisition Settings'. The 'Requisition Summary' section shows the following details: Business Unit (USC01), University of South Carolina, Requisition Name (2017 Apple Order), *Requester (STILESJ2, Mac Stiles), *Currency (USD), and Priority (Medium). At the bottom, a 'Cart Summary' indicates a total amount of 13,090.00 USD.

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**.


The screenshot shows the "Accounting Lines" interface. At the top, there are fields for "*Distribute By" (set to "Qty") and "SpeedChart". Below this is a tabbed interface with "ChartFields2" selected. The "ChartFields2" tab contains a table with columns for "Oper Unit", "Dept", "Fund", "Account", "Class", "PC Bus Unit", "Project", "Activity", "Cost Share", "Product", and "Funding Source". The "PC Bus Unit", "Project", and "Activity" columns are highlighted with a red box. The values in these columns are "USCSP", "10001005", and "1" respectively. The "Oper Unit" is "CL040", "Dept" is "155416", "Fund" is "A0001", "Account" is "53030", and "Class" is "202".

Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Cost Share	Product	Funding Source
CL040	155416	A0001	53030	202	USCSP	10001005	1			

- 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

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

Purchase Order

Page: 1 of 2

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 29189-
 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:	592.46	
				SC2160 (8%)		
	Please contact Ann Derrick 24 hours prior to delivery. Office No. 803-777-5811			Schedule Total	7,998.23	
				Item Total	7,998.23	
				Total SUT Code	592.46	
				SC2160 (8%)		
				Total PO Amount	7,998.23	

Time to Practice



Exercise #1

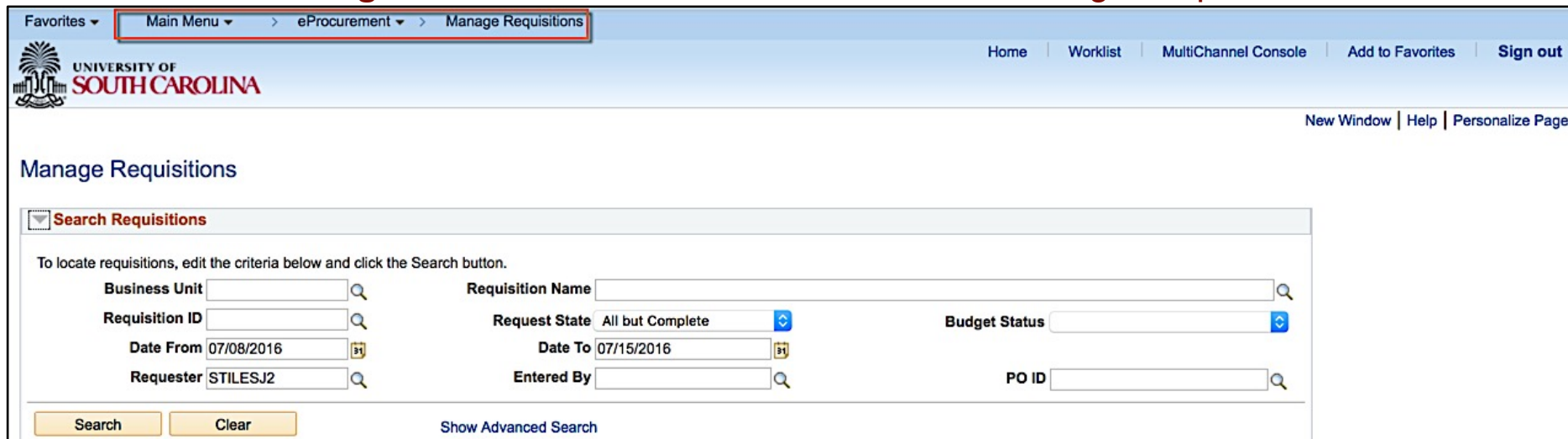
Creating a Quantity Based Requisition Line

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



The screenshot shows the 'Manage Requisitions' page in the University of South Carolina eProcurement system. The breadcrumb navigation at the top reads 'Main Menu > eProcurement > Manage Requisitions'. The page header includes the University of South Carolina logo and navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. On the right side, there are links for 'New Window', 'Help', and 'Personalize Page'. The main content area is titled 'Manage Requisitions' and features a 'Search Requisitions' section. Below this title, a message states: 'To locate requisitions, edit the criteria below and click the Search button.' The search criteria include: Business Unit, Requisition ID, Date From (07/08/2016), Requester (STILESJ2), Requisition Name, Request State (All but Complete), Date To (07/15/2016), Budget Status, Entered By, and PO ID. At the bottom of the search section, there are 'Search' and 'Clear' buttons, and a link to 'Show Advanced Search'.

Reviewing Requisition Information

- Below is an example of a Requisition Lifespan.

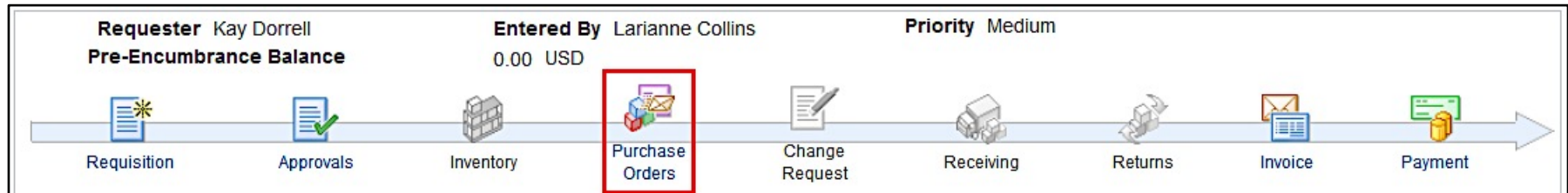
Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
1000014012	SCCSS 12/14/15	USC01	12/14/2015	PO(s) Dispatched	Valid	350.00 USD	[Select Action]	Go
Requester Kay Dorrell		Entered By Larianne Collins		Priority Medium				
Pre-Encumbrance Balance		0.00 USD						
Request Lifespan:								
Line Information							Personalize Find [Icons] First 1 of 1 Last	
Line	Description	Status	Price	Quantity	UOM	Supplier		
1	SCCSS Vending Registration a...	PO Dispatched	350.00000 USD	1.0000	EA	SC COUNCIL FOR THE SOCIAL STUDIES	✘	

- 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							
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.

Business Unit USC01

Requisition information Find **View All** First 1 of 4 Last

Requisition ID 1000009152 Line Number 1

Business Unit USC01

Requisition information Find **View 1** First 1-4 of 4 Last

Requisition ID 1000009152 Line Number 1

PO information Find | View All First 1 of 1 Last

PO Number 2000010926 Buyer HULON Change Order
 PO Date 10/12/2015 Supplier ID 0000009868 Terms N30 PO Status Dispatched

Lines Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		Invoice # 0002415 - check compressor	307.20 USD	EA	1.0000	Approved	[Print]

Requisition ID 1000009152 Line Number 2

PO information Find | View All First 1 of 1 Last

PO Number 2000010926 Buyer HULON Change Order
 PO Date 10/12/2015 Supplier ID 0000009868 Terms N30 PO Status Dispatched

Lines Personalize | Find | View All | [Print] | [Grid] First 1 of 1 Last

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
2		Inv # 24156 - Motor check	285.00 USD	EA	1.0000	Approved	[Print]

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.

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

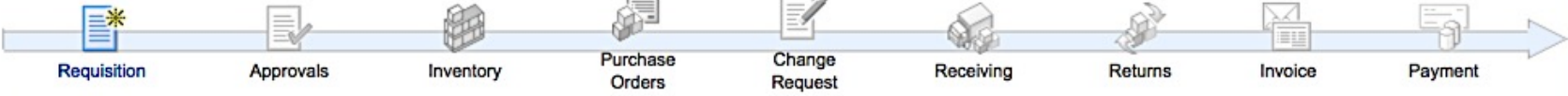
Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000026387	2017 Apple Order	USC01	06/30/2016	Open	Not Chk'd	13,090.00 USD	<div data-bbox="1400 821 1729 1021"> <ul style="list-style-type: none"> Cancel Check Budget Copy Edit PreCheck Budget View Print [Select Action] </div>

Requester Mac Stiles
Pre-Encumbrance Balance

Entered By Joanne Callahan
0.00 USD

Priority Medium

Request Lifespan:

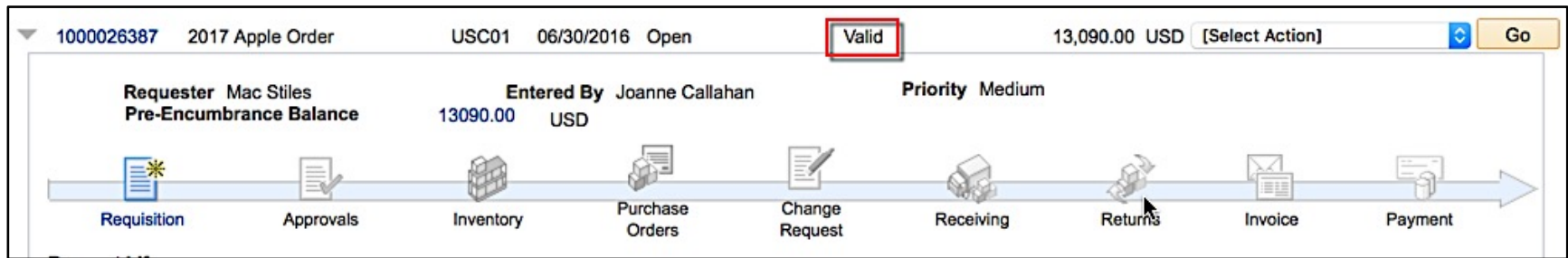


Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Go

Budget Checking a Requisition

- Notice the Budget Status is now "Valid".



The screenshot displays a requisition record with the following details:

- Requisition ID: 1000026387
- Description: 2017 Apple Order
- Account: USC01
- Date: 06/30/2016
- Status: Open
- Budget Status: **Valid** (highlighted in a red box)
- Amount: 13,090.00 USD
- Action: [Select Action] Go

Additional information includes:

- Requester: Mac Stiles
- Pre-Encumbrance Balance: 13090.00 USD
- Entered By: Joanne Callahan
- Priority: Medium

A workflow diagram below the details shows the following steps: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. The 'Returns' step is currently selected, indicated by a mouse cursor.

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 **X** for the line you would like to cancel.



The screenshot shows the Manage Requisition page. At the top, it displays the requester (Wende C. Miller-L:05/22/15), entered by (Wende C. Miller-L:05/22/15), and priority (High). Below this is a Pre-Encumbrance Balance of 6347.78 USD. A lifecycle diagram shows stages from Requisition to Payment. A table below lists two requisition lines. The first line, 'Dell 22 Monitor - P2217: Del...', is in a 'Pending Approval' status and has a red 'X' in the action column. A dropdown menu is open over the table, showing options: Cancel, Check Budget (highlighted), Copy, Edit, PreCheck Budget, View Print, and [Select Action].

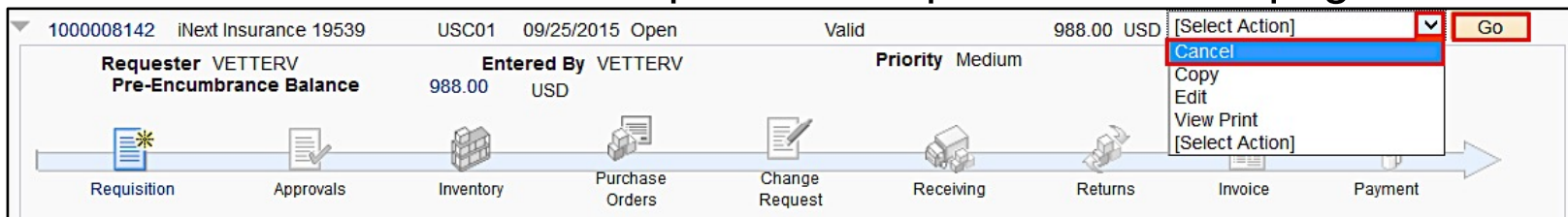
Line	Punchout Item	Description	Status	Price	Quantity	UOM	Supplier	Action
1		Dell 22 Monitor - P2217: Del...	Pending Approval	189.19000	2.0000	EA	DELL MARKETING LP	X
2		OptiPlex 7440 All-in-One Non...	Pending Approval	1193.88000	5.0000	EA	DELL MARKETING LP	X

- 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.



1000008142 iNext Insurance 19539 USC01 09/25/2015 Open Valid 988.00 USD [Select Action] [Go]

Requester VETTERV **Entered By** VETTERV **Priority** Medium
Pre-Encumbrance Balance 988.00 USD

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

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

Requisition Details for: **Joanne Callahan**

Business Unit USC01 **Date** 09/25/2015
Requisition ID 1000008142 **Status** Open
Requisition Name iNext Insurance 19539 **Total** 988.00 USD

Line Details						
Line	Item Description	Status	Price		Qty	Total
1	iNext Travel Insurance #19539	Open	988.00000	Each	1.0000	988.00

Cancel Requisition

Canceling a Requisition

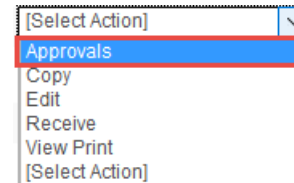
- Your requisition has been updated and on the Lifespan under Request State it says “Canceled”.
- Be sure to Check the Budget to release the pre-encumbrance.
- Notice the budget is at \$0.

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] <input type="button" value="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.



Approval Status

Business Unit USC01
 Requisition ID 1000003368
 Requisition Name Valley Sp Water_Dev_Blanket
 Requester Kay Dorrell
 Entered on 08/03/2015
 Status Approved
 Priority Medium
 Budget Status Valid

Total Amount 1,000.00 USD

Requester's Justification
 No justification entered by requester.

[View printable version](#)

Line Information ?

Review/Edit Approvers

Dept & Project Approval One

Line 1: Approved [View/Hide Comments](#)
 5 Gallon Water Bottles for Cooler - Cooler Rental Free

Approver One

Approved
 Shannon Lackey
 Requisition Dept Approval 1
 08/03/15 - 11:10 AM

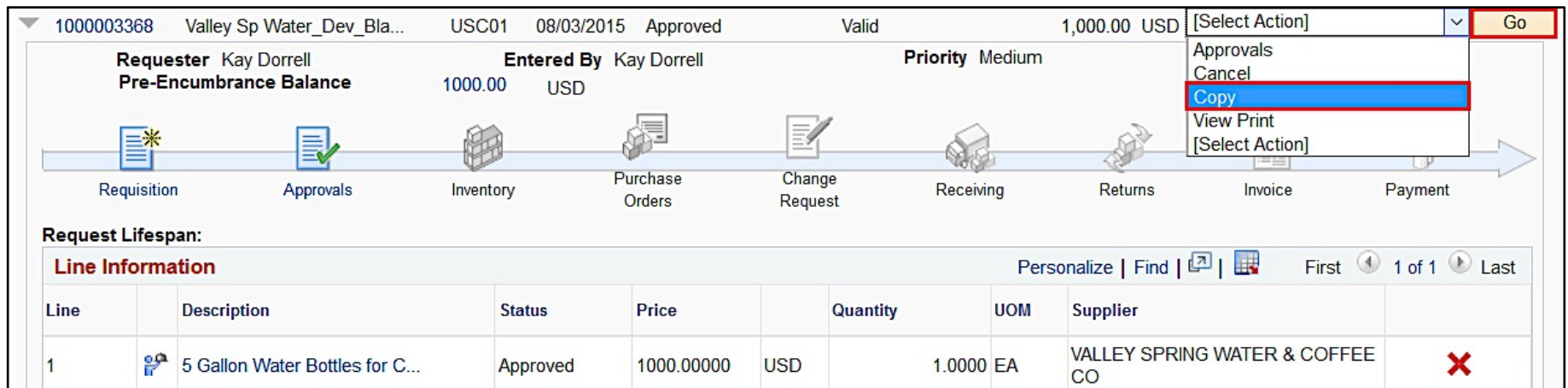
Skipped
 Kay Dorrell
 Requisition Dept Approval 1
 08/03/15 - 11:07 AM

Comments

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.



1000003368 Valley Sp Water_Dev_Bla... USC01 08/03/2015 Approved Valid 1,000.00 USD [Select Action] Go

Requester Kay Dorrell **Entered By** Kay Dorrell **Priority** Medium

Pre-Encumbrance Balance 1000.00 USD

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

Line Information Personalize | Find | First 1 of 1 Last

Line	Description	Status	Price	Quantity	UOM	Supplier
1	5 Gallon Water Bottles for C...	Approved	1000.00000 USD	1.0000	EA	VALLEY SPRING WATER & COFFEE CO

Copying a Requisition

- 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.

Cart Summary: Total Amount 1,000.00 USD

Expand lines to review shipping and accounting details + Add More Items

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ <input type="checkbox"/> 1	5 Gallon Water Bottles for Coo		VALLEY SPRING WATER & COFFEE CO	1.0000	Each	1,000.00000	1000.00		<input type="checkbox"/> Edit	<input type="checkbox"/>

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 1,000.00 USD

[Shipping Summary](#)

- Click the **Check Budget** link.

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

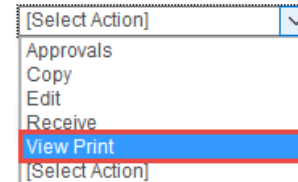
Check Budget Pre-Check Budget Budget Checking Status: **Valid**

Save & submit Save for Later + Add More Items ⌂ Preview Approvals

Printing a Requisition

To view a printout of requisition information:

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



Business Unit: USC01	Requester: DORRELLK	Status: Approved
Requisition: 1000003368	Requested By: Kay Dorrell	Currency: USD
Requisition Name: Valley Sp Water_Dev_Blanket	Entered Date: 8/3/15	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	Ship To: 173-1A06A	Address:	Shipping Quantity: 1.0000
Attention: Kay Dorrell	Due Date: 6/30/16	COL OF ENGR AND (15500)	Shipping Total: 1,000.00
Ship Via: COMMON	Freight Terms: DESTFP	315 MAIN STREET RM 1A06A	
		COLUMBIA SC 29208	
		United States	

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

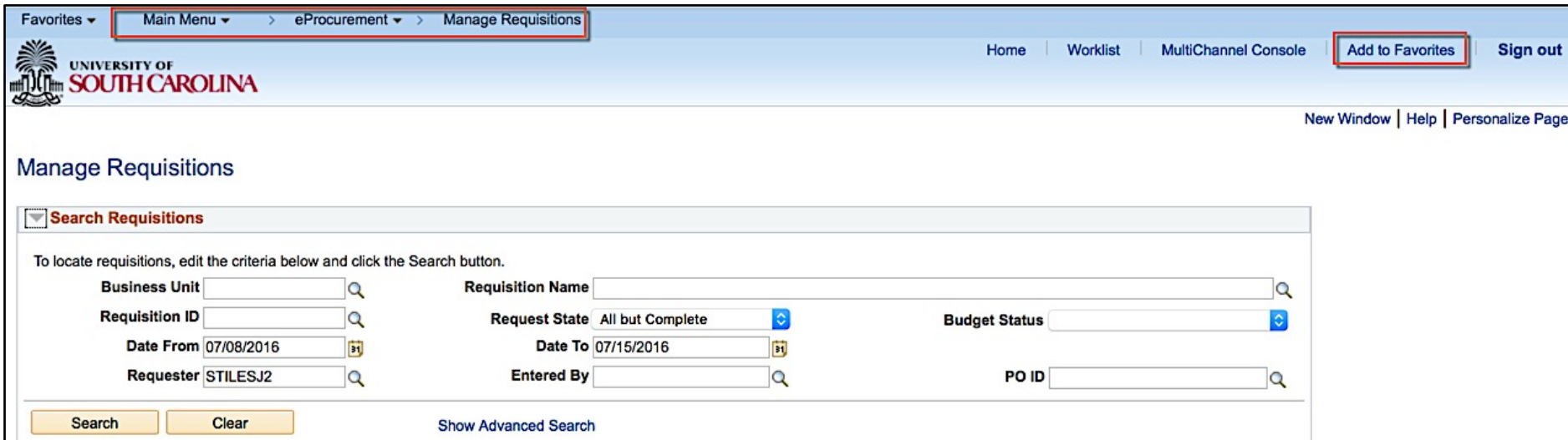
Open QTY	Open Amt
0.0000	1000.000

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.



University of South Carolina PeopleSoft interface showing the 'Manage Requisitions' page. The breadcrumb trail 'Main Menu > eProcurement > Manage Requisitions' is highlighted with a red box. The 'Add to Favorites' button is also highlighted with a red box.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	<input type="text"/>	Requisition Name	<input type="text"/>
Requisition ID	<input type="text"/>	Request State	All but Complete
Date From	07/08/2016	Date To	07/15/2016
Requester	STILESJ2	Entered By	<input type="text"/>
		Budget Status	<input type="text"/>
		PO ID	<input type="text"/>

Search Clear Show Advanced Search

Adding Pages to Favorites

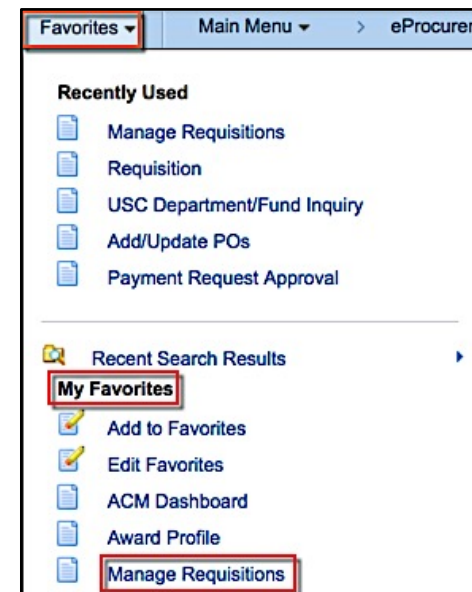
- Click the **OK** button to add this page to your Favorites.



- 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

The screenshot displays the 'Purchase Order Inquiry' page for the University of South Carolina. The main content area shows details for 'Line 1' of PO ID 2000028645. The line is for 'PPB- BEYOND THE QURAN' with a status of 'Approved' and a type of 'Amount Only'. The 'Physical Nature' is 'Services' with a 'Merchandise Amt' of 3,600.00 and 'Currency' of USD. The 'Category' is '966000' (Printing Services) and 'Category ID' is '00458'. The 'Contract SetID' is 'USC01'. The 'Supplier Name' is 'THOMSON' and the 'Buyer' is 'Dennis C'. The 'Receiving Required' checkbox is checked, and the 'Do Not' checkbox is unchecked. The 'Inspect' checkbox is also unchecked. The 'Configuration Code' is empty.

Line	Item ID
1	

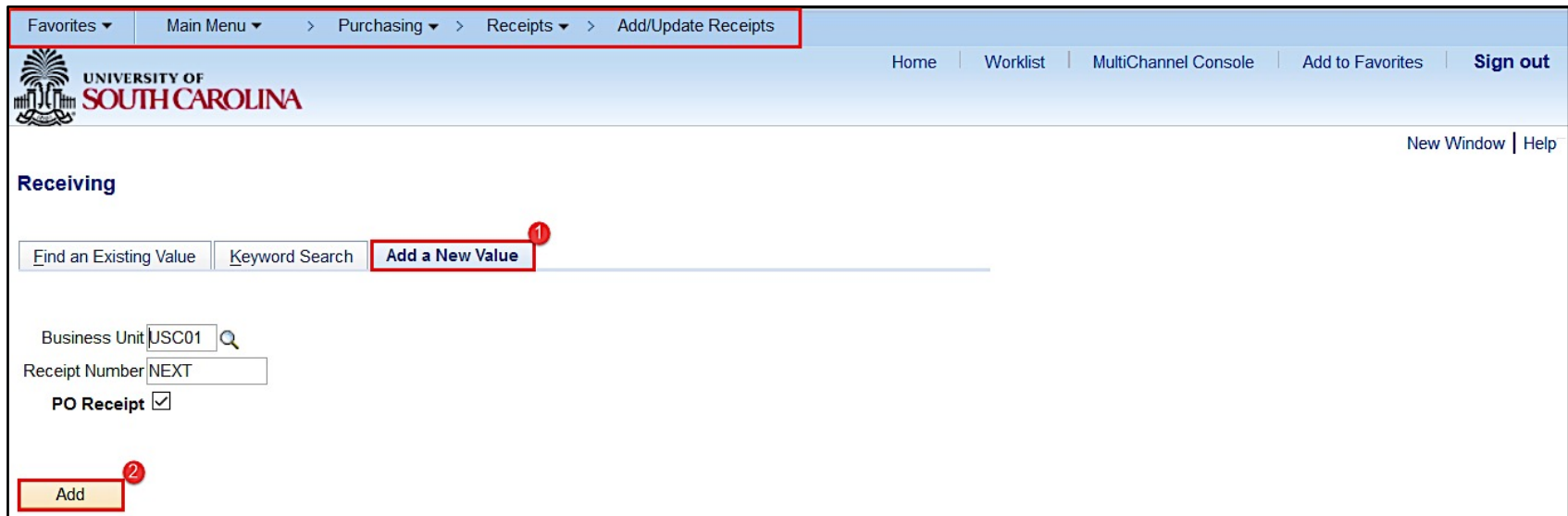
Receiving

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:

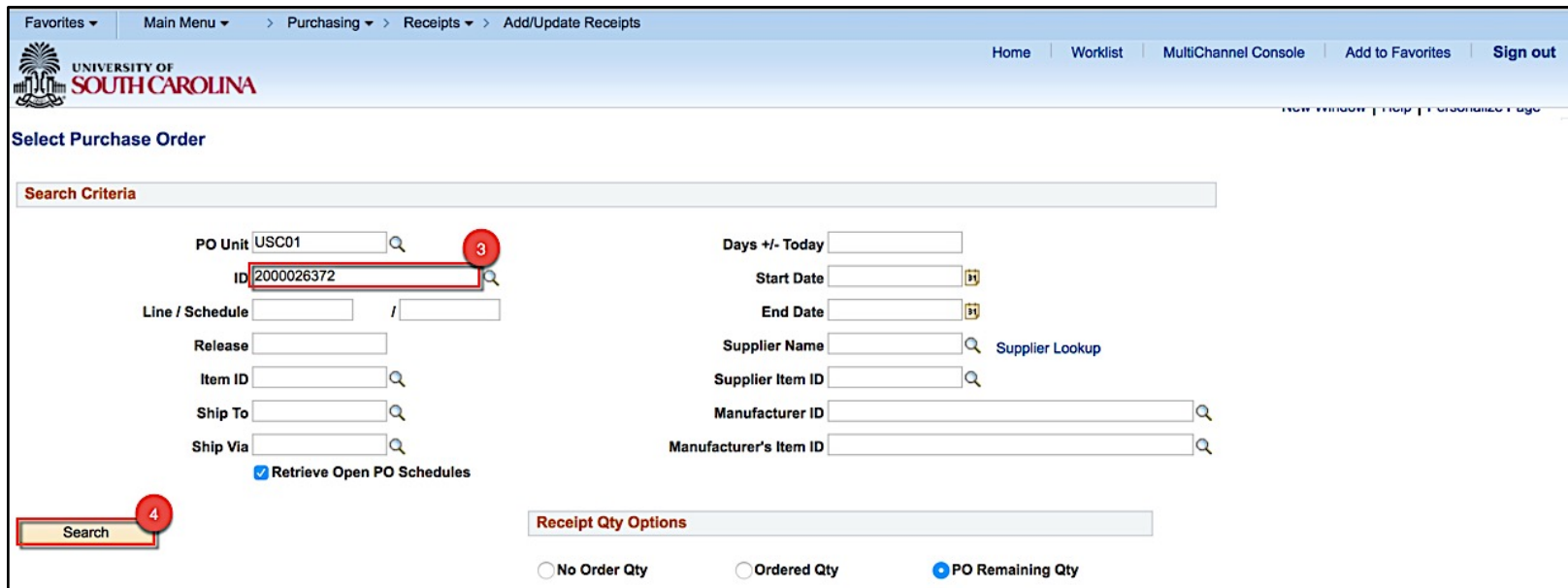
1. Click the **Add a New Value** tab and then click the Add button.
2. Click the **Add** button.



The screenshot shows the 'Receiving' page in the OneCarolina system. The breadcrumb trail at the top reads: Favorites > Main Menu > Purchasing > Receipts > Add/Update Receipts. The page header includes the University of South Carolina logo and navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. The main content area is titled 'Receiving' and contains a search bar with three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red box and a red circle containing the number '1'. Below the search bar are input fields for 'Business Unit' (containing 'JSC01'), 'Receipt Number' (containing 'NEXT'), and a checked checkbox for 'PO Receipt'. At the bottom left, there is an 'Add' button highlighted with a red box and a red circle containing the number '2'.

Receiving

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



The screenshot displays the 'Select Purchase Order' page in the University of South Carolina purchasing system. The page features a navigation bar at the top with 'Favorites', 'Main Menu', 'Purchasing', 'Receipts', and 'Add/Update Receipts'. The University of South Carolina logo is visible on the left, and navigation links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out' are on the right. The main content area is titled 'Select Purchase Order' and contains a 'Search Criteria' section. This section includes several input fields: 'PO Unit' (containing 'USC01'), 'ID' (containing '2000026372'), 'Line / Schedule', 'Release', 'Item ID', 'Ship To', 'Ship Via', 'Days +/- Today', 'Start Date', 'End Date', 'Supplier Name', 'Supplier Item ID', 'Manufacturer ID', and 'Manufacturer's Item ID'. A red circle with the number '3' highlights the 'ID' field. Below the search criteria is a 'Search' button, also highlighted with a red circle and the number '4'. At the bottom, there are radio buttons for 'Receipt Qty Options': 'No Order Qty', 'Ordered Qty', and 'PO Remaining Qty' (which is selected).

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.

Retrieved Rows Personalize | Find | View All | First 1-2 of 2 Last

Selected Rows Shipping Related More Details

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
<input checked="" type="checkbox"/>	USC01	2000026372	1	1		06/06/2016	1.0000			PowerEdge R530: PowerEdge R530
<input checked="" type="checkbox"/>	USC01	2000026372	2	1		06/06/2016	107.0000			OptiPlex 9020 Mini Tower - Upg

Select All Clear All

OK Cancel Refresh

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.)

Receipt Lines Personalize | Find | View All | First 1-2 of 2 Last

Receipt Lines More Details Links and Status Item / Mfg Data Opt Input Source Information

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track
1		PowerEdge R530: PowerEdge R530	1.0000	EA	4999.11000	1.0000	Open	<input type="checkbox"/>		<input type="checkbox"/>	EA	Device Track
2		OptiPlex 9020 Mini Tower - Upg	107.0000	EA	1098.87000	107.0000	Open	<input type="checkbox"/>		<input type="checkbox"/>	EA	Device Track

Inter Receipt Run Close Short Interface Asset Information

Save Notify Refresh Add Update/Display

Receiving

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

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

Receipt Lines | More Details | Links and Status | Item / Mfg Data | Optional Input | Source Information 

Line	Item	Description	Receipt Qty	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Device Track
1		Disposal of front load MSW (Mu	1.0000 	110000.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Device Track 

Interface Receipt Run Close Short Interface Asset Information


 Save  Notify  Refresh  Add  Update/Display

Receiving

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

Maintain Receipts





Receiving











Business Unit USC01 Receipt Status Fully Received 

Receipt ID **3000023798** Add Header Comments Activities
Header Details Document Status

▶ Header

Select Purchase Order

Receipt Lines Personalize | Find | View All |  |  First  1-2 of 2  Last

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information									
Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track		
1		PowerEdge R530: PowerEdge R530	<input type="text" value="1.0000"/>	 EA 	4999.11000	1.0000	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA 	Device Track		
2		OptiPlex 9020 Mini Tower - Upg	<input type="text" value="100.0000"/>	 EA 	1098.87000	100.0000	Received	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA 	Device Track		

Interface Receipt Run Close Short

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



Exercise #4

Copy Existing Requisition into a New Requisition



Exercise #5

**Cancel Original Requisition, Undo
Cancel, and Budget Check**

Time to Practice



Exercise #6

View Print Details

Time to Practice



www.iToon.co · 1555

Exercise #7

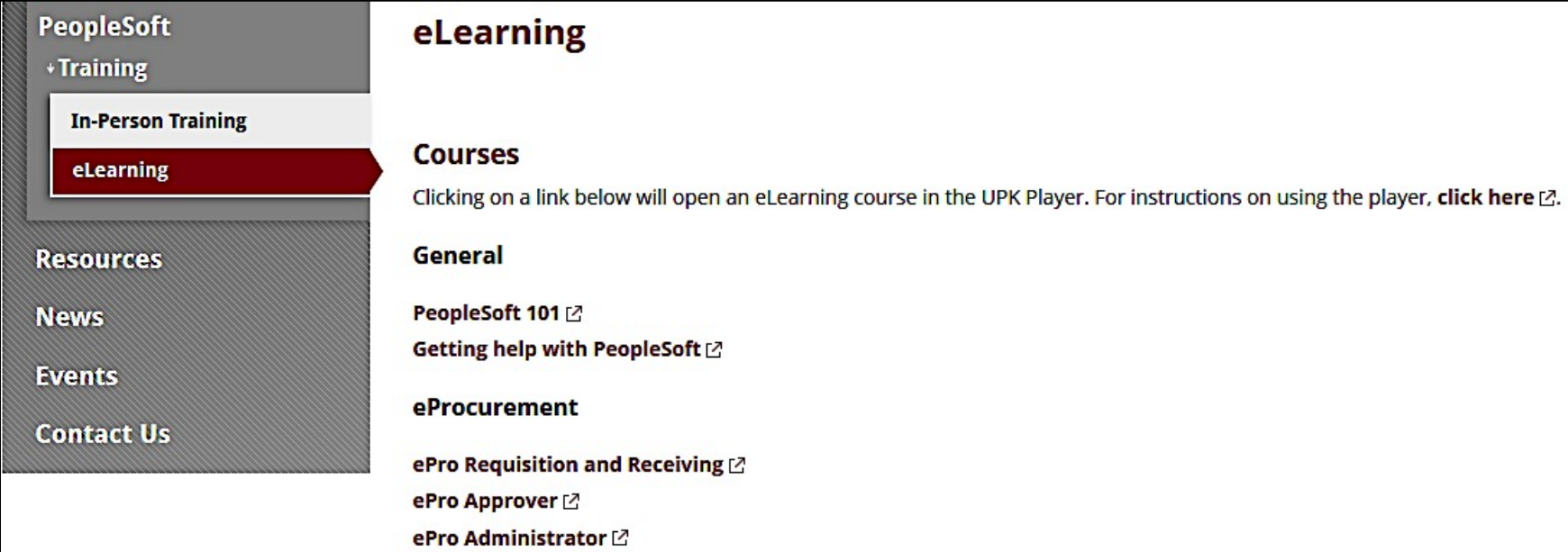
Creating a Receipt

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.

A screenshot of the PeopleSoft website's navigation menu and eLearning section. The left sidebar contains a menu with "PeopleSoft" at the top, followed by "Training" (with a plus sign), "In-Person Training", and "eLearning" (highlighted with a red arrow). Below these are "Resources", "News", "Events", and "Contact Us". The main content area is titled "eLearning" and includes a "Courses" section with a paragraph of text and a link. Below that is a "General" section with links for "PeopleSoft 101", "Getting help with PeopleSoft", and an "eProcurement" section with links for "ePro Requisition and Receiving", "ePro Approver", and "ePro Administrator".

PeopleSoft
+ Training
In-Person Training
eLearning

Resources
News
Events
Contact Us

eLearning

Courses

Clicking on a link below will open an eLearning course in the UPK Player. For instructions on using the player, [click here](#).

General

[PeopleSoft 101](#)
[Getting help with PeopleSoft](#)

eProcurement

[ePro Requisition and Receiving](#)
[ePro Approver](#)
[ePro Administrator](#)

PeopleSoft Resources



UNIVERSITY OF
SOUTH CAROLINA

CALENDAR MAP DIRECTORY

GATEWAYS

The Division of **Information Technology**

[SC.edu](#) » [About](#) » [Office](#) » [The I](#) » [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.

