

USC



UNIVERSITY OF SOUTH CAROLINA



# Catalog and Category Code Changes

A Quick Reference Guide for Catalog and Category Codes  
Procurement/Accounts Payable  
May 2016

# Today's Agenda

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**Reasons for Category Code Updates**

**New Category Hierarchy in PeopleSoft**

**Selecting A Category on a Requisition**

**Identifying an Asset Category**

**The Effect of a Category on Tax Status**

**The Effect of a Category on Receiving Required**

# Reasons for Category Code Updates

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- The new Category Codes follow the National Institute of Governmental Purchasing (NIGP) goods/services commodity code structure for standardizing purchasing, bringing the highest levels of organization and efficiency to procurement here at USC.
- Providing a more descriptive category to aid when searching for the appropriate one.
- These new **Categories** provide the correct expense account number, asset profile, and determine taxation and receipting for your purchases.
- Provides spending trend information to the Purchasing Department, contributing to more efficient procurement methods for future contracting opportunities and price negotiations with Suppliers.
- Effective date is June 1<sup>st</sup>.

# New Category Hierarchy in PeopleSoft

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- Catalogs represent the topic level group from which you are purchasing. For example, Scientific and Medical Equipment & Supplies, or Technology and Telecommunications Equipment & Supplies.
- Sub Catalogs represent the following classifications: (Notice the same classifications for most catalogs)
  - Supplies
  - Services
  - Rentals
  - Equipment (Capital and non-Capital)
- Categories default the General Ledger Account code, Asset Profile, Taxation, and Receiving requirement for the requisition line item.

# New Category Hierarchy in PeopleSoft



- Below is an example of the hierarchy of a catalog:

Catalog	Catalog Description	Sub-Catalog	Sub-Catalog Description	Category Description	Category Code	Account Code	Receiving Required	Tax Applicable
ADMIN_OFFICE	ADMINISTRATIVE AND OFFICE	ADMIN_SUPPLIES	ADMIN/OFFICE SUPPLIES/MATERIAL	Admin/Office Supplies	620000	53001	Y	Y
		ADMIN_SERVICES	ADMIN/OFFICE SERVICES	Admin/Office Equip Services	939590	52070	N	N
				Shipping/Freight Carriers	962860	52010	N	N
		ADMIN_FFE_<_5K	FURNITURE/FIXTURES/EQUIP < \$5K	Admin/Office Equipment	600000	53024	Y	Y
				Admin/Office Furniture	425000	53023	Y	Y
		ADMIN_FFE_>_5K	FURNITURE/FIXTURES/EQUIP > \$5K	Admin/Office Equipment (Asset)	60000A	56203	Y	Y
				Admin/Office Furniture (Asset)	42500A	56205	Y	Y
		ADMIN_RENTALS	ADMIN/OFFICE RENTALS	Admin/Office Equipment Rentals	985590	54015	N	N
		POST_OFFICE	POST OFFICE	Postage Fees and Stamps	963570	53003	N	N
				Postal Rentals/Leases	985600	54040	N	N

- Look for a Catalog/Category resource outlining all available catalogs

# Selecting a Category in PeopleSoft

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You can select a Category two ways:

- Category Tree
- “Find” button

# Selecting a Category in PeopleSoft



To select a Category using the Category Tree:

- Click the Category Lookup icon.

A screenshot of the PeopleSoft 'Create Requisition' page. The page is titled 'Create Requisition' and is for a 'Super User' at the University of South Carolina. The page has a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the navigation bar, there is a 'Request Options' dropdown menu and a search bar. The main content area is titled 'Special Requests' and contains a form for entering information about a non-catalog item. The form includes fields for 'Item Description' (2739MB Mesh Back Chair with Arms), 'Price' (299.99), 'Quantity' (10), 'Currency' (USD), 'Unit of Measure' (EA), and 'Due Date'. A red box highlights the '\*Category' field, which has a magnifying glass icon next to it, indicating the category lookup function.

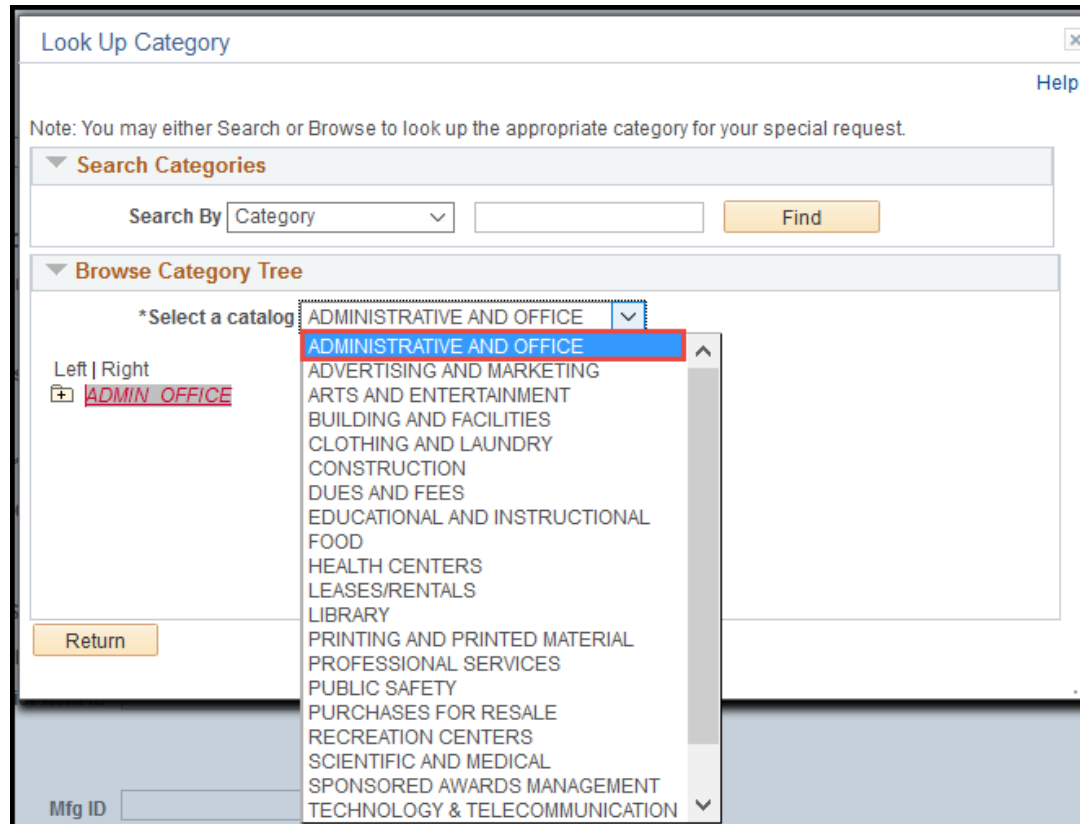
- Click the Browse a Category Tree expand arrow.

A screenshot of the 'Look Up Category' dialog box. The dialog box has a title bar with 'Look Up Category' and a close button. Below the title bar, there is a 'Help' link. A note states: 'Note: You may either Search or Browse to look up the appropriate category for your special request.' There are two main sections: 'Search Categories' and 'Browse Category Tree'. The 'Search Categories' section has a 'Search By' dropdown menu set to 'Category', a search input field, and a 'Find' button. The 'Browse Category Tree' section is highlighted with a red box and contains a 'Return' button.

# Selecting a Category in PeopleSoft

To select a Category using the Category Tree:

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



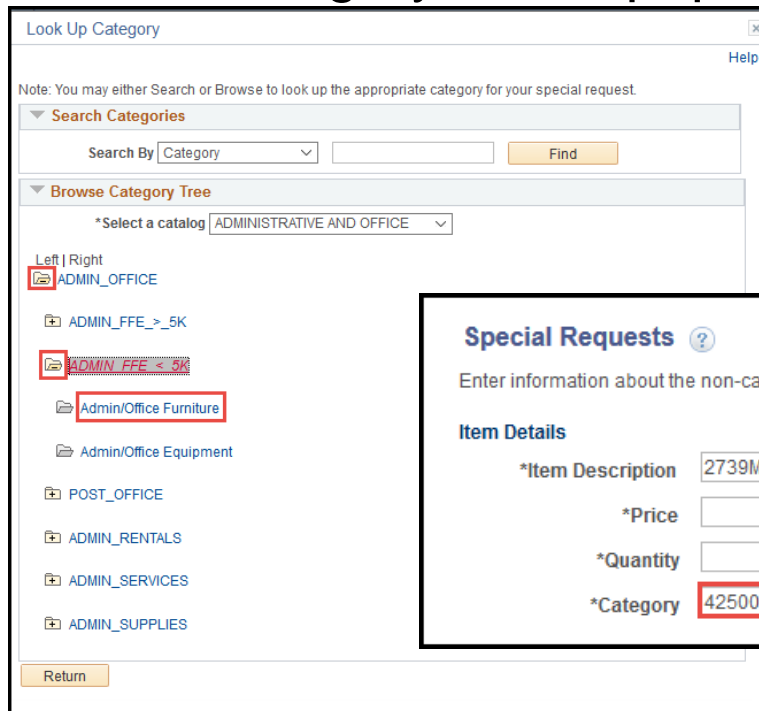
The screenshot shows the 'Look Up Category' interface. At the top, there is a title bar with 'Look Up Category' and a close button. Below the title bar, there is a 'Help' link. A note states: 'Note: You may either Search or Browse to look up the appropriate category for your special request.' The interface is divided into two main sections: 'Search Categories' and 'Browse Category Tree'. The 'Search Categories' section has a 'Search By' dropdown set to 'Category', an input field, and a 'Find' button. The 'Browse Category Tree' section has a '\*Select a catalog' dropdown menu with 'ADMINISTRATIVE AND OFFICE' selected. A list of categories is displayed below the dropdown, with 'ADMINISTRATIVE AND OFFICE' highlighted in blue. The list includes: ADMINISTRATIVE AND OFFICE, ADVERTISING AND MARKETING, ARTS AND ENTERTAINMENT, BUILDING AND FACILITIES, CLOTHING AND LAUNDRY, CONSTRUCTION, DUES AND FEES, EDUCATIONAL AND INSTRUCTIONAL, FOOD, HEALTH CENTERS, LEASES/RENTALS, LIBRARY, PRINTING AND PRINTED MATERIAL, PROFESSIONAL SERVICES, PUBLIC SAFETY, PURCHASES FOR RESALE, RECREATION CENTERS, SCIENTIFIC AND MEDICAL, SPONSORED AWARDS MANAGEMENT, and TECHNOLOGY & TELECOMMUNICATION. There is also a 'Return' button and an 'Mfg ID' field at the bottom left.



# Selecting a Category in PeopleSoft

To select a Category using the Category Tree:

- To view the Sub Catalogs, click the plus sign next to 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

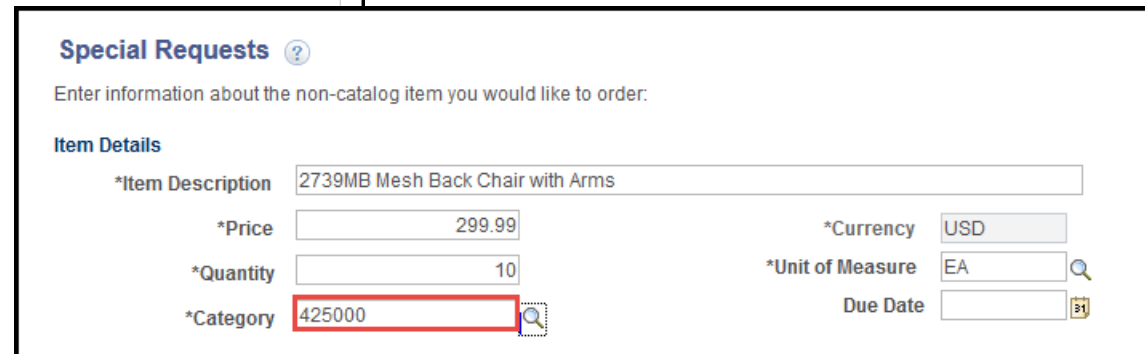
Browse Category Tree

\*Select a catalog: ADMINISTRATIVE AND OFFICE

Left | Right

- ADMIN\_OFFICE
- ADMIN\_FFE\_>\_5K
- ADMIN\_FFE < 5K**
- Admin/Office Furniture**
- Admin/Office Equipment
- POST\_OFFICE
- ADMIN\_RENTALS
- ADMIN\_SERVICES
- ADMIN\_SUPPLIES

Return



Special Requests

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

Item Details

\*Item Description: 2739MB Mesh Back Chair with Arms

\*Price: 299.99

\*Quantity: 10

\*Category: 425000

\*Currency: USD

\*Unit of Measure: EA

Due Date:

# Selecting a Category in PeopleSoft



To select a Category using the Find option:

- Click the Category Lookup icon.

A screenshot of the PeopleSoft 'Create Requisition' page. The page header includes 'UNIVERSITY OF SOUTH CAROLINA' and 'Super User'. The main content area is titled 'Special Requests' and contains a form for entering item details. The form fields include: '\*Item Description' (2739MB Mesh Back Chair with Arms), '\*Price' (299.99), '\*Quantity' (10), '\*Currency' (USD), '\*Unit of Measure' (EA), and 'Due Date'. The '\*Category' field is highlighted with a red rectangular box. A search bar is visible at the top of the form area.

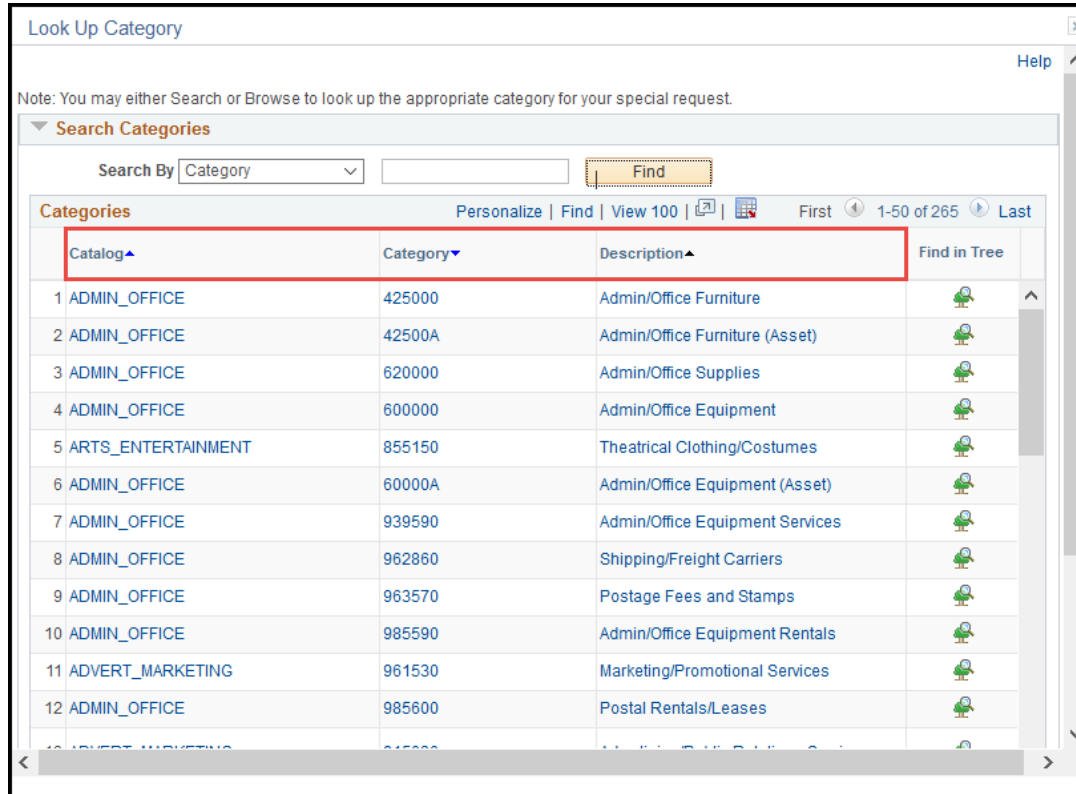
- Click the Find button.

A screenshot of the 'Look Up Category' dialog box. The dialog has a title bar with 'Look Up Category' and a close button. Below the title bar is a 'Note' and a 'Help' link. The main content area has two sections: 'Search Categories' and 'Browse Category Tree'. The 'Search Categories' section contains a 'Search By' dropdown menu set to 'Category', a text input field, and a 'Find' button highlighted with a red rectangular box. The 'Browse Category Tree' section is currently collapsed. A 'Return' button is located at the bottom of the dialog.

# Selecting a Category in PeopleSoft

To select a Category using the Find option:

- 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

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 100 | First 1-50 of 265 Last

	Catalog▲	Category▼	Description▲	Find in Tree
1	ADMIN_OFFICE	425000	Admin/Office Furniture	
2	ADMIN_OFFICE	42500A	Admin/Office Furniture (Asset)	
3	ADMIN_OFFICE	620000	Admin/Office Supplies	
4	ADMIN_OFFICE	600000	Admin/Office Equipment	
5	ARTS_ENTERTAINMENT	855150	Theatrical Clothing/Costumes	
6	ADMIN_OFFICE	60000A	Admin/Office Equipment (Asset)	
7	ADMIN_OFFICE	939590	Admin/Office Equipment Services	
8	ADMIN_OFFICE	962860	Shipping/Freight Carriers	
9	ADMIN_OFFICE	963570	Postage Fees and Stamps	
10	ADMIN_OFFICE	985590	Admin/Office Equipment Rentals	
11	ADVERT_MARKETING	961530	Marketing/Promotional Services	
12	ADMIN_OFFICE	985600	Postal Rentals/Leases	

# Selecting a Category in PeopleSoft



To select a Category using the Find option:

- 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: **Description** |  **Find**

- Click the Category link to populate the Category field.

Catalog	Category	Description	Find in Tree
1 ADMIN_OFFICE	425000	Admin/Office Furniture	
2 BUILD_FACILITIES	420000	Housing Furniture and Fixtures	
3 SCIENTIFIC_MEDICAL	420000	Hous	
4 BUILD_FACILITIES	90948A	Office (ASS	
5 ADMIN_OFFICE	42500A	Adm	
6 SCIENTIFIC_MEDICAL	415000	Labo	
7 SCIENTIFIC_MEDICAL	41500A	Labo	
8 SCIENTIFIC_MEDICAL	47045A	Hosp	

Special Requests

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

Item Details

\*Item Description: 2739MB Mesh Back Chair with Arms

\*Price: 299.99

\*Quantity: 10

\*Category: **425000**

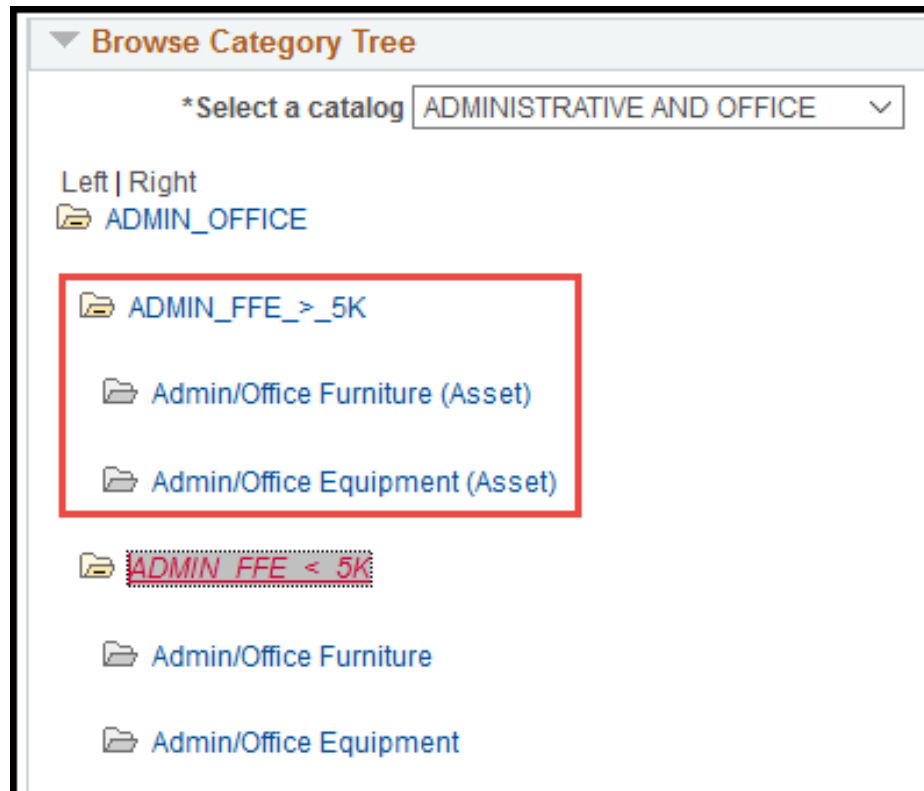
\*Currency: USD

\*Unit of Measure: EA

Due Date:

# Identifying an Asset Category

- A Capital Asset is an item that is individually greater than \$5,000 (>5k), and expected to be depreciated for more than 2 years. These items are recorded to 562xx account numbers.



# Identifying an Asset Category

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- 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.
- See Controller's Office for specific questions regarding assets.
- Additional training on Assets will be forthcoming.

# The Effect of a Category on Tax Status

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- Goods will encumber tax. For example, supplies and equipment.
- Services will not encumber tax. For example, maintenance or repair of equipment.
- No general exceptions – except for Research and Development and some goods outlined in the Tax Procedure. We are in the process of establishing procedures for Research and Development.

# The Effect of a Category on Receiving Required

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- 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.



# The Effect of a Category on Receiving Required



- If uncertain about to receive, or not to receive, use the following navigation:

**Main Menu → Purchasing → Purchase Orders → Review PO Information → Purchase Orders**

The screenshot displays the 'Details for Line ENTERPRISE-002' page in the OneCarolina system. The breadcrumb navigation at the top reads: 'Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders'. The left sidebar shows the 'Purchase Order Inquiry' section with a 'Purchase Order' sub-section. The main content area is divided into two columns of fields. The 'Receiving Required' field is highlighted with a red box and is set to 'Required'. Other fields include 'Contract Line', 'Group ID', 'Release', 'Rebate ID', 'RFQ ID', 'Supplier Item ID', 'Supplier's Catalog', 'GPO Contract', 'Manufacturer ID', 'Mfg Item ID', 'Price Qty', 'Schedule', 'Withholding', 'Inspect', 'Configuration Code', 'Category Line', 'Original Substituted Item', 'Description', 'RFQ Line', 'GPO ID', 'GTIN', 'Price Date', 'Due', 'Device Tracking', 'Replenish Code', 'Standard', and 'Inspect ID'. A 'Return' button is located at the bottom of the main content area.

# Upcoming Webinars/Training

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- Catalog and Category Code Changes  
5/23, 5/25
- Payment Request Updates  
5/24, 5/26
- Approver Responsibilities and Workflow Updates  
5/25, 5/26, 5/31, 6/2
- Requisition and Receiving Training (Catalog and Category codes will be covered in more detail.)  
5/24, 6/7

# Where to find this Quick Reference Guide



UNIVERSITY OF SOUTH CAROLINA

CALENDAR MAP DIRECTORY Search s.c.edu GATEWAYS

The Division of **Information Technology**

SC.edu » About » Office » The IT » PeopleSoft » Resources

## Resources

Click a link below to download the selected resource

### Payment Request Information

- [Payment Request Matrix »](#)
- [Payment Request Guidelines »](#)

### eProcurement Information

- [New Process for Requesting a Change Order](#)
- [Revised Quick Reference for Amount Only vs. Quantity »](#)
- [Revised Quick Reference for Receiving in PeopleSoft »](#)
- [Requisition and Receiving PPT »](#)
- [Receiving in PeopleSoft Webinar Recording »](#)
- [Dell Punchout Webinar PPT »](#)
- [Chrome Web Browser Update »](#)
- [Internet Explorer Web Browser Update »](#)
- [Mozilla Firefox Web Browser Update »](#)
- [Supplier Webinar PPT »](#)

# For Additional Questions

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- If you have any additional questions please email them to [purchasing@sc.edu](mailto:purchasing@sc.edu).
- For all other questions go to the [Contact Us](#) page and email them to the appropriate department.
- This presentation is also available to download on our PeopleSoft Training website.

# Thank You!

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