

# REQUISITIONS & RECEIVING

PeopleSoft Training for the eProRequisitioner Role



# AGENDA

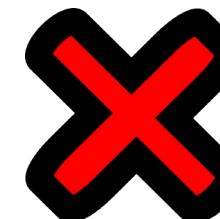
- Purchasing Methods
- Chart of Accounts (“Crosswalk”)
- Creating Requisitions
- Submitting Requisitions
- Managing Requisitions
- Receiving

# PURCHASING METHODS

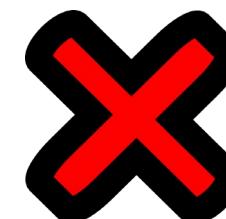
- Purchase Requisition



- P-Card Purchase



- Payment Request



# PURCHASE REQUISITIONS

- Purchase Requisitions are used to generate Purchase Orders for contractual services or supplies. The Purchase Order itself is a contractual document that contains terms and conditions.
- In general, purchase requisitions are required for all purchases greater than \$10,000. There are exceptions for certain types of payments, like reimbursements, honorariums, or stipends. Refer to the Controller's Office Payment Request Matrix for all eligible types.

# PURCHASE REQUISITIONS

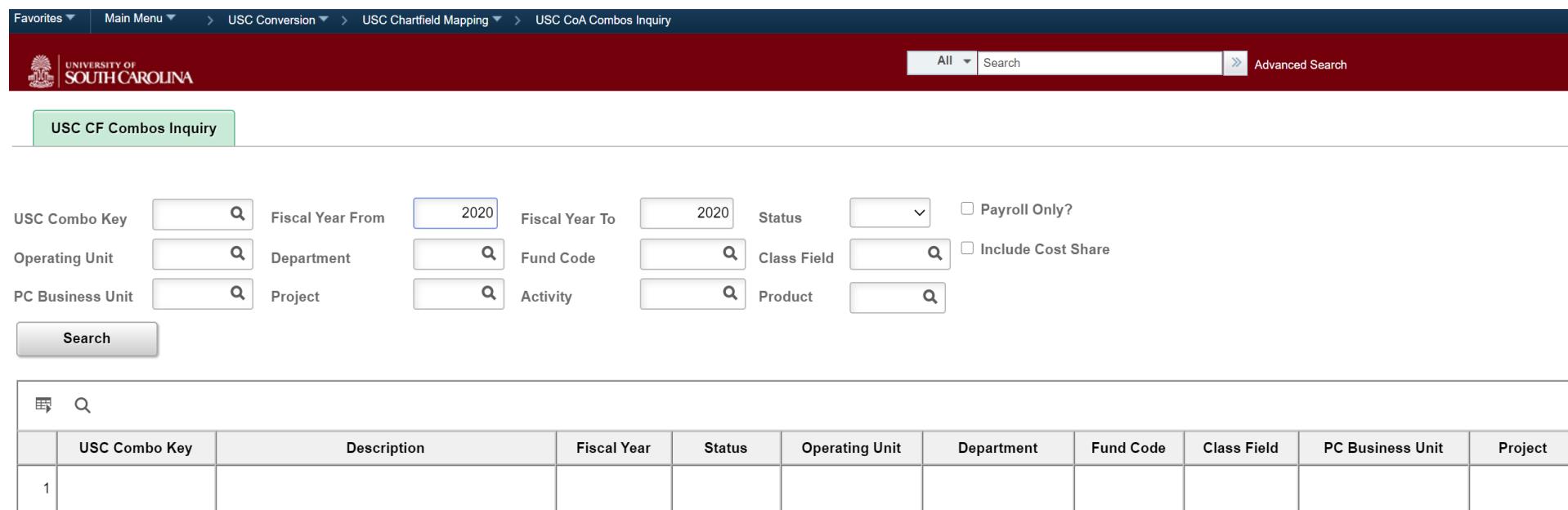
For purchases less than \$10,000, a PO is necessary whenever:

- 1) Supplier requires a PO to fulfill an order
- 2) Department requires a PO for tracking purposes or to maintain terms & conditions associated with the purchase
- 3) Assets are being acquired
  - defined as any item with a total cost of acquisition per unit greater than or equal to \$5,000 (inclusive of tax, shipping, installation, etc.)
  - Controller's Office is the authority for all asset approval
- 4) Radioactive materials are being acquired
- 5) Construction-related procurements

# CHART OF ACCOUNTS

Use the “Crosswalk” page to identify your PeopleSoft Chartfield strings.

Navigation Path: **Main Menu > USC Conversion > USC Chartfield Mapping > USC CoA Combos Inquiry**



Favorites ▾ Main Menu ▾ > USC Conversion ▾ > USC Chartfield Mapping ▾ > USC CoA Combos Inquiry

UNIVERSITY OF SOUTH CAROLINA

All ▾ Search Advanced Search

USC CF Combos Inquiry

USC Combo Key   Fiscal Year From   Fiscal Year To   Status   Payroll Only?

Operating Unit   Department   Fund Code   Class Field    Include Cost Share

PC Business Unit   Project   Activity   Product

	USC Combo Key	Description	Fiscal Year	Status	Operating Unit	Department	Fund Code	Class Field	PC Business Unit	Project
1										

# CHART OF ACCOUNTS

- You can perform a search using any of the fields at the top of the page to further refine your results. The more fields that are input, the more limited the results could be.
- For example, if you were interested in seeing a complete listing of all chartstrings that belonged to a specific Operating Unit, you would enter that Operating Unit and click Search.
- To find current chartfield strings, be sure to enter the current fiscal year.
- The “USC Combo Key” represents the legacy code made up of the old department and fund.

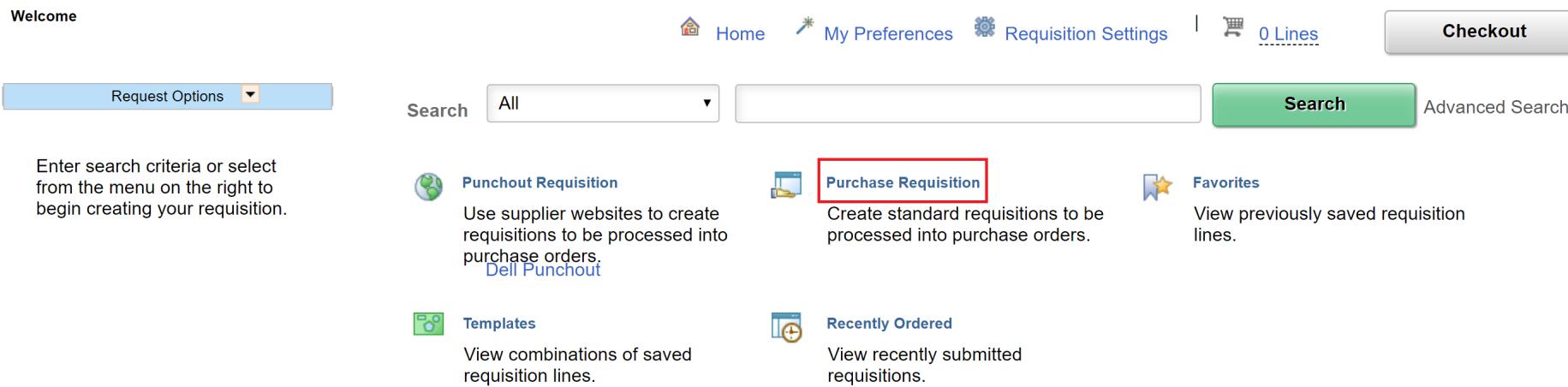
# CREATING REQUISITIONS

To begin creating a requisition, use the following Navigation Path:

**Main Menu > eProcurement > Requisition**

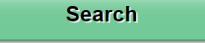
1. Click the Purchase Requisition link.

**Create Requisition** 



Welcome

Request Options 

Search All   Advanced Search

Home My Preferences Requisition Settings 0 Lines Checkout

Enter search criteria or select from the menu on the right to begin creating your requisition.

**Punchout Requisition**  
Use supplier websites to create requisitions to be processed into purchase orders.  
[Dell Punchout](#)

**Purchase Requisition**  
Create standard requisitions to be processed into purchase orders.

**Templates**  
View combinations of saved requisition lines.

**Recently Ordered**  
View recently submitted requisitions.

**Favorites**  
View previously saved requisition lines.

# CREATING REQUISITIONS

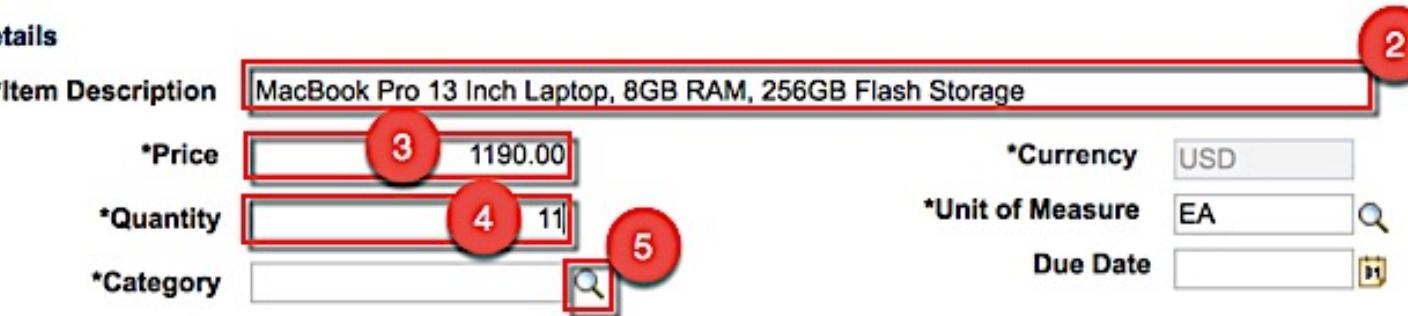
2. Click in the **Item Description** field and add a detailed description of the item you are requesting/ordering.
3. Click in the **Price** field and enter the unit price of the item.
4. Click in the **Quantity** field and enter how many of that item you need.
5. Click the **Category Lookup** button 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"/> <span>2</span>
*Price	<input type="text" value="1190.00"/> <span>3</span>
*Quantity	<input type="text" value="11"/> <span>4</span>
*Category	<input type="text"/> <span>5</span>
*Currency	<input type="text" value="USD"/>
*Unit of Measure	<input type="text" value="EA"/> 
Due Date	<input type="text"/> 



# CREATING REQUISITIONS

**Use the Item Description field to identify your requisition line items which will be viewed by your approvers.**

- Item Descriptions should contain a detailed description of what you are buying from the Supplier. Typically, these specific details should come from the quote you received from your 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

# CREATING REQUISITIONS

For the following requests, add additional information at the beginning of the Item Description field:

- Blanket Purchase Orders: “BPO” or “Blanket” or similar, as well as the effective start and end date. Fiscal year blanket orders should include date ranges like “7/1/20 to 6/30/21.”
- Change Orders that involve adding a new line to existing Purchase Order: “C/O to PO 20000xxxxx”
- Bids or Solicitations: “To Be Bid,” “Put Out for Bid,” or “Solicitation Required” in conjunction with using the Supplier named “TO BE BID BY PURCHASING” (Supplier ID #0000008279)

# CREATING REQUISITIONS

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

Selecting the correct Category is important because it:

- Populates the correct expense account number, asset profile (if applicable), tax applicability, and receipting requirement default for your purchases;
- Provides spending trend information for the Purchasing Department;
- Classifies items that as capital assets
  - Asset Category descriptions include the word “Asset,” making it easier to identify the appropriate one.
  - Asset Categories are contained within the sub-catalogs having a description “... >5K”.
  - Asset Category codes contain 5 digits and the letter ‘A.’ For example, Laboratory Equipment (Asset), 49000A.
  - Non-asset categories have 6 digits without the ‘A.’

# CREATING REQUISITIONS

There are two ways to choose a Category:

1. “Find” Button
2. Category Tree



# CREATING REQUISITIONS

Using the Find option:

- Click the **Category Lookup** icon (magnifying glass).
- Toggle the Search By option to **Description**.

Purchase Requisition [?](#)

Enter information for your requisition line item.

Item Details

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

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	Description	<input type="text"/>	<input type="button" value="Find"/>
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 [Browse Category Tree](#)

# CREATING REQUISITIONS

- Enter a short description and click **Find**. Single keywords are better than multiple words to ensure results are found.

▼ **Search Categories**

Search By

<b>Categories</b>				
	Catalog▼	Category▲	Description▼	Find in Tree
1	<a href="#">SC_PO_TECH_TELECOM</a>	204530	Desktop Computers	
2	<a href="#">SC_PO_TECH_TELECOM</a>	20453A	Desktop Computers (Asset)	
3	<a href="#">SC_PO_TECH_TELECOM</a>	204540	Laptop Computers	
4	<a href="#">SC_PO_TECH_TELECOM</a>	20454A	Laptop Computers (Asset)	

1-4 of 4 ▾

View All



**South Carolina**

# CREATING REQUISITIONS

Using the Category Tree:

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

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	<input type="text"/> 
*Currency	USD
*Unit of Measure	EA 
Due Date	<input type="text"/> 

**Look Up Category**  [Help](#)

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

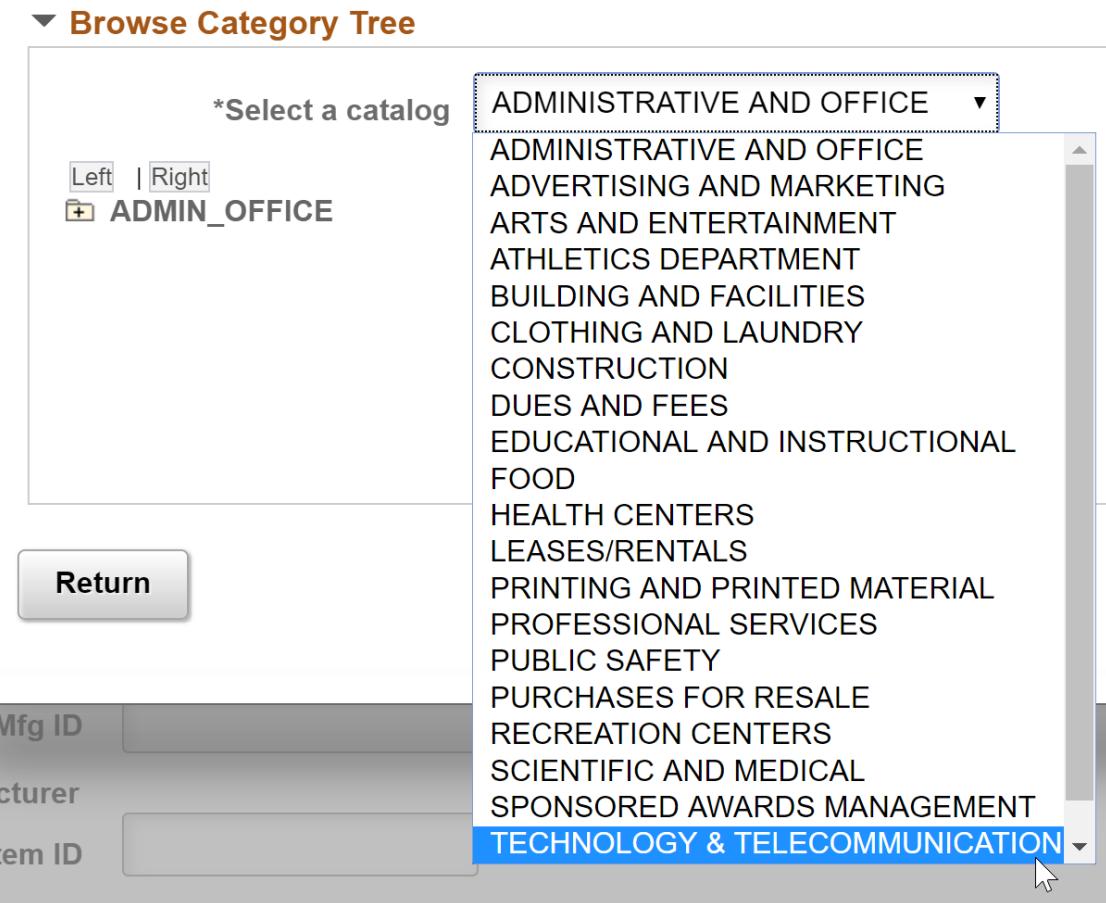
**▼ Search Categories**

Search By

**► Browse Category Tree**

# CREATING REQUISITIONS

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



# CREATING REQUISITIONS

- To view the Sub Catalogs, click the **Plus** sign on the left side of the catalog name. (Note: Do not click the links in all CAPS, as these are catalog names. Only select mixed-case descriptions which are the categories, at the lowest level.)
- Click the **Category** link to populate the Category field.

▼ Browse Category Tree

\*Select a catalog TECHNOLOGY & TELECOMMUNI ▾

Left | Right

- TECHNOLOGY\_TELECOM
- SUPPLIES AND MATERIALS
- SOFTWARE LESS THAN \$100,000
- SOFTWARE GREATER THAN \$100,000
- COMPUTERS/HARDWARE < \$5K
- Audio-Visual Equipment
- Desktop Computers
- Hardware Equipment
- Laptop Computers
- Network/Data Equipment
- Printers/Copiers/Fax Machines

# CREATING REQUISITIONS

The 6-digit category code (or 5-digits + letter A for assets) will be populated into the Category field whether you use the “Find” method or the Category Tree method to select the Category.

*Item Description	MacBrook Pro 13 Inch Laptop, 8GB RAM, 256GB Flash Storage		
*Price	1190.0000	*Currency	USD
*Quantity	11.0000	*Unit of Measure	EA 
*Category	204540 	Due Date	02/01/2020 

# CREATING REQUISITIONS

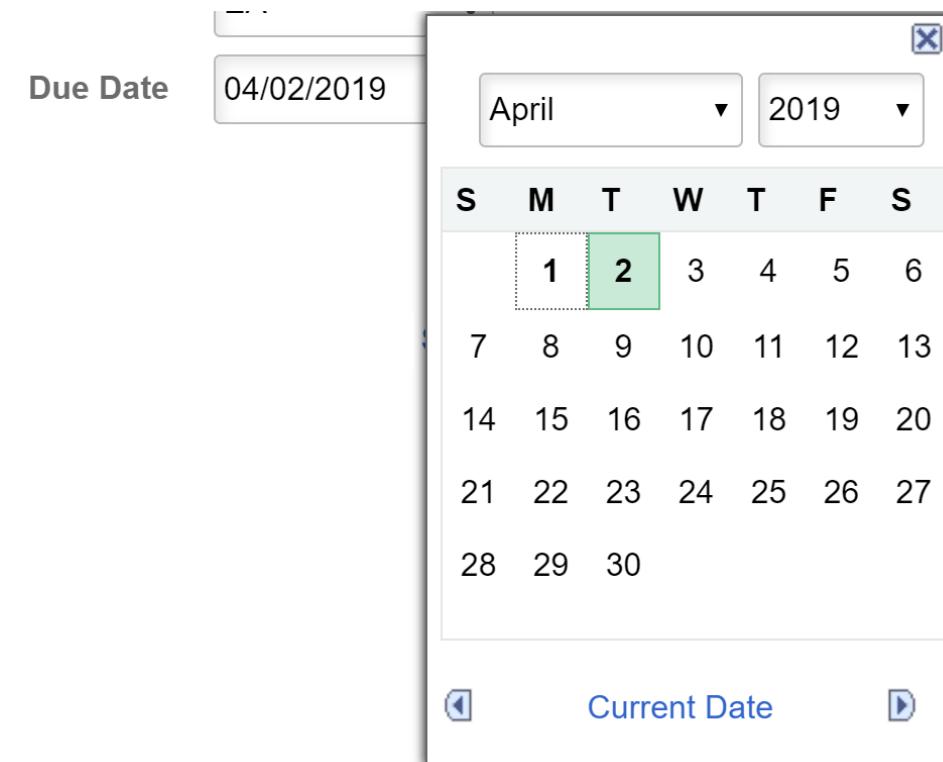
**Use the Due Date in the item details to indicate either:**

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

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

# CREATING REQUISITIONS

- Click the Calendar Due Date icon to select a date.



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

- You may also input the date instead of choosing the calendar icon using the MM/DD/YYYY format.

# CREATING REQUISITIONS

- Click a **Supplier** Lookup icon to select a supplier.
- Click in the **Name** field and enter any number of letters related to a supplier's full name.
- Click the **Find** button.

Supplier

Supplier ID  

Supplier Name  

Supplier Item ID

**Supplier Search**

Supplier ID  

Name  

Short Supplier Name

Alternate Supp Name

City

Country   State

Postal Code

# CREATING REQUISITIONS

- Click the **Supplier ID** link to choose that supplier.

**(Note:** Select the correct location as some Suppliers have multiple addresses.)

Supplier Search

Supplier ID	<input type="text"/>	<input type="button" value="Find"/>
Name	apple	<input type="button" value="Reset"/>
Short Supplier Name	<input type="text"/>	
Alternate Supp Name	<input type="text"/>	
City	<input type="text"/>	
Country	<input type="text"/> <input type="button" value=""/>	State <input type="button" value=""/>
Postal Code	<input type="text"/>	

Search Results

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
1	<a href="#">C000001490</a>	APPLE INC	0001		HIGHER EDUCATION SALES SUPPORT	AUSTIN	TX
2	<a href="#">0000037207</a>	APPLE SPICE	0001	MAIN	1240 1ST STREET S, STE D .	COLUMBIA	SC
3	<a href="#">0000037117</a>	APPLE SPICE CATERING	0001	MAIN	6185 RIVERS AVENUE STE M	NORTH CHARLESTON	SC
4	<a href="#">C000001499</a>	APPLEONE EMPLOYMENT SERVICES	0001	MAIN	107 Westpark Boulevard Ste 135	Columbia	SC
5	<a href="#">0000035799</a>	APPLETREE INC	0001	MAIN	5466 BUSH RIVER ROAD	COLUMBIA	SC

# CREATING REQUISITIONS

- Clicking the Supplier ID link populates the Supplier ID and Supplier Name fields on the item details page.

## Supplier

Supplier ID

C000001490



Supplier Name

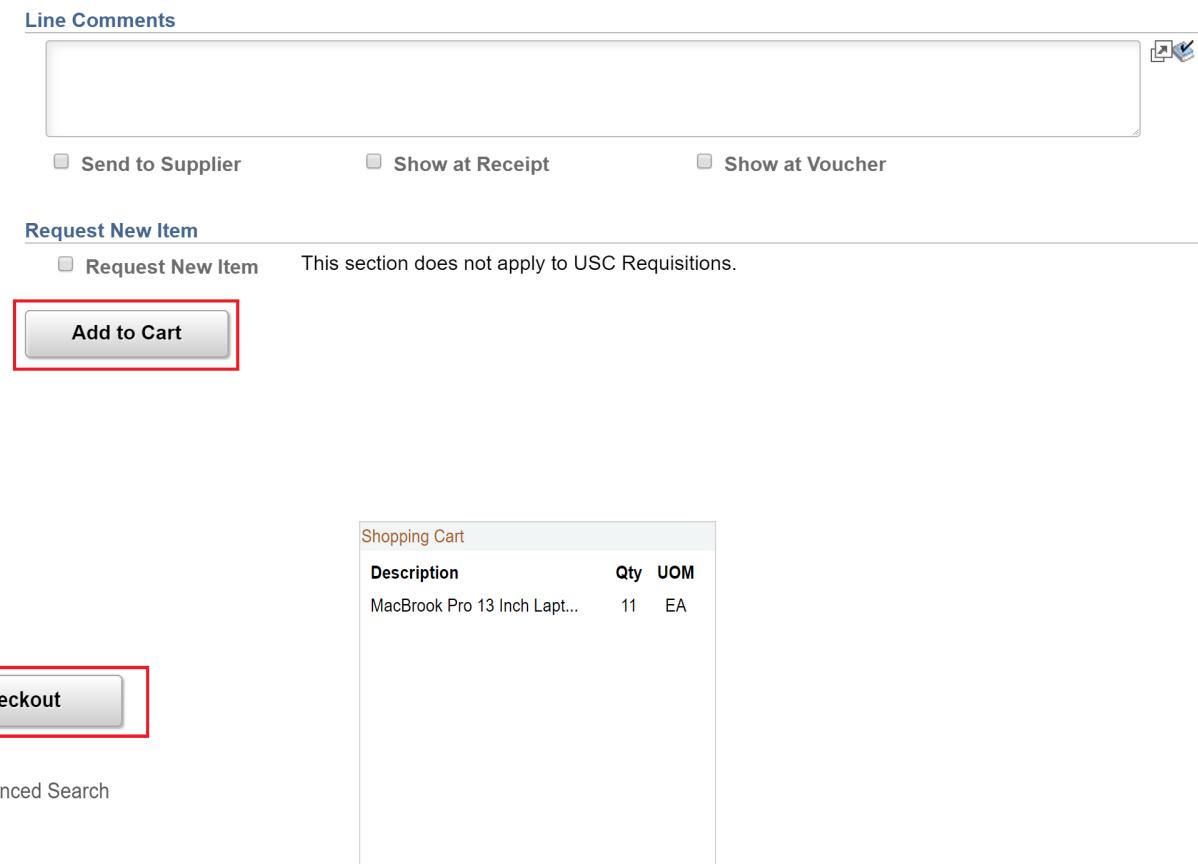
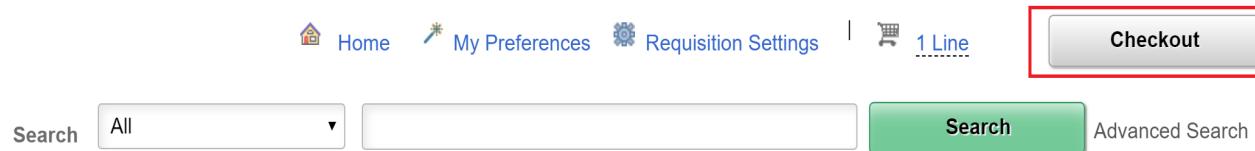
APPLE INC



Supplier Item ID

# CREATING REQUISITIONS

- Click the **Add to Cart** button. When you click Add to Cart, the item is placed in the Shopping Cart and all of the fields are cleared. (Note: You can add another item to the request by completing steps 2 thru 9 again. Each additional item will add a new line to the requisition, creating a Multi-Line Requisition.)
- Click the **Checkout** button.



# CREATING REQUISITIONS

Use the **Checkout – Review and Submit** page to save the requisition and submit it for approval immediately, or save for later. You can do the following on this page:

1. Name the Requisition
2. Add additional line items to the request
3. Edit the quantity
4. Add comments and attachments
5. Add/Update the Ship To location
6. Add Chartfield information in the Accounting Lines
7. Enter justification for approval for the requisition.

**Note:** If you need to change the unit price, click the line description to go back to the Item Details page and make the change. Click Apply at the bottom of the page.

# CREATING REQUISITIONS

## Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences

Requisition Settings

### Requisition Summary

Business Unit

USC01



University of South Carolina

1

Requisition Name



\*Requester

STILESJ2



Mac Stiles

Priority

Medium

\*Currency

USD

FAMIS Work Order

### Cart Summary: Total Amount 1.00 USD

Expand lines to review shipping and accounting details

2



Add More Items

### Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Amt Only	Details	Comments	Delete
1	1	1		1.0000	Each	1.0000	1.00	<input type="checkbox"/>			



South Carolina

# CREATING REQUISITIONS

▼ □ 1 1

Shipping Line	1	*Ship To Address	<input type="text"/>	1.0000	Each	1.0000	1.00				<a href="#">Add</a>	
Attention To	Mac Stiles	Add Shipto Comments		Quantity	1.0000							
Due Date	<input type="text"/>	Add One Time Address		Price	1.0000							
Ship Via	COMMON											
Freight Terms	DESTFP											
<a href="#">Price Adjustment</a>												
<a href="#">Pegging Inquiry</a>												
<a href="#">Pegging Workbench</a>												
▼ Accounting Lines												
*Distribute By		Qty	SpeedChart	<input type="text"/>								
<b>Accounting Lines</b>												
1-1 of 1												
Oper Unit	Dept	Fund	Account	Class	PC Bus Unit	Project	Activity	Cost Share	Product	Funding Source		
<input type="text"/>	<input type="text"/>	<input type="text"/>	53023	<input type="text"/>								

# CREATING REQUISITIONS

## Shipping Summary

 [Edit for All Lines](#)

### Ship To Location

#### Address

Attention To Mac Stiles

#### Comments

## Requisition Header Comments and Attachments

Header Comments and Attachments are visible on the PO, but not routed to Approvers.

7



[Send to Supplier](#)

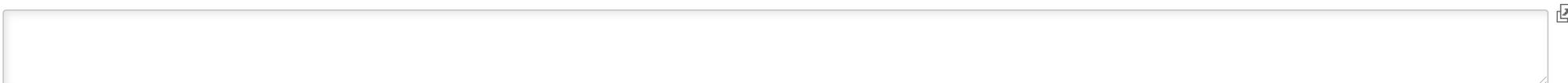
[Show at Receipt](#)

[Shown at Voucher](#)

[Add more Comments and Attachments](#)

## Approval Justification

Justification for this requisition is visible to Approvers on the Approval page.



 [Check Budget](#)

 [Pre-Check Budget](#)

 [Save & submit](#)

 [Save for Later](#)

 [Add More Items](#)

 [Preview Approvals](#)

# CREATING REQUISITIONS

- Add comments and upload attachments to the line item or to the Header. Approvers of the Requisition and the assigned Buyer in Purchasing will be able to see these.
- Click 'Add' or the comment bubble icon, and the Line Comment page will open.

Details Comments Delete

**Line Comment**

Business Unit	USC01	Requisition Date	09/04/2019
Requisition ID	1000050532	Status	Approved
Line	1		

**Comments**

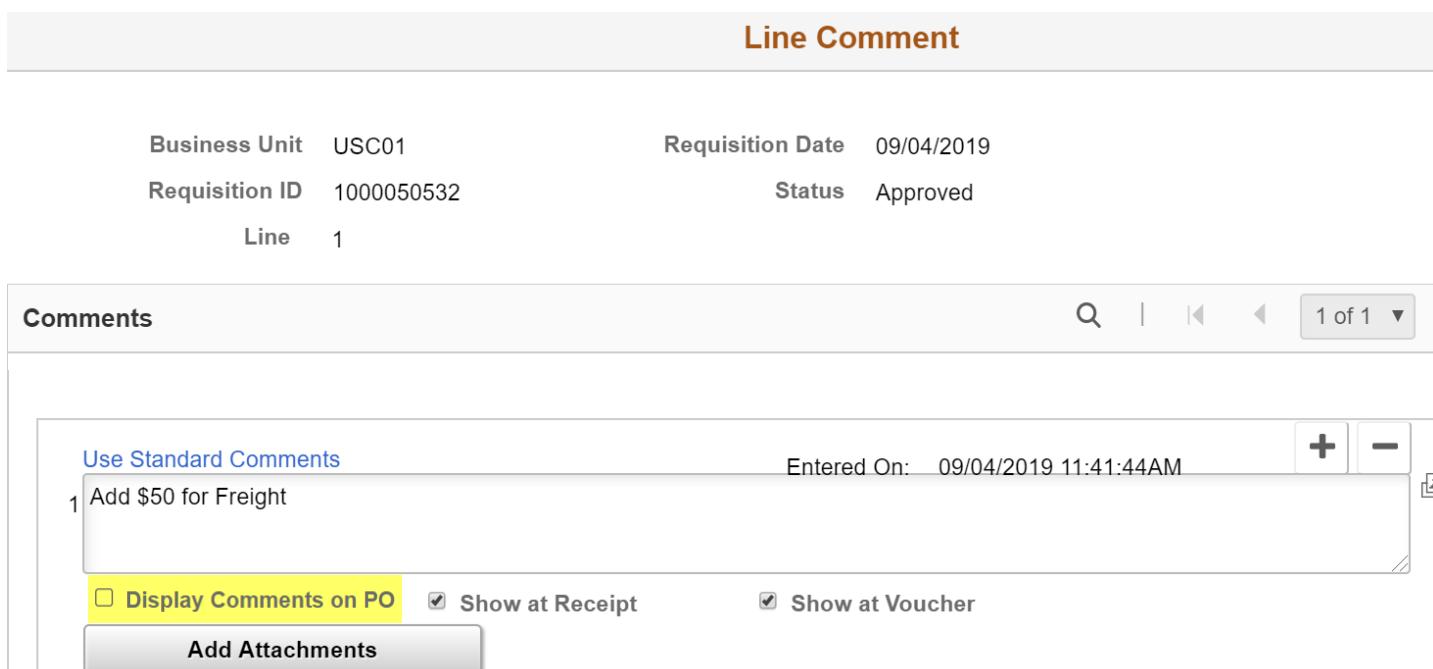
Use Standard Comments

1 Add \$50 for Freight

Entered On: 09/04/2019 11:41:44AM  

Display Comments on PO  Show at Receipt  Show at Voucher

Add Attachments



# SUBMITTING REQUISITIONS

At the bottom of the **Checkout** page, you can:

- Click the **Check Budget** link.
- Click the **Save & Submit** button or the **Save for Later** button.



- When you click the Check Budget link, a Requisition ID will be created which is located at the top of the **Checkout - Review and Submit** page.

# MANAGING REQUISITIONS

- Navigating Path: **Main Menu > eProcurement > Manage Requisitions**
- Enter a Requisition ID and click Search. Be sure to clear all fields that would prevent you from finding your requisition, such as Date, Request State, Requester, or Entered By.

## Manage Requisitions

### ▼ Search Requisitions

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

Business Unit	USC01		Requisition Name	<input type="text"/>				
Requisition ID	1000053924		Request State	<input type="text"/>	Budget Status	<input type="text"/>		
Date From	03/26/2020		Date To	06/02/2020		PO ID	<input type="text"/>	
Requester	<input type="text"/>		Entered By	<input type="text"/>				

**Search**

**Clear**

[Show Advanced Search](#)

# MANAGING REQUISITIONS

- Expand the grey arrow to view the **Request Lifespan** to view the sequence of associated documents. When an icon is active, you can click on it to see more information. You can also use the **Select Action** dropdown menu to perform actions or view information.

**Requisitions** 

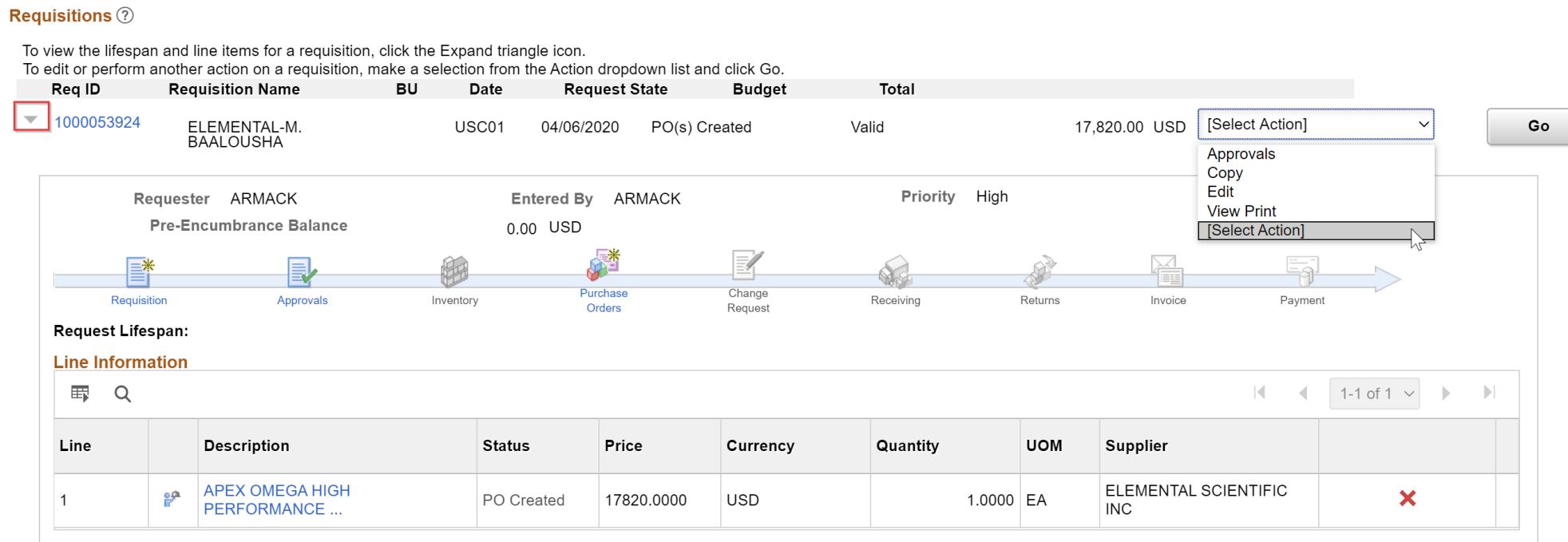
To view the lifespan and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000053924	ELEMENTAL-M. BAALOUSA	USC01	04/06/2020	PO(s) Created	Valid	17,820.00 USD	<b>[Select Action]</b> 

**Request Lifespan:**

**Line Information**

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	APEX OMEGA HIGH PERFORMANCE ...	PO Created	17820.0000	USD	1.0000	EA	ELEMENTAL SCIENTIFIC INC	



The screenshot shows a requisition management interface. At the top, a table displays basic requisition details: Req ID (1000053924), Requisition Name (ELEMENTAL-M. BAALOUSA), BU (USC01), Date (04/06/2020), Request State (PO(s) Created), Budget (Valid), and Total (17,820.00 USD). A dropdown menu labeled '[Select Action]' is open, showing options: Approvals, Copy, Edit, View, Print, and another '[Select Action]' option. Below the table is a 'Request Lifespan' timeline with icons for Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. The 'Approvals' icon is highlighted with a green checkmark. A context menu is also open over the timeline. At the bottom, a table titled 'Line Information' shows one line item with details: Description (APEX OMEGA HIGH PERFORMANCE ...), Status (PO Created), Price (17820.0000), Currency (USD), Quantity (1.0000), UOM (EA), Supplier (ELEMENTAL SCIENTIFIC INC), and a delete icon.

# 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.
- Services do not require receiving.

# RECEIVING

- Navigation Path: **Main Menu > Purchasing > Receipts > Add/Update Receipts**

## Receiving

Find an Existing Value    Keyword Search    Add a New Value

Business Unit USC01 

Receipt Number NEXT

PO Receipt

**Add**

# RECEIVING

- Enter the PO number in the **ID** field.
- Click Search.
- Select the line items you want to receipt.
- Click **OK**

**Select Purchase Order**

**Search Criteria**

PO Unit	USC01	<input type="button" value="🔍"/>
ID	2000052735	<input type="button" value="🔍"/>
Line	<input type="text"/>	Schedule <input type="button" value="🔍"/>
Release	<input type="text"/>	
Item ID	<input type="text"/>	<input type="button" value="🔍"/>
Ship To	<input type="text"/>	<input type="button" value="🔍"/>
Ship Via	<input type="text"/>	<input type="button" value="🔍"/>

Retrieve Open PO Schedules

**Receipt Qty Options**

No Order Qty    Ordered Qty    PO Remaining Qty

**Retrieved Rows**

	<input type="button" value="grid"/> <input type="button" value="🔍"/>	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	2000052735	1	1		06/30/2020	15.0000			HON Office Desk She
<input checked="" type="checkbox"/>	USC01	2000052735	2	1		06/30/2020	1.0000			Deliver and Install HC

Select All    Clear All

# RECEIVING

- For quantity-based lines, you can enter the *quantity* of the items that were received in the **Receipt Qty** field. For amount-based lines, you can enter the *dollar amount* in the **Receipt Price** field. Click **Save** when you have entered the appropriate values on your receipt lines.

Maintain Receipts

**Receiving**

Business Unit USC01		Receipt Status Open																																					
Receipt ID	NEXT	Header Comments/Attachments		Activities																																			
Header Details																																							
► Header			Select Purchase Order																																				
			<input type="button" value="Close Short All Lines"/> <input type="button" value="Print Delivery Report"/> <input type="button" value="Run PO Receipt Accrual"/>																																				
<b>Receipt Lines</b>																																							
<table border="1"><thead><tr><th colspan="2">Receipt Lines</th><th colspan="2">More Details</th><th colspan="2">Links and Status</th><th colspan="2">Item / Mfg Data</th><th colspan="2">Optional Input</th><th colspan="2">Source Information</th><th colspan="2"> </th></tr></thead><tbody><tr><td>Line</td><td>Item</td><td colspan="2">Description</td><td>Receipt Qty</td><td>*Recv UOM</td><td>Receipt Price</td><td>Accept Qty</td><td>Status</td><td>Close Short</td><td>Serial</td><td>Device Track</td><td>Stock UOM</td><td>Device Track</td></tr></tbody></table>												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
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		HON Office Desk Shell, Henna C		15.0000		EA	752.00000	15.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	EA	Device Track																									
2		Deliver and Install HON Office		1.0000			1200.00000	1.0000	Open	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Device Track																									

Interface Receipt  Run Close Short

# RECEIVING

- After saving, a **Receipt ID** will be generated, and the **Receipt Status** will change from **Open** to **Fully Received**.

Note: the receipt status is only applicable to the receipt being maintained. It does not indicate the status of the Purchase Order that the receipt was created for.

## Maintain Receipts

### Receiving

Business Unit USC01  
Receipt ID 3000092217  
[Header Details](#)

Receipt Status Fully Received   
[Header Comments/Attachments](#) [Activities](#)  
[Document Status](#)