

REQUISITIONS & RECEIVING

PeopleSoft Training for the eProRequisitioner Role



AGENDA

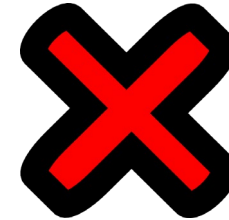
- Purchasing Methods
- Chart of Accounts (“Crosswalk”)
- Creating Requisitions
- Submitting Requisitions
- Managing Requisitions
- Receiving

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

Search

	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

[Home](#) [My Preferences](#) [Requisition Settings](#) | [0 Lines](#)

Checkout

Request Options

Search

All

Search

Advanced Search

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.



Favorites

View previously saved requisition lines.



Templates

View combinations of saved requisition lines.



Recently Ordered

View recently submitted requisitions.



South Carolina

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"/>			2
*Price	<input type="text" value="1190.00"/>	3		
*Quantity	<input type="text" value="11"/>	4		
*Category	<input type="text" value=""/>	5	<input type="button" value="🔍"/>	
			*Currency	<input type="text" value="USD"/>
			*Unit of Measure	<input type="text" value="EA"/> 🔍
			Due Date	<input type="text" value=""/> 📅

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

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		Find
-----------	-------------	--	------

Browse Category Tree

Return

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

Categories

1-4 of 4 | View All

	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)	

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

Look Up Category x

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

Return

CREATING REQUISITIONS

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

▼ **Browse Category Tree**

*Select a catalog

Left | Right
+ ADMIN_OFFICE

Return

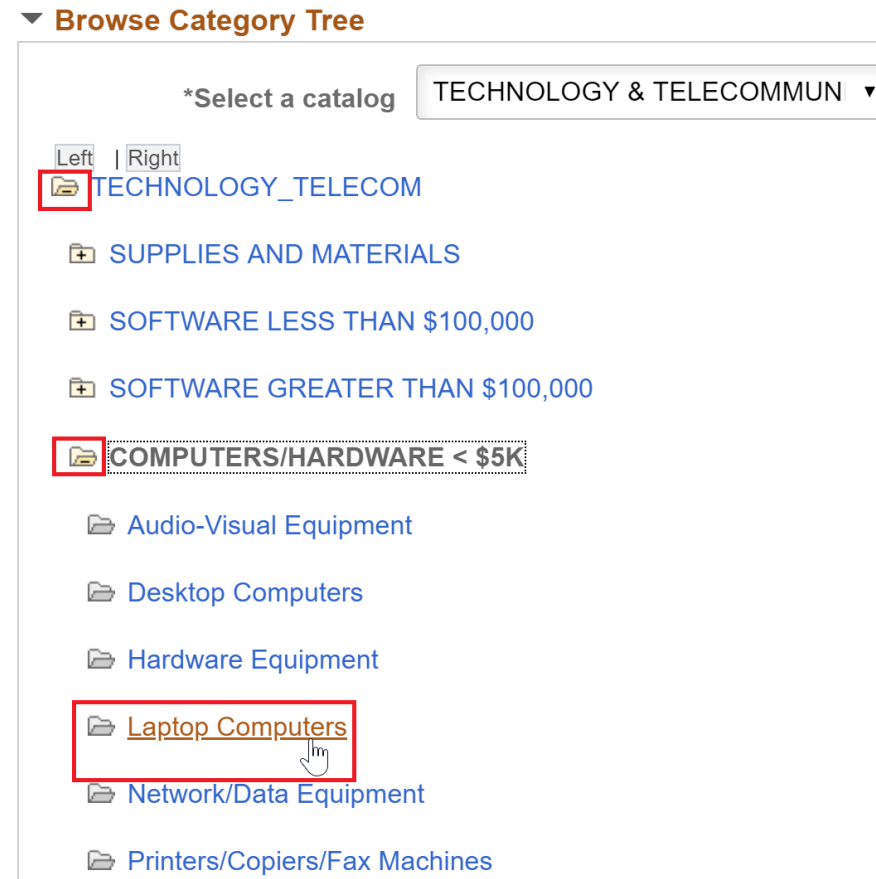
Mfg ID
Manufacturer
Item ID

ADMINISTRATIVE AND OFFICE ▼

- ADMINISTRATIVE AND OFFICE
- ADVERTISING AND MARKETING
- ARTS AND ENTERTAINMENT
- ATHLETICS DEPARTMENT
- BUILDING AND FACILITIES
- CLOTHING AND LAUNDRY
- CONSTRUCTION
- DUES AND FEES
- EDUCATIONAL AND INSTRUCTIONAL
- FOOD
- HEALTH CENTERS
- LEASES/RENTALS
- PRINTING AND PRINTED MATERIAL
- PROFESSIONAL SERVICES
- PUBLIC SAFETY
- PURCHASES FOR RESALE
- RECREATION CENTERS
- SCIENTIFIC AND MEDICAL
- SPONSORED AWARDS MANAGEMENT
- TECHNOLOGY & TELECOMMUNICATION

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.



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	

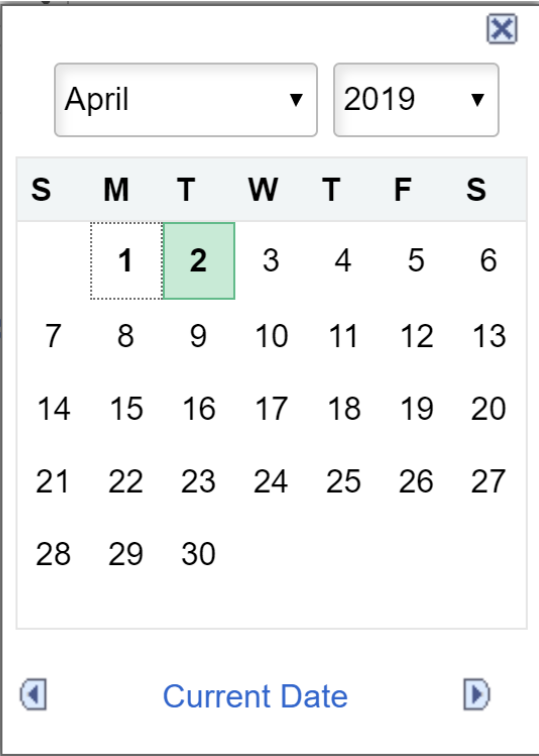
CREATING REQUISITIONS

- 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.

Due Date 04/02/2019



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				

Current Date

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 ×

[Help](#)

Supplier ID

Name

Short Supplier Name

Alternate Supp Name

City

Country

State

Postal Code

Find **Reset**

OK **Cancel**

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

Find

Name

apple

Reset

Short Supplier Name

Alternate Supp Name

City

Country

Q

State

Postal Code

Search Results

Q

1-10 of 12

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

Line Comments

☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher

Request New Item

☐ Request New Item This section does not apply to USC Requisitions.

Add to Cart

[Home](#) [My Preferences](#) [Requisition Settings](#) | [1 Line](#)

Search **Search** [Advanced Search](#)

Checkout

Shopping Cart		
Description	Qty	UOM
MacBook Pro 13 Inch Lapt...	11	EA

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

*Requester

STILESJ2



Mac Stiles

*Currency

USD

Requisition Name



Priority

Medium



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
▼ <input type="checkbox"/> 1 1				3 <input type="text" value="1.0000"/>	Each	1.0000	1.00	<input type="checkbox"/>		4 Add	



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CREATING REQUISITIONS

▼ □ 1 1

1.0000

Each

1.0000

1.00



Add



Shipping Line 1

⁵
*Ship To
Address

[Add Shipto Comments](#)

Quantity

1.0000



Attention To

[Add One Time Address](#)

Price

1.0000

[Price Adjustment](#)

[Pegging Inquiry](#)

[Pegging Workbench](#)

Due Date

Ship Via

Freight Terms

▼ Accounting Lines

*Distribute By

Qty



SpeedChart

Accounting Lines



⁶



1-1 of 1



Chartfields1

Chartfields2

Details

Details 2

Asset Information

Asset Information 2

Budget Information



Oper Unit

Dept

Fund

Account

Class

PC Bus Unit

Project

Activity

Cost Share

Product

Funding
Source

53023



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CREATING REQUISITIONS

Shipping Summary

 [Edit for All Lines](#)

Ship To Location
Address

Attention To
Comments

Mac Stiles

Requisition Header Comments and Attachments

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

?




☐ 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

  Add 

Line Comment

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

Comments Q | ◀ ▶ 1 of 1 ▼

[Use Standard Comments](#) Entered On: 09/04/2019 11:41:44AM + - 

1 Add \$50 for Freight

☐ 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.



Check Budget



Pre-Check Budget

Budget Checking Status: **Valid**



Save & submit



Save for Later



Add More Items



[Preview Approvals](#)

- 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.



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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

Requisition Name

Requisition ID

Request State

Budget Status

Date From

Date To

Requester

Entered By

PO ID

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. BAALOUSHA	USC01	04/06/2020	PO(s) Created	Valid	17,820.00 USD	<div><div>[Select Action]</div><div>Approvals</div><div>Copy</div><div>Edit</div><div>View Print</div><div>[Select Action]</div></div> <div>Go</div>

Requester ARMACK

Entered By ARMACK

Priority High

Pre-Encumbrance Balance 0.00 USD

Requisition

Approvals

Inventory

Purchase Orders

Change Request

Receiving



Returns

Invoice



Payment

Request Lifespan:

Line Information

1-1 of 1

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

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

<input type="text" value="Find an Existing Value"/>	<input type="text" value="Keyword Search"/>	<input type="button" value="Add a New Value"/>
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Business Unit

Receipt Number

PO Receipt ☒

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	<input type="text" value="USC01"/>	<input type="button" value="Q"/>	Days +/- Today	<input type="text"/>	
ID	<input type="text" value="2000052735"/>	<input type="button" value="Q"/>	Start Date	<input type="text"/>	
Line	<input type="text"/>	Schedule	<input type="text"/>	End Date	<input type="text"/>
Release	<input type="text"/>	Supplier Name	<input type="text"/>	<input type="button" value="Q"/>	Supplier Lookup
Item ID	<input type="text"/>	<input type="button" value="Q"/>	Supplier Item ID	<input type="text"/>	<input type="button" value="Q"/>
Ship To	<input type="text"/>	<input type="button" value="Q"/>	Manufacturer ID	<input type="text"/>	
Ship Via	<input type="text"/>	<input type="button" value="Q"/>	Manufacturer's Item ID	<input type="text"/>	
<input checked="" type="checkbox"/> Retrieve Open PO Schedules			UPN ID	<input type="text"/>	<input type="button" value="Q"/>

Receipt Qty Options

☐ No Order Qty ☐ Ordered Qty ☒ PO Remaining Qty

Retrieved Rows

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 ID NEXT

Header Comments/Attachments

Receipt Status Open

Activities

Header

Select Purchase Order

Close Short All Lines

Print Delivery Report

Run PO Receipt Accrual

Receipt Lines

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

Interface Asset Information

Save

Notify

Refresh

Add

Update/Display


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 Status	Fully Received	
Receipt ID	3000092217	Header Comments/Attachments	Activities	
	Header Details	Document Status		