Navigating PeopleSoft

Placing orders by Requisition
Tracking Requisitions
Receiving Goods
Vouchers
Payments
Purchase Order Inquiry
Closing Purchase Orders
Your Worklist
Helpful Queries

UNIVERSITY OF
SOUTH CAROLINA

Tracking Purchase Orders in PeopleSoft

Placing orders by Requisition

Go to: **Manage Requisition**

Main Menu>eProcurement>Manage Requisitions

Click on: **Create New Requisition link**

Tracking Purchase Orders in PeopleSoft

Tracking Requisition

- **Go to: Manage Requisitions**
    - Main Menu>eProcurement>Manage Requisitions
    - Defaults to requisitions created by you as the Requester
    - Clear button
        - Removes the Requester
        - Allows you to search by Requisition ID number

- **Open grey expand triangle to see Request Lifespan**
    - Track Requisition from creation to Payment
    - Colored icons indication action
    - Click colored Purchase Orders icon to see PO number

UNIVERSITY OF
SOUTH CAROLINA

Tracking Purchase Order

- **Go to: Purchase Order Inquiry**
  - Main Menu>Purchasing>Purchase Orders>Review PO Information>Purchase Orders
  - **Encumbrance Balance**
  - **Activity Summary** link
    - Receipt and Invoice totals made to PO
  - **Document Status** link
  - **Actions** drop down
    - **Voucher Totals**
    - **Activity Comments** – Buyer's Comments
  - **Encumbrance Balance for each line**
    - **Schedule** - icon
    - **Discribution/Chartfields** - icon
    - **<u>B</u>udget Information** - tab

UNIVERSITY OF
SOUTH CAROLINA

Tracking Purchase Orders in PeopleSoft

Receiving Goods

- **Lets PeopleSoft know you've received the goods**
- **Authorizes Accounts Payable to pay invoice for goods received**

- **Go to: Add/Update Receipts**
  - Main Menu>Purchasing>Receipts>Add/Update Receipts
  - Click the Add button
    - To add a new receipt

  - **Click the Find and Existing Value tab**
    - To see all existing receipts against a purchase order

UNIVERSITY OF
SOUTH CAROLINA

Tracking Purchase Orders in PeopleSoft

Vouchers
- **Are created to start the payment process**
- **A copy of the invoice is attached to the Voucher**

Payments are Processed
- **Indicate when and where the payment was processed**
- **Electronically deposited or paper check mailed.**

- **Both can be tracked through the Request Lifespan in Manage Requisitions**

UNIVERSITY OF
SOUTH CAROLINA

Tracking Purchase Orders in PeopleSoft

Closing Purchase Order

- **After you receive everything that was ordered.**
- **After Accounts Payable has paid all of the invoices**
- **Unused encumbrances are returned to your budget**
- **Email your request to close the purchase order to**
    - **purchase@mailbox.sc.edu**

UNIVERSITY OF
SOUTH CAROLINA

PAYMENT REQUEST INQUIRY

- **Go to: Payment Request Inquiry**
  - Main Menu>Accounts Payable>Review Accounts Payable > USC Payment Request Inquiry

  - **Search by:**
    - **Request ID**
    - **User ID**
    - **Supplier ID**
    - **Operating Unit**
    - **Fund Code**
    - **Department**
    - **Project Number**
    - **Invoice Number**
    - **Date Range**

UNIVERSITY OF
SOUTH CAROLINA

Your Worklikst

- **See the work that is waiting for your approval**

- **Look at: The Sign Out link**
  - **Worklist is three links to the left of Sign Out**

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **Department/Fund Crosswalk**
  - **Current list of Legacy Dept/Funds**
  - **Converted to PeopleSoft**

  - **SC_CF_DEPTFUND_XWALK**
    - **Put in the year**
    - **Download Excel SpreadSheet**
    - **Custom Sort: by your**
      - **Oper Unit**
      - **Dept**
    - **Filter: to select only your**
      - **Oper Unit**
      - **Dept**

UNIVERSITY OF
SOUTH CAROLINA

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **Catalog and Category Search**
  - **For Requisitions**

  - **SC_PO_CATEGORY_LIST**
    - **Category Codes**
    - **Account Codes**
    - **Taxable or Non-Taxable**
    - **Is Receiving is Required**

UNIVERSITY OF
SOUTH CAROLINA

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **PO Dept/Fund Activity**
  - **Open Purchase Orders**
  - **Sorted by Dept and/or Fund**

  - **SC_PO_ACTIVITY**
    - **Dept**
    - **Fund**
    - **Both**

UNIVERSITY OF
SOUTH CAROLINA

13

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **SC Ledger Actual Journals**
    - **Can be used to identify amounts for**
    - **Journal Entries**
    - **Identifies Journal ID**

    - **SC_PO_LEDGER_ACTUAL_JOURNALS**

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **Voucher Spend by Supplier**
  - **See Vouchers by**
    - **Oper Unit**
    - **Dept**
    - **Fund**
    - **You specify the period**

- **SC_AP_VOUCHER_SPEND**

UNIVERSITY OF
SOUTH CAROLINA

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **Matched: Receipt/PO/Voucher#'s**

  - **Search by**
    - **Receipt Number**
    - **Voucher Number**
    - **Purchase Order Number**

  - **SC_PO_MATCHING_SEARCH**

UNIVERSITY OF SOUTH CAROLINA

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **Effective Dates on Projects**

  - **SC_PO_PROJ_EFF_DATES**

QUERY VIEWER
Main Menu>Reporting Tools>Query>Query Viewer

- **Purchase Orders Associated to Project ID's**

  - **SC_PO_PROJ_PROMPT**

UNIVERSITY OF
SOUTH CAROLINA

QUERY VIEWER

Main Menu>Reporting Tools>Query>Query Viewer

- **Service Contract are usually on assets**
- ***Search By Query Name:**
  - **SC_AM_INVENTORY_REPORT**
    - **Inventory Report**
      - **Download Excel SpreadSheet**
      - **Custom Sort: by your**
        - **Oper Unit**
        - **Dept**
      - **Filter: to select only your**
        - **Oper Unit**
        - **Dept**

UNIVERSITY OF
SOUTH CAROLINA

As **Gamecocks**,
our spirit has
No Limits.

UNIVERSITY OF
SOUTH CAROLINA