

USC



UNIVERSITY OF SOUTH CAROLINA



Requisition Process Updates

A Quick Reference Guide for Requisition Process Updates
Procurement
May 2016

Today's Agenda

Asset Categories

Due Date

Freight

Budget Checking

Suppliers

Denied Requisitions

Line Descriptions

Dell Punchout

Receiving

Item Categories

ePro Services

Upcoming Webinars

Asset Categories

- Line items will no longer need to be capitalized on the accounting lines of the requisition. The Capitalize option is now grayed out.
- Select the Item Category associated with any asset purchase made, but the additional step on the accounting line is not needed.
- Accounts Payable make the determination on when to process vouchers to the Asset Management ledgers.


▼ Accounting Lines

*Distribute By SpeedChart

Accounting Lines		Personalize	Find	View All	Print	Grid	First	1 of 1	Last
Chartfields1	Chartfields2	Details	Details 2	Asset Information	Asset Information 2	Budget Information			
		Capitalize	Cost Type						
		<input type="checkbox"/>	<input type="text"/>						<input type="button" value="+"/> <input type="button" value="-"/>

Due Date

- Use the Due Date on a requisition to indicate either:
 1. the delivery date expected to receive goods or services.
 2. the last effective date of the purchase order - especially blanket orders or grant-related procurement that have a finite expiration.

Special Requests 

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

Item Details

*Item Description	<input type="text" value="Claflin Subaward EPSCoR"/>		
*Price	<input type="text" value="10000.00"/>	*Currency	<input type="text" value="USD"/>
*Quantity	<input type="text" value="1"/>	*Unit of Measure	<input type="text" value="EA"/>
*Category	<input type="text" value="9991"/>	Due Date	<input type="text" value=""/>

Supplier

Supplier ID	<input type="text" value="C000000932"/>	
Supplier Name	<input type="text" value="CLAFLIN UNIVERSITY"/>	Suggest New Supplier
Supplier Item ID	<input type="text" value=""/>	

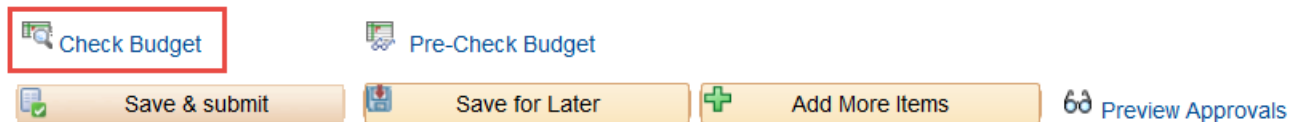
Freight

- Include shipping/freight amounts in comments and Purchasing will add those amounts to the PO using special designated Freight locations in the Purchase Order.
- Do not need to create a Requisition line devoted to the Freight.
- Taxes are automatically assigned to PO line items based on their tax applicability.
- Supplies and Equipment will have sales/use taxes applied and encumbered on the PO.
- Services do not incur tax.
- Never make tax a line item on a Requisition.
- Freight and taxes are incidental charges associated with the cost of acquisition.

Budget Checking

Budget a Requisition

- Always Budget Check your Requisition before you save and submit.




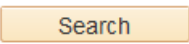
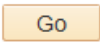
- Forgetting to Budget check a requisition can hold it up from being sourced to a Purchase Order, even if it has been approved in the Approval Workflow.
- This process establishes the pre-encumbrance amount which is retrieved from the accounting ledgers.

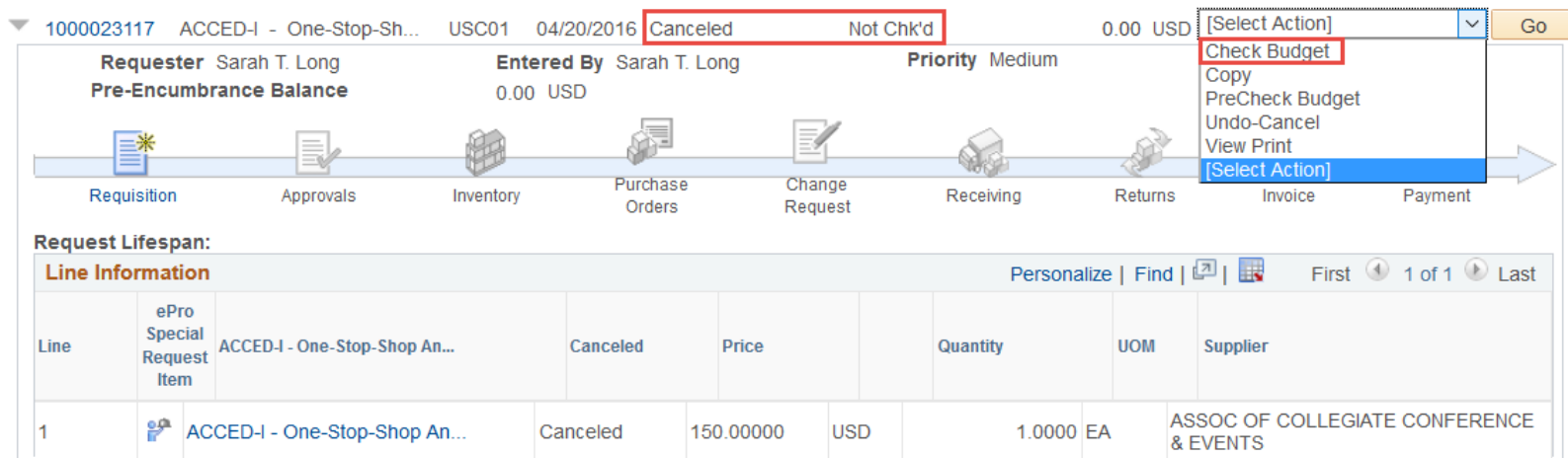
The screenshot shows the requisition details for 'James Clyburn Foundation' with a status of 'Not Chkd' (highlighted in red). A dropdown menu is open, showing options like 'Cancel', 'Check Budget' (highlighted in red), 'Copy', 'Edit', 'PreCheck Budget', 'View Print', and '[Select Action]'. Below the menu is a workflow diagram with steps: Requisition, Approvals, Inventory, Purchase Orders, Change Request, Receiving, and Returns. At the bottom, there is a table with the following data:

Line	ePro Special Request Item	request to return funds C. M...	Open	Price	Quantity	UOM	Supplier	
1		request to return funds C. M...	Open	1000.00000 USD	1.0000	EA	JAMES E CLYBURN FOUNDATION	✘

Budget Checking

Cancelling a Line on a Requisition

- Prior to it being sourced to a Purchase Order, the Requisition can be cancelled and must be budget checked. To cancel a Requisition:
 1. Cancel the requisition by clicking the 
 2. Click the  button in the Search Requisitions section to update the status
 3. Select Check Budget in the dropdown box and click the  button




1000023117 ACCED-I - One-Stop-Sh... USC01 04/20/2016 Canceled Not Chk'd 0.00 USD [Select Action] Go

Requester Sarah T. Long Entered By Sarah T. Long Priority Medium
Pre-Encumbrance Balance 0.00 USD

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

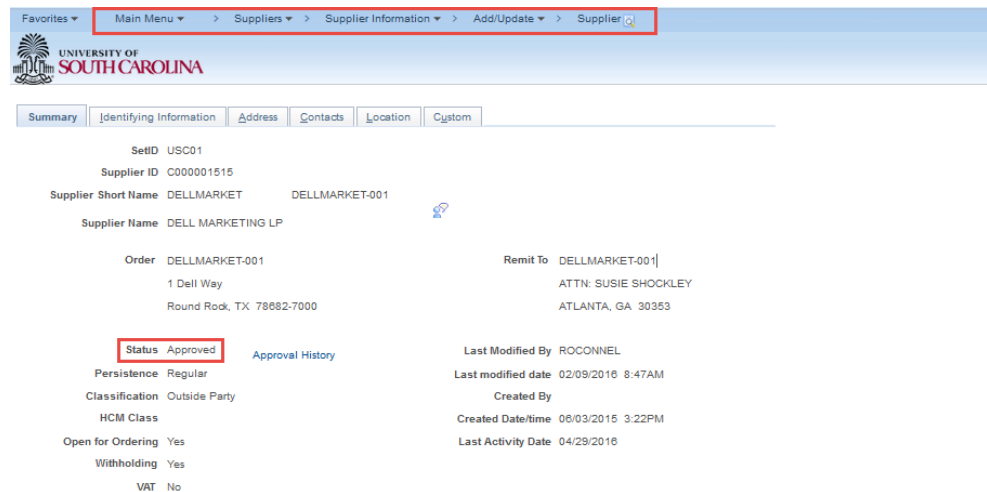
Request Lifespan:
Line Information Personalize | Find | First 1 of 1 Last

Line	ePro Special Request Item	ACCED-I - One-Stop-Shop An...	Canceled	Price	Quantity	UOM	Supplier
1		ACCED-I - One-Stop-Shop An...	Canceled	150.00000 USD	1.0000 EA	ASSOC OF COLLEGIATE CONFERENCE & EVENTS	

Suppliers

- Always check the supplier status using the following navigation:

Main Menu → Suppliers → Supplier Information → Add/Update → Supplier



University of South Carolina Supplier Information page. The navigation path is highlighted in red: Main Menu > Suppliers > Supplier Information > Add/Update > Supplier.

Supplier Information Summary:

- SetID: USC01
- Supplier ID: C000001515
- Supplier Short Name: DELLMARKET DELLMARKET-001
- Supplier Name: DELL MARKETING LP
- Order: DELLMARKET-001
1 Dell Way
Round Rock, TX 78682-7000
- Remit To: DELLMARKET-001
ATTN: SUSIE SHOCKLEY
ATLANTA, GA 30353
- Status: **Approved** (highlighted in red)
- Approval History
- Last Modified By: ROCONNEL
- Last modified date: 02/09/2016 8:47AM
- Created By
- Created Date/time: 08/03/2015 3:22PM
- Last Activity Date: 04/29/2016
- Persistence: Regular
- Classification: Outside Party
- HCM Class
- Open for Ordering: Yes
- Withholding: Yes
- VAT: No

- If the Supplier is Inactive or Unapproved, it can not be used it on a requisition.
- Any time the Supplier record is updated, it must be re-approved by the Controller's Office.
- Even if the requisition has a legitimate supplier, it can not be sourced to a Purchase Order until that approval is performed.

Denied Requisitions

- The requisition is not "dead" if it gets denied.
- If any important information is missing, or incorrect, the transaction will be sent back to the initiator to make the necessary edits. Just save the changes and resubmit, sending it back through the Approval workflow process.
- The approver will provide a reason for the denial in the comment section.

Line Descriptions

- The line description matters!
- It is important to properly describe what is being purchased. For direct payments, line description is also critical.
- These descriptions identify method of procurement.
- **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

Special Requests

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

Item Details

*Item Description	<input type="text"/>
*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"/>

Comments and Attachments

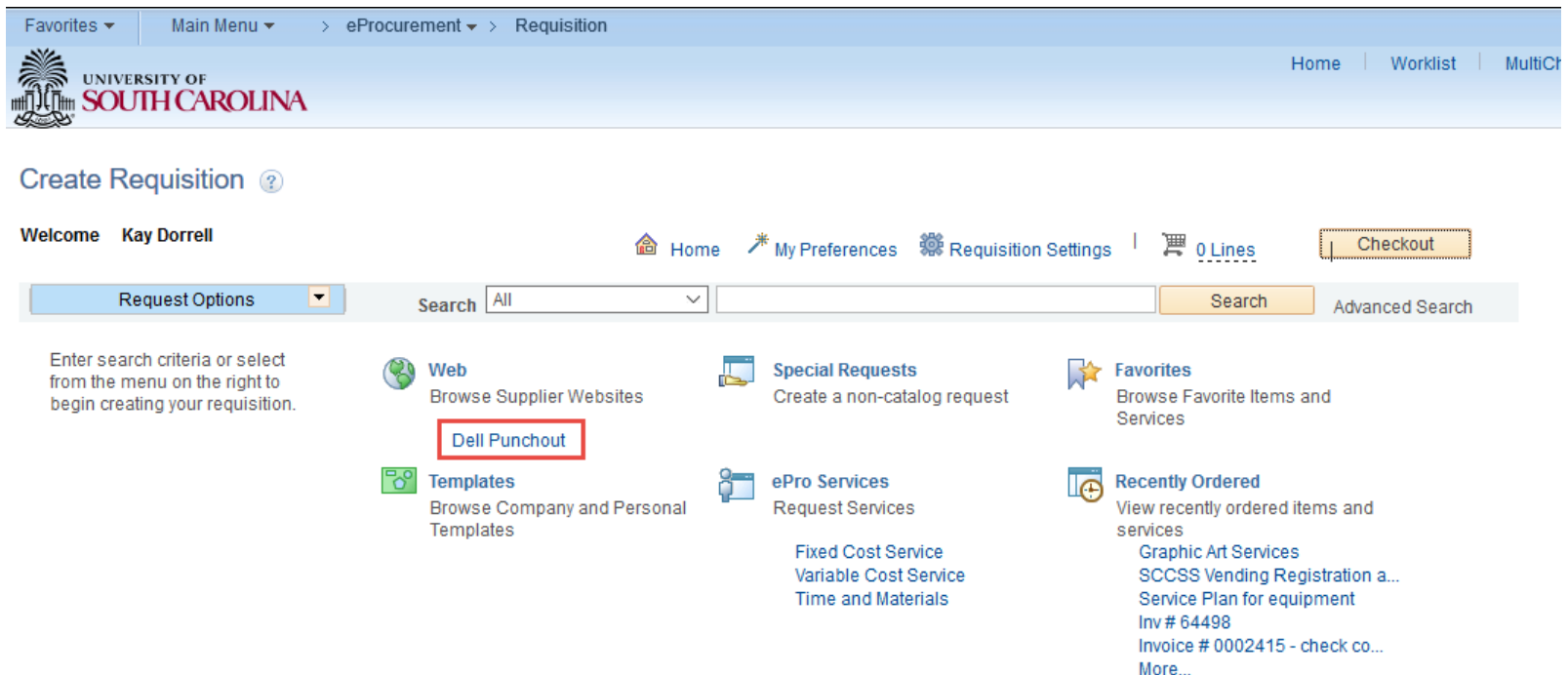


- Must include comments or attachments on the Line, not on the Header.
- Approvers will not be able to see comments and attachments in the Header, and sometimes attachments do not get completely sourced from the header.
- Only check Send to Supplier if the comments need to be seen by the Supplier.

The screenshot displays a software interface for managing requisition lines. A table at the top lists requisition details for 'Line 1' of 'Clafin Subaward EPSCoR' at 'CLAFLIN UNIVERSITY'. The table columns include Line, Description, Item ID, Supplier, Quantity, UOM, Price, and Total. A 'Comments' column contains an 'Add' button, which is highlighted with a red box. Below the table, a 'Line Comment' dialog box is open, showing fields for 'Business Unit' (USC01), 'Requisition Date' (05/02/2016), and 'Status' (Open). The dialog also includes a 'Comments' section with a text area, a 'Send to Supplier' checkbox, and 'Add Attachments' and 'Attachments' buttons. The background interface shows various navigation and action buttons like 'Details', 'Comments', and 'Delete'.

Dell Punchout

- If you purchase Dell computers or accessories, always use the Dell Punchout option on the Create Requisition page. Add Dennis Gallman (gallmand) as the Buyer.
- Use the P-card for items less than \$2500. This can be done by using the USC Premier website.



The screenshot displays the 'Create Requisition' page in the University of South Carolina's eProcurement system. The breadcrumb trail at the top reads: Favorites > Main Menu > eProcurement > Requisition. The University of South Carolina logo is visible on the left, and navigation links for Home, Worklist, and MultiC are on the right. Below the header, the page title 'Create Requisition' is followed by a user greeting 'Welcome Kay Dorrell'. A navigation bar includes links for Home, My Preferences, Requisition Settings, 0 Lines, and a Checkout button. A search bar is present with a dropdown menu set to 'All' and a 'Search' button. Below the search bar, a grid of options is shown, including 'Web' (Browse Supplier Websites), 'Special Requests' (Create a non-catalog request), 'Favorites' (Browse Favorite Items and Services), 'Templates' (Browse Company and Personal Templates), 'ePro Services' (Request Services), and 'Recently Ordered' (View recently ordered items and services). The 'Dell Punchout' option under the 'Web' category is highlighted with a red rectangular box. Other options listed include 'Fixed Cost Service', 'Variable Cost Service', and 'Time and Materials' under ePro Services, and 'Graphic Art Services', 'SCCSS Vending Registration a...', 'Service Plan for equipment', 'Inv # 64498', and 'Invoice # 0002415 - check co...' under Recently Ordered.

Receiving

Supplies and Equipment

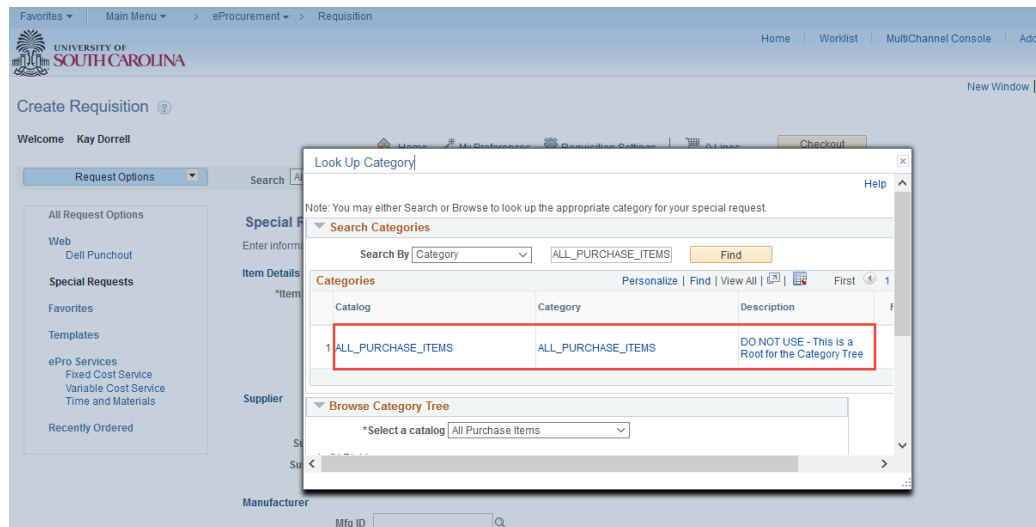
- When adding a Receipt to a PO that was issued for the acquisition of supplies or equipment, the dollar value that you assign to your Receipt should correspond to the amount of the goods received.
- An invoice may include sales tax, but do not include tax on receiving documents.
- Accounts Payable will add the correct sales/use tax on the Voucher they create.

Services

- When adding a Receipt to a PO that was issued for the acquisition of supplies or equipment, the dollar value that you assign to your Receipt should correspond to the amount received.

Item Categories

- Purchasing and Accounts Payable are working on a renovation of the Category Codes.
- This project should make the available Categories more accurate for purchases that departments are making.
- At no time should the “ALL_PURCHASE_ITEMS” Category be selected for a requisition. This is not a true Item Category, rather it is what is known as a catalog from which all other Categories are derived.



Upcoming Catalog & Category Update Changes webinars 5/17, 5/19, 5/23 and 5/25

ePro Services



- Effective June 1st, ePro Services will be inactivated.
- Requisitioners will need to select Special Request for regular requisitions.

A screenshot of the University of South Carolina eProcurement system interface. The top navigation bar includes "Favorites", "Main Menu", "eProcurement", and "Requisition". The University of South Carolina logo is on the left, and "Home", "Worklist", "MultiChannel Console", and "Add" are on the right. Below the navigation bar, there is a "Create Requisition" link with a help icon. A "Welcome Kay Dorrell" message is displayed. The main content area features a search bar with "All" selected, a "Search" button, and an "Advanced Search" link. Below the search bar, there are three main sections: "Web" with a globe icon and "Browse Supplier Websites" (with a "Dell Punchout" link below it), "Special Requests" with a folder icon and "Create a non-catalog request" (highlighted with a red box), and "Favorites" with a star icon and "Browse Favorite Items and Services". A "Checkout" button is visible in the top right corner of the main content area.

Upcoming Webinars

- Requisition Process Updates
5/12, 5/17, 5/18
- Catalog and Category Code Changes
5/17, 5/19, 5/23, 5/25
- Payment Request Updates
5/16, 5/19, 5/24, 5/26
- Approver Responsibilities and Workflow Updates
5/25, 5/26, 5/31, 6/2

Where to find this Quick Reference Guide



UNIVERSITY OF SOUTH CAROLINA

CALENDAR MAP DIRECTORY Search sc.edu GATEWAYS

The Division of **Information Technology**

SC.edu » Abol » Office » The I » 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



- If you have any additional questions please email them to 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!

