Requisition Process Updates

A Quick Reference Guide for Requisition Process Updates
Procurement
May 2016
Today’s Agenda

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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.
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 Form](image)
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.
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 Search button in the Search Requisitions section to update the status
3. Select Check Budget in the dropdown box and click the Go button
Suppliers

- Always check the supplier status using the following navigation:

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

- 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
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.
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.
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 1\textsuperscript{st}, ePro Services will be inactivated.
- Requisitioners will need to select Special Request for regular requisitions.
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

The Division of Information Technology

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!