Navigating PeopleSoft

Placing orders by Requisition
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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
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
  - Distribution/Chartfields - icon
  - Budget Information - tab
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
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
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
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
Your Worklist

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

• Catalog and Category Search
  • For Requisitions

• SC_POCATEGORYLIST
  • Category Codes
  • Account Codes
  • Taxable or Non-Taxable
  • Is Receiving is Required
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
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
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
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
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
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