



# REQUISITIONS (Classic), PURCHASE ORDERS, AND USING THE LIFESPAN

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## Overview

The Requisitions function in PeopleSoft Financials enables employees and procurement professionals to manage the purchasing of goods and services for the University. PeopleSoft Financials also contains related information including supplier records, payments, billing, budgets, and more.

Authorized requesters enter Requisitions in PeopleSoft in advance of a purchase. Purchasing Services then creates a purchase order in PeopleSoft, based on the requisition. Standard procedure is for Purchasing Services to email the purchase order to the supplier as an authorized university order, with the requester cc'd on the email.


A requisition creates a pre-encumbrance against the chartstring provided, reducing the available budget balance. Creation of the purchase order clears the pre-encumbrance and creates an encumbrance; the budget balance remains the same. Payment of the invoice clears the encumbrance and creates an expense.

## Requisition Settings

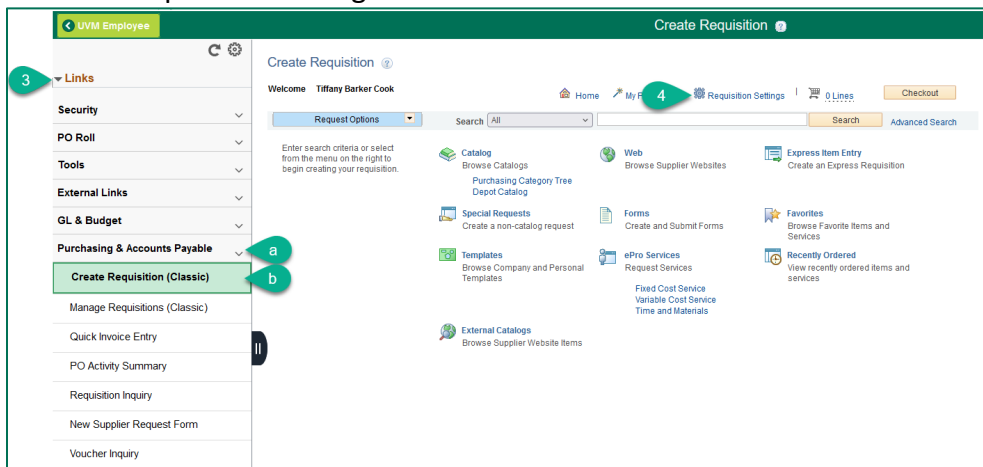
Requisition Settings are used to set defaults for certain fields that are the same across multiple lines/items. This can save the amount of data entry a user needs to do. If you are entering a single line/item, then you will not need to use Requisition Settings and can skip to the Create Requisition section.

1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.




- Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing related links. Then select **Create Requisition (Classic)**

- Click the Requisition Settings link.



- In the **Requisition Name** field, enter a Requisition Name that will be relevant when reviewing and searching for requisitions in the future.

- Click the lookup icon  to the right of the **Supplier ID** field.

- Enter the desired Search parameters in the **Supplier Search** screen.




- b. Click **Find**. The more characters entered, the more refined the search. Searching by Name produces results that contain the name entered.
- c. Select the appropriate supplier by clicking the radio button to the left of the appropriate **Supplier ID**.
- d. At the bottom of the screen, press **Select**.

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	Address Line 2	Address Line 3	State	
1 0000001202	Kevin Smiths Sports Connection	EPAY	E Payable Payments	38 South Main Street	Saint Albans	PO Box 1037		VT	
2 0000001202	Kevin Smiths Sports Connection	MAIN	ORDER/REMIT - ST ALBANS	38 South Main Street	Saint Albans	PO Box 1037		VT	
3 0000001202	Kevin Smiths Sports Connection	SO BURLING	ORDER/REMIT - SOUTH BURLINGTON	1174 Williston Road, Suite 1	South Burlington			VT	
4 0000002143	Smith Alvarez Sienkiewicz Architects	MAIN	ORDER/REMIT	117 Saint Paul Street, 3rd Floor	Burlington			VT	
5 0000002143	Smith Alvarez Sienkiewicz Architects	AR REFUND	AR REFUND	117 St. Paul Street, Suite 3	Burlington			VT	
6 0000005260	Paul Smiths College	ABAND PROP	REMIT - Abandoned Property	PO Box 265	Paul Smiths			NY	
7 0000005260	Paul Smiths College	GREEN SCHO	GREEN SCHOOL	PO Box 265	Paul Smiths			NY	
8 0000005260	Paul Smiths College	MAIN	ORDER/REMIT	PO Box 265	Paul Smiths			NY	
9 0000005260	Paul Smiths College	MEET	FALL WOODSMEN'S MEET	Fall Woodsmen's Meet Altn Brett McLeod	Paul Smiths	School of Forestry and National Resources	PO Box 7777	NY	
10 0000005260	Paul Smiths College	NRME	NRME	RI 86 & 30	Paul Smiths			NY	

7. Complete any fields that will be the same for all the requisition lines/items.  
**NOTE:** If you do not enter them in the Requisition Settings you will need to enter them on each of the lines.

- a. Click the **Category** field **look up** icon.
  - i. On the **Look-Up Category** page, ensure the Search By is set to **Description** in the dropdown menu. Enter account number or key words, then press **Find**. Click the **Description** label at the top of the column to sort the list for easier viewing.
  - ii. Click on the category to select it for use in your requisition.



- b. **Unit of Measure** - Enter the unit of measure or click on the **look up**  icon to find the unit. If the requested item's unit of measure is not listed, use **each (EA)**.

Most commonly used units of measure:

BOX – Box

CS – Case

EA - Each

LOT – Batch Lot

MO – Month

PAK – Pak

SET – Set

UNT – Units

8. If you need to change the default **Ship To location** or the **Chartstring** toggle the radio button from **Default** to **Override**, then update the fields accordingly.
- a. The **Account** defaults from the Category so this field should be left **blank**.
9. The **Due Date** field is ***not*** used by Purchasing Services and is not required. Requisitions are processed on a first come, first served basis.
10. When you have completed entering the requisition settings click **OK**.



**Requisition Settings**

Business Unit: UVM01 University of Vermont Requisition Name:

\*Requester: tbarker Tiffany Barker Cook Priority: Medium

\*Currency: USD

**Default Options**

☒ Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

☐ Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

**Line Defaults**

Supplier:  Category:

Supplier Location:  Unit of Measure:

Buyer:

**Shipping Defaults**

Ship To: 0000000206

Due Date:  Attention:

**Distribution Defaults**

SpeedChart:

**Accounting Defaults**

Personalize | Find |  |  First 1 of 1 Last

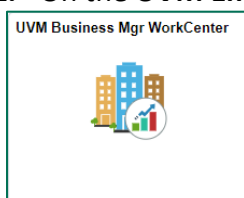
Chartfields1	Details	Asset Information	FFTP							
Dist	Percent	Location	GL Unit	Account	Oper Unit	Dept	Fund	Fund Affil	Source	Function
1		0000000206	UVM01		01	11200	100		100001	521


OK Cancel

## Create a Requisition

If creating a requisition for a single line/item, follow the instructions below. If you need to create a requisition for multiple lines/items, see the [Requisition Settings](#) section to set field defaults that are the same across multiple lines the skip to **Step 4**.

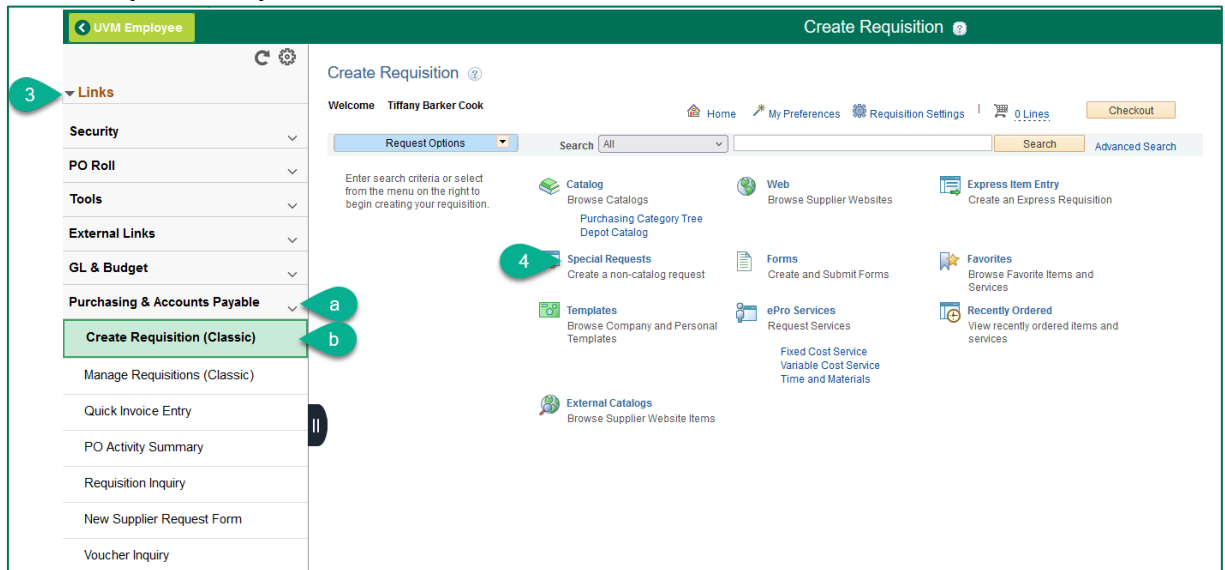
1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.




3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing related links. Then select **Create Requisition (Classic)**




4. Click the **Special Requests** link.




5. Complete the required fields denoted with an asterisk (\*).

- Item Description** – For goods, enter a description of the goods being purchased and their business purpose. For services, enter a description that includes the date and the nature of the service. Requisitions with insufficient descriptions may be returned to the requester for revisions.
- Price** - Enter the price of the item (e.g., 123.50).
- Quantity** - Enter the number of units to order
- Unit of Measure** - Enter the unit of measure or click on the **look up**  icon to find the unit. If the requested item's unit of measure is not listed, use **each (EA)**.  
Most commonly used units of measure:  

BOX – Box	CS – Case	EA - Each
LOT – Batch Lot	MO – Month	PAK – Pak
SET – Set	UNT – Units	
- Click the **Category** field **look up**  icon.



- i. On the **Look-Up Category** page, ensure the Search By is set to **Description** in the dropdown menu. Enter account number or key words, then press **Find**. Click the **Description** label at the top of the column to sort the list for easier viewing.
- ii. Click on the category to select it for use in your requisition.

6. Click the lookup icon  to the right of the **Supplier ID** field.
  - a. Enter the desired Search parameters in the **Supplier Search** screen.





- b. Click **Find**. The more characters entered, the more refined the search. Searching by Name produces results that contain the name entered.
- c. Select the appropriate supplier by clicking the radio button to the left of the appropriate **Supplier ID**. At the bottom of the screen, press **Select**.

Verify that the selected supplier's name and id are now in the appropriate fields of the **Supplier** section. If you are adding more than one item/line to your requisitions and want to default the supplier on lines, see [Requisition Settings](#).

Supplier Search										
Search Results										
	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	Address Line 2	Address Line 3	State	
<input type="radio"/>	1 0000000285	Office Environments Inc	ACH	ACH REMIT	PO Box 729	Williston			VT	
<input type="radio"/>	2 0000000285	Office Environments Inc	MAIN	ORDER/REMIT	PO Box 729	Williston			VT	
<input type="radio"/>	9 0000007256	Champlain Valley Office of Economic	FEEDING CH	FEEDING CHITTENDEN	PO Box 1603	Burlington			VT	
<input type="radio"/>	10 0000007256	Champlain Valley Office of Economic	FEED CHAMP	FEEDING CHAMPLAIN VALLEY	Feeding Champlain Valley	Burlington	PO Box 1594		VT	

7. The **Due Date** field is ***not*** used by Purchasing Services and is not required. Requisitions are processed on a first come, first served basis.
8. The **Blanket PO Dates** field is used with Blanket Purchase Orders. See instructions specific to [Blanket PO creation](#).
9. **Contract FP#** - enter the footprint number from the contract review process in the fillable box for "Contract #[ ]" when applicable.
10. The **Request New Item** section is not in use.
11. When the necessary item information has been entered, click **Add to Cart** to place this item on the requisition.

**Note:** The **Shopping Cart** on the right side of the screen displays a high-level running total of the items entered on the requisition.



Create Requisition ?

Welcome Kristy Perry

Home My Preferences Requisition Settings 1 Line

Request Options Search All Search

All Request Options

- Catalog
  - Depot Catalog
  - Purchasing Category Tree
- Special Requests
- Recently Ordered

Special Requests ?

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

Item Details

\*Item Description

\*Price

\*Quantity

\*Category

\*Currency USD

\*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

Blanket PO Dates

Format: mm/dd/yy-mm/dd/yy

Suggest New Supplier

Shopping Cart

Description	Qty	UOM
Item # 12345 Large Oval W...	1	EA

Total Lines 1

Total Amount (USD) 2000.00

Close Checkout

If you have additional items to order from the same supplier, repeat steps 6 through 23 to add the items to the requisition. **ONLY ONE SUPPLIER** can be used in each requisition.

### 12. Click either **Checkout** button.

Welcome Kristy Perry

Home My Preferences Requisition Settings 1 Line

Request Options Search All Search

All Request Options

- Catalog
  - Depot Catalog
  - Purchasing Category Tree
- Special Requests
- Recently Ordered

Special Requests ?

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

Item Details

\*Item Description

\*Price

\*Quantity

\*Category

\*Currency USD

\*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

Blanket PO Dates

Format: mm/dd/yy-mm/dd/yy

Suggest New Supplier

Checkout

Shopping Cart

Description	Qty	UOM
Item # 12345 Large Oval W...	1	EA

Total Lines 1

Total Amount (USD) 2000.00

Close Checkout

### 13. In the **Requisition Name** field, enter a Requisition Name that will be relevant when reviewing and searching for requisitions in the future.



### Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit UVM01 University of Vermont Requisition Name Room 1A Table

Requester kperry3 Kristy Perry Priority Medium

\*Currency USD

Cart Summary: Total Amount 2,000.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Item # 12345 Large Oval Wooden		Lindsay Wood Smith	1.0000	Each	2000.0000	2000.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 2,000.00 USD

14. Review the **Cart Summary** to ensure the items and quantities are accurate. To remove one line from the requisition, click the **Trashcan** icon to the far right of the line. For multiple line deletion, click the **checkbox** to the left of the line items, then click **Delete Selected** link below the items.

### Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit UVM01 University of Vermont Requisition Name Room 1A Table

Requester kperry3 Kristy Perry Priority Medium

\*Currency USD

Cart Summary: Total Amount 2,000.00 USD

Expand lines to review shipping and accounting details


Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Item # 12345 Large Oval Wooden		Lindsay Wood Smith	1.0000	Each	2000.0000	2000.00		Add	

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 2,000.00 USD

15. Click the  icon to expand the requisition line details. Review the **Ship To Address** and select a different one if necessary. If the UVM ship-to location you need is not in the search list, click the **Comments** bubble and add the address information on the **Line Comment** page, shown below. You can also include comments for the supplier or Purchasing Services here.

Cart Summary: Total Amount 2,000.00 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Item # 12345 Large Oval Wooden		Lindsay Wood Smith	1.0000	Each	2000.0000	2000.00		Add	

Shipping Line 1

\* Ship To 0000000206

Address Finance & Controller  
333 Waterman Bldg  
85 So Prospect St  
Burlington, VT 05405-0160

Add One Time Address Quantity 1.0000 Price 2000.0000

Price Adjustment  
Pegging Inquiry  
Pegging Workbench

Attention To Kristy Perry

Due Date



Line Comment page:

Line Comment

Business Unit UVM01 Requisition Date 06/28/2022 Status Open

Line 1

Comments

Entered On:

Please Ship to:  
123 Waterman Building, UVM  
Burlington, VT 05405

Please contact Tiffany prior to arrival @ 6-1092

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

Add Attachments

Attached File	User/Date Time	View	Send to Supplier
1		View	<input type="checkbox"/>

16. Attach required documents to the requisition by clicking **Add Attachments**.

Example of documents that may be required as attachments on requisitions are:

- Quotes, Estimates
- Contracts, Agreements, Terms & Conditions
- Quotation Evaluation Form or Single Sole Source Justification Form
- Employee vs. Independent Contractor Determination Form

17. Click **Choose File**, browse and select the file to attach, click **Upload**, then click **OK** to attach the file to the requisition. Multiple documents can be attached, by uploading one at a time.

Line Comment

Business Unit UVM01 Requisition Date 03/12/2018 Status Pending

Line 1

Comments

Entered On:

1 Need this shipped to:  
123 Waterman Building, UVM  
Burlington, VT 05405

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

Add Attachments

OK Cancel

File Attachment

Choose File No file chosen


Upload Cancel



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

**Add Attachments**

Attachments				
	Attached File	User/Date Time	View	Send to Supplier
1	QuotationEvaluationForm.pdf	tjbarker2024-07-16-16.41.52.144	<a href="#">View</a>	<input type="checkbox"/>
2	Quote_Terms_and_Conditions.pdf	tjbarker2024-07-16-16.46.26.643	<a href="#">View</a>	<input type="checkbox"/>

18. Click the  icon to expand the **Accounting Lines**. On the **Chartfields2** tab, review the Chartfield values to which this requisition item will be charged and change, or split if necessary.

**Note: DO NOT change the value in the Account field.** The system derives the Account value based on the Item Category. To change the Account, go back and change the Category code.

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	shirts		Kevin Smiths Sports Connection	4.0000	Each	25.0000	100.00			

Shipping Line 1

\*Ship To Address: 0000000206  
Finance & Controller  
333 Waterman Bldg  
85 So Prospect St  
Burlington, VT 05405-0160


Attention To: Cole Thomas  
Due Date:

Accounting Lines

\*Distribute By: Qty Accounting Tag: Multi-Accounting Tags

Account	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property
B4032	01	11011	100	100001	521				0000	0000	0000

Account number should NOT be modified

19. To split the item cost between multiple chartstrings, add distribution line(s). Click the  sign to the far right of the Accounting Line to create another line.

Accounting Lines

Account	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property
80014	01	11011	100	100001	521				0000	0000	

To change how the expenses are distributed, click the **Distribute By** dropdown, and select **Qty** (Quantity) or **Amt** (Amount). Select the method to use to allocate the expense account distribution.

Selecting either option enables you to distribute by percentage. If you change the amount or quantity, the percentage is adjusted. If you change the percent, the amount or quantity is adjusted. In either case, the total must equal 100 percent.

**Amount:** Select to enter a value in the Amount field. The sum of all distribution amounts must equal the schedule amount (the value in the Amount field on the Maintain Requisitions - Schedule page).



**Quantity:** Select to enter a value in the Req Qty field. The sum of all distribution quantities must equal the schedule quantity (the value in the Req Qty field on the Maintain Requisitions - Schedule page).

Enter the **Quantity** values or **Percent** values accordingly.

Accounting Lines

\*Distribute By: Qty Amt Qty Accounting Tag: Multi-Accounting Tags

Personalize | Find | View All | First 1-2 of 2 Last

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt
1	Open		0000000206	2.0000	50.0000	50.00
2	Open		0000000206	2.0000	50.0000	50.00

Update the values in the chartfields on the **Chartfields2** tab as needed. Repeat for all requisition lines.

Accounting Lines

Personalize | Find | View All | First 1-2 of 2 Last

Account	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property
80014	01	11011	100	100001	521				0000	0000	
80014	01	11002	100	100001	521				0000	0000	

Repeat steps 15-19 for all requisition lines.

## 20. When review is complete, click **Save & submit** on the bottom left of the screen.

### Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit: UVM01 University of Vermont Requisition Name: Room 1A Table

Requester: kperry3 Kristy Perry Priority: Medium

\*Currency: USD

Cart Summary: Total Amount 2,000.00 USD

Expand lines to review shipping and accounting details Add More Items

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	Item # 12345 Large Oval Wooden		Lindsay Wood Smith	1.0000	Each	2000.0000	2000.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 2,000.00 USD

Shipping Summary

Edit for All Lines

Ship To Location: 0000000206

Address: Finance & Controller  
333Waterman Bldg  
85 So Prospect St  
Burlington, VT 05405-0160

Attention To: Kristy Perry

Save & submit Save for Later Add More Items Preview Approvals

## 21. On the **Confirmation** page, click the **Check Budget** link or icon.



### Confirmation

Your requisition has been submitted.

Requested For	Kristy Perry	Number of Lines	1
Requisition Name	Room 1A Table	Total Amount	2,000.00 USD
Requisition ID	0000152937		
Business Unit	UVM01		
Status	Approved		
Priority	Medium		
Budget Status	Not Checked		

View printable version

Edit This Requisition

Check Budget

### No approvals required

Create New Requisition

Manage Requisitions

22. Verify that the **Budget Status** is valid. In the event of an error, click the **Error** link to see a description of the budget error. Work with your department budget manager or Sponsored Project Administration (SPA) to correct the error, then repeat the budget check process.

The type of error generated will depend on the fund being used in the chartstring:

A “**no budget exists**” error means that a budget for that chartstring is required but does not yet exist. A budget needs to be created for that chartstring to be used in a transaction.

An “**exceeds budget tolerance**” error means that the transaction exceeds the established budget for that chartstring (applicable for funds that are on control and do not allow spending over budget).

A “**Date out of bounds**” error means that the transaction date exceeds the project start/end date.

If the error is not resolved, Purchasing Services cannot see or process the requisition.

### Confirmation

Your requisition has been submitted.

Requested For	Kristy Perry	Number of Lines	1
Requisition Name	Room 1A Table	Total Amount	2,000.00 USD
Requisition ID	0000152937	Pre-Encumbrance Balance	2000.00 USD
Business Unit	UVM01		
Status	Approved		
Priority	Medium		
Budget Status	<a href="#">Error</a>		

**Correct Error and repeat budget check process. Purchasing Services does NOT see Requisition in their worklist until status is Valid.**




### Create a Blanket Requisition

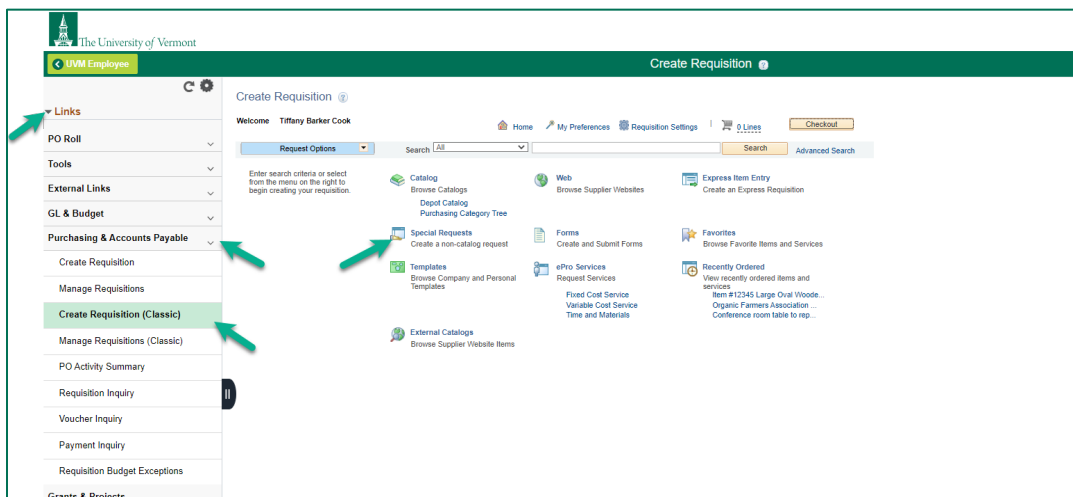
Requesters can enter requisitions for blanket purchase order in eProcurement at any time during the fiscal year as needed. If you are paying a supplier multiple times in a fiscal year, a blanket order is required.

If you need to create a blanket purchase order for a single line/item, follow the instructions below. If you need to create a requisition for multiple lines/items, see the [Requisition Settings](#) section to set field defaults that are the same across multiple lines the skip to **Step 4**.

1. Log into [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.



3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing related links. Then select **Create a Requisition (Classic)**
4. Click the **Special Requests** link.




5. Complete the required fields denoted with an asterisk (\*).
  - a. **Item Description** - For goods, enter a description of the goods being purchased and their business purpose. For services, enter a description that includes the date and the nature of the service. Requisitions with insufficient descriptions may be returned to the





requester for revisions.

- b. **Price** - enter a dollar amount **estimate of the total spend through the blanket end date**. If entering a blanket order based on a monthly charge or number of units, enter the monthly/unit amount in the **Price** field, e.g., 500.00, and the number of months in the **Quantity** field.
- c. **Quantity** - Enter the number of units to order. If it is a blanket order by dollar amount, enter 1 as the quantity. If the blanket order is by month or number of units, enter the correct quantity for the remaining fiscal year, e.g., 12 months.

- d. **Unit of Measure** - Enter the unit of measure or click on the **look up**  icon to find the unit. If the requested item's unit of measure is not listed, use **each (EA)**.

Most commonly used units of measure:

BOX – Box

CS – Case

EA - Each


LOT – Batch Lot

MO – Month

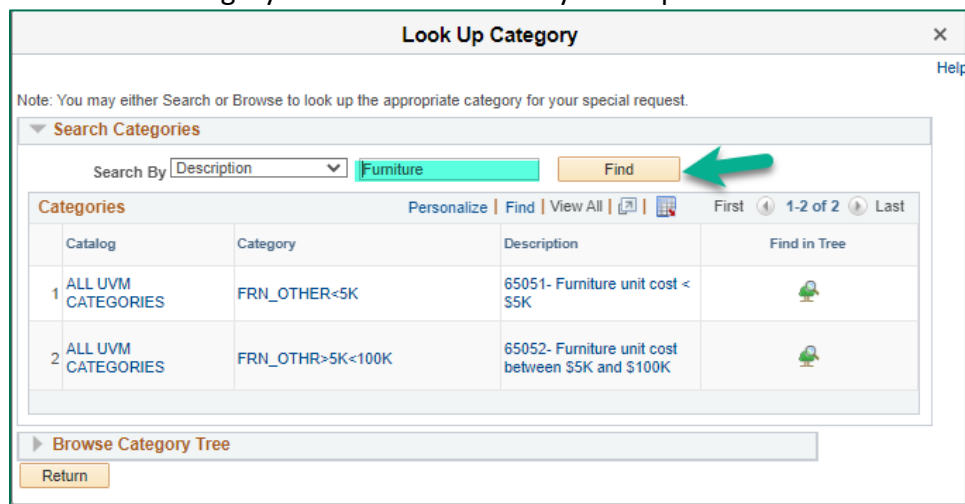
PAK – Pak


SET – Set

UNT – Units

- e. Click the **Category** field **look up**  icon.
  - i. On the **Look-Up Category** page, ensure the Search By is set to **Description** in the dropdown menu. Enter account number or key words, then press **Find**. Click the **Description** label at the top of the column to sort the list for easier viewing.

- ii. Click on the category to select it for use in your requisition.



- 6. Click the lookup icon  to the right of the **Supplier ID** field.



- a. Enter the desired Search parameters in the **Supplier Search** screen. Click **Find**. The more characters entered, the more refined the search. Searching by Name produces results that contain the name entered.

**Supplier Search**

Supplier ID  Find  
Name  smith Reset  
Short Supplier Name   
Alternate Supp Name   
City   
Country  State   
Postal Code

**Search Results** Personalize | Find | View 10 | First 1-44 of 44 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input type="radio"/>	1 0000001202	Kevin Smiths Sports Connection	EPAY	E Payable Payments	PO Box 1037	St Albans	VT	
<input type="radio"/>	2 0000001202	Kevin Smiths Sports Connection	MAIN	ORDER/REMIT - ST ALBANS	PO Box 1037	St Albans	VT	
<input type="radio"/>	3 0000001202	Kevin Smiths Sports Connection	SO BURLING	ORDER/REMIT - SOUTH BURLINGTON	1174 Williston Road, Suite 1	South Burlington	VT	
<input type="radio"/>	4 0000001277	Lesser Goldsmith Ent	MAIN	ORDER/REMIT	222 Dorset Street	South Burlington	VT	
<input type="radio"/>	5 0000002143	Smith Alvarez Sienkiewicz Architects	MAIN	ORDER/REMIT	117 St Paul Street, 3rd Floor	Burlington	VT	

- b. Select the appropriate supplier by clicking the radio button to the left of the appropriate **Supplier ID**. At the bottom of the screen, press **Select**.
  - c. Verify that the selected supplier's name and id are now in the appropriate fields of the **Supplier** section. You will need to populate all lines of your requisition with the same supplier ID and location.
7. Complete the **Blanket PO Dates** field for all blanket purchase orders. The start and end dates of the blanket purchase order must be entered in the following format: **mm/dd/yy-mm/dd/yy**, (e.g., 07/01/24-06/30/24).

**Create Requisition**

Welcome Tiffany Barker Cook

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced Search

**All Request Options**

- Catalog
  - Purchasing Category Tree
  - Depot Catalog
- Web
- Express Item Entry
- Special Requests**
- Forms
- Favorites
- Templates
- ePro Services
  - Fixed Cost Service
  - Variable Cost Service
  - Time and Materials
- Recently Ordered
- External Catalogs

**Special Requests**

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

**Item Details**

\*Item Description  Lab Supplies, beakers, test tubes, pipettes, glassware  
\*Price  50000 \*Currency  USD  
\*Quantity  1 \*Unit of Measure  LOT  
\*Category  RES\_SUPPL\_MATRL Due Date

**Supplier**

\*Supplier ID  0000018600  
\*Supplier Name  Thermo Fisher Scientific LLC Request a New Supplier  
Blanket PO Dates (MM/DD/YY-MM/DD/YY)  07/01/24-06/30/24  
Manufacturer   
Contract FP#

**Additional Information**

Blanket order for full fiscal year by total spend amount on 1 line and 1 chartstring.




8. When the necessary item information has been entered, click **Add to Cart** to place this item on the requisition.
9. **For remaining Blanket Requisition Processing**—refer to [Steps 12-22](#) under [Create a Requisition](#) above.
10. **Additional Notes for Blanket Requisitions:**
  - a. Use your best estimate for total spend. **Hint:** use last fiscal year's total spend amount as a starting amount. If you go over that amount, email Purchasing Services to increase the PO to cover the remainder of the fiscal year. See our FAQs.
  - b. If your requisition is connected to an RFP (Request for Proposal) and is a UVM contracted supplier, include the RFP # in the comments section. This means *no documents* are required to be attached to your requisition because Purchasing already has the documents on file for audit purposes.
  - c. Blanket Requisitions can be used for many different purposes to a supplier:
    - Purchasing goods or services multiple times through the fiscal year
    - Purchasing goods or services on a monthly basis
    - Purchasing goods or services quarterly
    - Purchasing services from an individual 2 or more times during academic year
    - Purchasing goods or services multiple times on different chartstrings
  - d. Include previous fiscal year purchase order # in comment field, if applicable.

## Create a Requisition for the Computer Depot

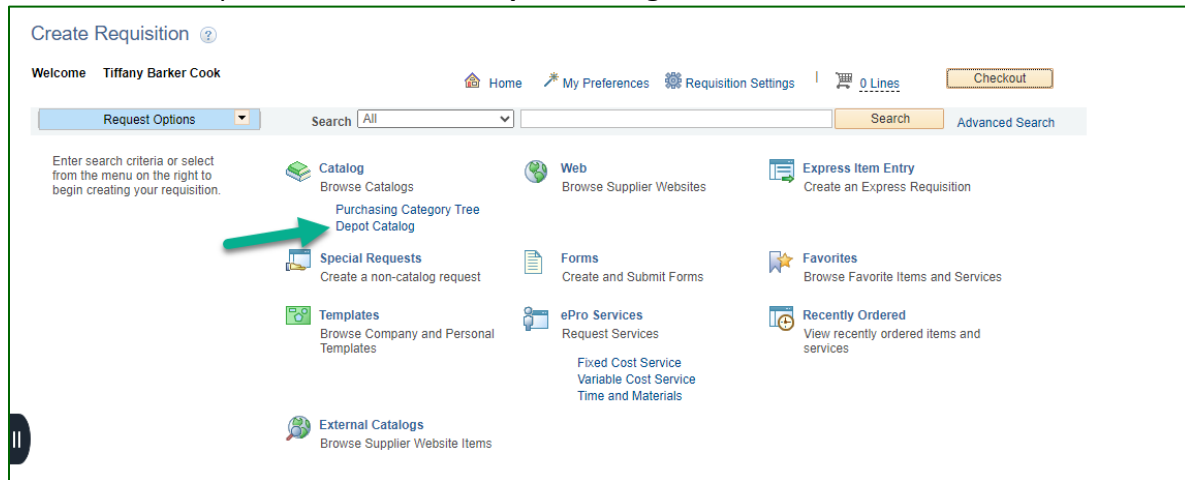
1. Log in to [PeopleSoft Financials](#).
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.



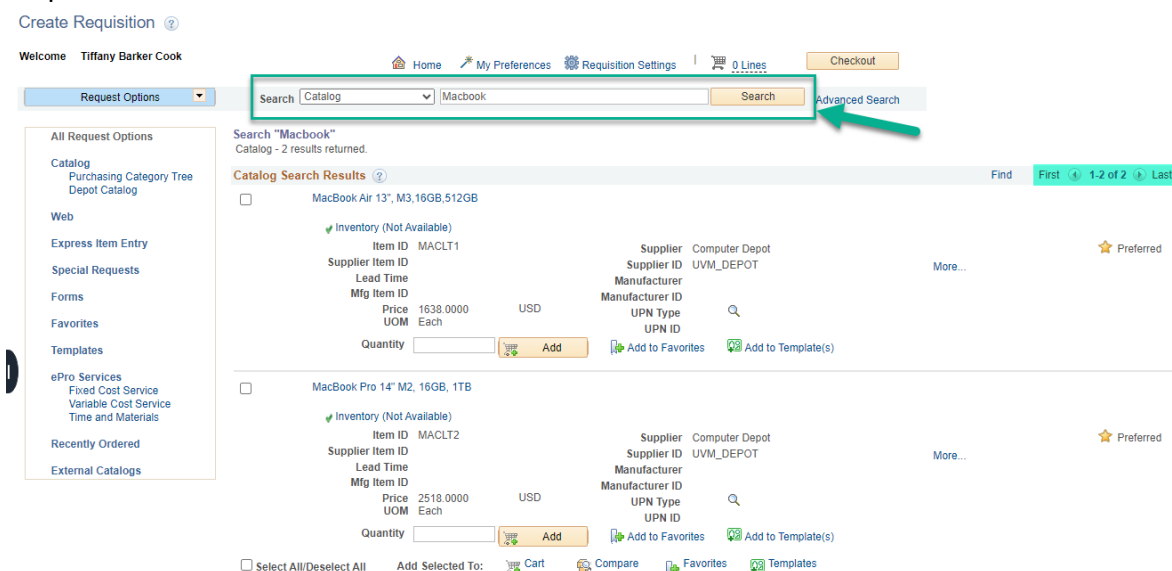
3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing related links. Then select **Create Requisition (Classic)**



4. To browse all depot items, click the **Depot Catalog** link.



5. If you know part of the item name, enter it in the **Search** field, and press **Enter** or click **Search**. In this example, searching by the term **MacBook** returns 2 items. To view the entire catalog, see Step 6.





- To narrow down the items available to you, you can select “Depot” or “Larner College of Medicine” in the **Filter by** section.

Create Requisition

Welcome Tiffany Barker Cook

Request Options Search Catalog Search Advanced Search

Filter by

Category Path  
Depot  
Larner College of Medicine

Browse Catalogs > Select + Sign for Categories

Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

Catalog Search Results

Find First 1-25 of 25 Last

Apple Custom Quote-Call 6-3067

Item ID APPLE\_QUOTE Supplier Computer Depot  
Supplier Item ID UVM\_DEPOT  
Lead Time  
Mfg Item ID  
Price 0.0000 USD  
UOM Each  
Quantity Add Add to Favorites Add to Template(s)

Satechi Type-C Slim Multiport

Inventory (Not Available)  
Item ID CLASADPT Supplier Computer Depot  
Supplier Item ID UVM\_DEPOT  
Lead Time  
Mfg Item ID  
Price 60.0000 USD  
UOM Each  
Quantity Add Add to Favorites Add to Template(s)

U2422HE USB-C Hub Display, Ver

- In the **Catalog Search Results**, find the desired item and enter the quantity to order in the Quantity field. Click **Add** to add the item to the cart. To add multiple items to the cart at once, see step 8.

**NOTE:** If you cannot locate a specific item you need use one of the Custom Quote options and contact the Depot at 6-3067.

Create Requisition

Welcome Kristy Perry

Request Options Search Catalog Search Advanced Search

Filter by

Category Path  
Depot

Browse Catalogs > Select + Sign for Categories

Select All/Deselect All Add Selected To: Cart Compare Favorites Templates

Catalog Search Results

MacBook Pro 13" 2.3GHz i5, 8GB

No Image

Item ID MPXR2LL/A Supplier Computer Depot  
Supplier Item ID UVM\_DEPOT  
Lead Time  
Mfg Item ID  
Price 1249.0000 USD  
UOM Each  
Quantity Add Add to Favorites Add to Template(s)

- To add multiple items to the cart at once, click the **Checkbox** to the left of each desired item, enter the quantity for each, then click the **+Cart** icon above the Catalog Search Results section (if no quantities are entered per item, a quantity of 1 will be used).



Welcome Kristy Perry (All Pages) Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search Catalog Search Advanced Search

Filter by Category Path Depot

Browse Catalogs > Select + Sign for Categories

Select All/Deselect All Add Selected To: **Cart** Compare Favorites Templates

Catalog Search Results Find First 1-72 of 72 Last

MacBook Pro 13" 2.3GHz i5, 8GB

Inventory (Not Available)

Item ID MPXR2LL/A Supplier Computer Depot Supplier ID UVM\_DEPOT Manufacturer UVM\_DEPOT Manufacturer ID Lead Time 30

Price 1249.0000 USD UOM Each

Quantity  Add Add to Favorites Add to Template(s)

MacBook Pro 13" 2.3GHz i5, 8GB

Inventory (Not Available)

Item ID MPXR2LL/A Supplier Computer Depot Supplier ID UVM\_DEPOT Manufacturer UVM\_DEPOT Manufacturer ID Lead Time 30

Price 1449.0000 USD UOM Each

Quantity  Add Add to Favorites Add to Template(s)

MacBook Pro 15" 3.1GHz i5 Touch

Inventory (Not Available)

Item ID MPXY2LL/A Supplier Computer Depot Supplier ID UVM\_DEPOT Manufacturer UVM\_DEPOT Manufacturer ID Lead Time 30

Price 1899.0000 USD UOM Each

Quantity  Add Add to Favorites Add to Template(s)

9. Requested items appear in the **Shopping Cart**, in the upper right corner of the screen. When all desired items are in the **Shopping Cart**, click one of the **Checkout** buttons.

Create Requisition

Welcome Kristy Perry (All Pages) Home My Preferences Requisition Settings 2 Lines **Checkout**

Request Options Search Catalog Search Advanced Search

Filter by Category Path Depot

Browse Catalogs > Select + Sign for Categories

Select All/Deselect All Add Selected To: **Cart** Compare Favorites Templates

Catalog Search Results Find First 1-72 of 72 Last

MacBook Pro 13" 2.3GHz i5, 8GB

Inventory (Not Available)

Item ID MPXR2LL/A Supplier Computer Depot Supplier ID UVM\_DEPOT Manufacturer UVM\_DEPOT Manufacturer ID Lead Time 30

Price 1249.0000 USD UOM Each

Quantity  Add Add to Favorites Add to Template(s)

MacBook Pro 13" 2.3GHz i5, 8GB

Inventory (Not Available)

Item ID MPXR2LL/A Supplier Computer Depot Supplier ID UVM\_DEPOT Manufacturer UVM\_DEPOT Manufacturer ID Lead Time 30

Price 1249.0000 USD UOM Each

Quantity  Add Add to Favorites Add to Template(s)

**Shopping Cart**

Description	Qty	UOM
2.3GHz dual-core Intel Co...	1	EA
3.1GHz dual-core Intel Co...	1	EA

Total Lines 2  
Total Amount (USD) 3348.00

Close **Checkout**



10. In the **Requisition Name** field, enter a Requisition Name that will be relevant when reviewing and searching for requisitions in the future.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit UVM01 University of Vermont

\*Requester sSkperry3 Kristy Perry (All Pages)

\*Currency USD

Requisition Name Laptops: J. Paris & T. Porter

Priority Medium

Cart Summary: Total Amount 3,348.00 USD

Expand lines to review shipping and accounting details

Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	2.3GHz dual-core Intel Core i5	MPXU2LL/A	Computer Depot	1.0000	Each	1449.0000	1449.00		Add	
2	3.1GHz dual-core Intel Core i5	MPXY2LL/A	Computer Depot	1.0000	Each	1899.0000	1899.00		Add	

Select All / Deselect All

Select lines to:

Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 3,348.00 USD

Shipping Summary

Edit for All Lines

Multiple values exist for one or more schedules. Expand lines to see shipping details.

11. Review the **Cart Summary** to ensure the items and quantities are accurate. To remove one line from the requisition, click the **Trashcan** icon to the far right of the line. For multiple line deletion, click the **checkbox** to the left of the line items, then click **Delete Selected** link below the items.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit UVM01 University of Vermont

\*Requester sSkperry3 Kristy Perry (All Pages)

\*Currency USD

Requisition Name Laptops: J. Paris & T. Porter

Priority Medium

Cart Summary: Total Amount 3,348.00 USD

Expand lines to review shipping and accounting details

Add More Items

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
<input checked="" type="checkbox"/> 1	2.3GHz dual-core Intel Core i5	MPXU2LL/A	Computer Depot	1.0000	Each	1449.0000	1449.00		Add	
<input type="checkbox"/> 2	3.1GHz dual-core Intel Core i5	MPXY2LL/A	Computer Depot	1.0000	Each	1899.0000	1899.00		Add	

Select All / Deselect All

Select lines to:

Add to Favorites Add to Template(s) Delete Selected Mass Change


Total Amount 3,348.00 USD

Shipping Summary

Edit for All Lines



Multiple values exist for one or more schedules. Expand lines to see shipping details.



12. Click the  icon to expand the requisition line details. Review the **Ship To Address** and select a different one if necessary. If the UVM ship-to location you need is not in the search list, click the **Comments** bubble and add the address information on the **Line Comment** page, shown below.

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	2.3GHz dual-core Intel Core i5	MPXU2LL/A	Computer Depot	1.0000	Each	1449.0000	1449.00		 Add	

Shipping Line 1

\*Ship To: 0000000206

Address: Finance & Controller  
333 Waterman Bldg  
85 So Prospect St  
Burlington, VT 05405-0160

Quantity: 1.0000  
Price: 1449.0000

Price Adjustment  
Pegging Inquiry  
Pegging Workbench

Attention To: Kristy Perry  
Due Date:

13. Line Comment page:

Line Comment

Business Unit UVM01 Requisition Date 03/08/2018  
Status Open

Line 2

Comments Find First 1 of 1 Last


Entered On:

1 Need this shipped to:  
123A Waterman Building, UVM  
Burlington, VT 05405

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



Add Attachments

OK Cancel

14. Click the  icon to expand the **Accounting Lines**. On the **Chartfields2** tab, review the Chartfield values to which this requisition item will be charged and change, or split if necessary.

**Note:** DO NOT change the value in the Account field. The system derives the Account value based on the Item Category.

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	swag		Kevin Smith's Sports Connection	1.0000	Each	1000.0000	1000.00		 Add	

Shipping Line 1

\*Ship To: 0000000206

Address: Finance & Controller  
333 Waterman Bldg  
85 So Prospect St  
Burlington, VT 05405-0160

Quantity: 1.0000  
Price: 1000.0000

Price Adjustment  
Pegging Inquiry  
Pegging Workbench

Attention To: Cole Thomas  
Due Date:

Accounting Lines

\*Distribute By: City Accounting Tag: Multi-Accounting Tags


Accounting Lines

Chartfields1 Chartfields2 Details Details 2 Asset Information Asset Information 2 Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt
1	Open		0000000206	1.0000	100.0000	1,000.00

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 1,000.00 USD

15. To split the item cost between multiple chartstrings, add distribution line(s). Click the  sign to the far right of the Accounting Line to create another line.





The screenshot shows the 'Accounting Lines' tab in the PeopleSoft Financials interface. The 'Distribute By' dropdown menu is open, showing options: 'Qty', 'Amt', and 'Qty'. The 'Qty' option is selected. The interface includes various tabs like 'Chartfields1', 'Chartfields2', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Chartfields2' tab is active, showing a grid of fields for Account, Oper Unit, Dept, Fund, Source, Function, PC Bus Unit, Project, Activity, Program, Purpose, and Property. The 'Distribute By' dropdown is highlighted with a red circle.

To change how the expenses are distributed, click the **Distribute By** dropdown, and select **Qty** (Quantity) or **Amt** (Amount). Select the method to use to allocate the expense account distribution.

Selecting either option enables you to distribute by percentage. If you change the amount or quantity, the percentage is adjusted. If you change the percent, the amount or quantity is adjusted. In either case, the total must equal 100 percent.

**Amount:** Select to enter a value in the Amount field. The sum of all distribution amounts must equal the schedule amount (the value in the Amount field on the Maintain Requisitions - Schedule page).

**Quantity:** Select to enter a value in the Req Qty field. The sum of all distribution quantities must equal the schedule quantity (the value in the Req Qty field on the Maintain Requisitions - Schedule page).

Enter the **Quantity** values or **Percent** values accordingly.

The screenshot shows the 'Accounting Lines' tab in the PeopleSoft Financials interface. The 'Distribute By' dropdown menu is open, showing options: 'Qty', 'Amt', and 'Qty'. The 'Qty' option is selected. The interface includes various tabs like 'Chartfields1', 'Chartfields2', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Chartfields2' tab is active, showing a grid of fields for Account, Oper Unit, Dept, Fund, Source, Function, PC Bus Unit, Project, Activity, Program, Purpose, and Property. The 'Distribute By' dropdown is highlighted with a red circle.

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt
1	Open		0000000206	0.7142	71.4200	714.20
2	Open		0000000206	0.1429	14.2900	142.90
3	Open		0000000206	0.1429	14.2900	142.90

Update the values in the chartfields on the **Chartfields2** tab as needed. Repeat for all requisition lines.

The screenshot shows the 'Accounting Lines' tab in the PeopleSoft Financials interface. The 'Distribute By' dropdown menu is open, showing options: 'Qty', 'Amt', and 'Qty'. The 'Qty' option is selected. The interface includes various tabs like 'Chartfields1', 'Chartfields2', 'Details', 'Details 2', 'Asset Information', 'Asset Information 2', and 'Budget Information'. The 'Chartfields2' tab is active, showing a grid of fields for Account, Oper Unit, Dept, Fund, Source, Function, PC Bus Unit, Project, Activity, Program, Purpose, and Property. The 'Distribute By' dropdown is highlighted with a red circle.

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt
1	Open		0000000206	0.7142	71.4200	714.20
2	Open		0000000206	0.1429	14.2900	142.90
3	Open		0000000206	0.1429	14.2900	142.90

Repeat steps 12-14 for all requisition lines.

- When review is complete, click **Save & Submit**. This will send the requisition to the **Computer Depot**. When they receive the requisition, they will send an approval email. The expense will be charged to the chartstring(s) provided. In the event that a chartstring is not valid, the Depot will ask the requisitioner for a new, valid chartstring. The requisition will be budget-checked by the **Computer Depot** once they have received the valid chartstring(s).



## Managing & Tracking Requisitions

The **Requisition Details** Query is helpful for finding information related to the requisition, including the purchase order, invoice, and payments made.


The query provides the following data:

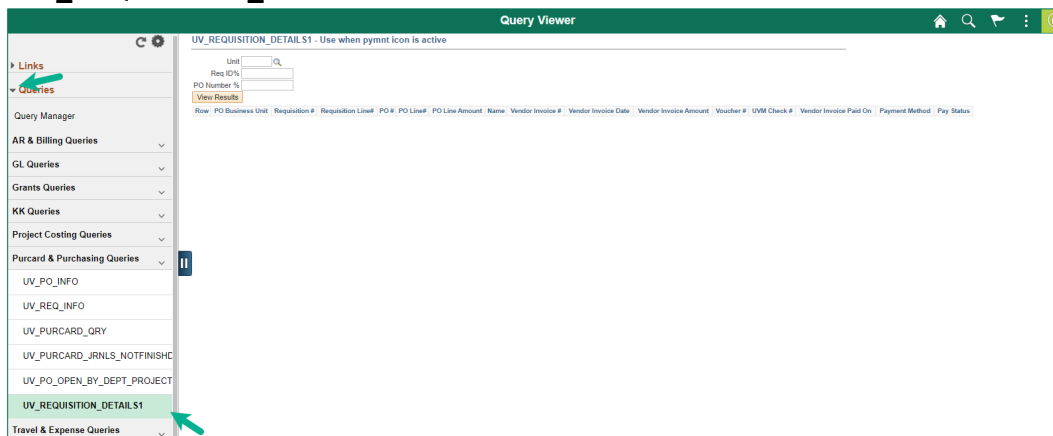
- PO Business Unit
- Requisition ID
- Requisition Line number
- Associated PO #, PO Line #, PO Line Amount
- Supplier Name, Invoice Number, Invoice Date, Invoice Amount
- Associated Voucher #
- UVM Check #, Payment Date, Method, Status (P = Paid, V = Void)

### Run the Requisition Details Query

1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.



3. Click the **Arrow**  icon to expand the **Queries** menu and the **PurCard & Purchasing Queries** menu to view frequently used Purchasing related queries. Then select **UV\_REQUISITION\_DETAILS1**



4. This query requires that you supply criteria, displaying required prompts for Unit, Req ID, and PO Number.



- a. **Unit:** Enter **UVM01** into the field or use the search icon to select the value. This is the purchasing Business Unit for the requisition.
- b. **Req ID & PO Number:** These fields display % next to them. Either data element is sufficient. Enter the id number you have into the corresponding field. Enter % in the other.

### Examples:

If you have the **Requisition ID**, enter criteria as follows:

UV\_REQUISITION\_DETAILS1 - Use when pymnt icon is active

Unit

Req ID%

PO Number %

[View Results](#)

If you have the **PO Number**, enter criteria as follows:

UV\_REQUISITION\_DETAILS1 - Use when pymnt icon is active

Unit

Req ID%

PO Number %

[View Results](#)

5. When you have completed entering your criteria click **View Results**.
6. You can download your results to Excel by clicking the **Excel Spreadsheet** hyperlink.

Query Viewer

UV\_REQUISITION\_DETAILS1 - Use when pymnt icon is active

Unit

Req ID%

PO Number %

[View Results](#)

Download results: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All

Row	PO Business Unit	Requisition #	Requisition Line#	PO #	PO Line#	PO Line Amount	Name	Vendor Invoice #	Vendor Invoice Date	Vendor Invoice Amount	Voucher #	UVM Check #	Vendor Invoice Paid On	Payment Method	Pay Status
1	UVM01	0000043187	1	0000041089	1	63.000	NASPA Student Affairs Administrators	199991	03/03/2009	63.000	00210650	1117325	03/27/2009	CHK	P

First 1-1 of 1 Last




### View Chartstring Information

Chartstrings track when and where goods and services are charged within the University. Requisition data including business unit, department, price and budget is found here.

1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.




3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing related links. Then select **Manage Requisitions (Classic)**
4. Enter the search criteria for a Requisition. Click **Search**.

**Manage Requisitions**


▼ **Search Requisitions**

To locate requisitions, edit the criteria below and click the Search button.



Business Unit:	UVM01	Requisition Name:	
Requisition ID:		Request Status:	All but Complete
Date From:		Date To:	
Requester:		Entered By:	
		PO ID:	

**Search** 

5. Click the **Req ID** link to open the **Requisition Details** page.

**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	
 <b>0000142769</b>	Flynn Center Dnce Works...	UVM01	01/04/2017	Complete	Valid	810.00 USD	 <b>Go</b>

6. Click the  icon to expand the Requisition Line.


**Requisition Details**

Requisition Summary

Business Unit	UVM01	Requisition Name	Flynn Center Dnce Workshop F16
Date	01/04/2017	Requisition ID	0000142769
Request State	Complete	Total Amount	810.00 USD
Requested For	kdutra	Pre-Encumbrance Balance	0.00 USD


Expand lines to review shipping and accounting details

**Requisition Lines**

Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
 1 	"Looking Deeper" Dance Works...	Complete	No	1.0000 AvgCost	810.00000 USD	Closed	810.00


PO information



7. View the Requisition Information. Click the  icon to expand the Accounting Lines section for accounting details. Chartstring Information is on the **More Details** tab.

Expand lines to review shipping and accounting details

Requisition Lines							
Line	Item Description	Source Status	Amount Only	Quantity	Price	Status	Total
1	"Looking Deeper" Dance Works...	Complete	No	1.0000 AvgCost	810.00000 USD	Closed	810.00
							
PO information							
Shipping Line 1	Ship To 0000000311			Quantity 1.0000			
	UVM Music & Dance			Price 810.00000	Price Adjustment		
	200C Music/Southwick Complex						
	392 South Prospect Street						
	Burlington, VT 05405-1708						
	Attention To Kelly Dutra						
	Due Date 01/04/2017						
 Accounting Lines							



If there are multiple accounting lines on this requisition line, click the **Next/Previous Arrows** , **First/Last** links, or **View All** option to see additional lines.

Accounting Lines


Distribute By Qty

Liquidate By Amt



Accounting Lines

Personalize |  

First 1 of 1 Last

Details More Details Mgre Details 2 Asset Information Budget Information 

Oper Unit	Fund	Dept	Program	Function	Source	PC Bus Unit	Project	Activity	Purpose	Property	Affiliate
12	320	52000	0317	201	300234				1951	0000	


 

## Manage Requisitions Using the Lifespan

The Request Lifespan is a tool that allows users to view each step in the procurement process. The status of where the requisition is currently in its lifespan is illustrated. Additional details can also be found here.

1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.



3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing related links. Then select **Manage Requisitions (Classic)**.



- The Business Unit field will populate automatically with **UVM01**. This is the default purchasing Business Unit.
- Verify the **Requester** user id.
- Enter a **Requisition ID** if known, or leave the field blank.
- Verify the **Date From** and **Date To** fields to ensure that they are correct.
- Click **Search**.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:	UVM01	Requisition Name:		
Requisition ID:		Request Status:	All but Complete	Budget Status:
Date From:		Date To:		
Requester:		Entered By:		PO ID:

Search

- Requisitions meeting the search criteria are displayed.
- To view more information regarding a requisition, expand the section by clicking on the triangle to the left of the line.
- The **Request Lifespan** is displayed. In the Request Lifespan, links will become active as that step in the procurement process is completed.

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	Status	Budget	Total	
0000140210	FY17 New Copier Cancer ...	UVM01	09/26/2016	PO(s) Dispatched	Valid	2,799.80 USD	<Select Action> Go
0000139320	FY17 Foundation Copier ...	UVM01	08/23/2016	PO(s) Dispatched	Valid	1,382.59 USD	<Select Action> Go

Only requisition lines that have a supplier assigned to them, have been approved, and have been budget-checked to **Valid** status, will move forward in the purchasing process.

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	
0000140210	FY17 New Copier Cancer ...	UVM01	09/26/2016	Complete	Valid	2,799.80 USD	[Select Act] Go

Requester: Tina Mazuzan Entered By: Natalie Guilette Priority: Medium

Pre-Encumbrance Balance: 0.00 USD

Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment

Request Lifespan:

Line Information

Line	Description	Status	Price	Currency	Quantity	UOM	Supplier
1	Copier Lease Konica KON-C458...	Closed	279.9800	USD	10.0000	EA	U S Bancorp Equipment Finance Inc



12. After Purchasing Services has created a purchase order for the requisition, the Purchase Orders link will become active in the Request Lifespan section.

Req ID	Requisition Name	BU	Date	Request State
0000140210	FY17 New Copier Cancer ...	UVM01	09/26/2016	Complete

Requester	Tina Mazuzan	Entered By	Natalie C
Pre-Encumbrance Balance	0.00	USD	

Requisition

Approvals

Inventory

Purchase Orders

Change Request

As shown above, the Request State for this is Complete. Definitions for requisition statuses are:

- PO Created – requisition is in process
- PO Approved – requisition is in process
- PO Dispatched – PO successfully processed, sent to supplier, and ready for department's use
- PO Complete – PO closed and encumbrance(s) released

13. Click the **Purchase Orders** link to view the Purchase Order Inquiry page. The PO Number and Requisition details are displayed.

Business Unit UVM01

Requisition information Find | View All First 1 of 1 Last

Requisition ID 0000140210 Line Number 1

PO information Find | View All First 1 of 1 Last

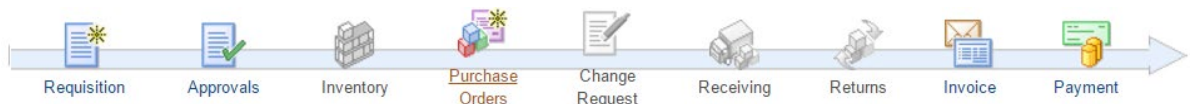
PO Number 0000152832 Buyer dharvey Change Order

PO Date 09/26/2016 Supplier ID 0000000715 Terms N0 PO Status Complete

Line	Item ID	Description	Merchandise Amt	UOM	PO Qty	Status	Line Details
1		Copier Lease Konica KON-C458- Serial #A79M011000635	2,799.80 USD	EA	10.0000	Closed	

[Return to Manage Requisitions](#)

14. As the Disbursement Center completes more steps in the procurement process, additional links will activate until the lifespan is completed.





15. An active **Invoice** icon indicates that an invoice is being processed for payment. Click the **Invoice** icon to view the voucher number, invoice amount and supplier information. Be sure to click **View All**, or scroll through to see all voucher lines associated with this PO.

Business Unit UVM01 Requisition ID 0000140210

Find | View All First 1 of 1 Last

Business Unit UVM01 PO Number 0000152832 Purchase Order Date 09/26/2016 Match Rule UVM\_MATCH

Supplier ID 0000000715 Supplier Location EPAY U S Bancorp Equipment Finance Inc

PO Line Find | View All First 1 of 1 Last

Line Number 1 Sched # 1 Item ID

Merchandise Amount 2799.800 PO Quantity 10.0000 Match Status PO: Matched

PO Voucher Lines Personalize | Find View All 1-3 of 10 Last

AP Unit	Voucher	Line	Entry Status	Match Status	Amount	UOM	Quantity	BU Recv	Receipt No	Receipt Line	Finalized Distribution
AP001	00715691	1	Postable	Matched	279.980 EA		1.0000				
AP001	00721036	1	Postable	Matched	279.980 EA		1.0000				
AP001	00724815	1	Postable	Matched	279.980 EA		1.0000				

16. An active **Payment** icon indicates payment has been processed. Click the **Payment** icon to view the check number (Payment Reference ID), check date, payment address, and other payment information. Be sure to click **View All** or scroll through to see all voucher payment lines associated with this PO.

Business Unit UVM01 Requisition ID 0000140210

Find | View All First 1 of 10 Last

Business Unit AP001 Requisition ID 0000140210 PO Number 0000152832 Voucher ID 00715691

PO Payment Find | View All First 1 of 1 Last

Bank Name US Bank NA Payment Reference ID 003821

Pay Cycle EPAY Accounting Date 09/27/2016

Pay Cycle Seq # 390 Payment Date 09/27/2016

Supplier Name U S Bancorp Equipment Finance Inc Days Outstanding 3

Address PO Box 790448 Payment Clear Date 09/30/2016

Address Line 2 Reconcile Date 09/30/2016

City St Louis MO 63179-0448 USA Payment Date 09/27/2016

Payment Amount 2,234.660 USD Payment Method EFT

Description

Review Payments Personalize | Find 1 of 1 Last

Details Additional Details

Business Unit	Voucher ID	Advice Sequence	Advice Date	Invoice Number	Gross Paid Amount	Paid Amount	Payment Currency
AP001	00715691	1	09/14/2016	313285413	279.98	279.98	USD

[Return to Manage Requisitions](#)




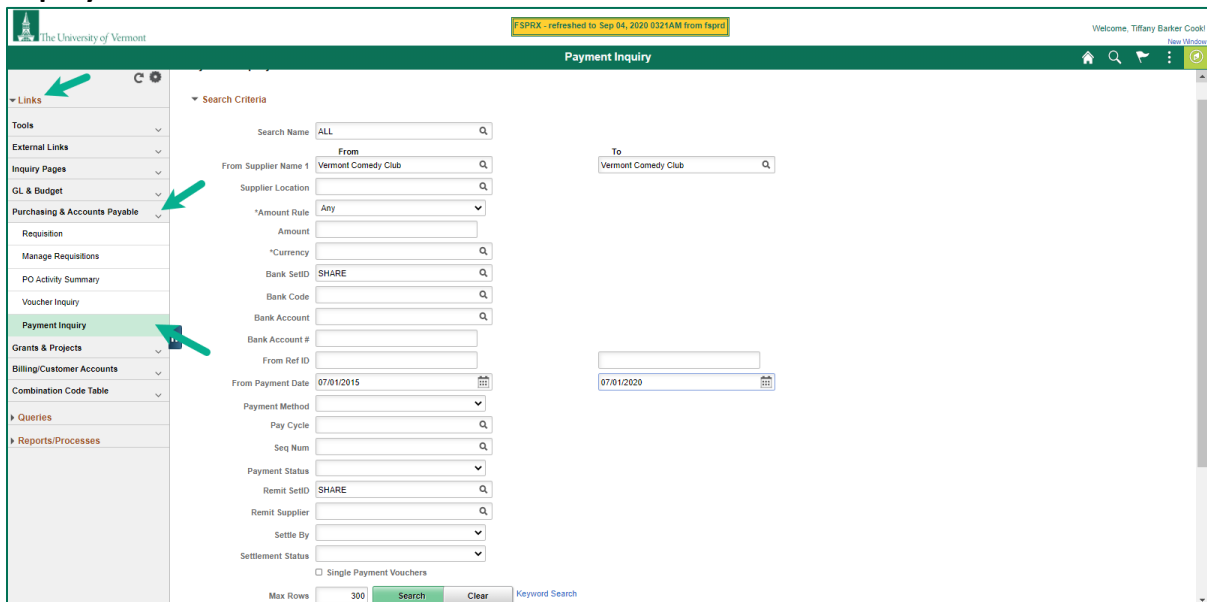
### Review Payment Information

This section provides guidance on how to review payments to the University's suppliers.

1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.




3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing & Accounts Payable related links. Then select **Payment Inquiry**.


 A screenshot of the PeopleSoft Financials Payment Inquiry page. The left-hand navigation pane shows the "Links" menu expanded, with "Purchasing & Accounts Payable" and "Payment Inquiry" highlighted. The main content area displays the "Payment Inquiry" search criteria form. Fields include "Search Name" (set to ALL), "From Supplier Name" (Vermont Comedy Club), "Supplier Location", "Amount Rule" (Any), "Amount", "Currency", "Bank SetID" (SHARE), "Bank Code", "Bank Account", "Bank Account #", "From Ref ID", "From Payment Date" (07/01/2015), "To" (07/01/2020), "Payment Method", "Pay Cycle", "Seq Num", "Payment Status", "Remit SetID" (SHARE), "Remit Supplier", "Settle By", and "Settlement Status". There is a checkbox for "Single Payment Vouchers" and a "Max Rows" field set to 300. At the bottom are "Search" and "Clear" buttons, along with a "Keyword Search" link.

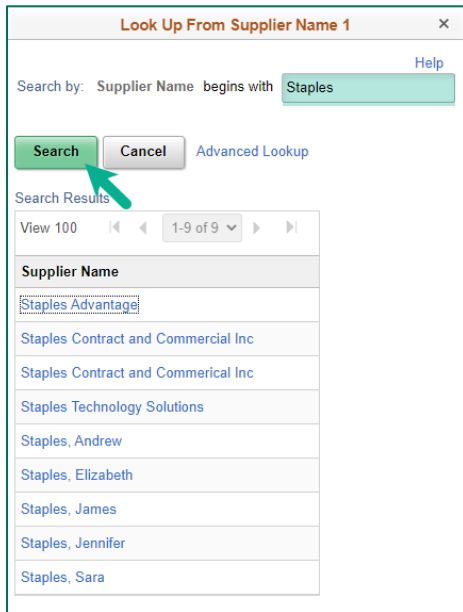
The **Payment Inquiry** page is displayed. Enter search criteria as outlined in the steps below.

**Note:** Up to 300 supplier payments are displayed. To display additional rows, increase the number in the Max Rows field, which is located below the search criteria fields.

4. Ensure that **SHARE** is in the **Remit SetID** field. If it does not default in, enter it manually or use the search icon to the right of the field to select it.
5. To narrow the search results, enter a payment date range, e.g., 07/01/2015 to 06/30/16.

- Click the **Look up**  icon to the right of the **From Supplier Name 1** field. Enter the beginning of the supplier name (e.g., **staples** for Staples Advantage) then click on the search icon to search for this supplier.

The search provides a list of all suppliers whose names begin with **staples**.



**Look Up From Supplier Name 1**

Search by: Supplier Name begins with Staples

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

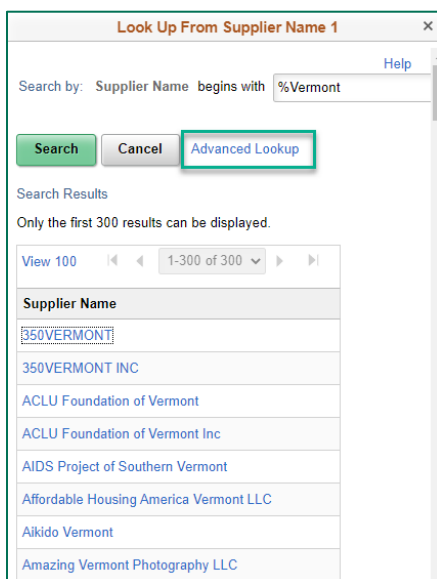
Search Results

View 100 1-9 of 9

Supplier Name
Staples Advantage
Staples Contract and Commercial Inc
Staples Contract and Commerical Inc
Staples Technology Solutions
Staples, Andrew
Staples, Elizabeth
Staples, James
Staples, Jennifer
Staples, Sara

Using the percent (%) sign allows for a more flexible supplier search. The search below provides all suppliers with Vermont in the name.

**Note:** The search produces more than 300 results, so you may need to use additional search criteria. The search can be further refined using the **Advanced Lookup**.



**Look Up From Supplier Name 1**

Search by: Supplier Name begins with %Vermont

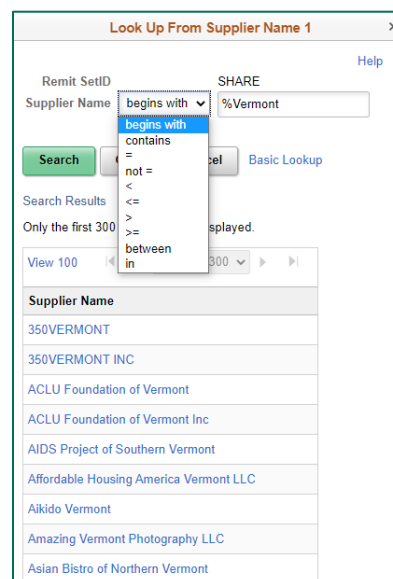
**Search** **Cancel** **Advanced Lookup**

Search Results

Only the first 300 results can be displayed.

View 100 1-300 of 300

Supplier Name
350VERMONT
350VERMONT INC
ACLU Foundation of Vermont
ACLU Foundation of Vermont Inc
AIDS Project of Southern Vermont
Affordable Housing America Vermont LLC
Aikido Vermont
Amazing Vermont Photography LLC
Asian Bistro of Northern Vermont



**Look Up From Supplier Name 1**

Search by: Supplier Name begins with %Vermont

**Search** **Cancel** **Advanced Lookup**

Search Results

Only the first 300 results can be displayed.

View 100 1-300 of 300

Supplier Name
350VERMONT
350VERMONT INC
ACLU Foundation of Vermont
ACLU Foundation of Vermont Inc
AIDS Project of Southern Vermont
Affordable Housing America Vermont LLC
Aikido Vermont
Amazing Vermont Photography LLC
Asian Bistro of Northern Vermont



The search using Supplier Name **contains** “Vermont Com” produces a shorter list of results. Use a specific piece of the supplier’s name to narrow down your search.

**Look Up From Supplier Name 1**

Remit SetID: SHARE

Supplier Name: contains ▼ Vermont Com

Buttons: Search, Clear, Cancel, Basic Lookup

Search Results

View 100 | 1-18 of 18

Supplier Name
Central Vermont Communications
Central Vermont Community Action Council
Central Vermont Community Land Trust
Southeastern Vermont Community Action
The Vermont Community Foundation
Vermont Comedy Club
Vermont Commercial Warehouse
Vermont Committee on Aids Resources

7. Once a supplier is selected, the supplier name will populate in the “From” and “To” Fields. Click **Search**.

**Payment Inquiry**

Search Criteria

Search Name: ALL

From Supplier Name 1: Vermont Comedy Club

To: Vermont Comedy Club

Supplier Location:

\*Amount Rate: Any

Amount:

\*Currency:

Bank SetID: SHARE

Bank Code:

Bank Account:

Bank Account #:

From Ref ID:

From Payment Date: 07/01/2015 To: 07/01/2020

Payment Method:

Pay Cycle:

Seq Num:

Payment Status:

Remit SetID: SHARE

Remit Supplier:

Settle By:

Settlement Status:

Single Payment Vouchers:

Max Rows: 300

Buttons: Search, Clear, Keyword Search



- The Payment Inquiry Result section will be displayed at the bottom of the screen. The columns can be sorted by clicking the column headers.

The **Payment Reference ID** Number is the check, ACH or E-Payment number.

**Payment Inquiry**

From Payment Date: [05/31/2019] To: [05/31/2019]

Payment Method: [▼]  
Pay Cycle: [▼]  
Seq Num: [▼]  
Payment Status: [▼]  
Remit SetID: [SHARE]  
Remit Supplier: [▼]  
Settle By: [▼]  
Settlement Status: [▼]  
☐ Single Payment Vouchers  
Max Rows: [300] **Search** **Clear** [Keyword Search](#)  
☐ Show Chart \*Chart Type: [Bar Chart]

**Sorting Criteria**

1st sort: [Bank Account] ☐ Descending  
2nd sort: [Payment Reference ID] ☐ Descending **Sort**

**Payment Inquiry Result**

[Payment Details](#) [Additional Info](#) [Supplier Details](#) [Financial Gateway](#)

Actions	Source	Payment Reference ID	Payment Method	Amount	Currency	Creation Date	Payment Date	Payment Status	Reconciliation Status	Reconcile Date
▼ Actions	VCHR	1476142	System Check	200.00	USD	05/31/2019	05/31/2019	Paid	Reconciled	06/20/2019

The **Supplier Details** tab displays the supplier address to which payment was sent.

**Payment Inquiry**

From Payment Date: [05/31/2019] To: [05/31/2019]

Payment Method: [▼]  
Pay Cycle: [▼]  
Seq Num: [▼]  
Payment Status: [▼]  
Remit SetID: [SHARE]  
Remit Supplier: [▼]  
Settle By: [▼]  
Settlement Status: [▼]  
☐ Single Payment Vouchers  
Max Rows: [300] **Search** **Clear** [Keyword Search](#)  
☐ Show Chart \*Chart Type: [Bar Chart]

**Sorting Criteria**

1st sort: [Bank Account] ☐ Descending  
2nd sort: [Payment Reference ID] ☐ Descending **Sort**

**Payment Inquiry Result**

[Payment Details](#) [Additional Info](#) [Supplier Details](#) [Financial Gateway](#)

Actions	Source	Payment Reference ID	Supplier Name	Supplier ID	Supplier Location	Address	City	State	Postal
▼ Actions	VCHR	1476142	Vermont Comedy Club	0000040096	MAIN	101 Main Street	Burlington	VT	05401



- Click on **Payment Reference ID** to display more information including vouchers paid on that payment.

**Payment Inquiry**

**Vouchers For a Payment**

[Back To Payment Inquiry](#)

Bank Name: TD Bank NA  
Bank Account #: \*\*\*\*\*4935  
Pay Cycle: AP\_RUN Seq Num: 1784  
Supplier Name: Vermont Comedy Club  
Address: 101 Main Street  
Burlington VT 05401 USA  
Payment Amount: 200.00 USD  
Payment Method: CHK  
Description:

Pymnt Ref ID: 1476142  
Accounting Date: 05/31/2019  
Payment Date: 05/31/2019  
Days Outstanding: 19  
Payment Clear Date: 06/19/2019  
Reconcile Date: 06/20/2019  
Value Date: 05/31/2019

**Details**

Business Unit	Voucher ID	Advice Seq	Advice Date	Invoice Number	Gross Paid Amount	Paid Amount	Currency	Discount Taken	Late Charge	Source
AP001	00863772	1	03/27/2019	P176608 3/27/19 SVC	200.00	200.00	USD			Accounts Payable Vouchers

- Click the **Voucher ID** link to display voucher-related information on the Voucher Inquiry page.

**Payment Inquiry**

**Voucher Inquiry**

[Back To Payment Vouchers](#)

Search Criteria  
Sort Criteria  
Display Currency Criteria

**Voucher Inquiry Results**

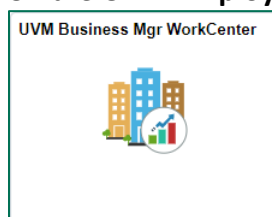
[Voucher Details](#) [Amounts](#) [More Details](#) [Supplier Details](#)

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
<a href="#">Actions</a>	AP001	00863772	P176608 3/27/19 SVC	03/27/2019	0000040096	Postable	<input type="checkbox"/>	Matched	VT COMEDY-002


## Review Voucher Information

**Note:** To access this page, users must have the **ePro Requester** security role.

- Log in to [PeopleSoft Financials](#)
- On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.





3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing & Accounts Payable related links. Then select **Voucher Inquiry**.

The **Voucher Inquiry** page is displayed. Enter search criteria as outlined in the steps below.

4. Change the **Business Unit** from UVM01 to **AP001**.
5. Enter the **Voucher ID** number or the **Invoice ID** number, if known.
6. Enter any other criteria to limit the data being returned. Commonly, searches are done by **Supplier ID, Department, Account, Purchase Order Number or Date Range**.



**7. Click Search.**

Updated 10/2024



- Click the tabs at the top of the **Voucher Inquiry Results** section to display: **Voucher Details**, **Amounts**, **More Details**, or **Supplier Details**.

**Voucher Inquiry**

\*Amount Rule   
Amount   
\*Currency   
\*Voucher Style   
Post Status   
Approval Status   
Voucher Balance   
Voucher Source   
User ID   
GL Business Unit   
Account   
Department   
VAT No   
Process Instance   
Match Status   
Sanctions Status   
Max Rows

▼ **Sort Criteria**  
\*Sort By   
\*Sort Asc/Dsc

► **Display Currency Criteria**

**Voucher Inquiry Results**

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	AP001	00863772	P176608 3/27/19 SVC	03/27/2019	0000040096	Postable	<input type="checkbox"/>	Matched	VT COMEDY-002

- Click the **Actions** link in the far left column to access links to: **Review Accounting Entries**, **Match Workbench**, **Payment Information**, **Voucher Details**.

▼ **Sort Criteria**  
\*Sort By    
\*Sort Asc/Dsc

► **Display Currency Criteria**

**Voucher Inquiry Results**

Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
AP001	00863772	P176608 3/27/19 SVC	03/27/2019	0000040096	Postable	<input type="checkbox"/>	Matched	VT COMEDY-002





10. Click the **Review Accounting Entries** link to review the associated accounting entries.

**Accounting Entries**

Voucher Accounting Entries

\*Business Unit: AP001 Voucher ID: 00863772 Invoice Number: P176608 3/27/19 SVC  
\*Accounting Line View Option: Standard Invoice Date: 03/27/2019 Show Foreign Currency: ☐  
Supplier ID: 000040096 \*Sort By: Posting Process Search Reset  
Supplier Name: Vermont Comedy Club

**Accounting Information** Find View All First 1 of 2 Last

Posting Process: AP Accrual GL Dist Status: Distributed Posting Date: 05/30/2019

Personalize Find View All First 1-2 of 2 Last

Description	Monetary Amount	Currency Code	Ledger	GL Unit	Accounting Date
Accounts Payable	-200.00	USD	ACTUALS	UVM01	05/30/2019
VT Comedy club venue for Publ.	200.00	USD	ACTUALS	UVM01	05/30/2019

11. Click the **Payment Information** link to display Payment Reference ID, Payment Date, Payment Amount, and Voucher Paid Amount.

**Note:** The **Payment Reference ID** displayed is the check, ACH or E-Payment number.

**Voucher Inquiry**

[Back To Voucher Inquiry](#)

Business Unit: AP001 Voucher ID: 00863772 Invoice Number: P176608 3/27/19 SVC  
Supplier Name: VERMONT COMEDY CLUB Supplier Location: MAIN  
Gross Invoice Amount: 200.00 Transaction Currency: USD

**Details**

Bank SetID	Bank Code	Bank Account	Payment Reference ID	Applied Business Unit	Applied Voucher ID	Payment Date	Payment Amount	Payment Currency	Voucher Paid Amount	Payment Status
SHARE	FI001	BN08	1476142			05/31/2019	200.00	USD	200.00	Paid

Click the number to link to the **Vouchers For a Payment** page.

**Voucher Inquiry**

**Vouchers For a Payment**

[Back To Payment Inquiry](#)

Bank Name: TD Bank NA Pymnt Ref ID: 1476142  
Bank Account #: \*\*\*\*\*4935 Accounting Date: 05/31/2019  
Pay Cycle: AP\_RUN Seq Num: 1784 Payment Date: 05/31/2019  
Supplier Name: Vermont Comedy Club Days Outstanding: 19  
Address: 101 Main Street Payment Clear Date: 06/19/2019  
Burlington VT 05401 USA Reconcile Date: 06/20/2019  
Payment Amount: 200.00 USD Payment Method: CHK Value Date: 05/31/2019  
Description:

**Details**

Business Unit	Voucher ID	Advice Seq	Advice Date	Invoice Number	Gross Paid Amount	Paid Amount	Currency	Discount Taken	Late Charge	Source
AP001	00863772	1	03/27/2019	P176608 3/27/19 SVC	200.00	200.00	USD			Accounts Payable Vouchers




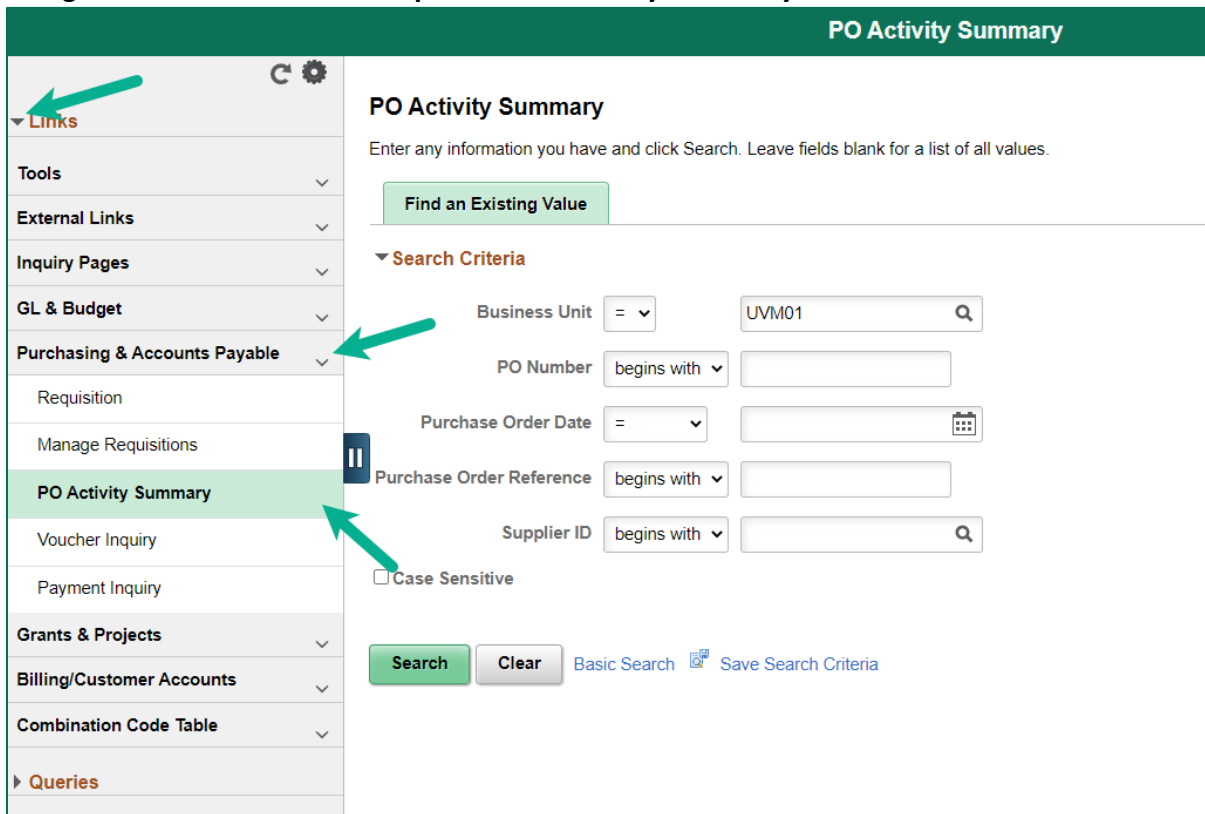
### Review the Purchase Order Activity Summary

Use the Purchase Order Activity Summary to view payment data on a purchase order and to view the invoiced-to-date totals for a blanket purchase order.

1. Log in to [PeopleSoft Financials](#).
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.



3. Click the **Arrow**  icon to expand the **Links** menu and the **Purchasing & Accounts Payable** menu to view frequently used Purchasing & Accounts Payable related links. Then select **PO Activity Summary**.
4. Navigation: **eProcurement > Reports > PO Activity Summary**




**PO Activity Summary**


Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**


**Search Criteria**

Business Unit =  


PO Number begins with

Purchase Order Date =  

Purchase Order Reference begins with

Supplier ID begins with  

☐ Case Sensitive

**Search** **Clear** [Basic Search](#)  [Save Search Criteria](#)



- On the **PO Activity Summary** page, type in the desired search criteria. Click **Search**.

The screenshot shows the 'PO Activity Summary' page. It has a green header bar with the title. Below the header, there's a section titled 'PO Activity Summary' with a subtitle: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There's a button 'Find an Existing Value'. Below that is a 'Search Criteria' section with several input fields: 'Business Unit' (dropdown with '=' and 'UVM01'), 'PO Number' (dropdown with 'begins with' and '0000150373'), 'Purchase Order Date' (dropdown with '=' and a date picker), 'Purchase Order Reference' (dropdown with 'begins with' and an empty field), and 'Supplier ID' (dropdown with 'begins with' and an empty field). There's a 'Case Sensitive' checkbox. At the bottom are 'Search' and 'Clear' buttons, with links for 'Basic Search' and 'Save Search Criteria'. A green arrow points to the 'Search' button.

- The **Activity Summary** page will be displayed. In the **Lines** section, the **Details** tab displays the total dollar amount of the PO Line; use the scrollbar to view details.

**Note:** Click on the tabs across the top individually or to view all information at once or click the

**Expand All**  icon.

The screenshot shows the 'Activity Summary' page. It has a green header bar with the title. Below the header, there's a section titled 'Activity Summary' with a subtitle: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There's a button 'Find an Existing Value'. Below that is a 'Search Criteria' section with several input fields: 'Business Unit' (dropdown with '=' and 'UVM01'), 'PO Number' (dropdown with 'begins with' and '0000150373'), 'Purchase Order Date' (dropdown with '=' and a date picker), 'Purchase Order Reference' (dropdown with 'begins with' and an empty field), and 'Supplier ID' (dropdown with 'begins with' and an empty field). There's a 'Case Sensitive' checkbox. At the bottom are 'Search' and 'Clear' buttons, with links for 'Basic Search' and 'Save Search Criteria'. A green arrow points to the 'Search' button.

The 'Activity Summary' page displays the following information:

Business Unit	UVM01	PO Status	Compl
Purchase Order	0000150373	Supplier	U.S. Bancorp Equipment Finance Inc.
Merchandise Amount	511.80 USD	Supplier Location	EPAY
Merchandise Receipt	0.00 USD		
Merchandise Returned	0.00 USD		
Merchandise Invoice	511.80 USD		
Merchandise Matched	511.80 USD		

The 'Lines' section shows a table with the following columns: Line, Line Details, Item, Item Description, UOM, Order Qty, Amount Ordered, and Currency. The table contains one line item:

Line	Line Details	Item	Item Description	UOM	Order Qty	Amount Ordered	Currency
1			Copier Lease Kyocera M2535DN S	EA	12.0000	511.800	USD

At the bottom of the 'Lines' section, there are buttons for 'Return to Search' and 'Notify'. A green arrow points to the 'Details' tab in the 'Lines' section.



- To see additional details about the item, click the item's link in the **Item Description** column.

Item Description

Help

Copier Lease Kyocera M2535DN Serial #LVZ4Z15539

Return

- Click the **Invoice** tab for the invoices paid to date. For purchase orders with multiple lines, the Invoice tab will show which lines have been invoiced to date. This tab also displays the amount remaining on this line of the purchase order. Use the scrollbar to view the **Un-invoiced Amount** column.

Activity Summary

Print | New W

Activity Summary

Business Unit UVM01 PO Status Compl  
Purchase Order 0000150373 Supplier U.S. Bancorp. Equipment Finance Inc  
Supplier Location EPAY

Merchandise Amount 511.80 USD  
Merchandise Receipt 0.00 USD  
Merchandise Returned 0.00 USD  
Merchandise Invoice 511.80 USD  
Merchandise Matched 511.80 USD

Lines

Details Receipt **Invoice** Matched RTV

Line	Line Details	Item	Item Description	UOM	Un-invoiced Amount	Currency	Invoice
1			<a href="#">Copier Lease Kyocera M2535DN S</a>	EA	0.000	USD	

Return to Search Notify



9. Select the **Invoice**  icon to display the associated voucher numbers and amount paid for each.

**Activity Summary** Print | New Window


**Activity Summary**

Business Unit UVM01 PO Status Compl  
Purchase Order 0000150373 Supplier U.S.Bancorp.Equipment.Finance.Inc  
Supplier Location EPAY

Merchandise Amount 0.000  
Merchandise Receipt 0.000  
Merchandise Returned 0.000  
Merchandise Invoice 0.000  
Merchandise Matched 0.000

**Lines**

Details Receipt **Invoice** Matched RTV

Line	Line Details	Item	Item Description	UOM	Un-invoiced Amount	Currency	Invoice
1			Copier Lease Kyocera M2535DN S	EA	0.000	USD	

[Return to Search](#) [Notify](#)

Click the **Voucher** number link to open the **Voucher Inquiry** page, which displays invoice number, invoice date, accounting date, etc.

**Invoice**

Unit UVM01 PO No. 0000150373 Line 1 Item ID

**Invoice**

1-6 of 12 [View All](#)


Sched Num	AP Unit	Voucher	Line	Quantity Invoiced	Amount Invoiced		
1	AP001	<a href="#">00734610</a>	1	1.0000	42.650	+	-
1	AP001	<a href="#">00724818</a>	1	1.0000	42.650	+	-
1	AP001	<a href="#">00714978</a>	1	1.0000	42.650	+	-
1	AP001	<a href="#">00706906</a>	1	1.0000	42.650	+	-
1	AP001	<a href="#">00720924</a>	1	1.0000	42.650	+	-
1	AP001	<a href="#">00757418</a>	1	1.0000	42.650	+	-

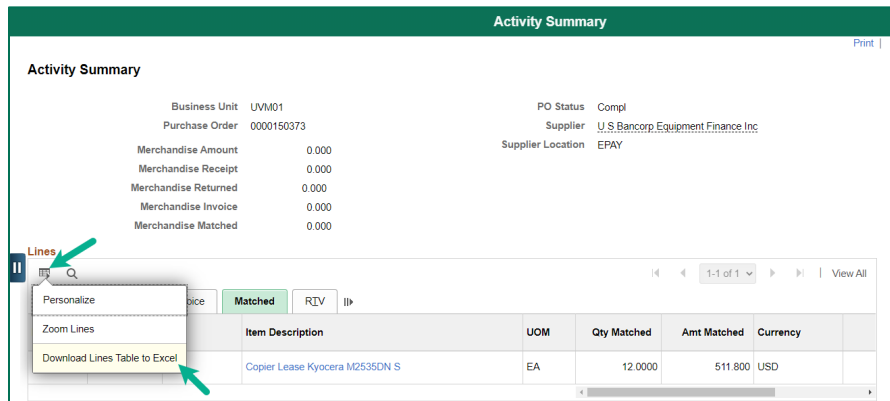
[Activity Summary](#)

[Return to Search](#) [Notify](#)

10. Click the **Activity Summary** link to return to the Activity Summary page.



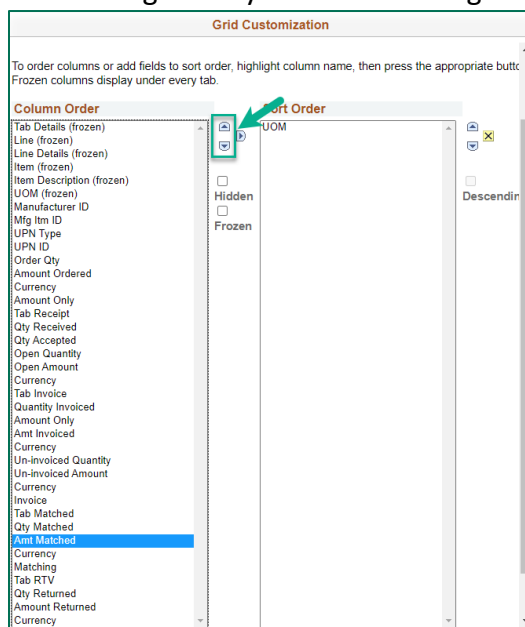
11. The **Matched** tab displays the quantity and dollar amount of invoices matched on a line of a purchase order. This information is useful for monitoring blanket POs during the fiscal year.
12. In the top left section of the **Lines** section, there is a **Grid Action Menu**  icon where you can select **Download Lines Table to Excel**. Download the data to a spreadsheet for further analysis if desired.



The screenshot shows the 'Activity Summary' page for a purchase order. The 'Matched' tab is selected. A 'Grid Action Menu' is open, showing options like 'Personalize', 'Zoom Lines', and 'Download Lines Table to Excel'. The menu is highlighted with a red arrow. The background shows a table with columns: Item Description, UOM, Qty Matched, Amt Matched, and Currency. The first row shows 'Copier Lease Kyocera M2535DN S' with a quantity of 12,000 and an amount of 511,800 USD.

Use the **Personalize** option in the **Grid Action Menu** to rearrange the order in which page content is displayed. For example, the Amount Invoiced column, Amount Un-invoiced column and Amount Matched column can be moved to the Details tab, thus allowing a summarized view of the purchase order activity at a glance.

To move a column's position, click on it, then use the up and down arrows near the top of the Column Order section to move it. Once complete, scroll down and click ok. The grid will have your new settings until you elect to change them.



The screenshot shows the 'Grid Customization' dialog box. It has a 'Column Order' list on the left and a 'Sort Order' list on the right. The 'Column Order' list contains various fields like 'Tab Details (frozen)', 'Line (frozen)', 'Item Description (frozen)', 'UOM (frozen)', 'Manufacturer ID', 'Mfg Item ID', 'UPN Type', 'UPN ID', 'Order Qty', 'Amount Ordered', 'Currency', 'Amount Only', 'Tab Receipt', 'Qty Received', 'Qty Accepted', 'Open Quantity', 'Open Amount', 'Currency', 'Tab Invoice', 'Quantity Invoiced', 'Amount Only', 'Amt Invoiced', 'Currency', 'Un-Invoiced Quantity', 'Un-Invoiced Amount', 'Currency', 'Invoice', 'Tab Matched', 'Qty Matched', 'Amt Matched', 'Currency', 'Matching', 'Tab RTV', 'Qty Returned', 'Amount Returned', and 'Currency'. The 'Amt Matched' field is highlighted. The 'Sort Order' list has 'UOM' at the top, with 'Hidden' and 'Frozen' checkboxes below it. The 'Descend' checkbox is also present.



## Frequently Asked Questions (FAQs)

### Is backup documentation required for a requisition?

Yes, backup documents are required and must be attached when submitting the requisition in PeopleSoft, for the majority of orders. See [Create a Requisition](#), [step 16 adding attachments](#) for instructions on attachments.

#### Exceptions to this are:

- If you are completing a blanket order with a UVM-contracted supplier, backup documents are not required.
- If you have an RFP # for a requisition, backup documents are not required. Note the RFP # in the line comments.

### What type of product description shows up on the budget reports?

On the Budget Transaction Detail Report, purchase order information is displayed in the following order: PO Number, Supplier Name, Line Description from the PO (30 characters), and Requisition ID.

### Can I modify my requisition if changes are needed?

Yes, but only if a purchase order has not yet been created. Use the **Change Requisition** function to modify a requisition. Navigation: eProcurement > Manage Requisitions. Search for the requisition. From the **[Select Action]** dropdown box on the right-hand side, choose **Edit**. Be sure to save, submit and budget check the requisition when done so it returns to Purchasing for processing.

### Will a copy of a purchase order be sent to me after I submit a requisition?

Yes, a copy of the purchase order will be emailed to the requester after it is in dispatch status. Standard procedure is for Purchasing Services to email the purchase order to the supplier as an authorized university order, with the requester cc'd on the email.

### What is the turnaround time for an invoice to be paid?

The Disbursement Center processes invoices for payment. UVM default terms are Net 30 days, unless a contract/agreement states a different payment term.

### How do I find out if a supplier already exists in PeopleSoft?

If you have a question about supplier files in PeopleSoft, contact the Disbursement Center at [disburse@uvm.edu](mailto:disburse@uvm.edu).

### If a supplier does not exist in PeopleSoft, what do I do?

Ask the supplier to complete a New Supplier W-9 form, found on the Disbursement Center website, and submit a New Supplier Request Form in PeopleSoft. Once you receive notification that the supplier has been added in PeopleSoft, you can add it to the requisition prior to submitting. See the [UVM New Supplier Request User Guide](#).



### **How do I change the dollar amount on a purchase order (change orders)?**

Send an email to the buyer listed on the purchase order or to [purchasing@uvm.edu](mailto:purchasing@uvm.edu) and request a [change order](#) that includes the following: PO #, Supplier Name, Line #, and amount of increase with new total. If the PO is a blanket order, estimate the amount for the remainder of the fiscal year, not just the amount for current invoices. Purchasing will make the changes and send a copy of the corrected purchase order. Note: If the increase reaches a new dollar threshold, further documentation and/or review may be required. If the amount exceeds the Not to Exceed amount on a contract, the contract will need to be amended with supplier initials and date on each update.

### **Once payment is made on a purchase order, how do I close the requisition and PO to clear the encumbrance?**

Email [purchasing@uvm.edu](mailto:purchasing@uvm.edu) with a list of Purchase Order #s and Requisitions to be closed and include the supplier's name for each. Use "Close POs" in the subject line of your request.

### **How do I change a chartstring on an Existing Purchase Order?**

If the PO line has not been used for payments, send an email with the new chartstring to the buyer listed on the purchase order or to [purchasing@uvm.edu](mailto:purchasing@uvm.edu) and request a [change order](#).

To change a chartstring on an existing PO line that has been used for payments, a new requisition line must be created. It is preferable to add the line to the original requisition for this purchase, using Manage Requisitions. The requisition line comments should include "Add line to PO XXXXXX." Purchasing will use this to add a new line to the existing PO. Also note in the comments if the original line(s) should be changed or closed.

### **How should I estimate travel expenses on a requisition?**

Travel expenses for individuals, sole proprietors or single-member LLCs must be on a separate line for tax-reporting purposes. Use your best estimate for travel lines or use \$1 as a place holder if expenses are unknown.

### **Should I submit a requisition or a check request for an expenses only reimbursement?**

If only expenses are being reimbursed, a Disbursement Check Request form is the correct method for requesting payment.





## Additional Resources

### General Hints

- When entering a requisition for an individual providing a service, indicate the date and nature of the service in the description field. Be sure to attach a services agreement if services and expenses combined exceed \$1,000.
- Be sure to account for any **freight or shipping costs** on the requisition. These costs can generally be included with the item costs and do not need to be broken out separately.
- Backup documentation (Employee versus Independent Contractor Determination Form, Quotes, Contracts/Agreements, etc.) must be attached when submitting the requisition. See **Create a Requisition**, [step 16 for adding attachments](#).
- If a one-time shipping address is needed, note that in the comments section. **DO NOT** use the Modify Shipping Address hyperlink. See **Create a Requisition**, [step 15 for adding line comments](#).
- There can be multiple items in a requisition, but **ONLY** one supplier per requisition.
- Track Requisition status through **Manage Requisitions**. The Request Lifespan displays the progress of the requisition to a Purchase Order to Invoice(s) to Payment(s).
- The Disbursement Center can overpay each line on a purchase order by up to 5% of the line value or a maximum of \$2,000. Any amount higher than that requires a change order to the purchase order, see our FAQs.
- If an invoice cannot be paid because there isn't enough encumbrance remaining on the PO, the invoice will be returned to the requester by Disbursement.
- There is an automated process to close purchase orders at fiscal year-end. You can request specific POs be closed prior to year-end, see our FAQs.
- POs from the current fiscal year can be re-opened by emailing the buyer on the PO. The department is responsible for ensuring the budget will pass budget checking.
- Use our [Purchasing & Payments Methods reference guide](#) when creating requisitions for commonly purchased goods and services. This can also be found under Key Resources on our webpage: <https://www.uvm.edu/finance/purchasing>

### Personalize Column Order

Personalization of pages is available in PeopleSoft Financials. Review the process for Customize Column Order in the [PeopleSoft Tips User Guide](#). The process is identical for all personalization in PeopleSoft Financials.

### Supplier Information

- [New Supplier W-9 Form](#). UVM must receive a completed W-9 to set up a new supplier correctly and determine IRS 1099 tax reporting classifications.



- Attach the completed Supplier W-9 Form to the New Supplier Request Form in PeopleSoft. See the [UVM New Supplier Request User Guide](#) for more details.
- The type of purchase being made and the results of the New Supplier W-9 Form will determine if an Employee versus Independent Contractor Determination Form ([EIC](#)) is required. An Employee versus Independent Contractor Determination Form ([EIC](#)) is required for an individual or sole proprietor providing services.
- The Employee versus Independent Contractor Determination Form (EIC) is only to be completed by the requesting department, **NEVER** by the supplier.

## Resources/Help

### Help/Footprints

If you have questions about information in this document or if, after reading it, you cannot find the information you need, please submit a PeopleSoft help desk ticket in [Footprints](#).

### Relevant UVM Policies and Procedures

- [Purchase or Lease, Contract Approval, and Signatory Authority of Goods & Services Policy](#)
- [University Policies and Operating Procedures](#)

### Training

- [UFS Training Topics \(PDF\)](#)
- [Professional Development & Training Classes](#)

### Relevant UVM Departments

- [Disbursement Center](#)
- [Purchasing Services](#)
- [University Financial Services](#)

### Suggestions? Updates?

- Send an email to [PS9-1Upgrade@uvm.edu](mailto:PS9-1Upgrade@uvm.edu).