REQUISITIONS (Classic), PURCHASE ORDERS, AND REVIEWING PAYMENT INFORMATION

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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 (previously called vendor 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. Purchasing Services sends the purchase order to the supplier as an authorized university order, with a copy forwarded to the requester.

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.

Create a Requisition

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 Requistion (Classic)
4. Click the **Special Requests** link.

5. Complete the required fields denoted with an asterisks (*).
   a. **Item Description** - Enter specific item or service information (e.g., Item #12345 Large Oval Wooden Conference Table).
      
      **NOTE:** Requisitions with insufficient descriptions will be returned to the requester for revisions (e.g., only supplier’s name entered, miscellaneous supplies, requisition #, etc.).
   b. **Price** - Enter the price of the item (e.g., 123.50).
   c. **Quantity** - Enter the number of units to order
   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.

   **Please note:** Beginning FY18, the Category Tree/Category Folders are no longer a means for searching categories.

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.
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.

d. If the desired supplier is not found, click the Suggest New Supplier link. Enter the required information about the new supplier and click OK.

Note: A field with an asterisk (*) is a required field and must be completed.
e. Attach a New Supplier W-9 form or IRS W-9 form to the requisition (as described in Step 25 below). New supplier requests will be reviewed and processed along with the Requisition.

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 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.

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.

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

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.
15. Click the icon to expand the requisition line details. Review the Ship To Address and select a different one if necessary. If the 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.

![Image of Line Comment page]

**Line Comment page:**

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
- New Supplier W-9 Form or IRS W-9 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.

![Image of attaching file to requisition]

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.

![Image of expanded accounting lines]
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.

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 percent 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.

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

Repeat steps 15-19 for all requisition lines.
20. When review is complete, click **Save & submit** on the bottom left of the screen.

21. On the **Confirmation** page, click the **Check Budget** link or icon.
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. Correct the error, and 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.

### Create a Blanket Requisition

Requesters can enter blanket purchase orders in eProcurement, at the beginning of a new fiscal year on July 1 or later, or 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.

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 asterisks (*).
   a. **Item Description** - Enter specific item or service information (e.g., lab supplies, beakers, pipets, glassware, test tubes) or (snowplow/lawn care monthly services).
      NOTE: Requisitions with insufficient descriptions will be returned to the requester for revisions (e.g., only supplier’s name entered, miscellaneous supplies, requisition #, etc.).
   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.

*Please note:* Beginning FY18, the Category Tree/Category Folders are no longer a means for searching categories.

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

![Look Up Category](image)

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](image)
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.

d. If the desired supplier is not found, click the Suggest New Supplier link. Enter the required information about the new supplier and click OK.

Note: A field with an asterisk (*) is a required field and must be completed.
e. Attach a New Supplier W-9 form or IRS W-9 form to the requisition (as described in step 16 Adding Attachments). New supplier requests will be reviewed and processed along with the Requisition.

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 exactly the following format: mm/dd/yy – mm/dd/yy, (e.g., 07/01/18-06/30/19).

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 – please 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 PO# 123456 by $xx.xx amount to cover the remainder of the fiscal year.

   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 3 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 Requistion (Classic)

4. 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 46 items. To view the entire catalog, see step 5.
5. To browse all depot items, click the Depot Catalog link.

6. 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 7.

7. 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).
8. 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.

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

11. Click the icon to expand the requisition line details. Review the Ship To Address and select a different one if necessary. If the 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.

12. Line Comment page:
13. 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.

14. 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.

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

Repeat steps 12-14 for all requisition lines.

**15.** 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_REQUISITIONDETAILS1**

![](image.png)

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_REQUISITIONDETAILS1 - Use when pymnt icon is active](image.png)

   If you have the **PO Number**, enter criteria as follows:
5. When have completed entering your criteria click **View Results**.

6. You can download your results to Excel by clicking the **Excel Spreadsheet** hyperlink.

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**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 Requistions (Classic)**.

4. Enter the search criteria for a Requisition. Click **Search**.
5. Click the **Req ID** link to open the **Requisition Details** page.

6. Click the **icon to expand the Requisition Line.**

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. 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.
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).

4. The Business Unit field will populate automatically with UVM01. This is the default Purchasing Business Unit.

5. Verify the Requester user id.

6. Enter a Requisition ID if known, or leave the field blank.

7. Verify the Date From and Date To fields to ensure that they are correct.

8. Click Search.

9. Requisitions meeting the search criteria are displayed.
10. To view more information regarding a requisition, expand the section by clicking on the triangle to the left of the line.

11. The Request Lifespan is displayed. In the Request Lifespan, links will become active as that step in the procurement process is completed.

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

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

As shown above, the Request State for this is Complete. Definitions for requisition statuses are:
13. Click the **Purchase Orders** link to view the Purchase Order Inquiry page. The PO Number and Requisition details are displayed.

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.
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.
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.

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.
6. Click the Look up icon to the right of the From Supplier Name 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 name begins with **staples**.

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**.

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

8. 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.
The **Supplier Details** tab displays the supplier address to which payment was sent.
9. Click on **Payment Reference ID** to display more information including vouchers paid on that payment.

![Payment Inquiry](image)

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

![Voucher Inquiry](image)

**Review Voucher Information**

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

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

9. Click the Actions link in the far left column to access links to: Review Accounting Entries, Match Workbench, Payment Information, Voucher Details.
10. Click the **Review Accounting Entries** link to review the associated accounting entries.

![Image of Accounting Entries](image1)

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.

![Image of Payment Information](image2)

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

![Image of Vouchers For a Payment](image3)
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
5. On the **PO Activity Summary** page, type in the desired search criteria. Click **Search**.

![PO Activity Summary screenshot]

6. 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.

![Activity Summary screenshot]
7. To see additional detail about the item, click the item’s link in the Item Description column.

8. 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.
9. Select the **Invoice** icon to display the associated voucher numbers and amount paid for each.

![Activity Summary](image)

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

![Invoice](image)

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.

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.
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.

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.

How many approvals does a requisition go through?

It depends on the purchase, the dollar amount, and the type of budget, but a standard workflow for requisitions not greater than $50,000 is as follows:

Requester > Manager (or designated approver) > Purchasing Services > supplier.

Please refer to the Contract Approval and Signatory Requirements for amounts over $50,000.

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.

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 supplier and to the requester.

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

UVM default terms are Net 30 days, unless a contract/agreement states a different payment term. Expect 7 to 10 business days for the Disbursement Center to process invoices for payment.

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

Please ask the supplier to complete a New Supplier W-9 form, found on the Disbursement Center or Purchasing Services website, and attach it to the requisition. The supplier will then be added in PeopleSoft.

How do I change the dollar amount on a blanket order?

Send an email to purchasing@uvm.edu that includes the following: PO#, Supplier Name, Line #, and amount of increase or decrease with new total. 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.

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

Please email purchasing@uvm.edu with a list of Purchase Orders and Requisitions to be closed. Use “Close POs” in the subject line of your request.

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

To change a chartstring on an existing PO, a new requisition must be created. The description should be “Add line to PO XXXXXX.” This will create a new line on the existing PO. Please note in the comments if the original line(s) should be closed.

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### Additional Resources

#### General Hints

- When entering a requisition for an individual who is providing a service, please indicate the date and nature of the service in the description field. Be sure to attach a services agreement for amounts exceeding $1,000 (services and expenses).

- Be sure to account for any **freight or shipping costs** on the requisition.

- Backup documentation (Employee versus Independent Contractor form, Quotes, Contracts/Agreements, etc.) must be attached when submitting the requisition. See [Create a Requisition, step 16 adding attachments](#).

- If a one-time shipping address is needed, please note that in the comments section. **DO NOT** use the Modify Shipping Address hyperlink. See [Create a Requisition, step 15 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 cannot overpay (within established limits) a purchase order. If an invoice cannot be paid because there isn’t enough encumbrance remaining on the PO, the invoice will be returned to the requester. To increase the dollar amount of a PO, please e-mail purchasing@uvm.edu. Estimate the amount necessary for the remaining fiscal year—not just the amount of the current invoice.

- There is an automated process to close purchase orders based on a PO being fully matched. This means a PO with a $0 balance. Purchasing Services will not contact departments to ask if a PO can be closed. It will be closed automatically when the balance is $0.
• **Do not underestimate** the dollar amount needed during the year on blanket purchase orders. If the PO is fully matched (the PO amount is $0), a system process will automatically close the PO. If additional invoices are received for a closed purchase order, a new requisition must be entered.

**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**

• **UVM Supplier (Vendor) W-9 Form.** *It is critically important that UVM receives a completed W-9, to set up a new supplier correctly and determine IRS 1099 Misc. tax reporting classification.*

• If a requester is already in contact with a supplier, please ask that they complete the form. This will shorten the time needed for purchase order creation.

• Attach the completed Supplier W-9 Form to the requisition.

• The results of the Supplier W-9 Form for a company will determine if an Employee versus Independent Contractor form is required.

• An **Employee versus Independent Contractor Status Determination form** is always required for an individual that is providing services.

• The Employee versus Independent Contractor form 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**

• **University Procurement Policy**

• **University Policies and Operating Procedures**

**Training**

• **UFS Roadshow Training Topics (PDF)**

• **Professional Development & Training Classes**

**Relevant UVM Departments**

• **Disbursement Center**
Suggestions? Updates?

- Send an email to PS9-1Upgrade@uvm.edu.