



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

TABLE OF CONTENTS

OVERVIEW.....	2
CREATE A REQUISITION	2
CREATE A BLANKET REQUISITION	12
CREATE A REQUISITION FOR THE COMPUTER DEPOT	17
MANAGING & TRACKING REQUISITIONS	22
Run the Requisition Details Query.....	22
View Chartstring Information.....	24
Manage Requisitions Using the Lifespan	26
Review Payment Information.....	30
Review Voucher Information	34
Review the Purchase Order Activity Summary.....	39
Is backup documentation required for a requisition?	44
What type of product description shows up on the budget reports?	44
How many approvals does a requisition go through?	44
Can I modify my requisition if changes are needed?.....	44
Will a copy of a purchase order be sent to me after I submit a requisition?	44
What is the turnaround time for an invoice to be paid?.....	44
If a supplier does not exist in PeopleSoft, what do I do?	44
How do I change the dollar amount on a blanket order?	44
Once payment is made on a purchase order, how do I close the requisition and PO to clear the encumbrance?	45
How do I change a chartstring on an Existing Purchase Order?	45
ADDITIONAL RESOURCES.....	45
General Hints.....	45
Personalize Column Order	46
Supplier Information	46
RESOURCES/HELP	46
Help/Footprints	46
Relevant UVM Policies and Procedures	46
Training	46
Relevant UVM Departments	46
Suggestions? Updates?	47



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

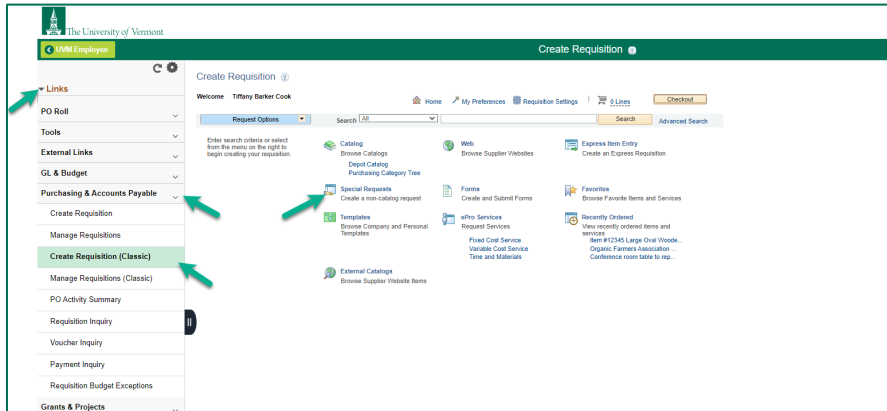
1. Log in to [PeopleSoft Financials](#)
2. On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.



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 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., 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

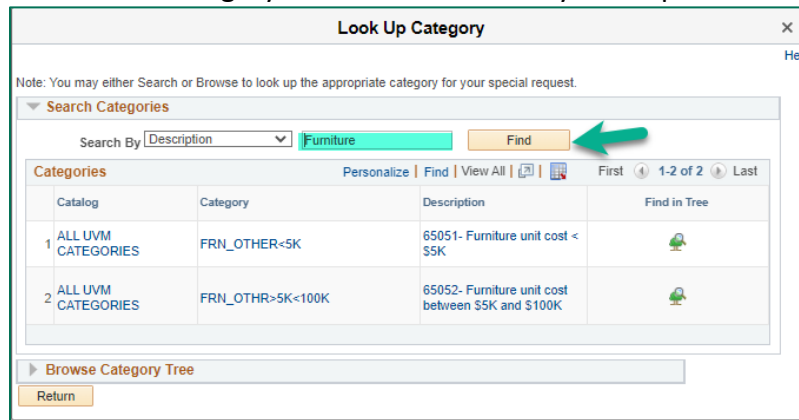
UNT – Units



- 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.



Note: You may either Search or Browse to look up the appropriate category for your special request.


Search Categories

Search By: Description | Furniture | Find

Catalog	Category	Description	Find in Tree
1 ALL UVM CATEGORIES	FRN_OTHER<5K	65051- Furniture unit cost < \$5K	
2 ALL UVM CATEGORIES	FRN_OTHR>5K<100K	65052- Furniture unit cost between \$5K and \$100K	

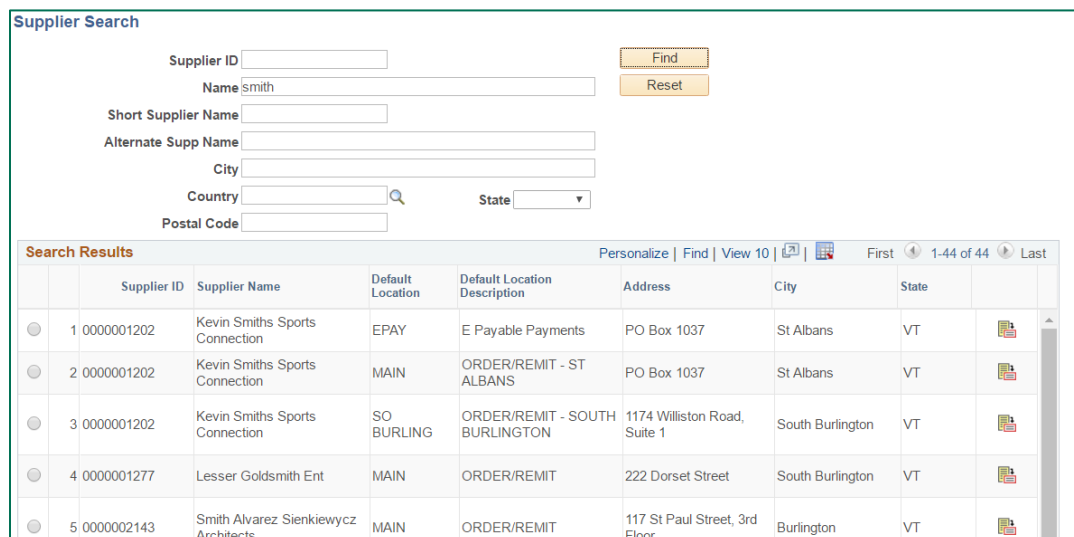
Browse Category Tree

Return

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: | Name: Smith | Find | Reset

Short Supplier Name: | Alternate Supp Name: | City: | Country: | State: | Postal Code: |

Search Results	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State
1	0000001202	Kevin Smiths Sports Connection	EPAY	E Payable Payments	PO Box 1037	St Albans	VT
2	0000001202	Kevin Smiths Sports Connection	MAIN	ORDER/REMIT - ST ALBANS	PO Box 1037	St Albans	VT
3	0000001202	Kevin Smiths Sports Connection	SO BURLING	ORDER/REMIT - SOUTH BURLINGTON	1174 Williston Road, Suite 1	South Burlington	VT
4	0000001277	Lesser Goldsmith Ent	MAIN	ORDER/REMIT	222 Dorset Street	South Burlington	VT
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.
- 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**.

Special Requests ?

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

Item Details

*Item Description	Item # 12345 Large Oval Wooden Conference Table		
*Price	2000.00	*Currency	USD
*Quantity	1	*Unit of Measure	EA
*Category	FRN_OTHER<5K	Due Date	

Supplier

Supplier ID	
Supplier Name	
Blanket PO Dates	

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

[Suggest New Supplier](#)

Suggested Supplier

Supplier Name	
Contact Name	

Address Information

Country	
Address 1	
Address 2	
Address 3	
City	
State	
Postal	

Phone Information

Phone Type		Prefix	
Telephone		Ext	
Comments			

254 characters remaining

OK

Cancel

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.

Welcome Kristy Perry

Home My Preferences Requisition Settings 1 Line **Checkout**

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
*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**

13. In the **Requisition Name** field, enter a Requisition Name that will be relevant when reviewing and search 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 kperry3 Kristy Perry
*Currency USD
Priority Medium
Requisition Name Room 1A Table

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
Requester kperry3 Kristy Perry
*Currency USD
Priority Medium
Requisition Name Room 1A Table

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 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 	Quantity 1.0000						
			Address Finance & Controller 333Waterman Bldg 85 So Prospect St Burlington, VT 05405-0160	Add One Time Address	Price 2000.0000					
			Attention To Kristy Perry							
			Due Date 							

Price Adjustment
Pegging Inquiry
Pegging Workbench

Line Comment page:

Line Comment ✕

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

Line 1

Comments Find First 1 of 1 Last

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

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
- 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.

The screenshot shows the 'Line Comment' window for Business Unit UVM01, Requisition Date 03/12/2018, and Status Pending. Line 1 has a comment: 'Need this shipped to: 123 Waterman Building, UVM Burlington, VT 05405'. A 'File Attachment' dialog box is open, showing 'Choose File' and 'No file chosen' buttons, with 'Upload' and 'Cancel' buttons below. The 'Add Attachments' button is also visible in the main window.

The screenshot shows the 'Attachments' table with the following data:

Attached File	User/Date Time	View	Send to Supplier
1 NewSupplier_W9.pdf	kperry32018-03-12-11.43.33.827	View	<input type="checkbox"/>
2 QuotationEvaluationForm.pdf	kperry32018-03-12-11.44.04.799	View	<input type="checkbox"/>
3 Quote_Terms_and_Conditions.pdf	kperry32018-03-12-11.44.16.453	View	<input type="checkbox"/>

Buttons: OK, Cancel


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.

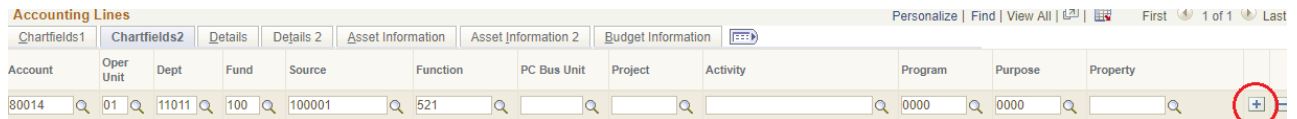
Note: DO NOT change the value in the Account field. The system derives the Account value based on the Item Category. To change the Account, go back and change the Category code.

The screenshot shows the 'Accounting Lines' window. A pink arrow points to the 'Account' field in the 'Chartfields2' tab, with the text: 'Account number should NOT be modified'.

Account	Oper Unit	Dept	Fund	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property
64032	01	11011	100	100001	521				0000	0000	0000



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.



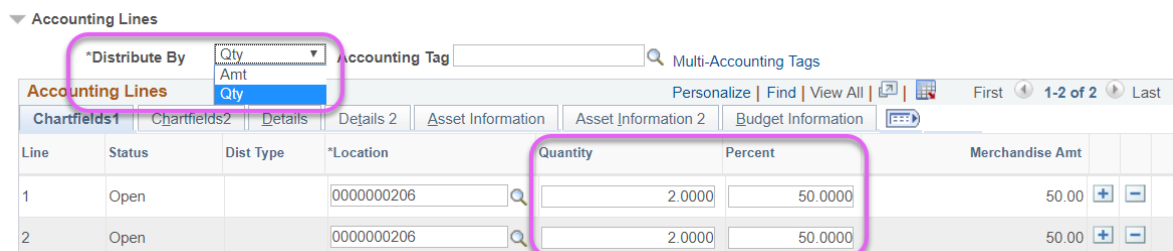
To change how the expenses are distributed, click the **Distribute By** dropdown, and select **Qty** (Quantity) or **Amt** (Amount). Select the method to use to allocate the expense account distribution.

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).

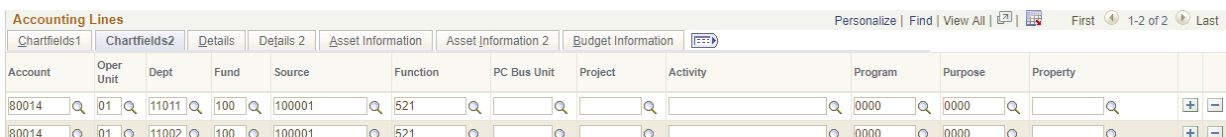
Quantity: Select to enter a value in the Req Qty field. The sum of all distribution quantities must equal the schedule quantity (the value in the Req Qty field on the Maintain Requisitions - Schedule page).

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



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.



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		Edit	

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. 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.

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	Error		

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


Create a Blanket Requisition

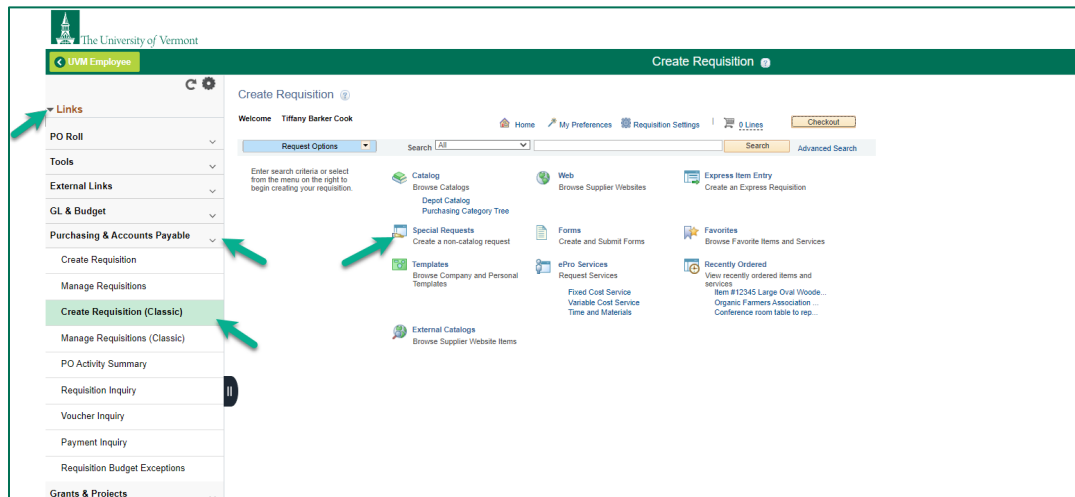
Requesters can enter blanket purchase orders in eProcurement, at the beginning of a new fiscal year on July 1 or later, or at any time during the fiscal year as needed. If you are paying a supplier multiple times in a fiscal year, a blanket order is required.


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.

Note: You may either Search or Browse to look up the appropriate category for your special request.


Search Categories

Search By: Description | Furniture | Find

Catalog	Category	Description	Find in Tree
1 ALL UVM CATEGORIES	FRN_OTHER<5K	65051- Furniture unit cost < \$5K	
2 ALL UVM CATEGORIES	FRN_OTHR>5K<100K	65052- Furniture unit cost between \$5K and \$100K	

Browse Category Tree

Return

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: | Name: smith | Find | Reset

Short Supplier Name: | Alternate Supp Name: | City: | Country: | State: | Postal Code: |

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	Find in Tree
1 0000001202	Kevin Smiths Sports Connection	EPAY	E Payable Payments	PO Box 1037	St Albans	VT	
2 0000001202	Kevin Smiths Sports Connection	MAIN	ORDER/REMIT - ST ALBANS	PO Box 1037	St Albans	VT	
3 0000001202	Kevin Smiths Sports Connection	SO BURLING	ORDER/REMIT - SOUTH BURLINGTON	1174 Williston Road, Suite 1	South Burlington	VT	
4 0000001277	Lesser Goldsmith Ent	MAIN	ORDER/REMIT	222 Dorset Street	South Burlington	VT	
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.
- 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**.



Special Requests

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

Item Details

*Item Description	Item # 12345 Large Oval Wooden Conference Table		
*Price	2000.00	*Currency	USD 
*Quantity	1	*Unit of Measure	EA 
*Category	FRN_OTHER<5K 	Due Date	

Supplier

Supplier ID	
Supplier Name	
Blanket PO Dates	

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

[Suggest New Supplier](#)

Suggested Supplier

Supplier Name	
Contact Name	

Address Information

Country	
Address 1	
Address 2	
Address 3	
City	
State	
Postal	

Phone Information

Phone Type		Prefix	
Telephone		Ext	

Comments	
<div>254 characters remaining</div>	

OK

Cancel

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).

Create Requisition ?

Welcome Kristy Perry

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All Search Advanced 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 Lab Supplies, beakers, test tubes, pipettes, glassware

*Price 50000

*Quantity 1

*Category RES_SUPPL_MATRL

*Currency USD

*Unit of Measure LOT

Due Date

Supplier

Supplier ID 0000018600

Supplier Name Thermo Fisher Scientific LLC Thermo Fisher Scientific LLC

Blanket PO Dates 07/01/18-06/30/19

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

Suggest New Supplier

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** – 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 Requisition (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.

Create Requisition ?

Welcome Kristy Perry

Home My Preferences Requisition Settings 0 Lines Checkout

Request Options Search All macbook Search Advanced Search

Search "macbook"
Catalog - 46 results returned.

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

Catalog Search Results ? Find First 1-46 of 46 Last

MacBook Pro Retina Display 15i
No Image

Item ID	MJLQ2	Supplier	Computer Depot	More...	★ Preferred
Supplier Item ID		Supplier ID	UVM_DEPOT		
Mfg Item ID		Manufacturer			
Price	1899.0000	Manufacturer ID			
UOM	Each	Lead Time	30		
Quantity		Add	Add to Favorites	Add to Template(s)	

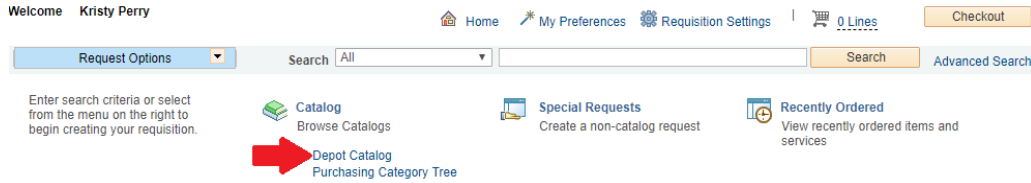
MacBook Pro Retina Display 15i
No Image

Item ID	MJLQ2	Supplier	Computer Depot	More...	★ Preferred
Supplier Item ID		Supplier ID	UVM_DEPOT		
Mfg Item ID		Manufacturer			
Price	1899.0000	Manufacturer ID			
UOM	Each	Lead Time	30		
Quantity		Add	Add to Favorites	Add to Template(s)	



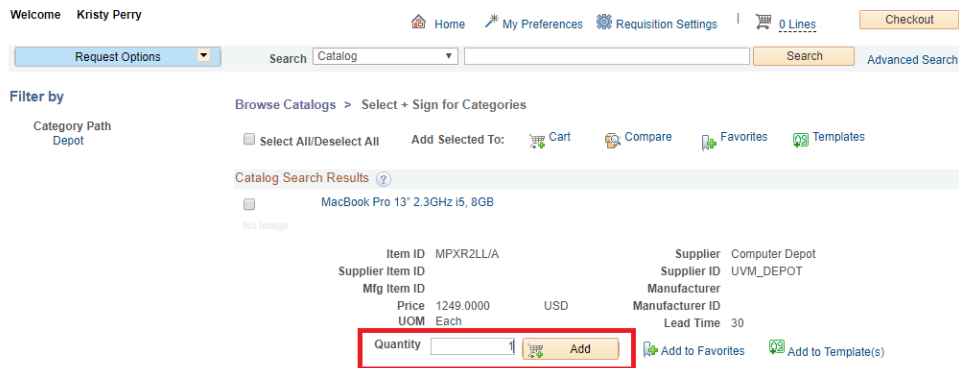
5. To browse all depot items, click the **Depot Catalog** link.

Create Requisition ?

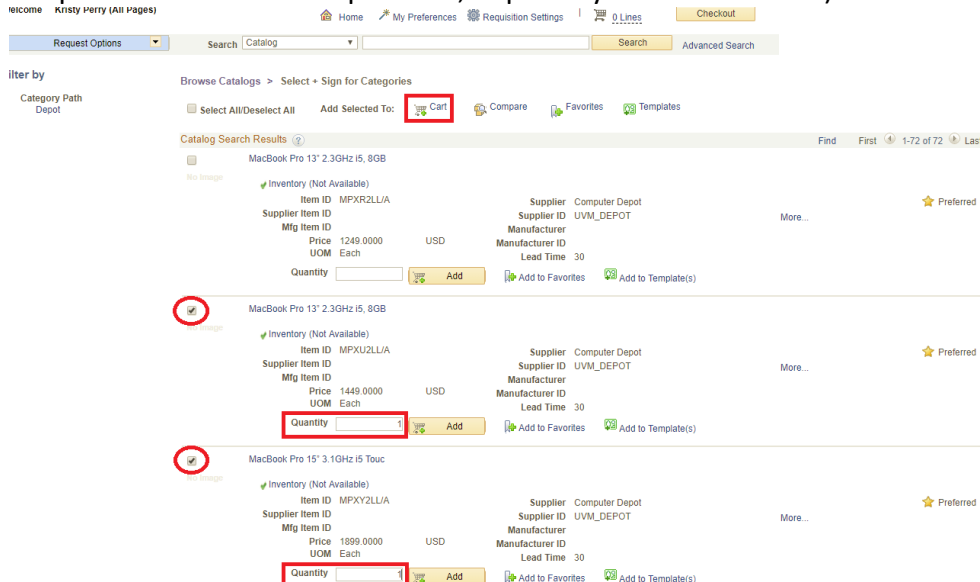


6. In the **Catalog Search Results**, find the desired item and enter the quantity to order in the Quantity field. Click **Add** to add the item to the cart. To add multiple items to the cart at once, see step 7.

Create Requisition ?



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.

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

No Image Inventory (Not Available)

Item ID MPXR2LL/A

Supplier Computer Depot

Supplier ID UVM_DEPOT

Mfg Item ID

Manufacturer Manufacturer ID

Price 1249.0000 USD

UOM Each

Lead Time 30

Quantity Add Add to Favorites Add to Template(s)

MacBook Pro 13" 2.3GHz i5, 8GB

No Image Inventory (Not Available)

Item ID MPXU2LL/A

Supplier Computer Depot

Preferred

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**

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

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	
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.



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.

Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit: UVM01 University of Vermont Requisition Name: Laptops: J. Paris & T. Porter

*Requester: sSkerry3 Kristy Perry (All Pages) Priority: Medium

*Currency: USD

Cart Summary: Total Amount 3,348.00 USD

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	Delete
2	3.1GHz dual-core Intel Core i5	MPXY2LL/A	Computer Depot	1.0000	Each	1899.0000	1899.00		Add	Delete

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. 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.

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	Delete

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: 03/08/2018

12. Line Comment page:

Line Comment

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

Line 2

Comments

Entered On:


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

Send to Supplier Show at Receipt Show at Voucher

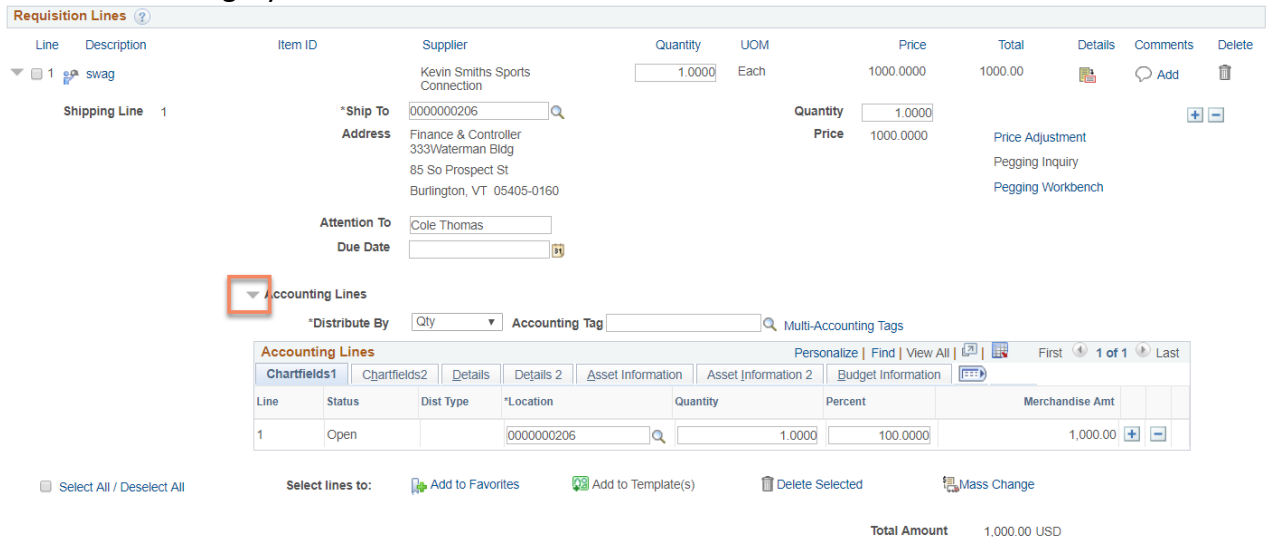
Add Attachments

OK Cancel



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.

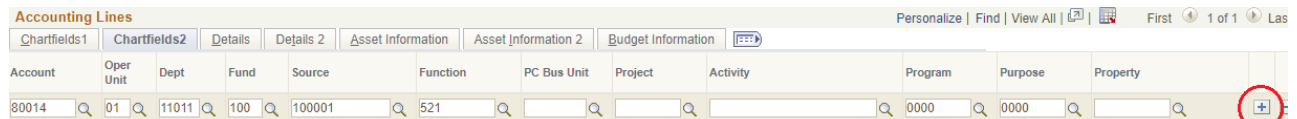


The screenshot shows the 'Requisition Lines' interface. The 'Accounting Lines' section is expanded, showing a table with one line. The line details are as follows:

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

The '+ icon at the end of the Accounting Line row is circled in red, indicating where to click to add a new line.

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.



The screenshot shows the 'Accounting Lines' interface with the 'Chartfields2' tab selected. The table has columns for Account, Oper Unit, Dept, Fund, Source, Function, PC Bus Unit, Project, Activity, Program, Purpose, and Property. The '+ icon at the end of the row is circled in red, indicating where to click to add a new 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.



Accounting Lines

*Distribute By: Qty (selected), Amt, Qty

Accounting Tag: Multi-Accounting Tags

Personalize | Find | View All | First 1-3 of 3 Last

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.

Accounting Lines

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

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 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

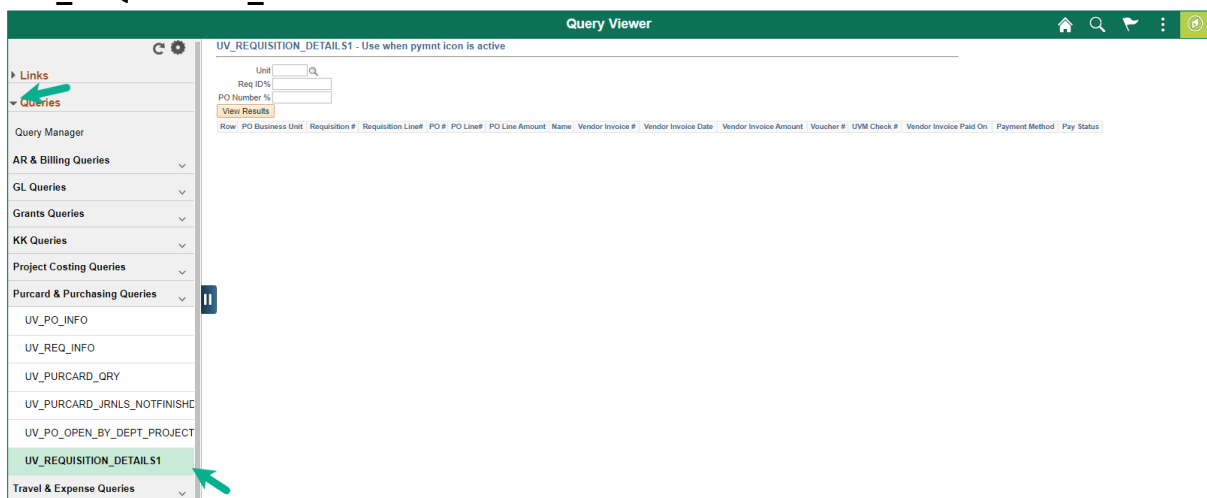
1. Log in to [PeopleSoft Financials](#)



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_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	<input type="text" value="UVM01"/>
Req ID%	<input type="text" value="0000043187"/>
PO Number %	<input type="text" value="%"/>
<input type="button" value="View Results"/>	

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



UV_REQUISITION_DETAIL\$1 - Use when pymnt icon is active

Unit

Req ID%

PO Number %

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

Query Viewer

UV_REQUISITION_DETAIL\$1 - Use when pymnt icon is active

Unit

Req ID%

PO Number %

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 #	U998 Check #	Vendor Invoice Paid On	Payment Method	Pay Status
1	UVM01	0000043167	1	0000041089	1	63.000	NASPA Student Affairs Administrators	199991	03/03/2009				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.

- Log in to [PeopleSoft Financials](#)
- 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 **Manage Requisitions (Classic)**
- 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: **Requisition Name:**

Requisition ID: **Request Status:** **Budget Status:**

Date From: **Date To:**

Requester: **Entered By:** **PO ID:**



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	
▶ 0000142769	Flynn Center Dnce Works...	UVM01	01/04/2017	Complete	Valid	810.00 USD	[Select Act] [Go]

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	Price Adjustment
			UVM Music & Dance	Price	810.00000	
			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 | [icon] [icon]

First 1 of 1 Last

Details More Details More Details 2 Asset Information Budget Information [icon]

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

< [progress bar] >




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**.

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

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.

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
0000139320	FY17 Foundation Copier ...	UVM01	08/23/2016	PO(s) Dispatched	Valid	1,382.59 USD

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.

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

Requester: Tina Mazuzan
Entered By: Natalie Guillette
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 and sent to supplier
- 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

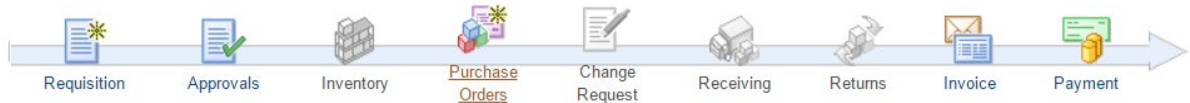
PO Date 09/26/2016 Supplier ID 0000000715 Terms N0 PO Status Complete

Lines Personalize | Find | View All | First 1 of 1 Last

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

Scroll Area 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 | First 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

PO Voucher 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 First 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**.

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 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 name begins 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

Look Up From Supplier Name 1

Remit SetID SHARE

Supplier Name begins with %Vermont

Search Cancel Basic 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

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: Any

*Amount Rule: Amount

*Currency: SHARE

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 Search Clear Keyword 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.



Payment Inquiry

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

Sorting Criteria

1st sort ☐ Descending
2nd sort ☐ Descending

Payment Inquiry Result

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

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

Sorting Criteria

1st sort ☐ Descending
2nd sort ☐ Descending

Payment Inquiry Result

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

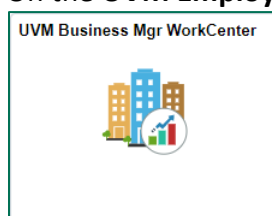
[Voucher Details](#) | [Amounts](#) | [More Details](#) | [Supplier Details](#) | [II](#)

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


Review Voucher Information

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

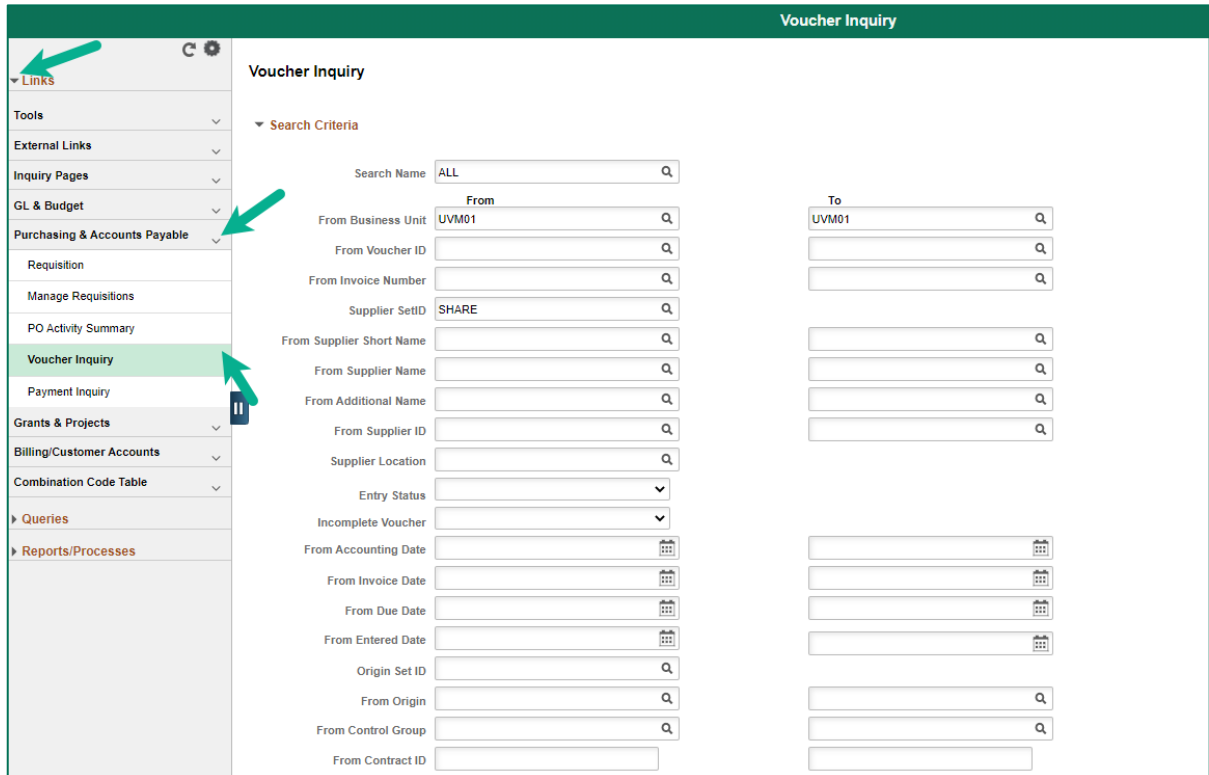
- Log in to [PeopleSoft Financials](#)
- On the **UVM Employee Homepage** click on the **UVM Business Mgr WorkCenter** tile.





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.

[illegible]



8. 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

9. 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
Supplier Name Vermont Comedy Club Search Reset

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 # *****4035 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
Reconcile Date 09/20/2019
Value Date 05/31/2019
Burlington VT 05401 USA
Payment Amount 200.00 USD Payment Method CHK
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




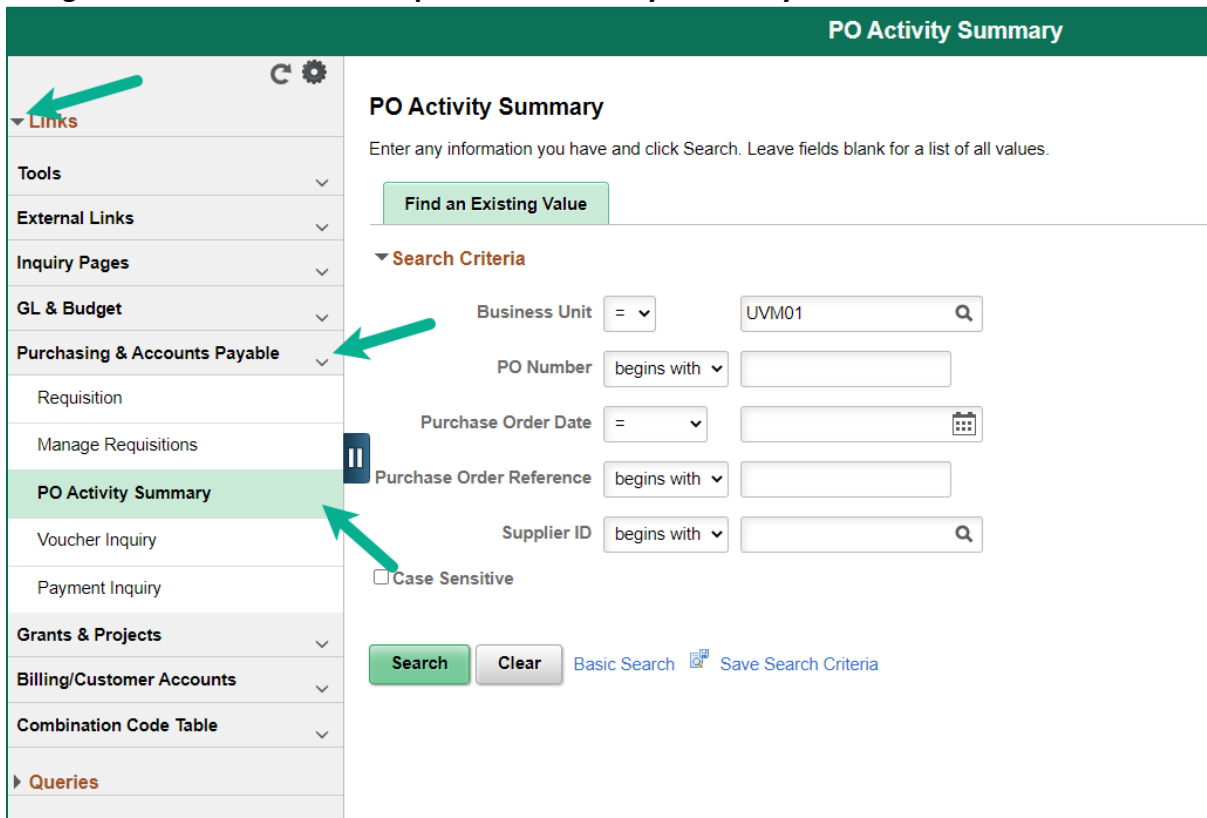
Review the Purchase Order Activity Summary

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**





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

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 = UVM01

PO Number begins with 0000150373

Purchase Order Date =

Purchase Order Reference begins with

Supplier ID begins with

☐ Case Sensitive

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

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

Business Unit UVM01

Purchase Order 0000150373

PO Status Compl

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	Order Qty	Amount Ordered	Currency
1			Copier Lease Kyocera M2535DN S	EA	12.0000	511.800	USD

Return to Search **Notify**



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

Item Description [X]

Help

Copier Lease Kyocera M2535DN Serial #LVZ4Z15539

Return

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.

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 [More]

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

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	00734610	1	1.0000	42.650	+	-
1	AP001	00724818	1	1.0000	42.650	+	-
1	AP001	00714978	1	1.0000	42.650	+	-
1	AP001	00706906	1	1.0000	42.650	+	-
1	AP001	00720924	1	1.0000	42.650	+	-
1	AP001	00757418	1	1.0000	42.650	+	-

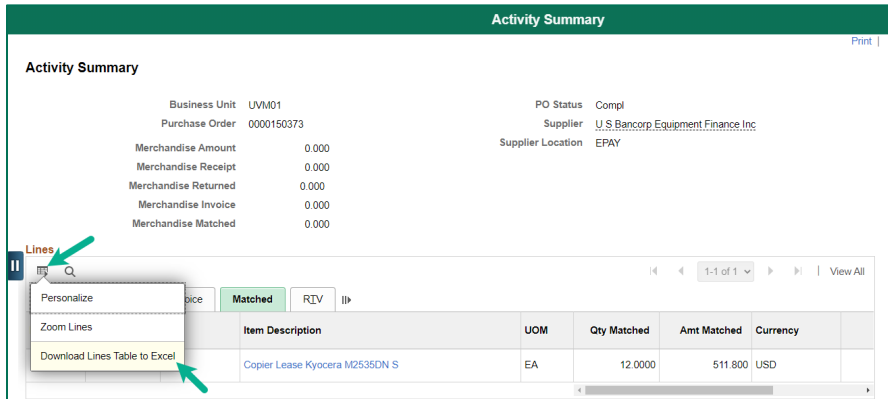
[Activity Summary](#)

[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.



Activity Summary

Business Unit: UVM01
Purchase Order: 0000150373
PO Status: Compl
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

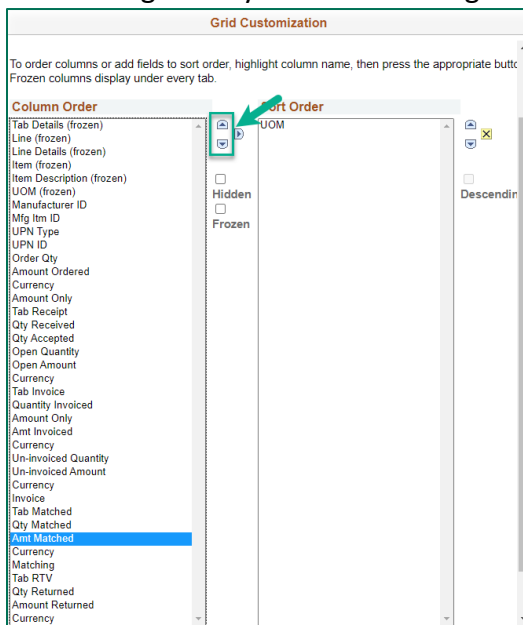
Lines

Personalize
Zoom Lines
Download Lines Table to Excel

Item Description	UOM	Qty Matched	Amt Matched	Currency
Copier Lease Kyocera M2535DN S	EA	12.0000	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.



Grid Customization

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

Column Order

- Tab Details (frozen)
- Line (frozen)
- Line Details (frozen)
- Item (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
- Currency

Sort Order

UOM

Hidden
Frozen

Descend



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 and include the supplier name for each. 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.

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](#)



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

Suggestions? Updates?

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