PeopleSoft eProcurement Implementation Project

Sourcing Requisitions To Purchase Orders

PeopleSoft Version: 9.1 Financials/Supply Chain
Prepared by: Aaron Dise & Denise McDonald

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Revision Control

VERSION	DATE	NAME	COMMENTS
1.0	6/22/2016	Aaron Dise	Initial Release
1.1	12/19/2016	Aaron Dise	UWSYS Updates
1.2	1/26/2017	Aaron Dise	Budget Check Updates
1.3	2/15/2017	Aaron Dise	PO Reference Field and Account Update
1.4	3/9/2017	Aaron Dise	Additional option for reqs stuck in processing
1.5	3/10/2017	Denise Mcdonald	Added comment on Matching Exceptions and PO Email dispatch options

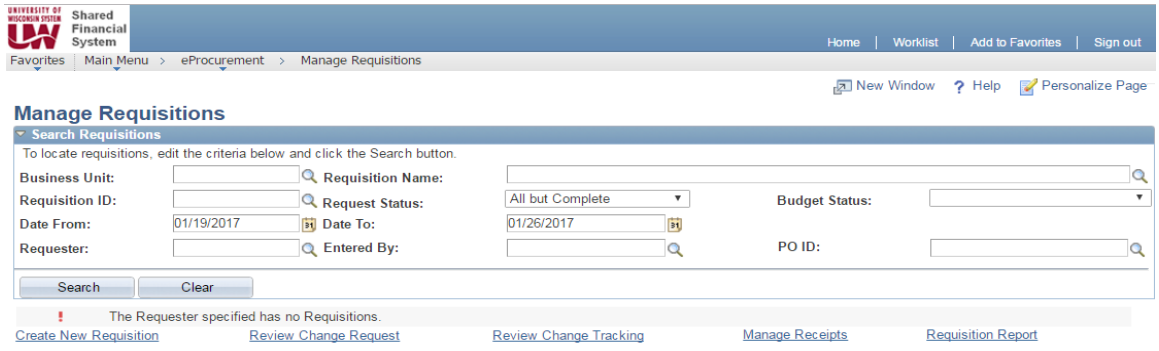
Budget Check

The steps below describe the process of budget checking **Approved Requisitions** prior to Expediting/Sourcing to a Purchase Order.

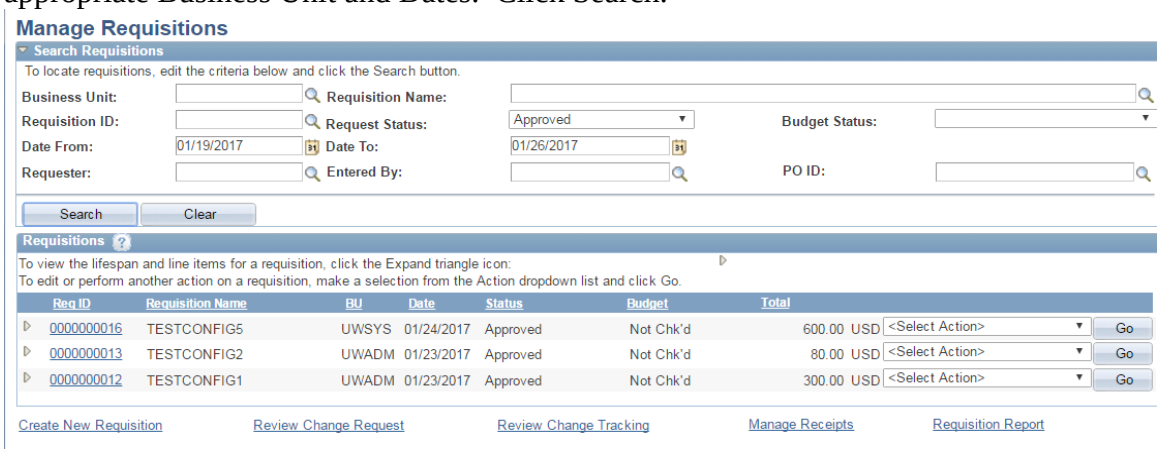
If you need to approve the requisition, go to the eProcurement Approver Document on the SFS Documentation & Training Team Site.

Budget Checking Approved Requisitions

1. Follow the path below to the Manage Requisition page.
   Main Menu > eProcurement > Manage Requisitions



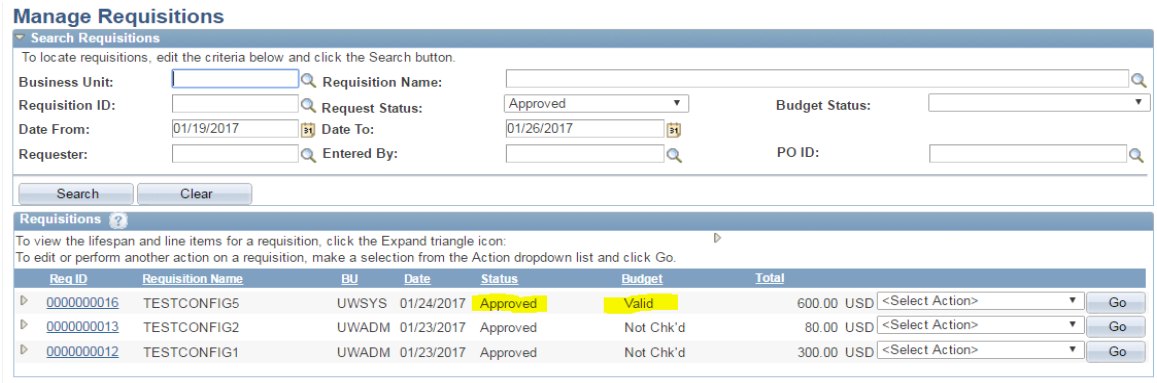
2. From the Manage Requisition Page select the Requisition Status of Approved and the appropriate Business Unit and Dates. Click Search.



3. Find the Requisition to Budget Check. Use the <Select Action> drop down menu to the right, and select "Check Budget."

Click Go.

4. The Approved Requisition is now Valid and available for Expedite/Sourcing. See the below.



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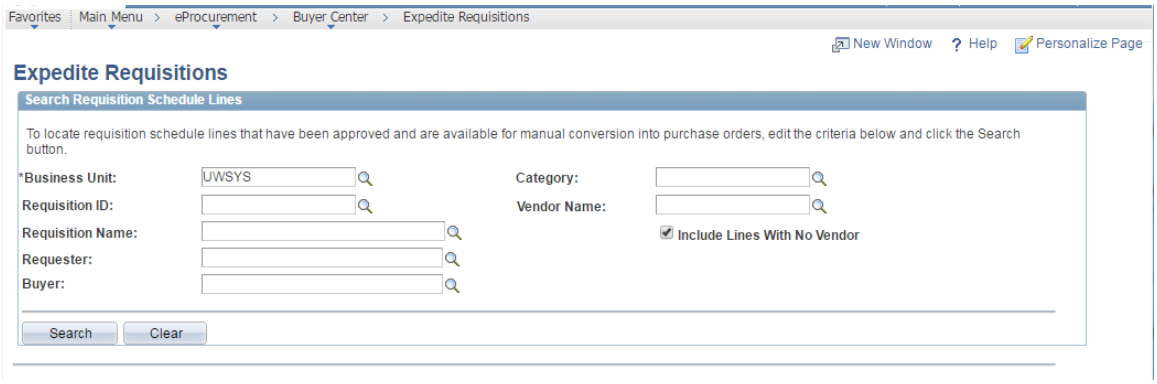
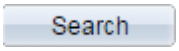
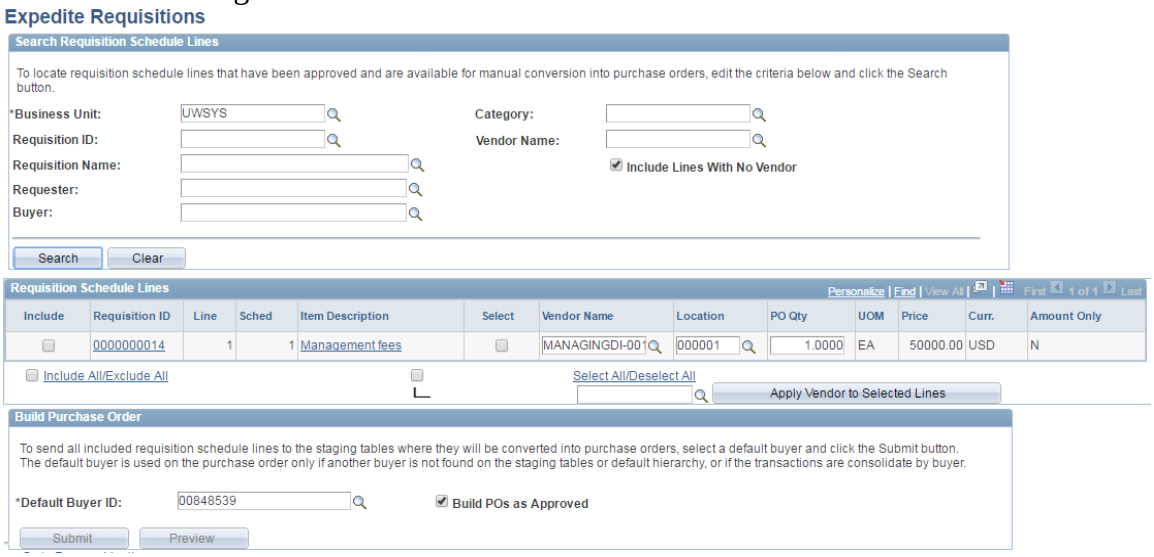
Expedite Requisition

The steps below describe the business process of converting a Requisition to a Purchase Order.

1. Follow the path below to the Expedite Requisitions page.
   Main Menu > eProcurement > Buyer Center > Expedite Requisitions



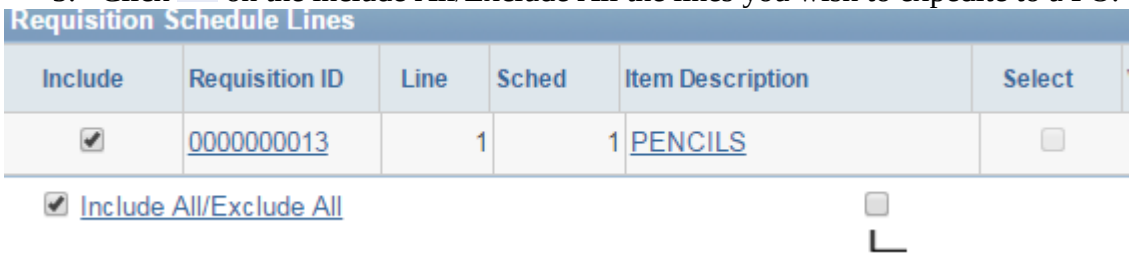
2. Enter your Business Unit and click  to view all available requisitions for sourcing.



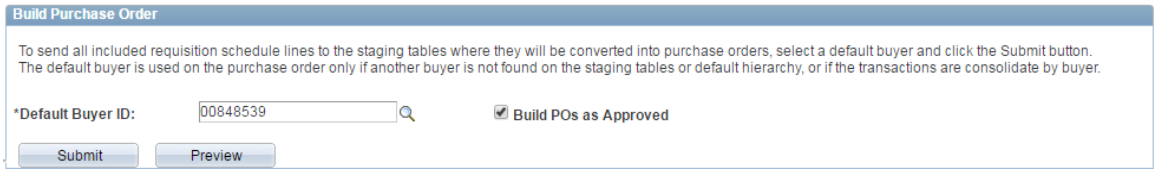
3. Verify the Vendor Name field is populated. The requisition cannot be sourced without a Vendor.

4. Verify the Default Buyer ID field is populated. If an update is needed, please make it at this time. This will be the Buyer ID you want on the Purchase Order.

5. Click ☑ on the include All/Exclude All the lines you wish to expedite to a PO.

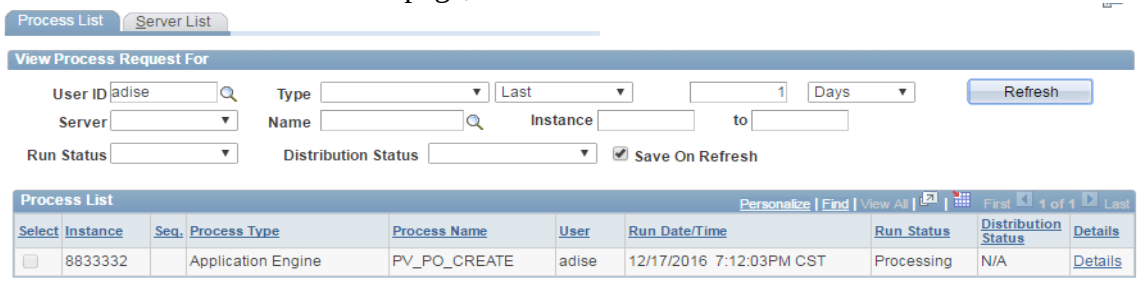


6. Click ☑ to build the PO as Approved.

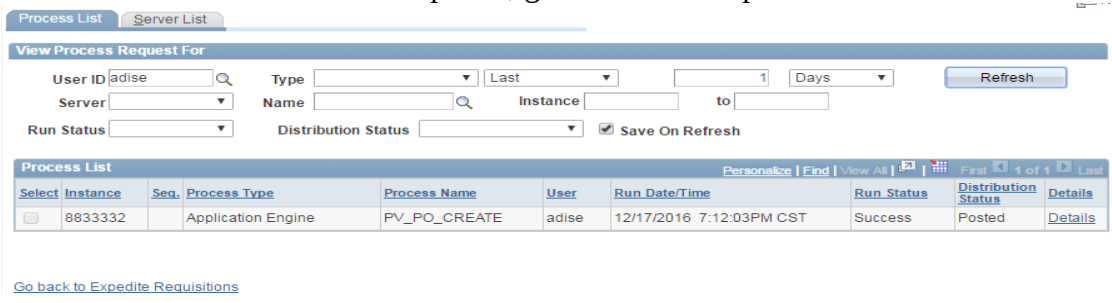


7. Click Submit Those lines are currently in process of becoming a purchase order.

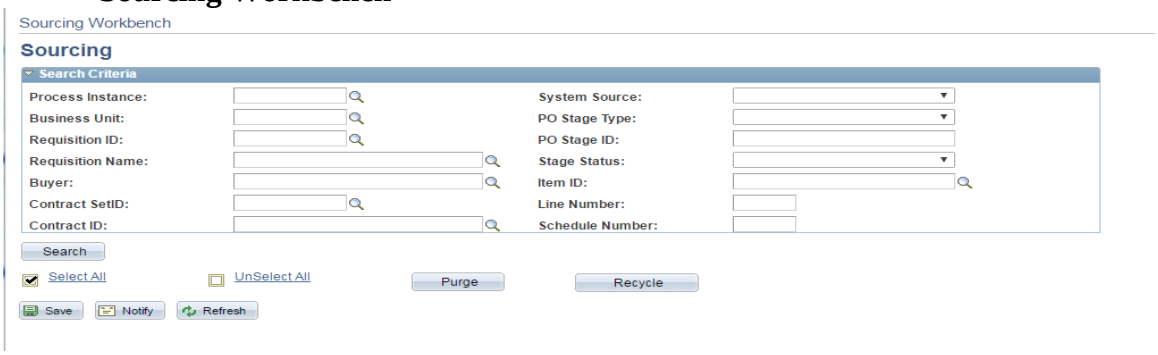
8. Go to the bottom of the page, and Click Go to Process Monitor



9. Click Refresh until the Run Status equals Success. Once the process has run to Success. Click Go back to Expedite Requisitions to Expedite other requisitions as needed. If no others to expedite, go to the next step.



10. Verify the requisition has become a Purchase Order.
    Main Menu > eProcurement > Buyer Center > Procurement Processes > Sourcing Workbench



11. Enter, at minimum, the below:
    a. Business Unit
    b. Buyer Empl ID
    c. Other search criteria can be entered to limit the number of results

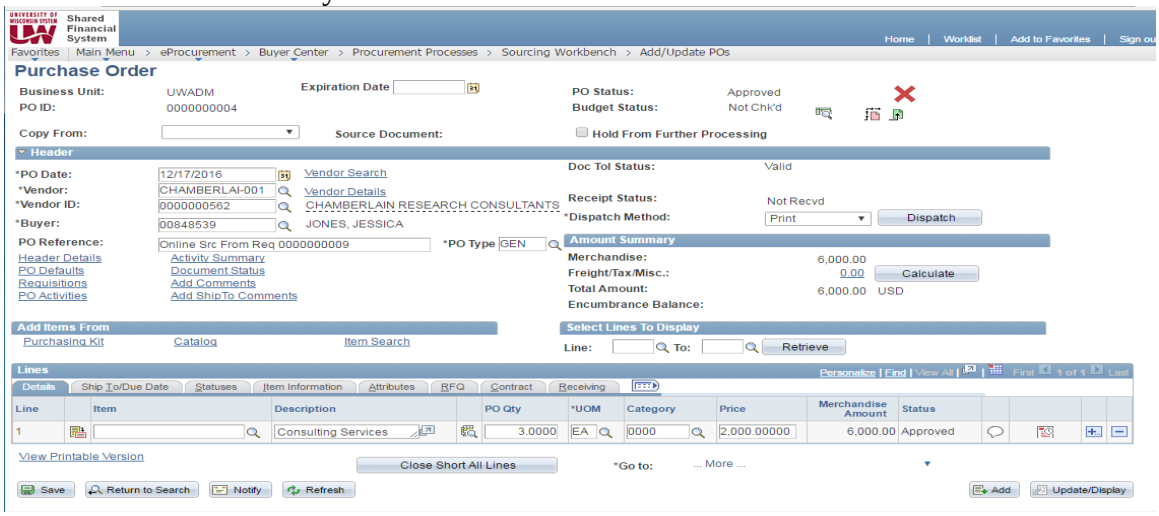
12. Click Search . If the PO was created, the *Stg Status should say Completed.

Sel	Instance		*Stg Status	Unit	Buyer	Vendor ID	Loc	Item ID	Description	Requisition ID	Purchase Order
	8850676		Completed	UWADM	JONES, JESSICA	0000000562	000001	Item	Consulting Services	0000000009	0000000004
	8849422		Completed	UWADM	Auditor, EXAUD60	0000000350	000001	Item	DRAWER DIVIDERS	0000000010	0000000002
	8849422		Completed	UWADM	Auditor, EXAUD60	0000002800	00001	Item	Computer Desk	0000000010	0000000003
	8847524		Completed	UWADM	JONES, JESSICA	0000002811	00001	Item	Consulting Service	0000000011	0000000001

13. Completed POs are now available for dispatch. The new Purchase Order ID is listed to the right of the Requisition ID.

14. Click the blue hyperlink under Purchase Order, to view the PO details.

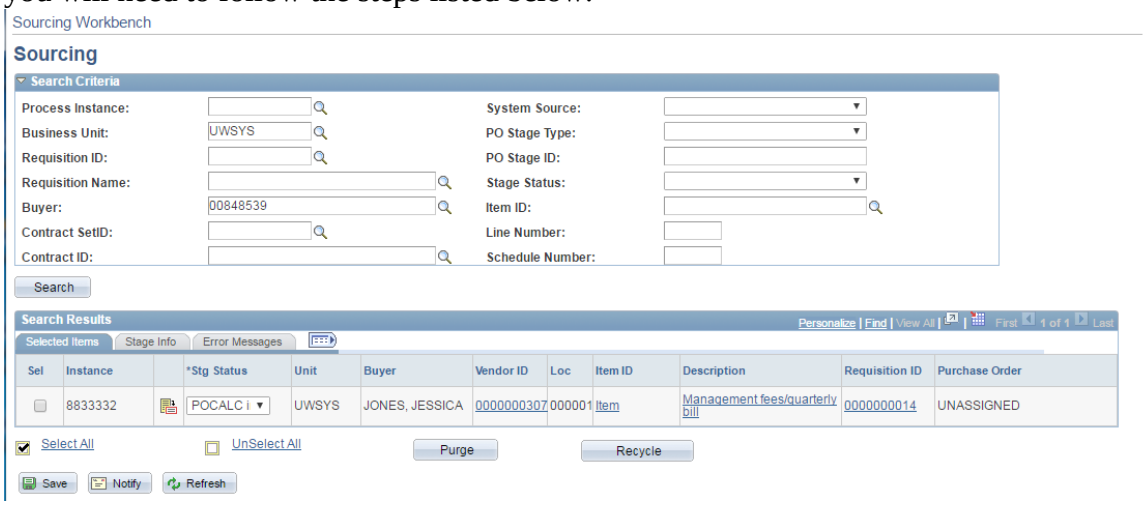
15. You will be taken directly to the created PO.



16. If no issues with the creation of the PO, go to the PO Updates section, listed further down.

17. If errors were encountered, proceed to the next steps, where you can try expediting again (step 18) or creating the PO by copying the requisition (step 22).

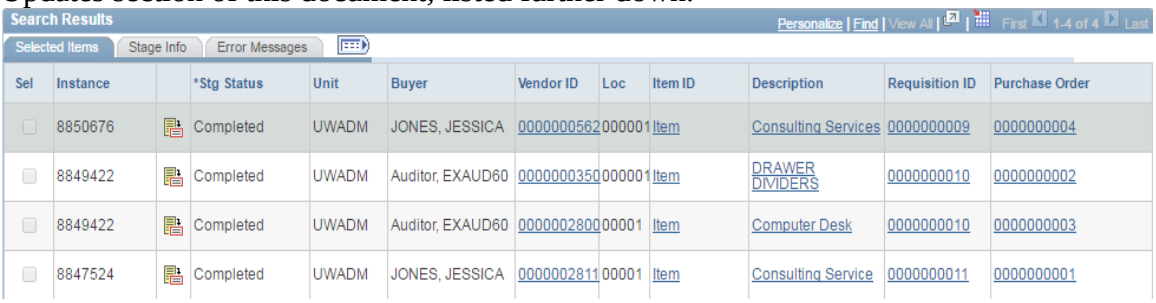
18. In most cases the Stage Status will be complete and you'll see the PO ID. However, in some cases if the process didn't complete or the line(s) were in error, you will need to follow the steps listed below.



19. Change the *Stg Status to ‘Reset Req and Purge’, Click Save

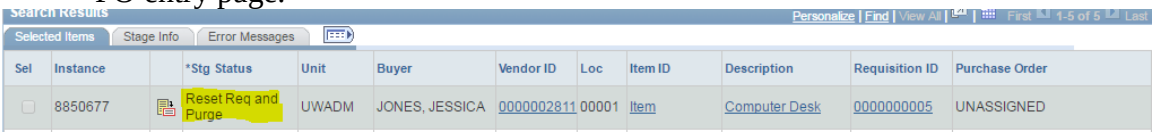
20. Follow the same Expedite Steps above to source this requisition to a Purchase Order.
Main Menu > eProcurement > Buyer Center > Expedite Requisitions

21. POs should have been created and are now available for dispatch. Click the blue hyperlink associated to the PO to view the PO details and proceed to the PO Updates section of this document, listed further down.



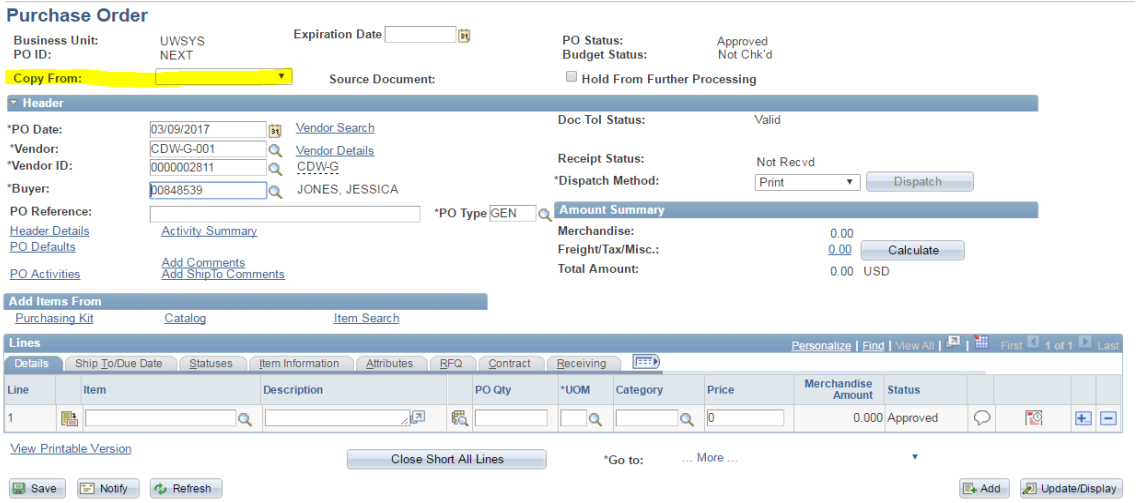
22. If there is still an issue with the requisition, follow the steps below to create the purchase order from the requisition using the copy function.

23. Change the Stage Status to ‘Reset Req and Purge’, Click Save. Proceed to the PO entry page.

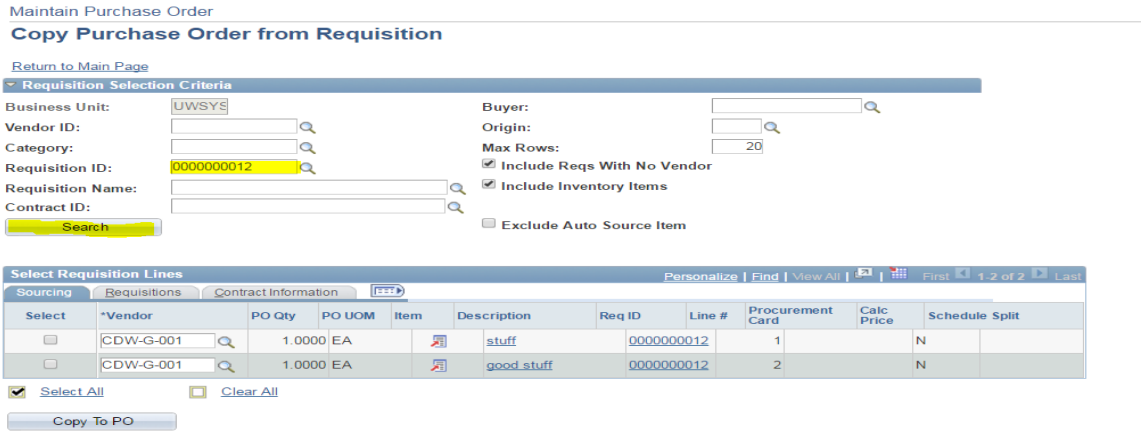


24. Access the PO Entry page using the below path.
Main Menu > Purchasing > Purchase Orders > Add/Update POs
    a. Populate the Vendor and Vendor ID fields. This must be populated prior to the Requisition Copy.

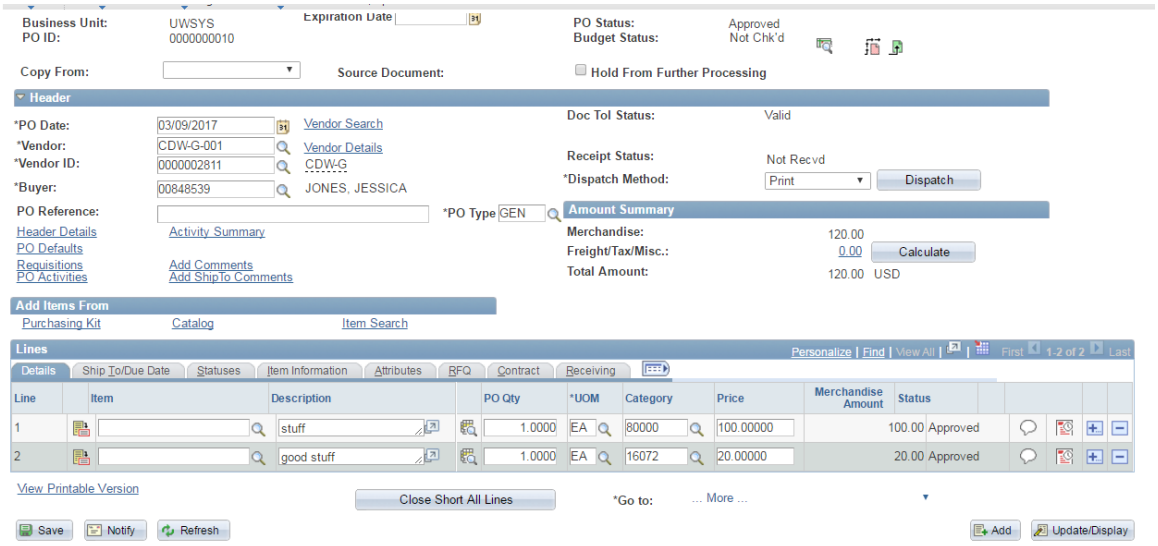
    b. Select the Copy From drop down highlighted below and select Requisition.



25. Enter the Requisition ID and click Search. Click Select All . Click Copy To PO.



26. Click Save . The PO has been created. Proceed to the PO Updates section of this document.



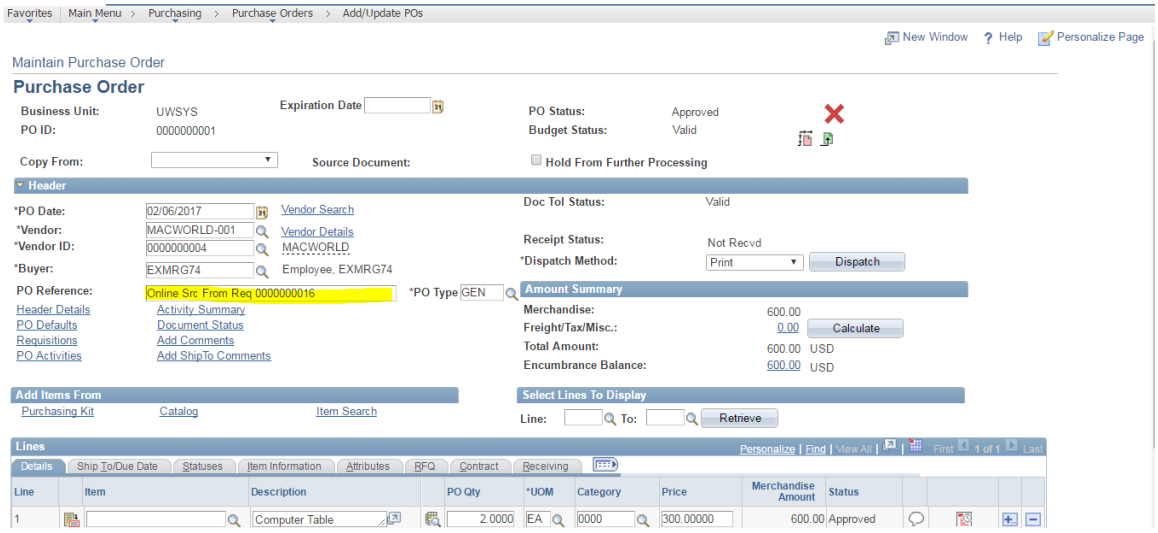
PO Updates

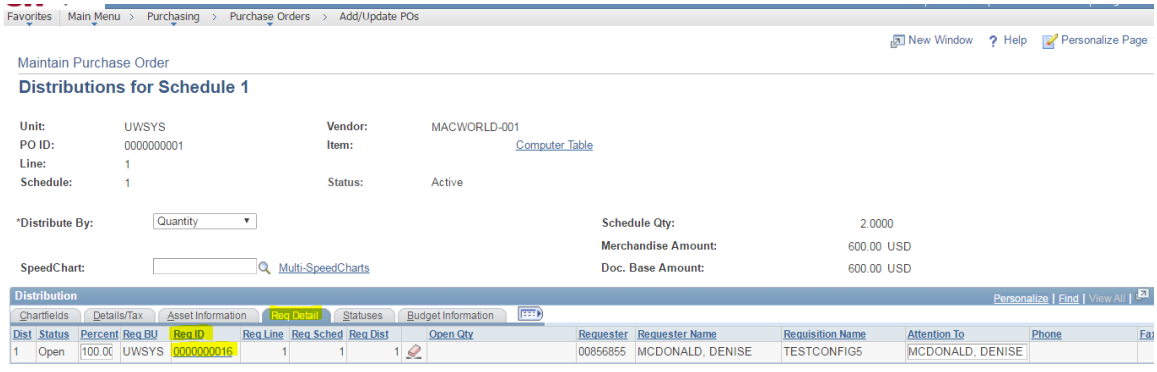
The steps below describe the changes required from the Buyer once the Requisition is sourced to a Purchase Order.

1. Go to the Add/Update PO page.
   Main Menu > Purchasing > Purchase Orders > Add/Update POs

   When a PO is built from a requisition, the PO Reference gets populated with the Requisition ID. The UWSA Purchasing Group currently utilizes the PO Reference field for other purposes. You can remove the Requisition from the Reference field and populate with the desired information.

   If required you can still view the Req ID via the Distribution for Schedule page, Req Detail tab shown below in the second screenshot.

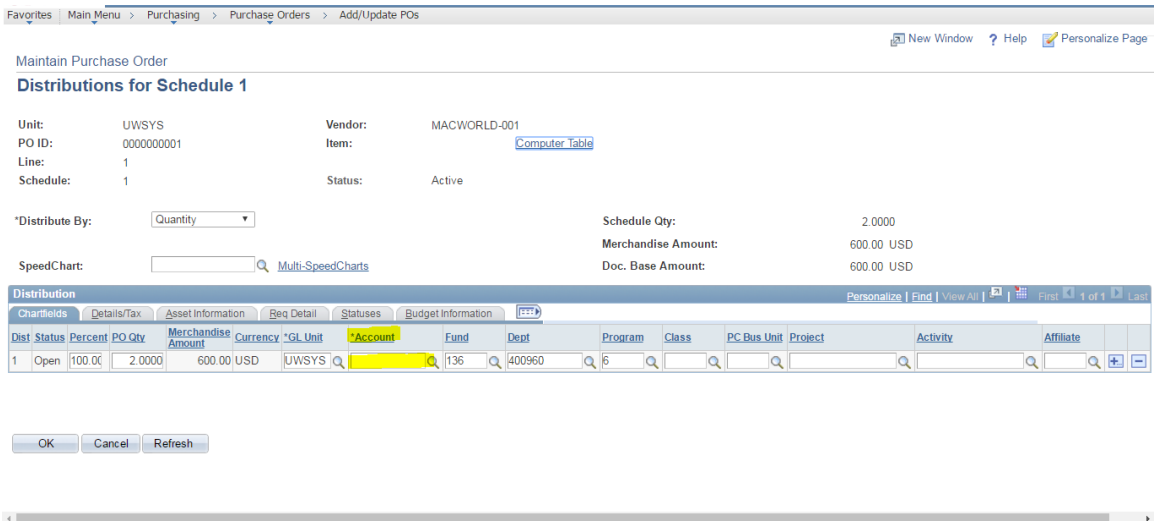




1. Update the **Category** once the Req has been sourced to a Purchase Order.

   The Buyer will need to go the chartfield tab, to take note of the Account Code from the Requisition. Changing the Category from 0000 to a new category will wipe out the Account Code.

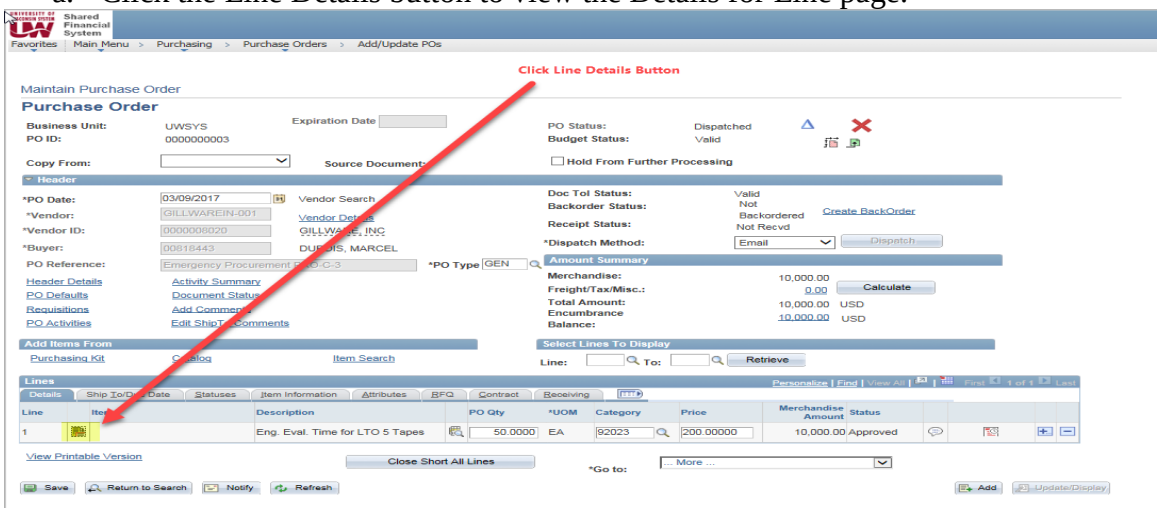
   The page below shows the effect of changing the category and the account being wiped out on the Distribution Page. Once you change the category, go to the chartfields tab and re-enter the Account code. The PO will not save without a valid Account Code.



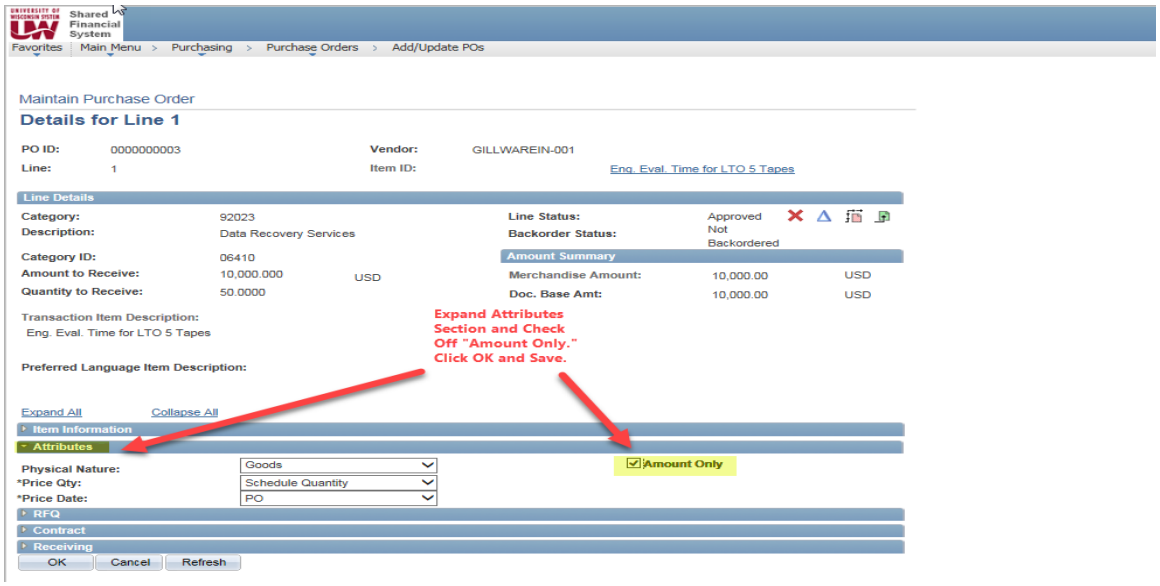
   If you did not note the account code before updating the category, go back to the Manage requisition page and view the requisition to get the account code.

   Main Menu > eProcurement > Manage Requisitions

2. If Matching has been implemented at your site, flag the PO as "Amount Only." This will prevent unnecessary Match exceptions based on quantity. See the below screen shots. Please note, flagging a PO as "Amount Only" will be change the PO quantity to 1, if it is not already at 1, and change the merchandise amount.
    a. Click the Line Details button to view the Details for Line page.



3. Expand Attributes and check off the box next to "Amount Only." Click OK and save the PO. A message may appear confirming you are OK with a PO quantity of 1, select "OK."

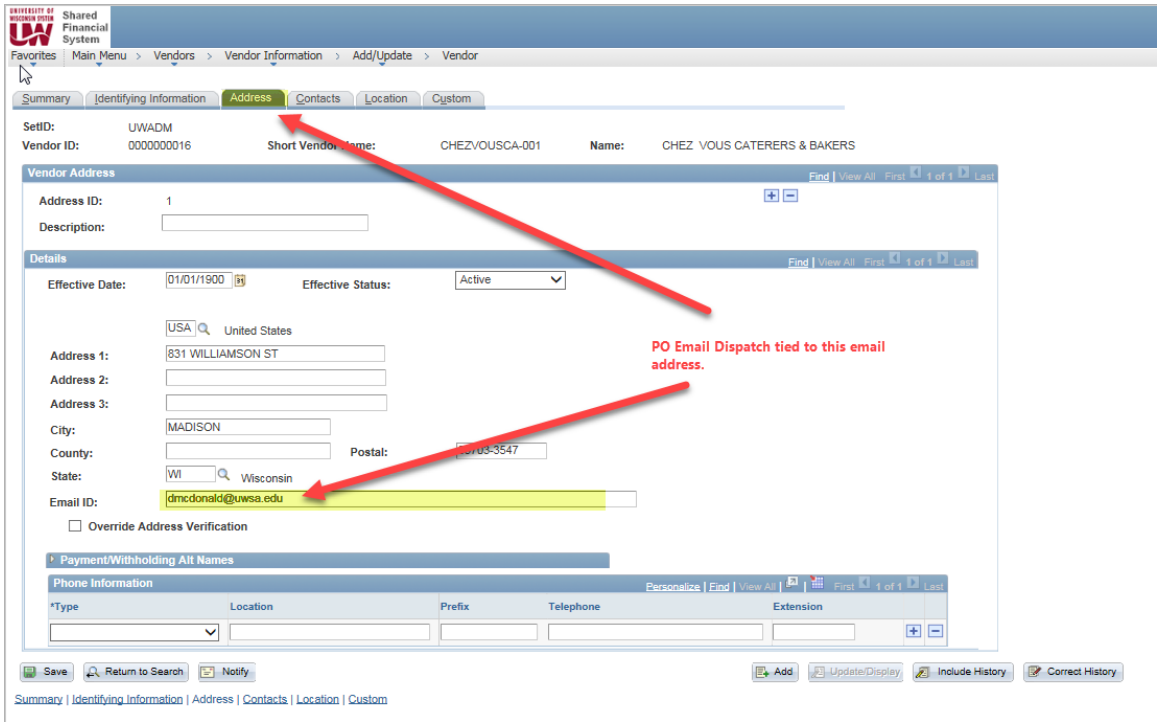


4. Once all the PO updates are completed, the steps/process of managing a PO will be the same as before. You can Dispatch using the Print or Email Function. Instructions on PO Email Dispatch are listed below.

PO Email Dispatch

Dispatching the PO using Email allows you to electronically send the dispatched PO directly to the vendor. It is recommended that once a valid email address is obtained for a vendor, it should be added to the Vendor file on the Vendor Address tab for future use. This will allow the email address to be automatically populated in the PO Email Dispatch Options Page.

Please note, these types of updates should be forwarded and handled by your Accounts Payable group.



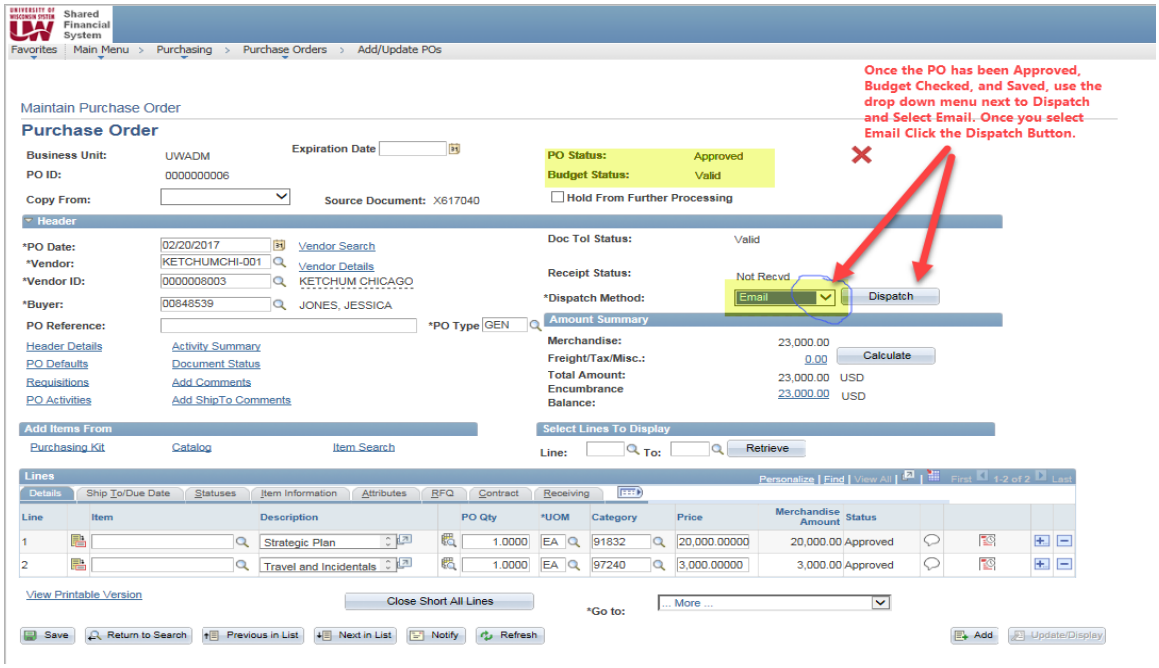
People Soft provides 3 ways to electronically dispatch a PO via Email.

i. Buyer's Workbench
ii. Overnight Batch Job
iii. Select PO Email Dispatch from Maintain Purchase Order Page.

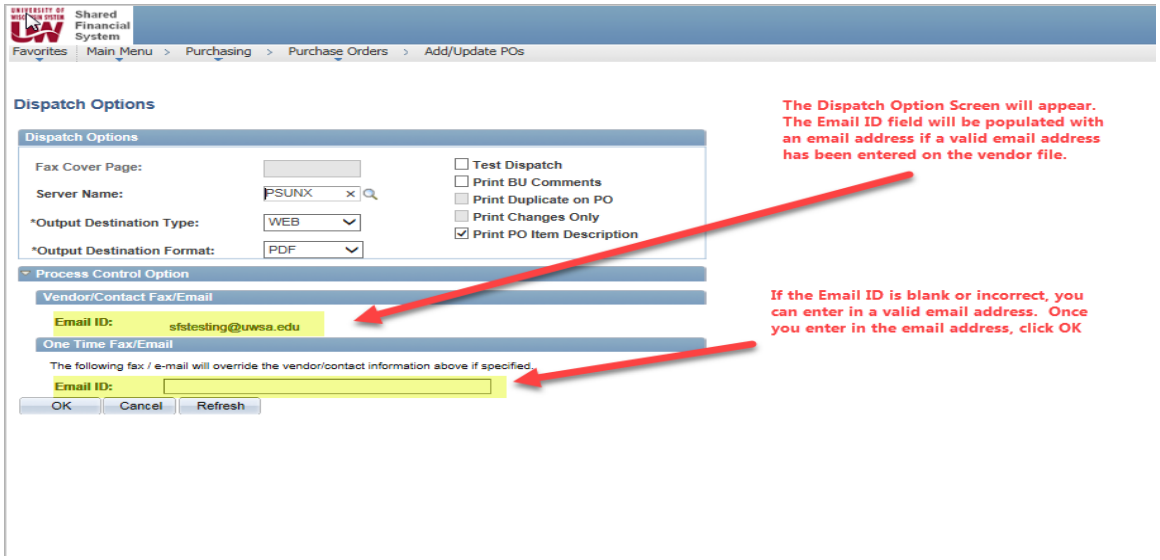
Below are the steps to electronically dispatch the PO from the Maintain Purchase Order Page.

Main Menu > Purchasing > Purchase Orders > Add/Update POs

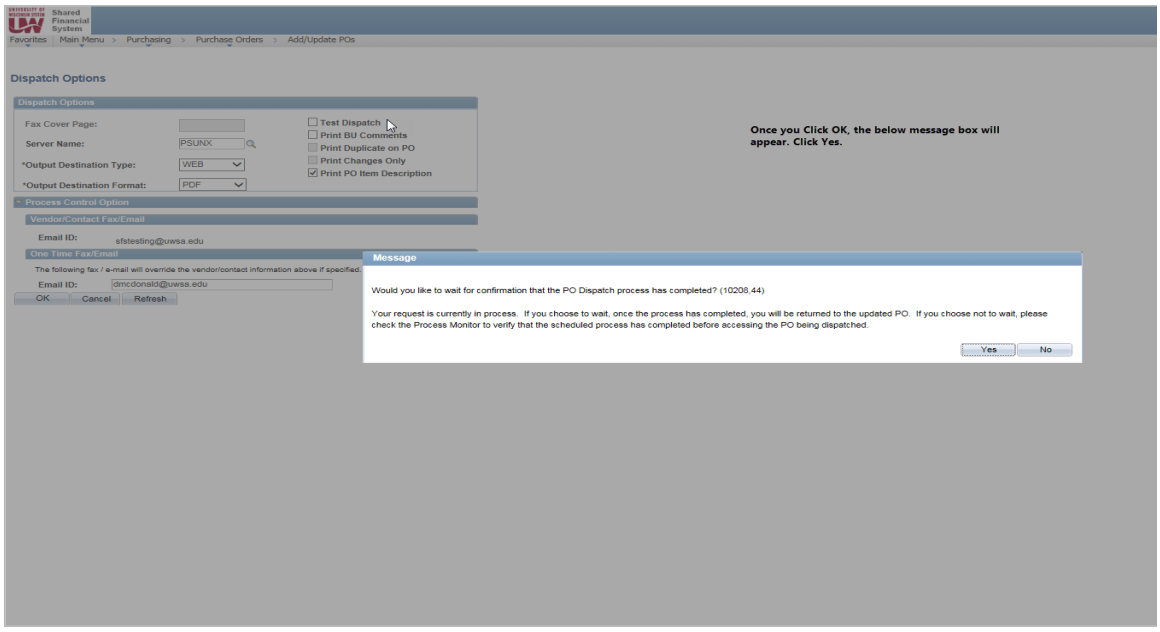
1. Once the PO has been Approved, Budget Checked, and Saved, use the drop down menu next to Dispatch and Select Email. Once you select "Email" Click the Dispatch Button.



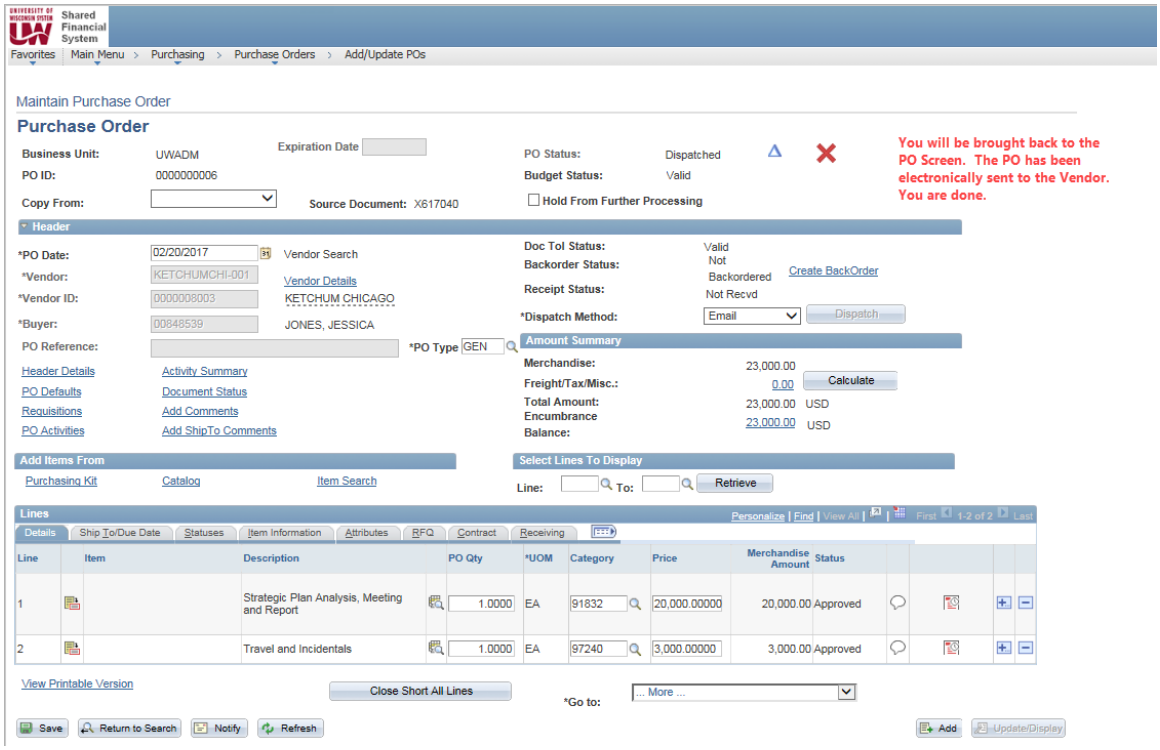
2. Update the email addresses, if required and click "OK."



3. The Below Message will appear. Click “Yes” to electronically dispatch the PO to the Vendor.

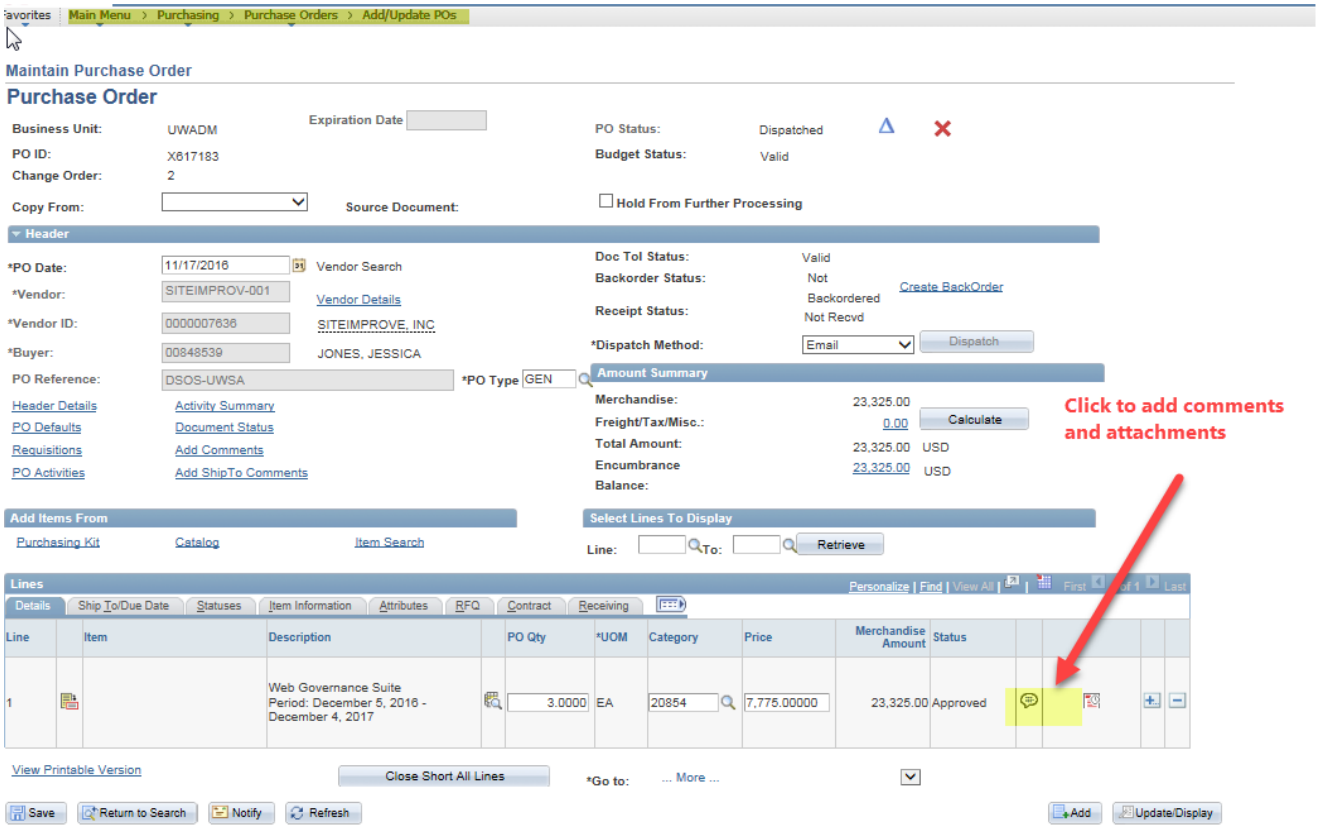


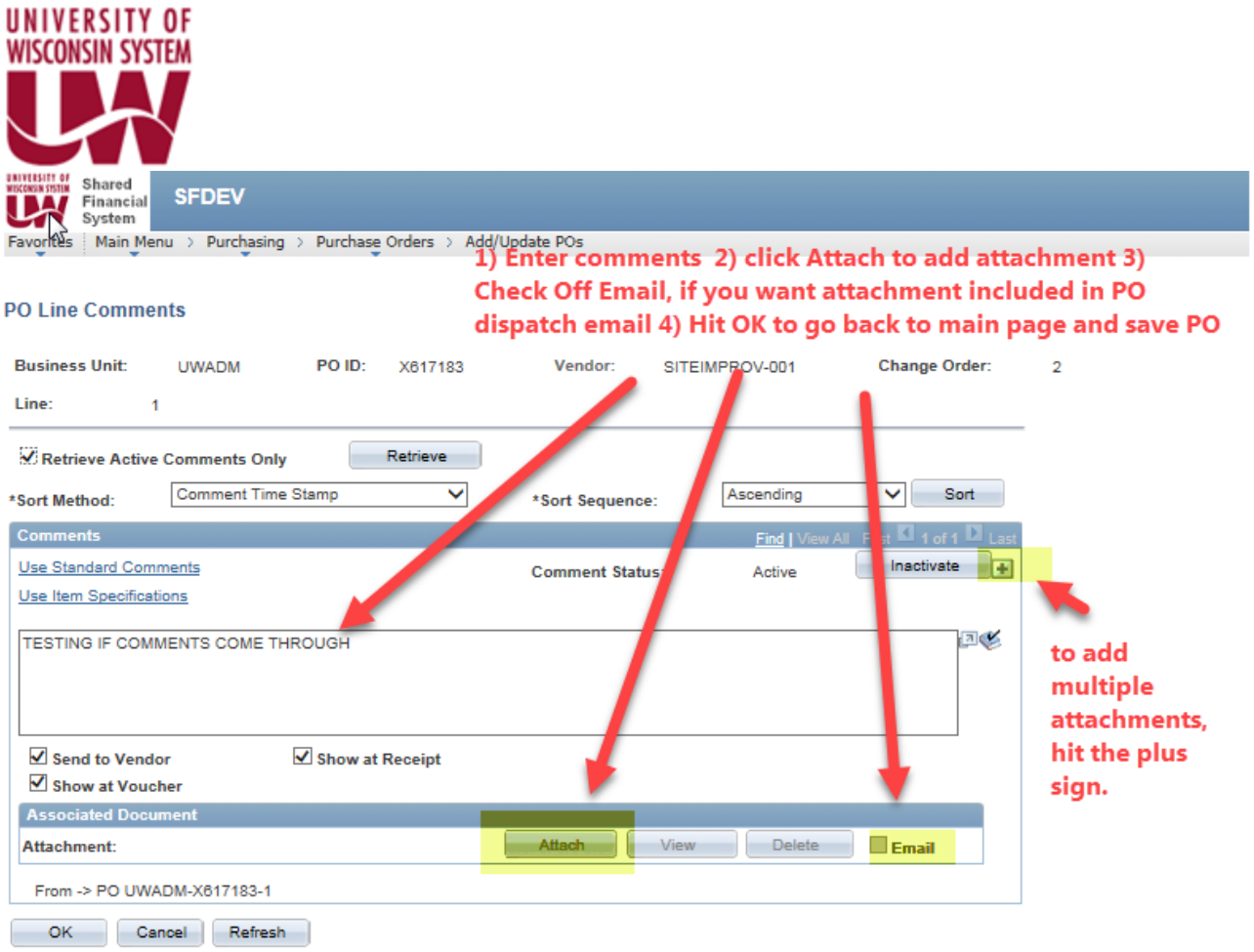
4. You will be brought back to the Maintain Purchase Order Page. You are done.

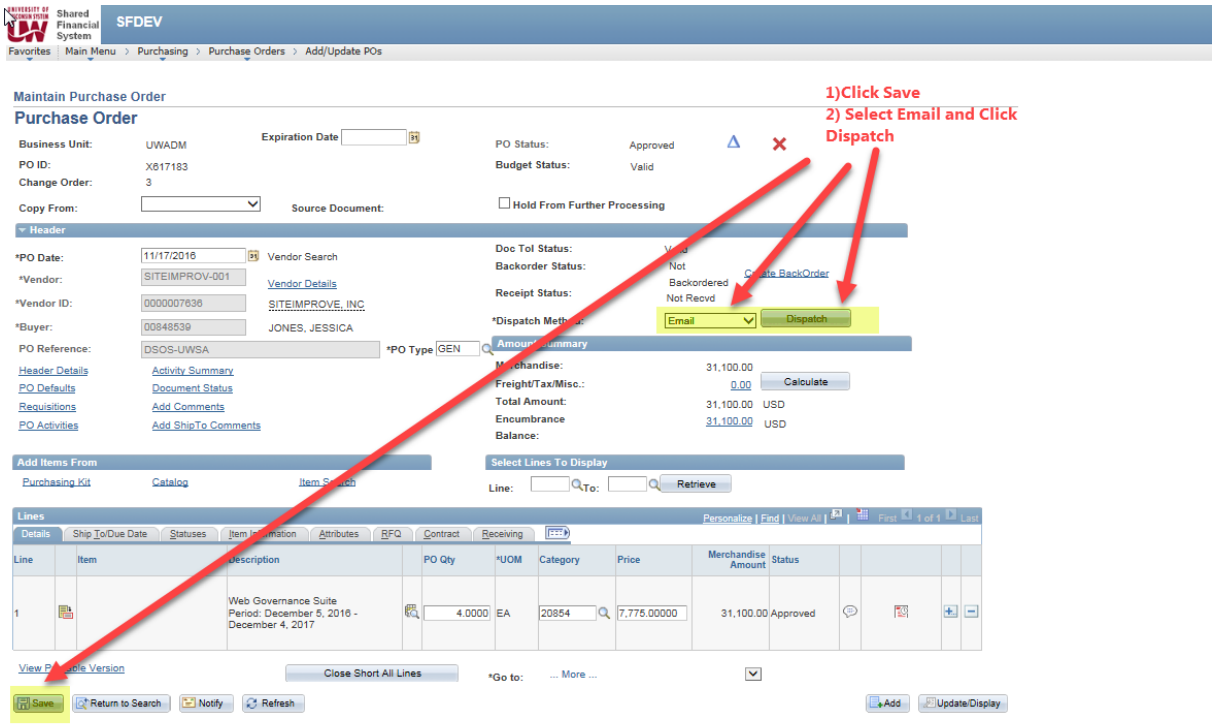


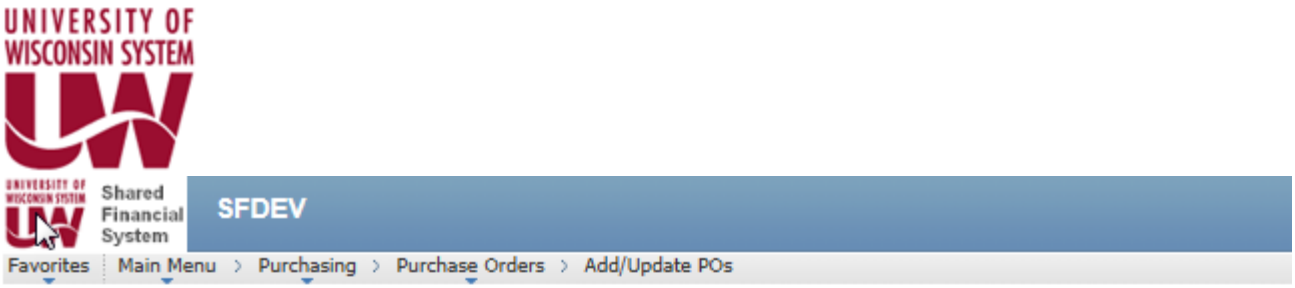
PO Email Dispatch with Attachments

The below screen shots provide instructions on including attachments with email dispatched PO's.




SFDEV
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs
1) Enter comments 2) click Attach to add attachment 3) Check Off Email, if you want attachment included in PO dispatch email 4) Hit OK to go back to main page and save PO
PO Line Comments
Business Unit: UWADM
PO ID: X617183
Vendor: SITEIMPROV-001
Change Order: 2
Line: 1
Retrieve Active Comments Only
Retrieve
*Sort Method: Comment Time Stamp
*Sort Sequence: Ascending
Sort
Comments
Use Standard Comments
Use Item Specifications
Comment Status: Active
Inactivate
TESTING IF COMMENTS COME THROUGH
Send to Vendor
Show at Receipt
Show at Voucher
Associated Document
Attachment:
Attach
View
Delete
Email
From -> PO UWADM-X617183-1
OK
Cancel
Refresh
to add multiple attachments, hit the plus sign.


SFDEV
Favorites | Main Menu > Purchasing > Purchase Orders > Add/Update POs
1)Click Save
2) Select Email and Click Dispatch
Maintain Purchase Order
Purchase Order
Business Unit: UWADM
PO ID: X617183
Change Order: 3
Expiration Date
PO Status: Approved
Budget Status: Valid
Copy From:
Source Document:
Hold From Further Processing
Header
*PO Date: 11/17/2016
*Vendor: SITEIMPROV-001
*Vendor ID: 0000007636
*Buyer: 00848539
PO Reference: DSOS-UWSA
*PO Type GEN
Vendor Search
Vendor Details
SITEIMPROVE, INC
JONES, JESSICA
Doc Tol Status:
Backorder Status: Not Backordered
Receipt Status: Not Recvd
*Dispatch Method: Email
Dispatch
Header Details
PO Defaults
Requisitions
PO Activities
Activity Summary
Document Status
Add Comments
Add ShipTo Comments
Merchandise: 31,100.00
Freight/Tax/Misc.: 0.00
Calculate
Total Amount: 31,100.00 USD
Encumbrance 31,100.00 USD
Balance:
Add Items From
Purchasing Kit
Catalog
Select Lines To Display
Line: To:
Retrieve
Lines
Details
Ship To/Due Date
Statuses
Attributes
RFQ
Contract
Receiving
Line
Item
Description
PO Qty
*UOM
Category
Price
Merchandise Amount
Status
1
Web Governance Suite Period: December 5, 2016 - December 4, 2017
4.0000
EA
20854
7,775.00000
31,100.00
Approved
Close Short All Lines
*Go to:
Save
Return to Search
Notify
Refresh
Add
Update/Display



Dispatch Options

Dispatch Options

Fax Cover Page:

Server Name: PSUNX

*Output Destination Type: WEB

*Output Destination Format: PDF

- [ ] Test Dispatch
- [x] Print BU Comments
- [ ] Print Duplicate on PO
- [x] Print Changes Only
- [x] Print PO Item Description

Process Control Option

Vendor/Contact Fax/Email

Email ID: sfstesting@uwsa.edu

One Time Fax/Email

The following fax / e-mail will override the vendor/contact information above if specified.

Email ID: dmcdonald@uwsa.edu

OK Cancel Refresh

1) enter email if Email ID: email is not correct
2)Click OK