How to Enter and Receive Requisitions in PeopleSoft

In order to make a purchase you will need to place a requisition in PeopleSoft.

Please follow the steps to make your request
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Implemented by GFU
  VISA
  IDC
  Reimbursements
  Mileage reimbursements
  Student reimbursements
  Stipends
Introduction to Requisitions

Before you Begin: Are you paying an individual not tied to an entity or business? If so please check with HR before starting the requisition process as individuals not affiliated with a business are paid out through time keeping or check request.

VISA requests – Requesters no longer need to go through the requisition process for visa. DO NOT enter a requisition for a visa unless otherwise instructed to do so by your department head for special approvals required for larger visa purchases.

Requisition Flow
1. Requester (you) enters a requisition in PeopleSoft (adding attachments for bids and quotes)
2. The requisition is approved (you, the requester receive a "requisition approval" via email, but can't purchase yet)
3. If the requisition is not approved - you CAN NOT PURCHASE your request at all. I'm Sorry.
4. The Purchasing Department converts the requisition into a PO and dispatches the PO number (dispatch sheets are also sent out via email).
5. Requester receives items (after a requisition is converted to a PO, the requester then receives items in PeopleSoft under requisition receipts and sends invoice to finance with receipt number (process described in this tutorial page 24).
6. Accounts payable pays the vendor/supplier using the receipt information you entered in PeopleSoft
   ➢ Note: The requester will need to communicate with accounts payable making sure that accounts payable has both the invoice and the PeopleSoft receipt that is tied to that invoice so that vendors can be paid. Refer to image below for requisition process
REQUISITIONS
To view all requisition processing, log into MY GFU and click on the requisitions tile. From the next screen view you can perform all tasks needed for requisition purchasing requests. (For instructions on how to print a dispatched PO go to page 19)

ENTERING A REQUISITION
Step 1 – From the requisition tile go to manage requisitions and click create requisition
   ➢ Depending on your screen preference, if you do not have a requisition tile > Go to the side bar navigator > financials > eProcurement > requisition > Click on Requisitions (as mentioned, your screen/s may look slightly different)
Step 2 - On the requisition screen add the following fields - noted in red squares in image below

- **Requisition name** (name something you will recognize, such as department supplier, product type ex: TurfPro-Grounds Dept.
- **Supplier** (click on the magnifying glass to view options – see page 6 for screen shots.
- **Requester** – section will auto fill with who is making the request
- **Category** (click on the magnifying glass for options, (screen listed on Page 6)
- **Unit of Measure** – always choose **EA** for each. (unless purchasing in units of weight.)
- **DO NOT Add the account on first screen.** PeopleSoft may auto default to supply default accounts and your PO will not always be charged correctly > Enter account string on last step of process (noted on page 8 and 9 of tutorial)
Don’t know how to add the supplier?

- click the magnifying glass under supplier
- add the name OR short name (use only one word at a time: example Oregon Vineyard Landscape, type in “Oregon” or Landscape”
- click find
- select the correct vendor
- If two identical vendors are listed, select the one tied to Remit

After clicking OK, you will add items on page 7
- **ADD:** Item details, price and quantity (additional information is helpful)
- **NOTE: BLANKET PO** If you want to receive against a declining balance (aka a blanket PO): You need to set up the requisition so that the price and quantity are reversed. So the quantity will have your dollar amount and your price will say “1”
- Add item to cart. **If no more items are needed, Click CHECK OUT for this requisition and proceed to Step 3 on page 8** To add another line item to your purchase order, fill out screen again and add to cart **NOTE:** shipping costs should be its own line item click CHECK OUT when done adding line items to requisition.
Step 3 - Finalize Requisition – once complete with adding line items:

- You **MUST** enter an *approval justification* for why you are making the purchase request*
- If applicable, you **MUST** also add any quotes or bids that are affiliated with your request. (see page 9 of tutorial for how to do this)
- If you wish to add more lines from this point - select *add more lines* at the bottom of the page and go back a screen
- *Adding accounts / If you wish to split the accounts strings see next page (page 10)*
- If you wish to come back to your entry, click *save for later*
**Adding a quote or bid as an attachment**

To add an attachment to your request click on the comments button located to the right of your listed line items.

➢ Select add attachments : add the quote/ bid that applies to the request, click ok to save, then continue onto adding your account string.
Adding the account to your requisition (not split between accounts):
- To add an account or multiple account strings to be charged (like if you want something split 50/50) see page 11

If all line items are charged to the SAME account
- Select all boxes indicating the line items
- Click Select ALL
- Select Mass Change

Adding accounts continued on Page 11
Enter account string (string is added under different tabs, noted in red squares below)

- Enter GL Unit and account on under **chartfield 1 tab**, and the rest of the account string under **Chart field 2 tab**,
- **Chart field 3 tab** is where you would add COVID1-19 in the Chart field 1 box, projects or other chart filed 1 #s
If you wish to **SPLIT** accounts to be charged

- Select the item you want split
- Click the drop down arrow in account strings
- Click the plus sign > add separate accounts

**Divide the accounts as You need** in Chart Field 1 tab
Divide the percentage of the Accounts in Chart Field 2 tab

Click **Save**

**Proceed to budget check**
Step 4 – After clicking **budget check**, you will get this “warning”, click OK

If no errors occur and your budget is **valid**, proceed to save and submit

If **Err** occurs: If the following message appears after you click budget check, your account string is incorrect. Please verify that you entered the correct string by repeating account string steps, adjust through mass change (see below)
Verify your account: Fill in GL unit, account on chart field 1 tab again
Select chart field two and add the rest of the account string, don’t forget the budget reference
Save > now click check budget again, save and submit
Return to budget check and submit requisition (image noted back on page 13)
DONE: For Requisition Submissions – please make note of the requisition number provided to you for reference.

NOTE: Your requisition will be sent through the approver process and the Purchasing Department will issue you a Purchase Order number. This PO number can be viewed by looking at your requisitions

Proceed to next pages for how to view, print and receive
How to View MY PO now that requisition has been submitted

In order find out your PO # from the Requisition # which you just entered

- Click on Requisitions > Manage Requisitions (same location as where you created a requisition)
- From this screen you click on the drop down arrow and select PO number – (expanded screen shot on Page 18)
Requisitions will indicate whether or not they have been dispatched – “PO(s) dispatched”

- To view the PO # click the drop down arrow
- Click the purchase order image
- On the second screen shot on this page view your PO number
- If the Purchase order link is dead, click on approvals to see where your requisition is at in the approval process (not dispatched yet)
PRINTING YOUR OWN PO ITEMIZATION

If you wish to print a listed itinerary of line items for your reference, you will need to go to manage requisitions (page 14) locate your requisition, and click open a new window in your web browser (this is to enable the print feature to work) from the new window select requisition ID, click the drop down arrow and select PO (as noted on Page 15 for screen shots)

From this screen you can view your PO details

- Be sure to select “View ALL” for a complete list of all line items listed on your PO
- Print the screen from your web browser for a printed itinerary
Receiving (Main View)
(There are different screen views depending on your PeopleSoft set up affiliated with your GFU login ID. A secondary view is listed on Page 23)

**Step 1** - *Requisitions in MYGFU* (same place as where you created the requisition)
**Step 2:** Under Manage Requisitions go to *Receive Items* (note different screens deepening on your GFU set up)

- Click add new receipt

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*Your Search returns more than 50 receipts, please modify the search criteria to limit your search.*
➢ Click add again

➢ Type in the PO in the ID section – make sure all other boxes are clear > click search
Select the receipt you are receiving against (if you set up a declining balance (Blanket PO) prior receipts can be viewed on this screen in People Soft – as noted in yellow)

Click OK
Adjust amount to be received if needed > Click Save > Take note of receipt # on second screen
Receiving (main view) Completed

**Last Step – Communicate with Finance** *(Send info to Accounts Payable)*
Finance will need the receipt number and a copy of the supplier invoice in order to pay the vendor. Please submit that information in an email to:
accountspayable@georgefox.edu

**Example**
Hi Accounts Payable
Invoice attached to this email
Receipt # 11155533
-  Thanks -

For questions on the requisition process please contact purchasing@georgefox.edu

**NOTE:** You can view your past receipts by visiting Manage receipts > and doing a search *(screen shown below)* type in recite #, PO # or do a general search of all receipts:

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**THANK YOU FOR YOUR PATIENCE**
Receiving secondary view
Go to requisitions and receive items (if this is your view, do the following)

One Line Items is selected for receiving if you only wish to receive one item, click receive selected and view next screen
By Clicking **Save Receipt**, a receipt number is generated

IF Blanket PO – The below screen is where you would edit amounts if blanket PO (refer to page 22 for specific screen shots)

![Receipt Screen](image)

- **NOTE:** Save the date and receipt number provided to you when you receive your product.

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**Receipt Saved Successfully**

You have saved receipt # 0000044405 containing the following items:

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Received Quantity</th>
<th>Reject Quantity</th>
<th>Accept Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Autoclave Maintenance Blanket</td>
<td>1.0000</td>
<td></td>
<td>1.0000</td>
</tr>
</tbody>
</table>

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**Last Step** – Communicate with Finance accounts payable – **Review page 25 for what to communicate**
Other Helpful PeopleSoft Screen Shots

From the “receive items screen” under Manage requisitions, you can look up receipt numbers, Po’s and filter your searches.  

- **NOTE:** This view does not automatically appear if you have secondary view for receiving noted on page 26 – if you wish to alter your view you must reach out to IT

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**Manage Receipts**

**Search Criteria**

- Received Date From [Calendar]
- To [Calendar]
- Business Unit
- Receipt ID
- PO Unit
- PO ID
- Show Status
- Ship To

**Receipts**

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Receipt ID</th>
<th>Date</th>
<th>PO ID</th>
<th>Supplier</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>GFU01</td>
<td>0000045489</td>
<td>08/04/2020</td>
<td>0000023288</td>
<td>TONKON TOR-001</td>
<td>Received</td>
</tr>
</tbody>
</table>

**Add New Receipt**  
**Process Receipts**  
**Inspection**  
**Review ASN Receipt**  
**Manage Return To Supplier**

Return to Manage Requisitions
Other Purchasing Methods Implemented By GFU

**VISA:** Visa purchases are made on your department card and are processed through concur each month. By default, Visa requests do not go through the requisition process. However, some departments require a Requisition and PO # for approval to purchase significant items. Please defer to your departments purchasing requirements.

**Inter Department Charges:** No requisition is needed for Interdepartmental charges, this process has not changed from last year. You can find the IDC form on the finance page of the GFU site.

**Reimbursements:** As of May 12 the purchasing policy dictates that all purchases must get pre-approved before any funds can be released. As noted in the purchasing policy personal credit cards are not to be used for George Fox business. Please contact the Purchasing Department for further questions. purchasing@georgefox.edu

**Mileage reimbursements:** Mileage reimbursements are different than other reimbursements – please review the policies of mileage reimbursements on the finance page of the GFU site.

**Student reimbursements:** This item falls under HR/timekeeping and check requests. Please check with HR or accounts payable for the best method for how to proceed.

**Stipends:** Again, if funds are being released to a person not tied to a business or an entity, the request needs to go through HR Timekeeping or Check request. Please follow-up with HR or accounts payable for best practice.

For all other purchasing questions please contact purchasing@georgefox.edu or refer to the finance page for forms and notes on purchasing policies.