GEORGE FOX

UNIVERSITY

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

Directory

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 <u>can't purchase yet</u>)

3. If the requisition is <u>not approved</u> - 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 <u>receives items in PeopleSoft</u> under requisition receipts and sends invoice, PO#, Supplier # and receipt # to Accounts Payable through the Request to Pay Form (process described in this tutorial page 26).

6. Accounts payable pays the vendor/supplier using the Request to Pay form Info

➢ Refer to image below for requisition process

Req ID	Requisition Name	BU	Date	Request State	Budget	Total		
▼ 0000011369	CrescentElec-Lemons	GFU01	08/06/2020	PO(s) Created	Valid	2,500.00 USD	[Select Action] ∨	Go

Requester Sonia M Rademacher   Entered By Sonia M Rademacher   Priority Medium

Pre-Encumbrance Balance   Not Available

Requisition   Approvals   Inventory   Purchase Orders   Change Request   Receiving   Returns   Invoice   Payment

Request Lifespan:

Line Information   Personalize | Find | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

Line		Description	Status	Price	Currency	Quantity	UOM	Supplier	
1	🔧	Crescent Electric-Lemons pro...	PO Created	1.0000	USD	2,500.0000	EA	CRESCENT ELECTRIC SUPPLY	✗

Create New Requisition   Review Change Request   Review Change Tracking   Manage Receipts   Requisition Report

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.
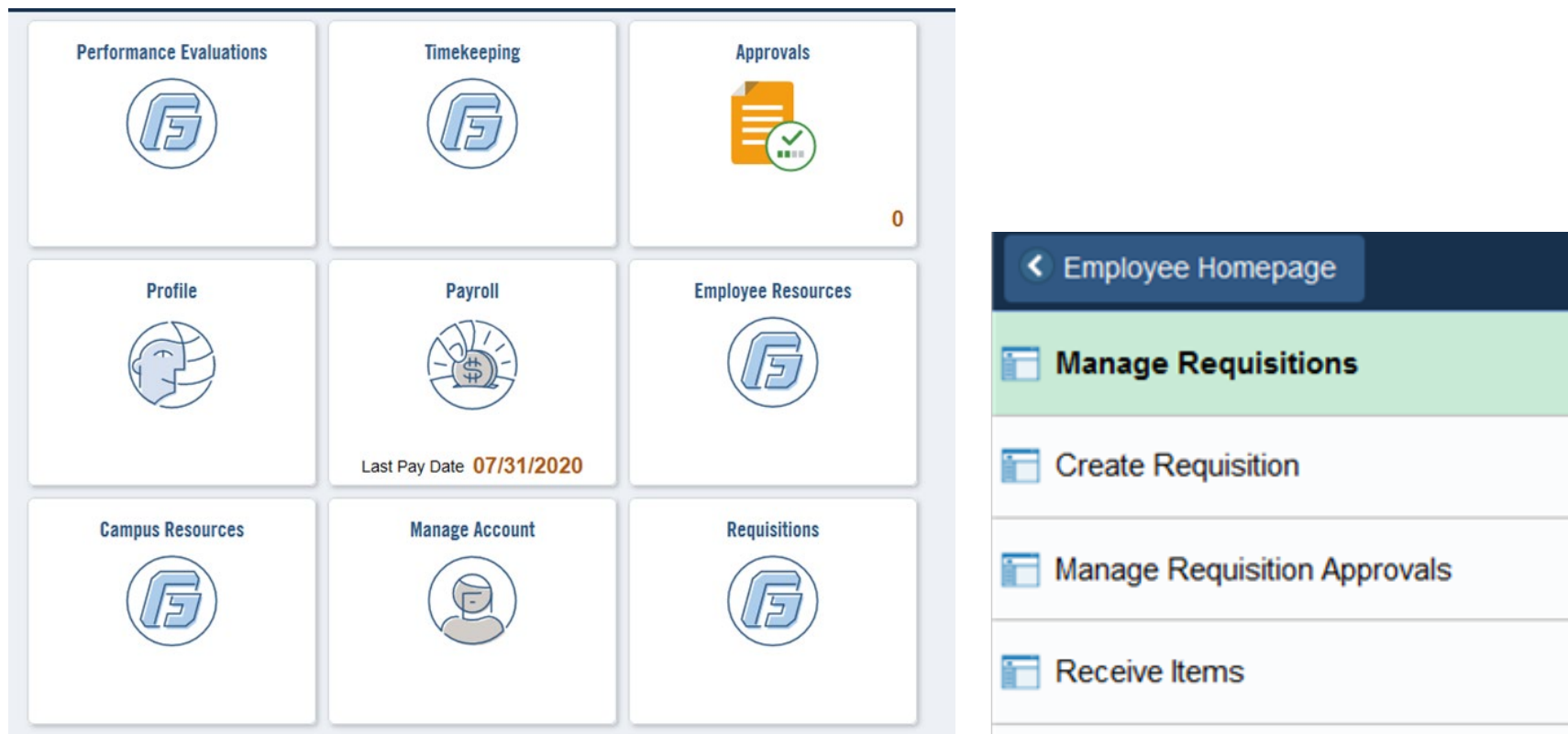
ENTERING A REQUISITION

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 or 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, clear account field**. PeopleSoft may auto default to supply default accounts and your PO will not always be charged correctly > Enter account sting on last step of process **(noted on page 8 and 9 of tutorial)**

Requisition Settings

Business Unit	GFU01	George Fox University
Requester	SRADEMACHER	Sonia M Rademacher
*Currency	USD	

Requisition Name: test
Priority: Medium

Line Defaults ⓘ

Note: The defaults specified in this page will be applied to requisition lines which are available for sourcing when there are no predefined values for these fields.

Supplier	0080011347
Supplier Location	1
Buyer	

Category	HVAC SUPPLIES
Unit of Measure	EA

Shipping Defaults

Ship To	NEPLANT
Due Date	

Add One Time Address
Attention:

Distribution Defaults

SpeedChart

Accounting Defaults

Personalize | Find | 🔲 | 🖼   First ◀ 1 of 1 ▶ Last

Chartfields1 | Details | Asset Information | 🔳

Dist	Percent	Location	GL Unit	Account	Fund	Dept	Program	Oper Unit	Project
1	100.0000	NEPLANT	GFU01			710010			

OK   Cancel

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 that says *Remit to* in the described location

Supplier Search

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

Search Results   Personalize | Find | View All | | First 1 of 1 Last

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
◉	1 80000382	NAPA AUTO PARTS	REMIT		29025 SW TOWN CENTER LOOP W	WILSONVILLE	OR	

Select   Cancel

After clicking select and 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 unless vendor includes shipping in total of invoice proposal. click CHECK OUT when done adding line items to requisition.

Step 3 - Finalize Requisition – once complete with adding line items:

*You **MUST** <u>enter</u> 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*

Cart Summary: Total Amount 250.00 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	Napa-BR supplies		NAPA AUTO PARTS	250.0000	Each	1.0000	250.00		Add	🗑

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

Total Amount   250.00 USD

Shipping Summary

Edit for All Lines

Ship To Location   NEPLANT
Address   Plant Services
1101 Villa Road
Newberg, OR 97132

Attention To   Sonia M Rademacher

Requisition Comments

Enter requisition comments

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

Approval Justification

Enter approval justification for this requisition

Check Budget

Save & submit   Save for Later   Add More Items   Preview Approvals

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

Checkout - Review and Submit

Review the item information and submit the req for approval.

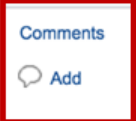My Preferences   Requisition Settings

Requisition Summary

Business Unit	GFU01	George Fox University	Requisition Name	Test
*Requester	JOHNS	John Shaw	Priority	Medium
*Currency	USD			

Cart Summary: Total Amount 1.00 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	Test		ORACLE AMERICA, INC	1.0000	Each	1.0000	1.00		Add	

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

Total Amount   1.00 USD

➢ **Select add attachments : add the quote/ bid that applies to the request, click ok to save, then continue onto adding your account string**

Line Comment

Business Unit	GFU01	
	Requisition Date	06/23/2020
	Status	Open
Line	1	

Comments   Find   First ◀ 1 of 1 ▶ Last

Entered On:

1 [   ]

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

Add Attachments

OK   Cancel

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**

Cart Summary: Total Amount 1.00 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
▸ ☑ 1 1			CARDINAL TRACKING, INC.	1.0000	Each	1.0000	1.00	🖼️	💬 Add

☐ Select All / Deselect All   Select lines to: 📥 Add to Favorites   📗 Add to Template(s)   🗑 Delete Selected   📇 Mass Change

Total Amount   1.00 USD

Shipping Summary

✎ Edit for All Lines
      Ship To Location   NEPLANT
          Address   Plant Services
                            1101 Villa Road
                            Newberg, OR 97132
      Attention To   Sonia M Rademacher

Requisition Comments

  Enter requisition comments

  ┌───┐
  │   ↗ │
  └───┘

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

Approval Justification

  Enter approval justification for this requisition

  ┌───┐
  │   ↗ │
  └───┘

🔍 Check Budget

[Save & submit]   [Save for Later]   [+ Add More Items]   68 Preview Approvals

Enter account string (sting is added under different tabs, noted in red squares below)

➢ Enter **GL Unit** and account on under *charfield 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 flied 1 box, projects or other chart filed 1 #s

Select "all distribution lines" click OK

◀ll Request Options

Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to

◉ All Distribution Lines
Apply changes to all existing distribution lines.

○ Matching Distribution Lines
Apply changes to each existing distribution line by matching the distribution line numbers.

○ Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

OK   Cancel

This completes adding an account string
Skip page 13 and go to page 14 to continue in your request process and BUDGET CHECK
To know how to SPLIT your charges between two accounts view Page 13

If you wish to SPLIT accounts to be charged

  ➢ Select the item you want spilt
  ➢ 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

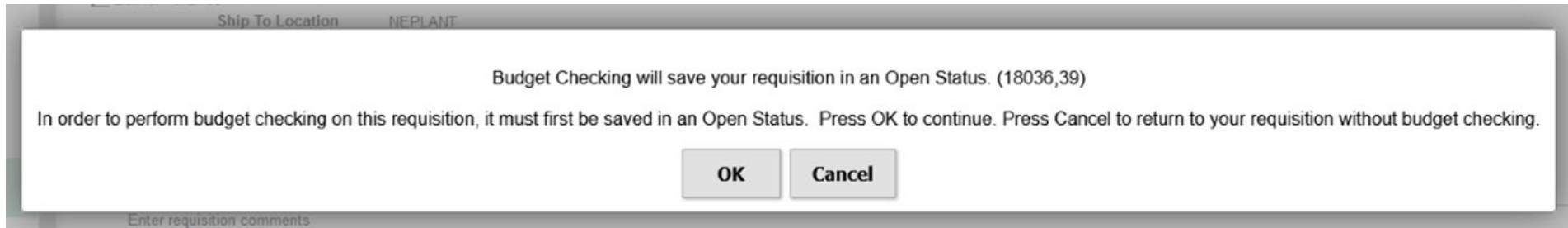**Step 4 – After clicking budget check, you will get this "warning", click OK**

Ship To Location   NEPLANT

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.

OK   Cancel

Enter requisition comments

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

Check Budget   Budget Checking Status:Valid

Save & submit   Save for Later   Add More Items   Preview Approvals
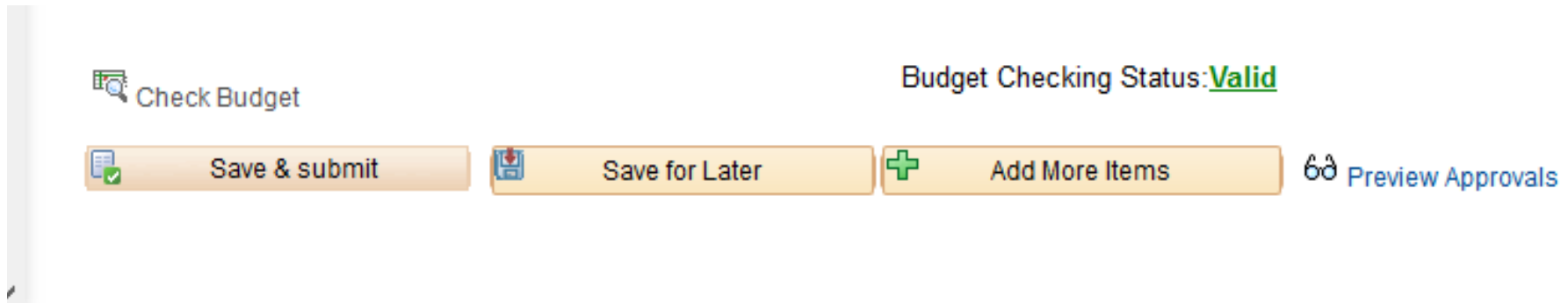
If Error occurs: If the following message appears after you click budget check, your account string is incorrect. Please verify that you entered the correct string by repeating account string steps, adjust through mass change (see below)

Shipping Summary

Correct ChartFields Combination on Line Number: 1 Schedule Number: 1 Distribution Line Number: 1 for Chartfields: DEPTID/ PROGRAM_CODE in Group: DEPT_PROG. (10208,66)

For a list of valid ChartField combination data, please refer Combination Data under Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Combination Editing > Review Combination Data

OK

Requisition Comments

Adjusting account strings that have errs – see next three screen shots
Verify your account: Fill in *GL unit*, *account* on chart field 1tab 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

Please enter GL Business Unit before selecting other chartfield values

Accounting Information   Personalize | Find | ⬚ | 📰   First ◄ 1 of 1 ► Last

| Chartfields1 | **Chartfields2** | Chartfields3 | Details | Asset Information | 📼▶ |

Oper Unit	Fund	Dept	Program	Class	Bud Ref		
🔍	🔍	🔍	🔍	🔍	🔍	+	−

Load Values From Defaults

[OK]   [Cancel]

Accounting Lines

SpeedChart [ ] 🔍

Please enter GL Business Unit before selecting other chartfield values

Accounting Information   Personalize | Find | ⬚ | 📰   First ◄ 1 of 1 ► Last

| **Chartfields1** | Chartfields2 | Chartfields3 | Details | Asset Information | 📼▶ |

Dist	Percent	Location	GL Unit	Account		
1		🔍	GFU01 🔍	🔍	+	−

Load Values From Defaults

[OK]   [Cancel]

Return to budget check and submit requisition (image noted back on page 14)

DONE: For Requisition Submissions – please make take note of the requisition number provided to you for reference.

Confirmation

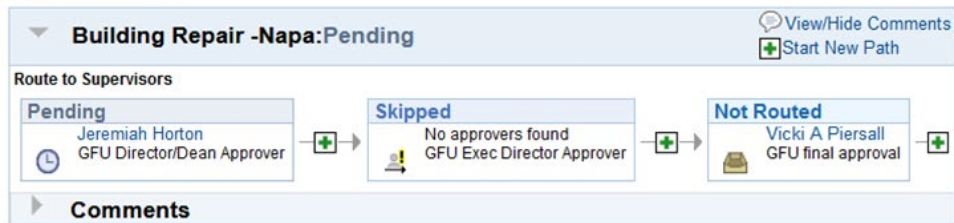Your requisition has been submitted.

Requested For	Sonia M Rademacher	**Number of Lines**	1
Requisition Name	Building Repair -Napa	**Total Amount**	250.00 USD
Requisition ID	0000011245	**Pre-Encumbrance Balance**	
Business Unit	GFU01		Not Available
Status	Pending		
Priority	Medium	**Approval Justification**	
Budget Status	Valid		

Approval Justification

Building Repair - Napa supplies - applied to machine repair and building repair of tools (example table saw, saw blades, post wires, paint tools) this PO is different then the Napa PO applied to grounds mechanic and auto repairs. request made by Carl Anderson superintendent of Building repair of the Plant Service Department

View printable version   Edit This Requisition   Check Budget

Fiscal Approval

View/Hide Comments
Start New Path

▼ **Building Repair -Napa:Pending**

Route to Supervisors

Pending	Skipped	Not Routed
Jeremiah Horton	No approvers found	Vicki A Piersall
GFU Director/Dean Approver	GFU Exec Director Approver	GFU final approval

▶ **Comments**

Apply Approval Changes

Create New Requisition   Manage Requisitions

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 and receive

How to View MY PO now that my 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)

Req ID	Requisition Name	BU	Date	Request State	Budget		Total	
▼ 0000011369	CrescentElec-Lemons	GFU01	08/06/2020	PO(s) Created	Valid		2,500.00 USD	[Select Action] ▾ Go

Requester Sonia M Rademacher   **Entered By** Sonia M Rademacher   **Priority** Medium
Pre-Encumbrance Balance   Not Available

Requisition — Approvals — Inventory — **Purchase Orders** — Change Request — Receiving — Returns — Invoice — Payment

Request Lifespan:

Line Information   Personalize | Find | 🔲 | 🔢   First ① **1 of 1** ① Last

Line		Description	Status	Price	Currency	Quantity	UOM	Supplier	
1		Crescent Electric-Lemons pro...	PO Created	1.0000	USD	2,500.0000	EA	CRESCENT ELECTRIC SUPPLY	✖

Create New Requisition   Review Change Request   Review Change Tracking   Manage Receipts   Requisition Report

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PO information   🔍 | ◁ ◀ 1 of 1 ▾ ▶ ▷ | View All

PO Number 0000023352		**Buyer** SRADEMACHER		**Change Order**	
PO Date 08/06/2020		**Supplier ID** 80007952 **Terms** 30		**PO Status** Approved	

Lines

📑 🔍   ◁ ◀ 1-1 of 1 ▾ ▶ ▷ | View All

Line	Item ID	Description	Merchandise Amt		UOM	PO Qty	Status	Line Details
1		Crescent Electric-Lemons project	2,500.00	USD	EA	2,500.0000	Approved	📑

Return to Manage Requisitions

PRINTING YOUR OWN PO ITEMIZATION (This step is not required as you DO RECIEVE an official dispatch PO FROM THE PURCHASING DEPARTMENT)

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 -R*equisitions 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**

➢ **Click add again**

< Review Receipts

Receiving

| Find an Existing Value | Add a New Value |

Business Unit GFU01 🔍
Receipt Number NEXT
PO Receipt ☑

Add

➢ **Type in the PO in the ID section** – make sure all other boxes are clear > click search

Select Purchase Order

Search Criteria

PO Unit GFU01 🔍   Days +/- Today   30
ID 22828 🔍   Start Date 06/29/2020 📅
Line   Schedule   End Date 08/28/2020 📅
Release   Supplier Name 🔍 Supplier Lookup
Item ID 🔍   Supplier Item ID 🔍
Ship To 🔍   Manufacturer ID 🔍
Ship Via 🔍   Manufacturer's Item ID 🔍
☐ Retrieve Open PO Schedules   UPN ID 🔍

Search   **Receipt Qty Options**
                                ○ No Order Qty   ⦿ Ordered Qty   ○ PO Remaining Qty

OK   Cancel   Refresh

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 squares)

	Retrieved Rows								Personalize | Find | View All | 🗗 | 🖼	First ◀ 1-2 of 2 ▶ Last	

Selected Rows | **Shipping Related** | **More Details**

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty	Prior Receipt	Item	Description
☐	GFU01	0000022828	1	1		07/07/2020	278.0000	277.5900		NAPA - auto parts -
☐	GFU01	0000022828	2	1		07/17/2020	2222.0000	564.4300		NAPA - AUTO - corected

☑ Select All   ☐ Clear All

OK   Cancel   Refresh

Click OK

Adjust amount to be received if needed > Click Save > Take note of receipt # on second screen

Maintain Receipts

Receiving

Business Unit GFU01   Receipt Status Open   ✖

Receipt ID NEXT   Header Comments/Attachments   Activities

Header Details

▶ **Header**

Select Purchase Order   [Close Short All Lines]   [Print Delivery Report]   [Run PO Receipt Accrual]

Receipt Lines   Personalize | Find | View All | ⊡ | 🖼   First ◀ 1 of 1 ▶ Last

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information	🔳

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track	
1	🔳	NAPA - AUTO - corected	1	EA 🔍	1.00000	2222.0000	Open	☐	☐	☐	EA 🔍	Device Track	✖

☐ Interface Receipt   ☑ Run Close Short

[💾 Save] [📧 Notify] [🔄 Refresh]   [➕ Add] [📝 Update/Display]

Maintain Receipts

Receiving

Business Unit GFU01   Receipt Status Fully Received ✖

Receipt ID 0000045396   Header Comments/Attachments   Activities

Header Details   Document Status

▶ **Header**

Select Purchase Order   [Close Short All Lines]   [Print Delivery Report]   [Run PO Receipt Accrual]

Receipt Lines   Personalize | Find | View All | ⊡ | 🖼   First ◀ 1 of 1 ▶ Last

Receipt Lines	More Details	Links and Status	Item / Mfg Data	Optional Input	Source Information	🔳

Line	Item	Description	Receipt Qty	*Recv UOM	Receipt Price	Accept Qty	Status	Close Short	Serial	Device Track	Stock UOM	Device Track	
1	🔳	NAPA - AUTO - corected	1.0000	EA 🔍	1.00000	1.0000	Received	☐	☐	☐	EA 🔍	Device Track	✖

☐ Interface Receipt   ☑ Run Close Short

[💾 Save] [📧 Notify] [🔄 Refresh]   [➕ Add] [📝 Update/Display]

Receiving (main view) Completed

Last Step – Communicate with Finance

AP does not have access to your individual approval flow

Send info to Accounts Payable so that your invoice can be vouched and paid

Finance will need <u>the PO number; the receipt number and a copy of the supplier invoice in order to pay the vendor, as this information does not auto inform the accounts pay team.</u> The requisition process is designed for a requester to gain approval to purchase and spend funds. AP will still need information to reconcile your invoice

<u>*Please submit the above information by filling out the Request for Payment form online*</u>

If you require the link to this form, please email Purchasing or Accounts Pay requesting the form

- FINISHED -

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:

Manage Receipts

Search Criteria

Received Date From	06/29/2020	To	07/29/2020	Show Status	Received//Open	
Business Unit	GFU01	Receipt ID		Ship To		
PO Unit		PO ID		Search	Clear	

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

Your Search returns more than 50 receipts, please modify the search criteria to limit your search.

Receiving secondary view

Go to requisitions and receive items (if this is your view, do the following)

1. **Select the PO you wish to receive against (click the box) then click receive selected**

You have 13 lines open for receiving

Receive Selected and go to the Receive Form.

Requisition Lines to Receive											Personalize	Find	View All	First ◀ 1-13 of 13 ▶ Last

Requisition Lines to Receive | **Purchase Order Details**

	Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
☐	GFU01	Autoclave Maintenance FY20	Autoclave Maintenance Blanket		3898.3	3839.3	EA	SCIENCE LA		Teresa Arnold	ALLEN THER-002	
☐	GFU01	dl water system FY20	dl water service FY20 (monthly fee)		12	9	EA	SCIENCE LA		Teresa Arnold	EVOQUA-001	
☐	GFU01	dl water system FY20	dl water service FY20 (monthly fee)		12	9	EA	SCIENCE LA		Teresa Arnold	EVOQUA-001	

You may select one or multiple line items for recieving, click receive selected and view next screen

You have 13 lines open for receiving

Receive Selected and go to the Receive Form.

Requisition Lines to Receive											Personalize	Find	View All	First ◀ 1-13 of 13 ▶ Last

Requisition Lines to Receive | **Purchase Order Details**

	Req BU	Requisition	Item Description	Item ID	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Ship To GLN	Attention To	Supplier	Supplier ID Number
☑	GFU01	Autoclave Maintenance FY20	Autoclave Maintenance Blanket		3898.3	3839.3	EA	SCIENCE LA		Teresa Arnold	ALLEN THER-002	
☐	GFU01	dl water system FY20	dl water service FY20 (monthly fee)		12	9	EA	SCIENCE LA		Teresa Arnold	EVOQUA-001	
☐	GFU01	dl water system FY20	dl water service FY20 (monthly fee)		12	9	EA	SCIENCE LA		Teresa Arnold	EVOQUA-001	

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)

Receive Items

New Receipt

    *Business Unit GFU01 🔍

    Receipt Status Open

    *Received Date 04/15/2020 📅

Reject Shipment

Receipt Lines ⍰   Personalize | Find | View All | 🔲 | 🔳   First ◀ 1 of 1 ▶ Last

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Receipt	Procurement Group ID	Primary Unit	Unit Allocation Amt	Unit Allocation Qty		PO	Cancel Line
1		Autoclave Maintenance B	3898.3000 📋	EA 🔍	3898.3000	📑	💬		N			📑	💬	❌

    Save Receipt

Add New Receipt   Inquire Receipts

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

Receipt Saved Successfully

You have saved receipt # 0000044405 containing the following items:

Receipt Lines

🔳   🔍   ◀   ◀   1-1 of 1 ⬍   ▶   ▶

Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity
1	Autoclave Maintenance Blanket	1.0000		1.0000

Return to Manage Requisitions   Return to Receiving

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

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.

Amazon – Every department is able to make amazon purchases with their department credit card. However, those purchases are still approved by the purchasing department who receives a notification of when a purchase has been requested. The Purchasing department approves the purchase request and then the funds are released. If a request is denied by the Purchasing Department the visa card is not charged for the specified item and a notification goes out to the requester informing them of the denial.

Interdepartmental 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, 2021 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 Purchasing web page for forms and notes on purchasing polies.

For specific questions relating to this tutorial or submitting requisitions feel free to reach out to Sonia Rademacher at srademacher@georgefox.edu