

2010

# The University of New Orleans

## PeopleSoft 9.0: Verbal Purchase Requisition End-User Training



Updated: August 12, 2010

Training Group



## Contents

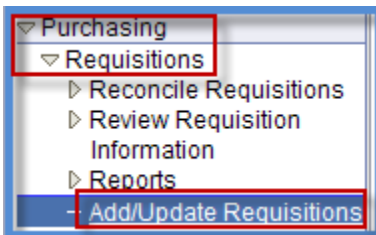
Verbal Purchase Order Entry .....	3
Submitting Verbal Purchase Requisition.....	8

## Verbal Purchase Order Entry

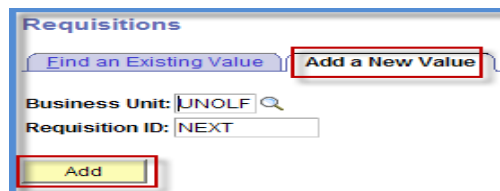
Verbal Purchase Orders are issued for orders that total \$999.99 or less and do not require competition. To request a verbal purchase order, follow the procedure below:

### Navigation

1. Purchasing > Requisitions > Add/Update Requisition



2. Select Add



3. Select the 'Requisition Defaults' hyperlink.

[Requisition Defaults](#)

**Maintain Requisitions**

**Requisition Defaults**

Business Unit: UNOLF      Requisition Date: 07/24/2009  
 Requisition ID: NEXT      Status: Pending

**Default Options**

**Default**      If you select this option, the default values entered on this page are treated as part of the defaulting logic and are only applied if no other default values are found for each field. If default values already exist in the hierarchy, they are used, and the values on this page are not used.

**Override**      If you select this option, all default values entered on this page override the default values found in the default hierarchy.

**Line**

Buyer:        Unit of Measure:    
 Vendor:        Vendor Location:    
 Category:        [Vendor Lookup](#)

**Schedule**

Ship To:        \*Distribute by:    
 Due Date:        \*Liquidate by:    
 Ultimate Use Code:        [One Time Address](#)

**Distribution**

SpeedChart:

4. Select the override radio button.

**Override**

5. Enter the vendor ID. If the vendor is not in the database, obtain a W-9 form and submit it with the vendor request form on the Purchasing SharePoint site.


Vendor:

6. Enter the Category. To shorten your search options, enter 003, 004, etc. before selecting the magnifying glass to view the list of options. Please refer to the Category list below.

Category:

Category_Item	Descr	Acct	Category_Item	Descr	Acct
00302	Advertising	630200	00330	Maintenance of Equipment	634603
00402	Agricultural Supplies	640200	00336	Maintenance Prop & Eqpt Other	634606
00395	Armored Car Services	639030	00392	Management Services	639010
00404	Automobile & Truck Supplies	640700	00340	Membership Dues to Prof Organ	635000
00376	Basic Telephone Charges	638601	00342	Miscellaneous Expense	635400
00304	Catering	630300	00358	Moving Expenses-Departments	637100
00308	Computer Services- Off Campus	631200	00360	Moving Expenses-Nonpersonnel	637100
00410	Computer Supplies	642700	00380	Network Installation	638603
00306	Conference Services	630400	00448	Non-Automove Equipment Supply	646200
00378	Data Lines & Circuits	638602	00450	Office Supplies	646700
00324	Document Destruction	634510	00406	Oper Supplies Clothing & Unifo	641700
00412	Food Supplies	643700	00446	Opr Supplies Medical & Dental	645700
00322	Garbage and Waste Disposal	634500	00382	Other Communication Services	638604
00414	Household Supplies	644700	00452	Other Supplies	647200
00440	Inventory - Beer	645212	00320	Parking	634300
00438	Inventory - Concessions	645211	00454	Personal Supplies	647700
00442	Inventory - Liquor	645213	00338	Pest Control	634607
00444	Inventory - Novelties	645214	00346	Postage, Freight and Express	635800
00418	Inventory- New Text	645201	00350	Printing, Binding & Duplicate	636200
00428	Inventory-Cards	645206	00352	Publication of Dissertations	636300
00434	Inventory-Food	645209	00354	Publication of Funded Findings	636600
00426	Inventory-Insignia	645205	00362	Rentals - Buildings	637401
00432	Inventory-Miscellaneous	645208	00366	Rentals - D.P. Equipment	637403
00436	Inventory-Office Supplies resa	645210	00364	Rentals - Equipment	637402
00430	Inventory-Specials	645207	00370	Rentals - Other	637405
00424	Inventory-Supplies	645204	00456	Repair & Maintenance Supplies	648200
00422	Inventory-Trade Book	645203	00394	Security Services	639020
00420	Inventory-Used Text	645202	00372	Software Maintenance	637406
00314	Laundry	633400	00408	Software Purchase & Licensing	642200
00318	Leases-Rent Duplicating Equip	634201	00374	Subscriptions	638200
00316	Linen Services	633410	00458	Teaching & Research Supplies	649200
00348	Mailing Services	635900	00386	Telephone Installation	638606
00326	Maint of Prop & Eqpt Auto Rep	634601	00460	Telephony	649300
00334	Maintenance DP Eqpt & Software	634605	00390	Temporary Agency Employee Svs	639000
00332	Maintenance Janitorial/Custodi	634604	00344	Training	635410
00328	Maintenance of Buildings	634602			

7. Select the Unit of Measure ( The Unit of measure is **ALWAYS LOT** for Verbal Purchase Order Requisitions)

Unit of Measure:  

8. The ship to location should default. This locating can change by selecting the magnifying glass lookup.

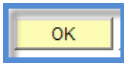
Ship To:  

9. Enter the due date. The due date should always be the current date.

Due Date:  

10. Enter your Speed Key



SpeedChart:  

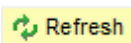
11. Select OK.  This will take you back to the main requisition entry screen.

12. Enter the line information for Line 1. Verbal Purchase requisitions require one line with the total amount of your request. If you desire to include the details of each item, add this information in the "Add Comment" link. DO NOT ADD ADDITIONAL LINES. Enter your descriptions, quantity and estimated amount of the Verbal Purchase Requisition.

The description should be something generic that states what items are being purchased.

**NOTE:** The line description used on this requisition will be what appears on the NVision reporting system. A general description is required for purchasing and payment processing but an internal reference may be added to the end of the description for ease of NVision tracking (e.g. Office Supplies (Internal Reference)).

Line								
Details		Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Source
Line	Item	Description	Quantity	UOM	Category	Price		
1		<input type="text" value="Research supplies for"/> 	<input type="text" value="1"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="800.00000"/>		

13. Select the 'Refresh'  button to populate the 'requisition defaults' previously entered. The completed screen should look similar to the one below.

Line							
Details	Ship To/Due Date	Status	Vendor Information	Item Information	Attributes	Contract	Source
Line	Item	Description	Quantity	*UOM	Category	Price	
1		Research supplies	1	LOT	00432	800.00000	

14. Select Save. The requisition id is now at the top of the page. Please make note of this requisition number as you may need it in case any unexpected system issue occurs.

**Maintain Requisitions**

---

**Requisition**

Business Unit: UNOLF

**Requisition ID: 0000000344**

15. Approve the Requisition by selecting the green check next to Status.

Status: Open

16. Budget Check the requisition. Budget check the requisition by selecting the icon next to the budget status. In order for the purchase order to be created, the budget check status must be valid. **It will be the requesting unit's responsibility to assure the budget check status is valid prior to submitting the request to the Purchasing Office. Budget errors will be submitted to the appropriate budget offices for review on Tuesday and Friday of each week. Should you have an emergency situation, please contact the Purchasing Office with the requisition number.**

**Maintain Requisitions**

---

**Requisition**

Business Unit: UNOLF

Requisition ID: 0000000344 [Copy From](#)

Status: Approved ✖

**Budget Status: Not Chkd**

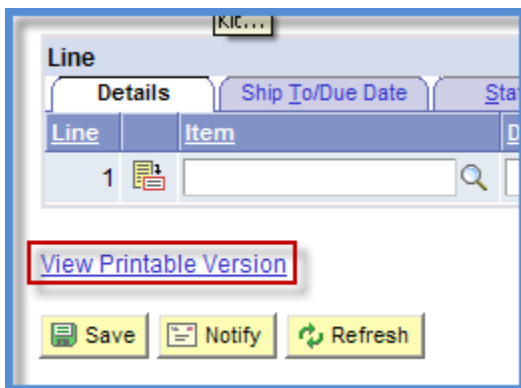
Hold From Further Processing

17. Once the budget check is valid, submit the verbal purchase requisition to [purchasing@uno.edu](mailto:purchasing@uno.edu) via email. Below are the instructions on submitting verbal Purchase Orders.

## Submitting Verbal Purchase Requisition

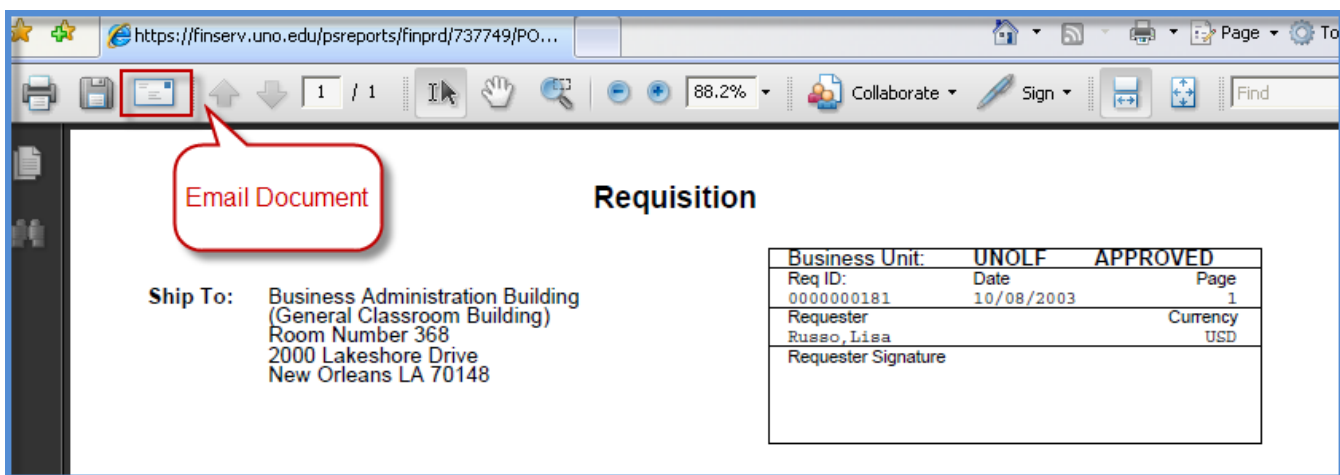
A completed and budget checked verbal request can be submitted via email to the purchasing mailbox ([purchasing@uno.edu](mailto:purchasing@uno.edu)). Once received the requisition will be entered as a purchase order and a reply email confirming the purchase order number will be sent.

18. To submit the requisition, select the 'View Printable Version' hyperlink at the bottom left of the requisition entry screen.



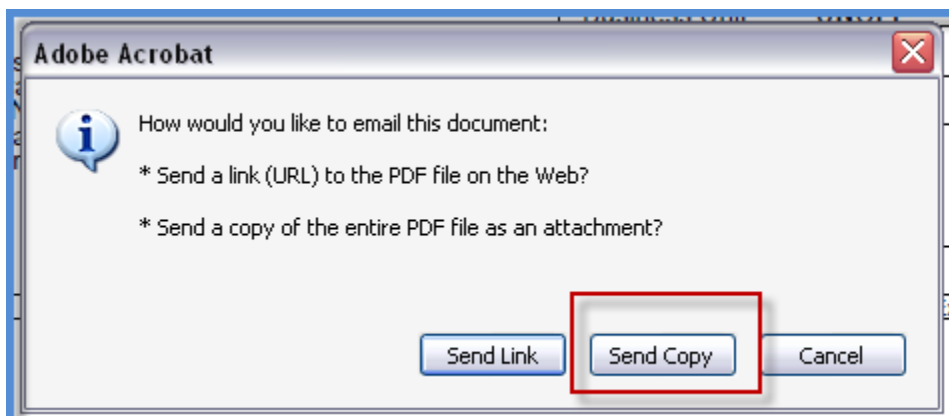
An Adobe PDF version of the requisition will open on screen. Select the email document icon (highlighted below) to send an email requesting the Purchasing Office to complete.

**Note:** If you don't see the email document icon select **File from your tool bar > Send>Page by email.**





The next window will appear asking to select “send a link” or “send a copy”. Select the “Send Copy” option.



An Outlook email message window will open to compose the email. The email address is [purchasing@uno.edu](mailto:purchasing@uno.edu). The subject line should be Verbal PO Request (You can change it to the Vendor name and the Requisition Number). Any additional comments needed may be typed into the context of the email. Select Send when complete. The request will then be routed to the purchasing office for completion.

