

2009

The University of New Orleans

PeopleSoft 9.0: Verbal Purchase Order Request & Vendor Add/Update Forms using SharePoint



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Verbal Purchase Orders Formerly DO (Direct Orders)

Direct Orders will now be known as verbal purchase orders.

Changes to expect:

1. All verbal purchase orders will be entered into PeopleSoft.
2. All amounts requested will be reserved from your budget through an encumbrance.
3. Budget checking must validate before a verbal purchase order number will be issued.
4. Pre-Verification of your vendor is a **MUST**.
 - a. Everyone with access to enter an online request will be given permissions to view our vendor database. ([See Pre- Vendor Verification Document](#))
 - b. If your vendor is not present in the database, you will need to request the W-9 form from the vendor and complete the vendor add or update request form on the purchasing SharePoint site. A copy of the W-9 form can be found on the Internal Revenue Service's website at <http://www.irs.gov/pub/irs-pdf/fw9.pdf>.
 - c. If there is a change in vendor from the original request, you will be required to submit a request to the purchasing office to change the purchase order to the new vendor. Please lookup the buyer of the purchase order in the system and submit a request to change the vendor to them. Accounts Payable will not be able to process invoices until this is completed.

Two ways to request a verbal purchase order:

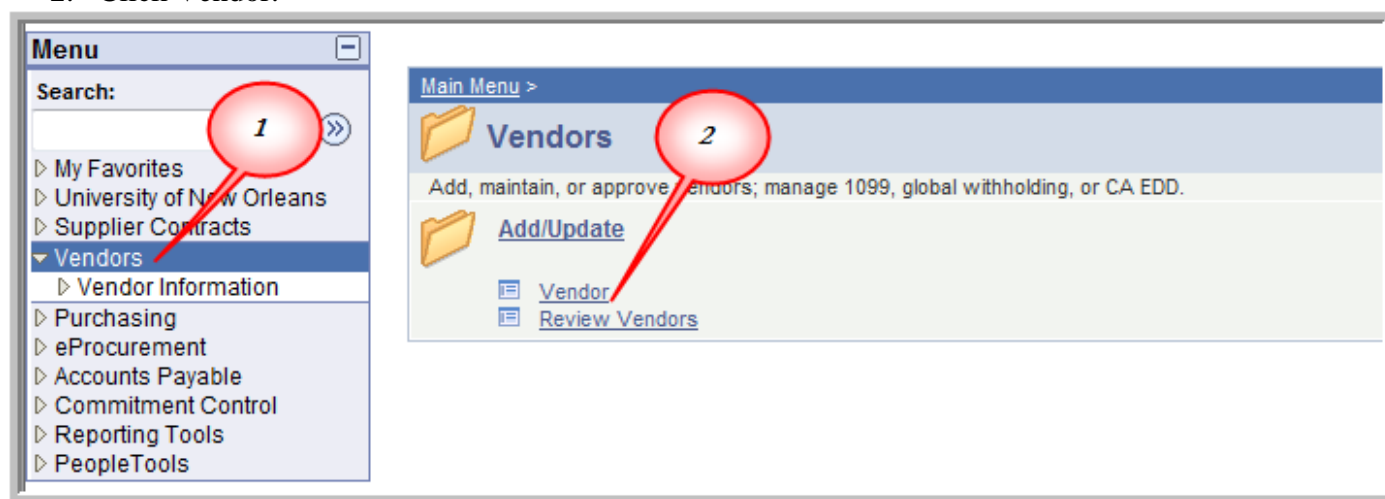
1. You can continue to place phone calls to the purchasing office to request a verbal purchase order as you have done in the past. We ask that all requests for multiple verbal purchase orders be processed through our SharePoint form.
2. You will also be able to request a verbal purchase order through our Verbal PO Request form on SharePoint. You can find this on the purchasing SharePoint site. <https://sharepoint.uno.edu/finance/purchasing/default.aspx>
 - a. Access to this will be assigned to parties designated by the business manager, dean, director, or department chairperson of each division.
 - b. Should you need to request access, the responsible party for your division will need to submit a request to the purchasing office. The purchasing office's email address is purchase@uno.edu.

Pre-Verification of Vendor

The Vendor Summary page enables you to view information about vendor’s based on the Vendor ID number, Short Name or Long Name. You can use partial values in any of these fields to locate a vendor in the database. At the top of each page users can click on the Address and Contacts tab for additional vendor information.

To review a vendor:

1. Click the **Vendors** link
2. Click Vendor.



3. Enter **UNOLF** in the “Set ID field”.
4. Key the all or part of the Corporate Vendor Name into the “Name 1” field. If you are unsure how Vendors are named in the PeopleSoft Financials database refer to the [Vendor Guideline Document in SharePoint](#). In the example we will use the vendor “Bowman Sports”



NOTE: PeopleSoft provides a field called “Short Vendor Name” that is **10 characters in length**. To search using the Vendor Short Name, type the **first four characters** of the **first word** in the Vendors Name.

5. Select the yellow **Search** button.

Summary | **Address** | Contacts

SetID: UNOLF

Vendor ID: 0000000009

Vendor Short Name: BOWMANSPOR BOWMANSPOR-001

Vendor Name: BOWMAN SPORTSWEAR

Order: BOWMANSPOR-001

PO BOX 609

NEWCOMERSTOWN, OH 43832

Remit To: BOWMANSPOR-001

PO BOX 609

NEWCOMERSTOWN, OH 43832

Status: Approved

Persistence: Regular

Classification: Supplier

HCM Class:

Open for Ordering: Yes

Withholding: No

VAT: No

Last Modified By: UNOADMIN

Last modified date: 04/30/2009 12:14PM

Created By:

Created Date/time:

Last Activity Date: 04/30/2009

Save | Return to Search | Notify

6. Click the Address tab to view Vendors address and Phone Information.

Summary | **Address** | Contacts

SetID: UNOLF

Vendor: 0000000009 Short Vendor Name: BOWMANSPOR-001 Name: BOWMAN SPORTSWEAR

Vendor Address Find | View All First 1 of 1 Last

Address ID: 1

Description: MAIN

Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1901

Status: Active

Country: USA United States

Address 1: PO BOX 609

Address 2:

Address 3:

City: NEWCOMERSTOWN

County: **Postal:** 43832

State: OH Ohio

Email ID:

Payment/Withholding Alt Names

Phone Information Customize Find | View All First 1 of 1 Last

Type	Prefix	Telephone	Extension

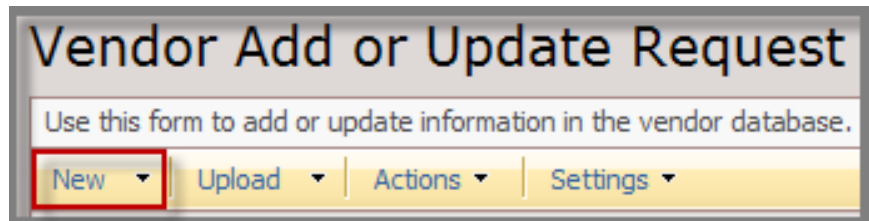
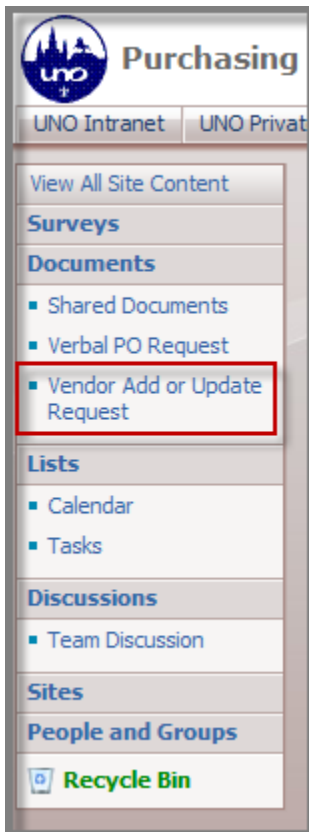
Vendor Add/Update Request Using SharePoint

In order to access the SharePoint site, a request must be made to the purchase office requesting access to this form. The email can be submitted to the general purchasing mailbox (purchase@uno.edu). The request must be from the Dean, Department Chair, Business Manager or other applicable authority over the department budgets.

The purchasing SharePoint site may be accessed by entering this url:

<https://sharepoint.uno.edu/finance/purchasing/default.aspx>

1. Select Vendor Add or Update Request under documents on the left navigation bar.
2. Select New, complete the form, attach the w-9 from the vendor and submit.



3. You will receive an email with the following information.

Vendor Add or Update Request has started on [2009-03-19APPLE ONE](#).
 Participants are Verbal PO Request
 Each person will get 1 day

Each person will receive a task to approve [2009-03-19APPLE ONE](#). The tasks will be assigned one at a time in the order shown above.

[View the status of this workflow.](#)

4. You can view the status of the order by selecting the ‘view the status of this workflow’ link.

5. Purchasing will receive an email requesting the verbal po and reply with the verbal po number as illustrated below.

Vendor Add or Update Request has completed on [2009-03-19APPLE ONE](#).
 Vendor Add or Update Request on 2009-03-19APPLE ONE has successfully completed. All participants have completed their tasks.

Approved by Kerry John Hutchinson, Jr
 vendor number 0000012345

[View the workflow history.](#)

If you have trouble reading the PO number you can select the ‘view workflow history’ link.

Workflow History

[View workflow reports](#)

The following events have occurred in this workflow.

Date Occurred	Event Type	User ID	Description
3/19/2009 11:54 AM	Workflow Initiated	Kerry John Hutchinson, Jr	Vendor Add or Update Request was started. Participants: Verbal PO Request
3/19/2009 11:54 AM	Task Created	Kerry John Hutchinson, Jr	Task created for Verbal PO Request. Due by: 3/20/2009 11:54:15 AM
3/19/2009 12:05 PM	Task Completed	Kerry John Hutchinson, Jr	Task assigned to Verbal PO Request was approved by Kerry John Hutchinson, Jr. Comments: vendor number 0000012345
3/19/2009 12:05 PM	Error	System Account	An error has occurred in Vendor Add or Update Request.

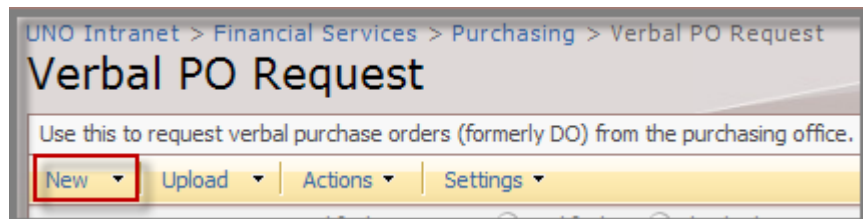
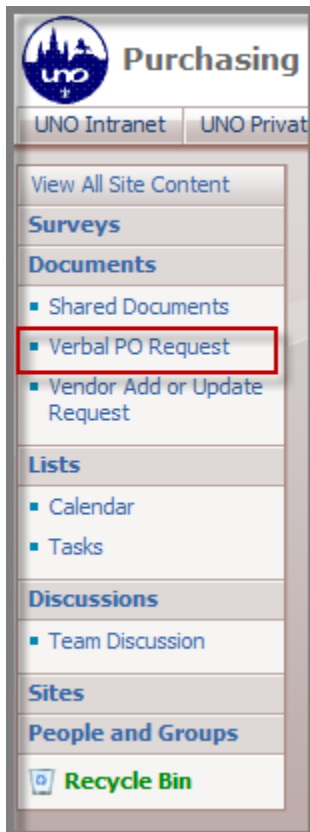
Requesting a Verbal Purchase Order Using SharePoint

In order to access the SharePoint site, a request must be made to the purchase office requesting access to this form. The email can be submitted to the general purchasing mailbox (purchase@uno.edu). The request must be from the Dean, Department Chair, Business Manager or other applicable authority over the department budgets.

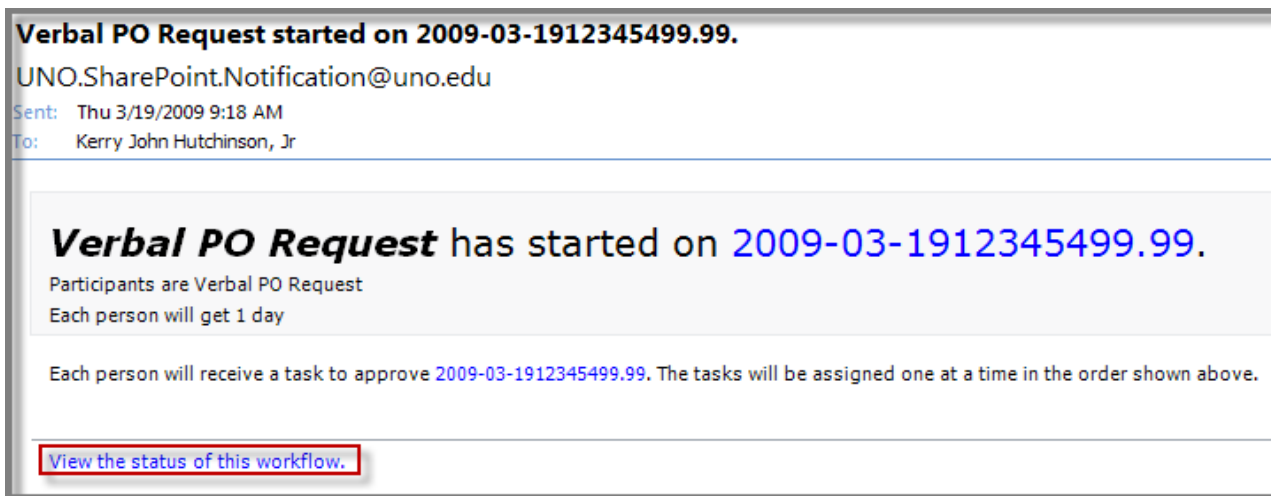
The purchasing SharePoint site may be accessed by entering this url:

<https://sharepoint.uno.edu/finance/purchasing/default.aspx>

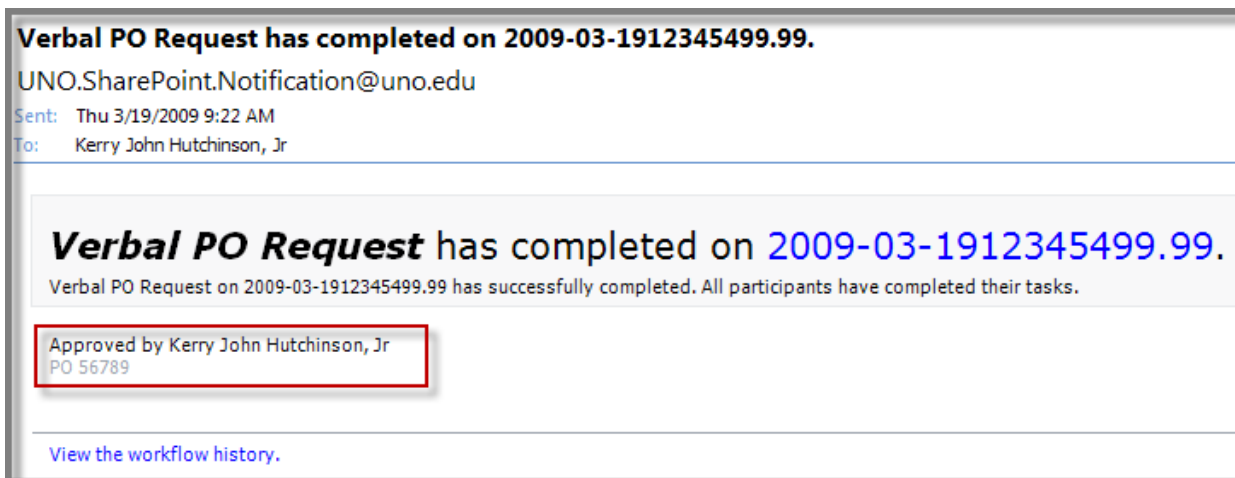
- a. Select the Verbal PO Request under documents on the left navigation bar.
- b. Select New, complete the request form and submit.



c. You will receive an email with the following information.



2. You can view the status of the order by selecting the ‘view the status of this workflow’ link.
3. Purchasing will receive an email requesting the verbal po and reply with the verbal po number as illustrated below.



If you have trouble reading the PO number you can select the ‘view workflow history’ link.

Workflow History			
View workflow reports			
The following events have occurred in this workflow.			
Date Occurred	Event Type	User ID	Description
3/19/2009 9:18 AM	Workflow Initiated	Kerry John Hutchinson, Jr	Verbal PO Request was started. Participants: Verbal PO Request
3/19/2009 9:18 AM	Task Created	Kerry John Hutchinson, Jr	Task created for Verbal PO Request. Due by: 3/20/2009 9:18:00 AM
3/19/2009 9:21 AM	Task Completed	Kerry John Hutchinson, Jr	Task assigned to Verbal PO Request was approved by Kerry John Hutchinson, Jr. Comments: PO 56789
3/19/2009 9:21 AM	Error	System Account	An error has occurred in Verbal PO Request.