

2010

# The University of New Orleans

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



Updated: August 12, 2010

Training Group



## Contents

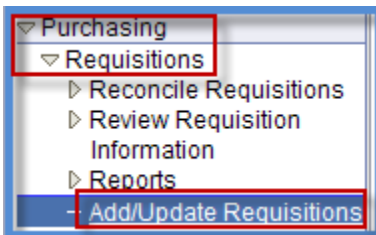
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## Verbal Purchase Order Entry

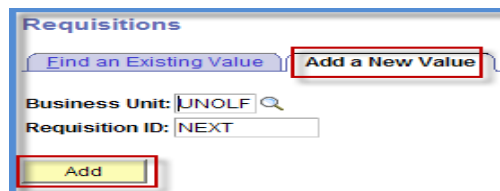
Verbal Purchase Orders are issued for orders that total \$999.99 or less and do not require competition. To request a verbal purchase order, follow the procedure below:

### 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:

- Select the override radio button.

**Override**

- 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:

- 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.

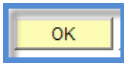
Ship To:  

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

Due Date:  

10. Enter your Speed Key



SpeedChart:  

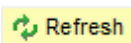
11. Select OK.  This will take you back to the main requisition entry screen.

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"/>  | 1        | <input type="text"/> | <input type="text"/> | 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**

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**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**

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**Requisition**

Business Unit: UNOLF

Requisition ID: 0000000344 [Copy From](#)

Status: Approved ✖

**Budget Status: Not Chkd**

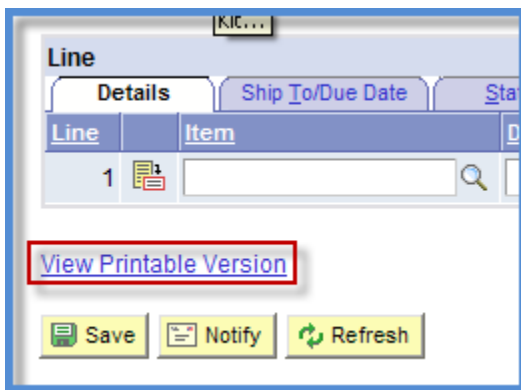
Hold From Further Processing

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

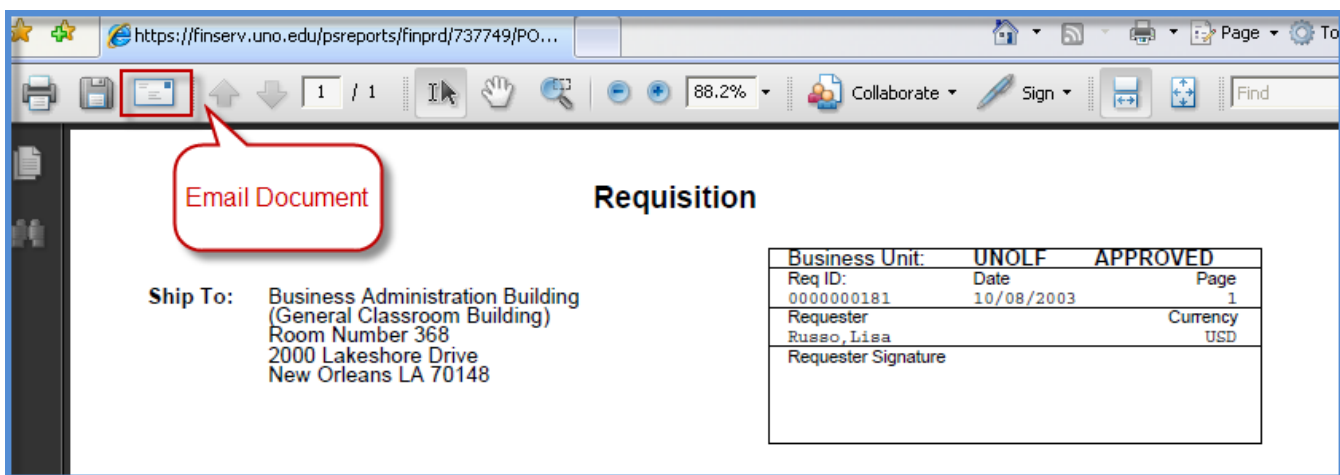
A completed and budget checked verbal request can be submitted via email to the purchasing mailbox ([purchasing@uno.edu](mailto:purchasing@uno.edu)). Once received the requisition will be entered as a purchase order and a reply email confirming the purchase order number will be sent.

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



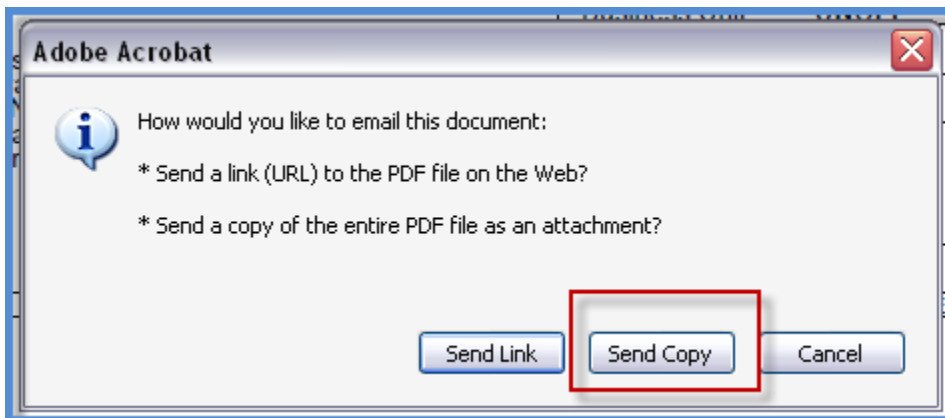
An Adobe PDF version of the requisition will open on screen. Select the email document icon (highlighted below) to send an email requesting the Purchasing Office to complete.

**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.

