Key Changes: Add/Update Purchase Order

The purpose of this job aid is to provide a visual overview of the Add/Update Purchase Order pages in PeopleSoft version 9.2. The numbers on the images are associated with field changes. They correspond with the descriptions to the left. For specific instructions on how to create change orders, please refer to the Procurement Specialist reference manual.

Summary of Key Changes

- Supplier replaces Vendor.
- Encumbrance balance is displayed.
- Most change orders now route for approvals.
- Procurement specialists may create change orders for any amount.

Description of Noted Changes

1. <Activity Summary>
   New summary that displays totals of associated transactions (e.g., total amount received).

2. Encumbrance Balance
   View the balance of the purchase order’s remaining encumbrance.

3. <View Approvals>
   Reveals approval-related details if a change order was created.
Key Changes: Standard Purchase – Create Requisition

The purpose of this job aid is to provide a visual overview of the Create Requisition pages in PeopleSoft version 9.2. The numbers on the images are associated with field changes. They correspond with the descriptions to the left. For specific instructions on creating requisitions, please refer to the Create Requisitions reference manual.

Summary of Key Changes

- “Standard Purchase” title replaces the “Special Request Tab” requisition title.
- New appearance and additional preference management options.
- Supplier replaces Vendor.
- Search by Supplier Name.
- Additional comment and justification fields.

Description of Noted Changes

1. <My Preferences>
   Manage optional search parameters.

2. <Requisition Settings>
   Manage the requisition’s ChartFields and supplier defaults.

3. <Shopping Cart icon>
   Displays a summary of each requisition item.

4. <Checkout>
   Advance to review and submit the order (replaces Step 3: Review and Submit page).

5. Supplier Name
   Search by Supplier Name.

6. <Add to Cart>
   Add item to the requisition.
7. <Requisition Settings>
   Access to the Requisition Settings page.

8. <Add More Items>
   Return to previous page to add a new item (line).

9. Ship to Address
   Displays full business address of where the order will be delivered (P Location).

10. <Price Adjustment>
    Increase or decrease the line item’s price.

11. Requisition Comments
    Enter header comments (now automatically expanded) which populate the Purchase Order.

12. <Add more Comments and Attachments>
    Add additional comments and/or attachments at the header level.

13. Approval Justification
    Enter the business justification for University approvers. Information will not appear on the Purchase Order.

14. <Save for Later>
    Saves requisition in “open” status (replaces <Save and Preview Approvals> button).
PO Change Order Approvals

Key Changes:

- PO Change Orders that total $100 or more and have either an increase or decrease in quantity, price, or dollar amount or have category or ChartFields changes will now route for approvals.
- PO Change Order approvals will follow the same workflow rules as requisition approvals.

Process Overview for PO Change Orders

Here is an overview of the PO Change Order life cycle:

- Department identifies a need and notifies the procurement specialist to make changes to the PO.
- The procurement specialist enters the changes on the PO and clicks <Save>.
- The Change Order will route to the approver(s) based on the PO’s criteria (e.g. dollar amount).
- The approver(s) reviews and takes action on the Change Order.
  - If approved, EFS will automatically budget check and dispatch the PO during the next scheduled procurement job.
  - If sent back, the procurement specialist must make the suggested changes and click <Save> to re-route the Change Order for approvals.

Routing for Approval

PO Change Orders pending approval will be available for review by either the primary or alternate approver(s). If a PO Change Order has not been approved or sent back within five days, the procurement specialist will receive an email notification from EFS to follow-up with the associated approvers.

Accessing PO Change Orders

Approvers may access PO Change Orders awaiting approval in three possible ways: through the Worklist (for primary approvers), by navigating to Purchasing > Purchase Orders > Approve POs, or through the Approval WorkCenter located near the bottom of the Main Menu.

Purchase Order Approval Requirements

- Purchasing Services must approve changes to federal contracts that increase POs to total $25,000 or more.
- Purchasing Services must approve changes that increase the PO to total $50,000 or more.
- Controller’s Office must approve changes to POs for audit services.
- Facilities Management must approve changes to POs for construction services.
- Environmental Health and Safety must approve changes that increase POs for restricted chemicals.
Reviewing a PO Change Order

1. Verify the PO's new total, supplier, and procurement specialist.
2. Ensure the procurement specialist clearly described what changed and why.
3. Click <View purchase order comments> to see all comments from the inception of the PO. Verify any required forms were attached (e.g. Exception to Regents Purchasing policy).
4. Review each line's details. Lines with the clock icon indicate that your approval is required. Use the task bar to scroll to the right of the page to view any line level comments and attachments.
5. To preview the ChartFields and copy of the PO, click <View Printable Version> or <View Line Details>.
6. Click <View PO> to access the PO Inquiry Page to view the POs full details. To verify what was changed, select <Change History> from the Go To dropdown menu. Click<Ship Changes>, then sort by Description to determine what was changed.
7. Take action on the change order: approve, send back, or hold. If sending back, text is required in the Approval Comments box.
Requisition Approval

Key Changes:

• Requisitions pending approval will be available for review by either the primary or alternate approver(s).

• If a requisition has not been approved or sent back within five days, the requisition preparer will receive an email notification from EFS to follow-up with the associated approvers.

• Approvers must choose between three possible actions: approve, send back, or hold. Send back replaces the “deny” action.

• Additional requisition alerts were added to remind approvers to verify the requisition preparer uploaded required attachments or entered data correctly into certain requisition fields.

• Requisition preparers are able to add header level comments to their requisitions. Therefore, a new link called “View Requisition Comments” will appear for approvers to review any header level attachments (e.g. statement of work, Price Comparison Form) or comments.

• Requisitions that total $25,000 and are paid for by a federally sponsored contract will now route to Purchasing Services for approval.

Accessing Requisitions

Approvers may access requisitions awaiting approval in three possible ways: through the Worklist (for primary approvers), by navigating to eProcurement > Manage Requisition Approvals, or through the Approval WorkCenter located near the bottom of the Main Menu.

Routing for Approval

Requisitions are simultaneously routed to the primary approver and to a pool of one or more alternate approvers. A requisition needing approval will remain in the primary approver’s queue until it has been approved. In the case that a requisition has not been approved or sent back within five days, the preparer will be notified by a system-generated email. Requisition preparers will follow up with the approver when a requisition has not been approved within the five days.

Taking Action on Requisitions Needing Approval

Criteria for approving a requisition remain the same.
Requisition Approval (cont.)

Reviewing Requisitions Pending Approval

Here is a visual summary of the Requisition Approval page and how to review its information and take action upon it. Steps with a * next to them indicate new or changed functionality.

*1. Determine whether any Requisition Alerts appear. If so, follow their instructions.
2. Verify the requisition’s total, supplier, and start and end dates (if CPS/blanket order).
3. Ensure the preparer’s justification and purchase adheres to policy.
*4. <View Requisition Comments> to see any header level comments. Verify any required forms were attached (e.g. statement of work, price comparison form).
5. Review each line’s details. Lines with the clock icon indicate that your approval is required. Click the icon under the Requester’s Comments column to view any line level comments and attachments.
6. To preview the ChartFields and Ship to information, click <View Printable Version> or <View Line Details>.
*7. <View Requisition> to access the Requisition Inquiry Page to view the requisition’s full details.
*8. Take action on the requisition: approve, send back, or hold. If sending back, text is required in the Enter Approver Comments box.