**Purchasing Navigation Quick Reference Guide**

**HOW DO WE….**

1. Navigate to the Requisition page to enter requisitions?

Purchasing Requisitions Add/Update Requisitions

2. Copy a requisition from an existing requisition?

Purchasing Requisition Add/Update Requisition

Click the ADD Tab. Click on “Copy From” on the Maintain Requisition page

3. Approve a requisition?

Purchasing Requisitions Add/Update Requisitions Find an Existing Value

Enter the Requisition ID # and click Search. Click on the check mark in the Status area. Click Save.

4. Print a Requisition (since the PO does not list the chart string on it)?

To print your requisition before approval from your approver, click on the View Printable Version link on the Maintain Requisitions page. Note that your Requisition must be saved prior to printing it. You will be prompted to do so during the printing process. After clicking OK, you will get an error message stating that you do not have permission required to run the window option. Click OK. On the menu click People Tools and follow the breadcrumbs below:

Process Scheduler --- Process Monitor --- Click refresh until your run status states success --- Click details (highlighted in blue) --- Click view Log/Trace --- Click on PDF Link --- Print requisition

To print requisitions **after they have been approved** follow the navigation below.

Purchasing Requisitions Reports Print Requisitions

5. Review Requisition Information?

Purchasing Requisitions Review Requisition Information Requisitions

6. Review Purchase Order Information?

Purchasing Purchase Orders Review PO Information Activity Summary

7. Look up a Req # with the PO # and viceaversa?

(For Requisitons) Purchasing Requisition Review Requisition Information Document Status

(For POs) Purchasing Purchase Orders Review PO Information Document Status

8. Print a PO?

Purchasing Purchase Orders Review PO Information Print PO’s

9. Look up a chart string a PO is being charged to?

Purchasing Purchase Orders Review PO Information Purchase Orders

To the right of the item description line – click on the red symbol. On the Schedule page click on the symbol with the 3 small arrows.

10. Look up a PO total amount?

Purchasing Purchase Orders Review PO Information Activity Summary

11. Access a Query for Purchase Orders?

Reporting Tools Query Query Viewer

12. [Find the purchase order given a CG number? Sometimes invoices are received for subcontracts that only reference a CG number.](https://wiki.umbc.edu/pages/viewpage.action?pageId=19104034)

There is a query that can address this. Navigate to Reporting Tools, Query, Query Viewer. On the Query Viewer screen, in the box to the left of the words “begins with” type the name of the Query UM\_PO\_CG\_ORDERS\_BY\_PROJECT, then click the Search button.   
  
 Click the **Run to HTML** link or **Run to Excel** link.

13. Find a listing of all Queries for Purchasing?

A listing of all Queries is posted on the Procurement website – [www.umbc.edu/procurement](http://www.umbc.edu/procurement) under the tab PEOPLESOFT and PURCHASING under the heading Miscellaneous.

12. Enter Receipts?

Purchasing Receipts Add/Update Receipts

13. Cancel Receipts?

As long as Accounts Payable has not matched the receipt, you can cancel the receipt per the navigation below:

Purchasing Receipts Add/Update Receipts

Click the **Find Existing** **Value** Tab and enter the receipt #

14. Look up what receipts have been processed, for what amount and to what chartstring ?

The navigation below will tell you if Accounts Payable has matched the receipt and started process for payment only. The amount that was paid is the amount that is listed on the invoice. The chartstring used is whatever the dept. entered on the requisition.

Purchasing Purchase Orders Review PO Information Activity Summary

**For more in depth information, please review the Requisition Training manual located on the Procurement website under PeopleSoft and Purchasing.**