

PS Financials 9.2

Requisition Search without payment information

The Procurement Tools are based on your specific budget administration security privileges. Example data given here is to demonstrate functionality. You will need to enter your own data when stepping through the process.



1. Click in the Purchasing & Payables Inquiry.

A screenshot of the PS Financials 9.2 web application. The top navigation bar is dark red with a back arrow and "Staff Homepage" on the left, and "Financials & Annual Budget" on the right. A left sidebar contains a list of menu items: "Chartfield Value Lookup", "Annual Budget", "Carryover Projects", "Grants and Projects", "Purchasing & Payables Inquiry" (highlighted in green with a blue arrow pointing to it), "My Requisitions", "Create Requisition", "Requisition Inquiry", "Purchase Order Inquiry", "Temporary Requisition Approver", "Wells Fargo P-Card Portal", and "Forms". The main content area has a sub-header "Purchasing & Payables" and "Results for: wvu". Below this is an "Invoice Search Criteria" form with fields for Vendor, Account, Invoice #, Project, Requisition ID, ChartField 1, Purchase Order #, Department, Fund Code, and Fiscal Year. There are "Search" and "Clear" buttons. A note at the bottom reads: "PLEASE NOTE: Lines appear to duplicate in grid below when partial payments are involved. This is a display error only. Actual amounts paid do not exceed total amount of invoice/disbursement request. Payment Date information is correct. Contact finance@pugetsound.edu if further clarification is needed."

2. Click in the Requisition ID field and enter the desired information into the Requisition ID field. Please remember that requisition and purchase order numbers have leading zeroes to make a 10-digit number. For example, enter "0000012721" and click the Search button.

Staff Homepage Financials & Annual Budget

Chartfield Value Lookup Purchasing & Payables

Annual Budget

Carryover Projects

Grants and Projects

Purchasing & Payables Inquiry

My Requisitions

Create Requisition

Requisition Inquiry

Purchase Order Inquiry

Temporary Requisition Approver

Wells Fargo P-Card Portal

Forms

Results for: wvu

Invoice Search Criteria

Vendor Account

Invoice # Project

Requisition ID 0000012721 ChartField 1

Purchase Order # Department

Fund Code Fiscal Year

PLEASE NOTE: Lines appear to duplicate in grid below when partial payments are involved. This is a display error only. Actual amounts paid do not exceed total amount of invoice/disbursement request. Payment Date information is correct. Contact finance@pugetsound.edu if further clarification is needed.

- This requisition has been ordered because a requisition ID and PO ID number have been populated, however, there is no invoice number, invoice date or payment date.

Staff Homepage Financials & Annual Budget

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Invoice Search Criteria

Vendor Account

Invoice # Project

Requisition ID 0000012721 ChartField 1

Purchase Order # Department

Fund Code Fiscal Year

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Supplier ID	Vendor	Remit Vendor Name	Requisition ID	PO ID	Voucher ID	Invoice Number	Invoice Date	Amount	Payment Date	Accounting Date	Fiscal Year	Fund Code	Dept	Project	ChartField 1	Account	Note (Y/N)
0000001097	DELL MARKETING LP	DELL MARKETING LP	<u>0000012721</u>	<u>0000016007</u>				334.89		02/17/2022	2022	10	7201			61015	N
0000001097	DELL MARKETING LP	DELL MARKETING LP	<u>0000012721</u>	<u>0000016007</u>				1,024.29		02/17/2022	2022	10	7201			69021	N
0000001097	DELL MARKETING LP	DELL MARKETING LP	<u>0000012721</u>	<u>0000016007</u>				8.07		02/17/2022	2022	10	7300			61020	N

- Hint: Any data field with blue lettering indicates that you can drill down to further details. You can click on the requisition number link or on the comments graphic.
- Click on the Return button. Congratulations! You have searched for a requisition with no payment information.