Ready, Set, Upload!

Purchase Requisitions

Procurement and Contract Services

Agenda

- Demonstrate: Document Upload into PeopleSoft Requisitions.

- Demonstrate: Requisition & PO Status Look-up.

- Philanthropic Funded Purchasing.

- Questions and Answers.

Document Upload
Begins April 1st

- Supporting Documents are uploaded in "COMMENTS".
- If missing a document, the Req. will be OPENED.

- You will receive an email, subject: "Req# MissingDoc".

- Upload missing Doc., click "Notify" and contact your Approver.

Document Upload – Tips & Tricks

- Documents can be uploaded one at a time.

- OR – <u>Combine</u> all documents and upload together as one file.

- Maximum character for file name is 65 characters.

- Maximum file size is 1mg.

Req. and PO Status
Tips and Tricks

■ Buyer Assignment: Numbers are also in handout.

– Amy   63000**20240**

– Grace   63000**102101**

– Dusty   6300**5389991**

– Pam   6300000**7344**

– Ave   63000**22255**

– Tiffany   6300**3655443**

– Courtney   6300**4759923**

Req. and PO Status
Tips and Tricks

- Req. Status "<u>Open</u>" means contact Approver for approval.

- Req. Status "<u>Approved</u>" means Procurement is working on it.

- PO Status "<u>Dispatched</u>" means PO has been issued and sent to the vendor.

Uploading Documents in PeopleSoft Begins April 1st

- **Benefits of document upload**:

  - Streamline the process.

  - All documents and communication with the vendor,

  - Quotes and final agreements.

  - **All available to you!**

  …… even when the req. and/or PO is closed.

Procurement with Philanthropic Funds

- Philanthropic funded PO purchases will follow State funded process.

- **Services** All services will need a purchase requisition.

- **Goods greater** than $10,000 will need a purchase requisition.

- **Goods less** than $10,000 will need to be entered on a *philanthropic direct expenditure form* and sent to CSUSB ***Accounts Payables***, Sierra Hall.

Questions and Answers

Procurement and Contract Services

Thank You!