PeopleSoft Purchasing Advice of Change College Requisition (CR) or Subcontract Requisition (SC)
Purchasing Overview

Purchase Orders/Change Orders are generated from on-line requisitions. The Origin Field will indicate the type of Requisition being processed. Departments will be able to process an on-line requisition resulting in one of the following documents:

- College Requisition (CR)
- Internal Vendor Purchase Order (IV)
- Limited Value Purchase Order (LV)
- Subcontract Purchase Order (SC)

A (CR) College Requisition is processed when the purchase is:

1. In excess of $5,000
2. Blanket Orders (External Vendors and Internal Vendors)
3. Commodities and/or Services that are prohibited on a Limited Value Purchase Order (see section 2.16 of the URI Purchasing Manual)
4. Change Order (Advice of Change) to a PO issued as a result of a prior CR. Note: Change orders cannot be processed to a LVPO or IV.

A (LV) Limited Value Requisition is processed when:

1. The purchase is $5,000 or less (inclusive of all costs; i.e. shipping and handling)
2. The commodity and/or service is an allowable purchase on a LVPO (see section 2.16 of the URI Purchasing Manual)
3. The purchase is a one-time delivery, one-time payment situation
4. The purchase is within the current fiscal year only.

A (IV) Internal Vendor Requisition is processed when:

1. The purchase is from a URI Internal Vendor and is a one-time delivery, one-time payment situation (see section 2.12 of the URI Purchasing Manual)

A (SC) Subcontract Requisition is processed when:

1. A Research Subcontract exists between URI and a subrecipient to perform part of the statement of work in a URI sponsored research project.
2. An Advice of Change is required to an existing Subcontract Purchase Order

For additional information on Subcontract Purchase Orders please visit the Office of Sponsored Projects Review at: http://www.uri.edu/research
Requisition Workflow Terminology

1) Approval Levels with associated Roles.
   a) Pre-Approval - (Requester Role)
   b) Level 1 – (Signatory from Signature Authorization)
   c) Level 2 – (Final Review from Signature Authorization)
   d) Level 3 – (Administrative Approvals i.e. Sponsored and Cost Accounting and Foundation.)
2) Approver – User who Approves Requisition or Chartfield String.
3) Category Code – Used to categorize the item that is being purchased. Users should select the Category code that most closely matches the item(s) they are purchasing. The Account Code is defaulted based on the Category selected.
4) Denied Requisition – Requisition that is sent back to Requester for correction or cancellation.
5) Final Review – 2nd Level Approver for the CFS – (Optional Approval Level)
6) Hold from Further Processing Checkbox – When checked: the Requisition is on hold, when Unchecked: the Requisition is available for processing.
7) Origin – Type of Requisition – Indicates to the system and users how the Requisition is processed. The two letter alpha code should be used for Requisitions. The origins are listed below.
   i) CR – College Requisition: Routed to Purchasing for completion.
   ii) IV – Internal Vendor Requisition: Purchase order auto generated directly from Req.
   iii) LV – Limited Value Requisition: Purchase Order auto generated directly from Req.
   iv) SC – Subcontract Requisition: Routed to the Research Office for completion.
8) Originator – A user who enters a Requisition but does not have Pre-Approval authority.
9) Pre-Approval Process – Requisition is entered by an Originator who must have a Requestor Approve Req. The Requester Pre-Approves the Req by clicking the Green Pre-Approve Check which changes the status from Open to Pending to facilitate workflow processing.
10) Requester – User who has been granted the authority to Pre-Approve Req. The Requester will be the primary contact Requisitions and/or Purchase orders.
11) Routing – The process of electronically moving work.
12) Ship to Location – Address where the Item’s final delivery is shipped.
13) Ship to Control – Determines where the shipped item is first sent.
14) Ship to Comments - Field used to Add the Attn: (Person’s Name) whom the item will be sent to.
15) Workflow – Paperless On-Line work routing system
16) Worklist – Approvers work queue, where users manage/review Requisition(s).
Components of a Requisition

This manual explains how to enter each component of a requisition, and how they relate to each other.

In PeopleSoft requisitions consist of five components:

- **Requisition Header** – This includes the Requester, Requisition date, Origin, Accounting Date and Header Comments.
- **Requisition Defaults** – Where general information pertaining to the entire requisition is entered. This includes data such as the Vendor, Category (if all items are of the same category), Ship To, Due Date
- **Lines** – Where the description, unit of measure (UOM), price, category and quantity for each item you are ordering.
- **Schedule** – Where the due date, ship to address and unit price are stored for each item on the requisition.
- **Distribution** – Where accounting information (i.e. chartfield string) is entered. The chartfield string includes the account, fund, department, program and project and budget date.
Log into PeopleSoft using your UserID and Password and in accordance with the URI Access and Compliance (*Data Confidentiality Statement*) -

The requisition ID (Requisition number) will auto generate the next number once the requisition has been saved

All text should be entered in upper/lower case
Requisition Header
Requester – defaults based on your logon.
Requisition Date – defaults to the current date.

Origin defaults to ONL, Change to: CR = College Requisition or SC if you are processing a change to a subcontract.

Click on Requisition Defaults hyperlink.

IT IS IMPORTANT THAT YOU ACCESS THIS PAGE AND ENTER THE FOLLOWING FIELDS PRIOR TO ENTERING ANY INFORMATION ON THE LINES WHICH WILL BE DISCUSSED LATER. PLEASE NOTE: ANY INFORMATION ENTERED IN THIS SCREEN WILL POPULATE TO ALL LINES.

Buyer – Leave Blank
Unit of Measure – Leave Blank
Vendor - Select the same vendor as on the original PO.

Click on the Vendor Lookup
Type the vendor name or a portion of the vendor name. If the vendor is an individual, type the last name first. Click

Select the vendor from the Search Results. If there are multiple locations select the “MAIN” Location.

Note: If there are multiple locations beginning with MAIN, preview the address for each and select the appropriate “MAIN” location.

Click OK

Category – Use the same category that was used for the po that is being changed.

For example, in the below po, the category is 406A.

Enter the category
### Purchasing Advice of Change College Requisition (CR) or Subcontract Requisition (SC) (Rev. 1-20-2015)  

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**THE UNIVERSITY OF RHODE ISLAND**

**Purchase Order**

<table>
<thead>
<tr>
<th>Date Ordered</th>
<th>Revision</th>
<th>P.O. #</th>
<th>Date Issued</th>
<th>Ship To:</th>
<th>Bill To:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>University of Rhode Island</td>
<td>University of Rhode Island</td>
</tr>
</tbody>
</table>

**Vendor:** 6000209277  
**Address:** 746 College Ave, Suite 1  
**Ship To:** University of Rhode Island  
**Bill To:** University of Rhode Island  

**Goods or Services can only be delivered and/or performed during the period indicated above.**

**Natural Gas Transportation Service Freq MFH #33**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Amount</th>
<th>Unit Price</th>
<th>Line Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-2011</td>
<td>1.00</td>
<td>100.00</td>
<td>100</td>
</tr>
<tr>
<td>2011-2012</td>
<td>1.00</td>
<td>100.00</td>
<td>100</td>
</tr>
<tr>
<td>2012-2013</td>
<td>1.00</td>
<td>100.00</td>
<td>100</td>
</tr>
</tbody>
</table>

**Delivery of goods or services as requested by agent.** Payments will be authorized upon submission of invoices. Invoices for services and/or goods provided shall be submitted in accordance with the University of Rhode Island’s policies and procedures. The University reserves the right to reject any invoice that it deems to be non-conformant with the terms of the contract. Any disputed invoices will be resolved between the University and the vendor. All invoices must be submitted by the due date as indicated above. Any unused balance at the end of the fiscal period is automatically deleted.

**Notes to Vendor:**

The above P.O. must appear on all invoices. The University reserves the right to reject any invoice that it deems to be non-conformant with the terms of the contract. Any disputed invoices will be resolved between the University and the vendor. All invoices must be submitted by the due date as indicated above. Any unused balance at the end of the fiscal period is automatically deleted.
Select the ship to location in one of the following ways:

- If you know the four digit department number where the goods/services are being delivered you may enter that number in the **Ship To:** field, click **Look Up** and select from the Search Results, or
- Search by the department name by clicking **Look Up**, type the department name in the description field, click **Look Up** and select from the Search Results.
- If the ship to on the PO was an OFFSITE address, select OFFSITE and enter the ship to address in the comment field as described in the procedures for College Req.
**Due Date** – If the due date is changing enter the new due date, otherwise type or click the and select the same date as on the po.

If you are processing an advice of change to a multi-year blanket purchase order, enter the due date for the line that you are changing.

**Distribute by:** Defaults to “Amount” – DO NOT CHANGE

**Distributions** When processing an advice of change, the distribution will be entered on the line. Do Not enter the distribution(s) on the Requisition Defaults.

If the due date is 30 days in the past or 30 days in the future the following message will appear.

**Message**

Warning -- date out of range. (15,9)

The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date.
Purchasing Advice of Change

All change orders require a detailed breakdown of the reason(s) for the change. Depending on the circumstances, the reason may be included as a “comment” or as an “attachment”.

If additional information needs to be added, it can be added as a “comment” which will be described later.

**Description** – The description on all advice of changes should read:

Advice of Change to PO # (reference po #). The description also needs to indicate if this is an increase or a decrease and the actual amount of the increase or decrease.

**Quantity** – When increasing or decreasing a dollar amount on a blanket po, the quantity will typically be 1. However, if you are processing a change to increase a quantity, enter the actual quantity. If you are decreasing the quantity enter 1 and indicate in the description the actual quantity decrease.

**UOM** – The UOM on changes to a blanket po or a decrease to a standard po will typically be TOT. Otherwise, enter the appropriate UOM.

Enter the UOM or click to select.
Price:

- When “increasing” a purchase order enter the actual amount of the increase.
- When “decreasing” a purchase enter an amount of 1 (DO NOT ENTER A NEGATIVE AMOUNT, DO NOT ENTER 0)
- When “transferring” funds from one chartfield to another chartfield enter the actual dollar amount of the increase on a line and a separate line for the chartfield that is being reduced with an amount of one dollar.
- When “changing” a date only enter an amount of 1

**Price** – Enter the price

**Click the Schedule**

Category – Note the category has populated from the Requisition Defaults. DO NOT CHANGE.
*Ship To - defaults from the Requisition Defaults page.

*Ship to Control – the default ship to control is “K” for Kingston Central Receiving.

When the default Ship to Control is accepted the ship to address that will print on the purchase order will include URI, Central Receiving, Kingston, RI. 02881.

To Change the default Ship to Control click

Select “G” for GSO Central Receiving
Select “D” for Direct Delivery to the department (non-Central Receiving).

If delivery is to be made to the Alton Jones Campus or FCCE select “D” for Direct Delivery.

(Note: This action only needs to be performed on line 1/Schedule 1).

When selecting “K” or “G”, the ship to address will read URI, Central Receiving followed by the City, State, Zip, department name and address.

Ship To: URI Central Receiving
        Kingston, RI 02881
        Department of Chemical Engineering
        16 Greenhouse Rd., 205 Crawford Hall
        Attention: Emma Harrold
Ship to Comments – When processing an advice of change do not enter a ship to comment.

Click on the distribution button

Click \( + \) to add rows when using multiple chartfield strings.

Enter the desired number of rows. For example if the advice of change is being charged to 2 chartfield strings, click to add 1 row.
The total percent and dollar amount of the line populated to distribution line 1 and the Account populated on all distribution lines from the category that was chosen on the Requisition Defaults page. DO NOT CHANGE THE ACCOUNT.

Enter the percent or amount for each distribution line along with fund, dept, program and if the chartfield string contains a project and activity select the PC Bus Unit (URIPS) by clicking . Type the project and select the activity by clicking .

NOTE: The budget date defaults to the current date. Therefore, when processing an advice of change that affects a future fiscal year, the budget date must be changed in order to pre-encumber the funds in the appropriate fiscal year. Change the budget date, if necessary, and click .
This Requisition will be held from further processing (20001, 42)

The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.

Click **OK**
Most Advice of changes will be one line item, however, if there are additional lines click to add the desired number of rows and follow the same procedures as above for entering line information including the distribution(s).

Once all of the lines have been added comments may be added by clicking on the hyperlink.
Comments – Comments can either be a typed comment(s) or an attached document(s).

All documentation relating to the advice of change must be attached to the electronic requisition. This includes but is not limited to; explanation/justification for increase/decrease, etc.

Comments or information pertaining to the advice of change may be used for comments for the vendor, or internal comments.

For the comments to print on the advice of change purchase order you must select the Send to Vendor option. If the comments are for internal use only, do not check the box.

Note: All requisition “comments” will print on the requisition but will not print on the Purchase Order unless you have checked the Send to Vendor option.

The Send to Vendor option applies to comments in the comment text box only, not to the documents attached.

Attachments, for the most part, must first be scanned and saved to a location where you will retrieve them and attach to the requisition. The naming convention for attachments is as follows: Requisition Origin (CR), Requisition ID_ followed by the type of attachment; ie: explanation, for example CR123_Explanation.

Any attachment that is to be sent to the vendor along with the resulting advice or change purchase order will need to be scanned and attached separately and not combined with any internal documentation.
If an “OFFSITE” Ship to Location was chosen, enter the entire ship to address in the comment field as follows:

URI, Dept. Name

c/o Company Name

Street Address

Attention

City, State, Zip

Click  ☑ Send to Vendor

If there are no more comments and/or attachments click OK

To add additional comments and/or attachments click +
To add an attachment:

Click [Attach]

Click [Browse...]

Locate the attachment and double click.

Click [Upload]

Select the file: Z:\Scanned PDFs\CR19893_Justification.pdf

Click [Upload]
If you would like the attachment to be included with the resulting purchase order, check the box.

If the attachment(s) is for internal use only do not check the box. For example, if the attachment includes a sole source justification the e-mail check box will not be checked.

If there is more than one comment and you would like to view all comments click on the [View All] hyperlink. Once you are in the “view all” mode you can either scroll down to the last comment to add another comment or insert comments in between other comments by clicking +

Continuing adding comments and/or attachments by clicking + or Click [OK] when done.
To view and/or print a copy of the requisition, click the hyperlink.

View Printable Version

Message

Do you wish to save the current document? (10250,274)

Document cannot be printed if it is not saved. If you choose Yes, document will be saved and printed. If you choose No, document cannot be printed.

Yes No

Message

This Requisition will be held from further processing (20001,42)

The Hold From Further Processing check box is currently on for this requisition. If your intention is to hold this requisition simply hit the OK button in this message box. If you would like to release this requisition, turn off the Hold From Further Processing check box and hit the save button.

OK
Once you have previewed and/or printed the requisition, close the window by clicking
If necessary, make any changes that need to be made. When the requisition is complete and if you are an “originator” uncheck the box and click .

Note: The requisition will remain in open status until the requester Submit the requisition for Approval.

The requester will receive an e-mail informing them that a requisition is pending and needs to be submitted for approval.
If you are a “requester” and you have received an e-mail notification regarding a requisition that needs to be submitted for approval, logon to PeopleSoft, retrieve the requisition via the following navigation: (Purchasing>Add/Update Requisitions>Find an Existing Value). Enter the Requisition ID and click Search. Once you have reviewed the requisition, uncheck the , click on to Submit for Approval. Once the requisition has been Submitted for Approval, the status will change from open to pending.

If you are a “requester” and you have entered the requisition, uncheck the , Click on the to Submit for Approval (the status changes from Open to Pending). Click

The requisition has now entered the workflow approval process. Once this happens the requisition cannot be retrieved.

Workflow Approval

Level 1 – Signatory for Signature Authorization
Level 2 - Final Review from Signature Authorization
Level 3 – Administrative Approvals; ie:
- Foundation Office when using Foundation Funds
- Sponsored and Cost Accounting when using Research Funds
- Business Services when using Bond Funds
The “approver(s)” (level 1) will receive an e-mail:

This e-mail is to notify you that College Requisition: 0000019889, Requester: bettyg, is seeking level 1 approval for Chartfield String: URIPS10040550000, and has been added to your e-Campus Financials Worklist.

The Approver(s) can either “Approve” or “Deny” the requisition. Note: All approval levels have the authority to “approve” or deny a requisition.

If the requisition is Denied, the requester will receive an e-mail informing them that the requisition has been denied. If the approver indicated a reason it will appear as a comment.

This e-mail is to notify you that College Requisition: 0000019889 entered on 01/30/2012 has been denied by OPRID: bettyg
Comments: Please hold off on this purchase until next fiscal year.

Once a requisition has been denied, the requester can retrieve the requisition; (Purchasing>Add/Update Requisitions>Find an Existing Value). Enter the Requisition ID and click Search. Make necessary changes, approve and save. Upon saving the requisition, the workflow approval process will begin again. If a requisition needs to be cancelled please see “Cancelling a Requisition”

If the “approver(s)” (level 1) approve the requisition and any other approvals that may be required; i.e. (level 2) Final Review, (level 3) Foundation Office if Foundation Funds are being used, Sponsored and Cost Accounting if Research Funds are being used, etc. the “requester” will receive an e-mail indicating that the requisition has been approved.

This e-mail is to notify you that College Requisition: 0000019889 entered on 01/30/2012 has been approved.

Once the requisition has been approved by all levels the budget checking process will automatically be initiated.

Upon successful completion of the budget checking process, the requisition will be routed to:

- URI Purchasing, if the Origin is “CR”
- URI Research Office, if the Origin is “SC”
If the requisition fails budget checking, the requester will receive an e-mail:

This e-mail is to notify you that College Requisition: 0000019889 has budget errors.

Because the requisition did not pass budget check the requester is able to access the requisition and determine the cause of the budget error and either process a budget transfer and/or make the necessary changes.

Retrieve the requisition – Purchasing>Requisitions>Add/Update Requisitions. Click on the tab: Find an Existing Value, enter the requisition number in the Requisition ID field; ie: 0000019883 and click Search.

When you retrieve the requisition you will notice that the Budget Status = Error and the requisition has automatically been placed back on hold.

Click on the hyperlink Error to determine the cause of the budget error.
If a budget transfer is necessary to support the advice of change you will first need to make the budget transfer. Once the transfer has been made, uncheck the **Hold From Further Processing**. Click **Save**. In this example, the requisition will not require re-approval and will invoke the budget process again.

If there are changes to the distributions, i.e. change the chartfield string or change the price, the workflow approval process will start again once the requisition is taken off hold, Submitted for Approval and saved.

Other examples of budget error exceptions include but are not limited to:

**Budget Date Out of Bounds.** This budget exception typically occurs when using a fund 500. If you receive a budget error of this type you will need to contact the appropriate accountant in the Sponsored and Cost Accounting Office.
If you have processed a CR for an advice of change to a purchase order, the URI Purchasing Department will issue an advice of change purchase order and will e-mail a copy to:

- **Vendor** – This is the vendor’s authorization to proceed
- **Requisitioning Department** – This is the department receiving report copy

If you have processed a SC for an advice of change to a subcontract purchase order, the Research Office will issue an advice of change purchase order and will e-mail a copy to:

- **Vendor** – This is the vendor’s authorization to proceed
- **Requisitioning Department** – This is the department receiving report copy

If there are any attachments they will be a separate PDF file. For example, the PO is one pdf and the attachment(s) are a separate pdf.

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**Purchase Order 0000017109**

URI:Purchasing@uri.edu

Sent: Tue 9/14/2010 8:19 AM

To: betty@uri.edu

This e-mail is to notify you that Purchase Order 0000017109 from the University of Rhode Island has been issued. To view the purchase order, click on the PDF file attached to this e-mail. If you have any questions please contact the URI Purchasing Department at 401-874-2171.
Below is a sample Purchase Order Change Order:

![Sample Purchase Order Change Order](image-url)
Once the goods/services are received, the department copy of the purchase order is to be signed by the individual who has signature authorization for “receiving reports” and forward to the URI Accounts Payable Office. Note: Payment cannot be made until the URI Accounts Payable Office receives the invoice from the vendor and the signed receiving report copy of the po.
Returned Requisition

A College Requisition submitted to Purchasing requiring additional information, specifications, documentation, etc. may be returned. When a requisition is returned from Purchasing, the requester will receive an e-mail stating the reason for return.

Returned requisitions will not require re-approval through the workflow approval process unless there is a change to the chartfield string or price. For example, if a requisition is returned for detailed specifications, the requester will retrieve the requisition (see instructions above: retrieve requisition), attach the specifications, and click Resubmit. Once the Resubmit button has been clicked, the requisition will automatically route back to Purchasing.

If there is a change to quantity, price or chartfield string a change order to the requisition will be created and the requisition will require re-approval. Once a change is made to one of the above fields you will receive the following message:

Click Yes

Click Save

Uncheck Hold From Further Processing
Click on 

The Status will change from Open to Pending

Click

The requisition has now entered the workflow approval process. Once this happens the requisition cannot be retrieved.

Cancelling a Requisition

Requesters can cancel a college requisition when the following conditions exist:

- **Status: Open/Budget Status: Not checked and the Hold From Further Processing is checked.** For example, if you prepare a requisition and decide you no longer need the goods/services it is your responsibility to cancel the requisition.
- **Status: Denied/Budget Status: Not checked**
- **Status: Returned Requisitions - Approved/Budget Status: Valid**

Example of Denied Requisition
**Example of Returned Requisition**

If the Hold From Further Processing box is checked, you must uncheck the box before cancelling the requisition.

To cancel a requisition click on the **X**

**Click Yes**

**Click Ok**

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**Message**

Cancelling a requisition will commit any changes made and prevent further changes. Continue? (Y/N)

When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

**Click Yes**

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**Successful Cancellation**

The requisition has been canceled, you must click ok to finalize the cancellation.

**Click Ok**