

PO Inquiry and Activity Summary

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PO Inquiry Pages

This training document reviews the PO inquiry pages by navigating directly to the inquiry pages. Other lookup pages like the Purchase Order provides links to the same pages.

Purchase Orders Review Information – This page is used to view PO general information and provides links to the Header Comments (including attachments), Document Status and Activity Summary and other links which are currently not in use

Activity Summary – This page is used to view summary and details of related financial transactions applied towards a PO and displays remaining PO balances.

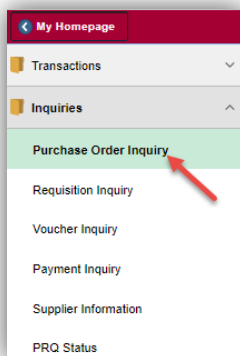
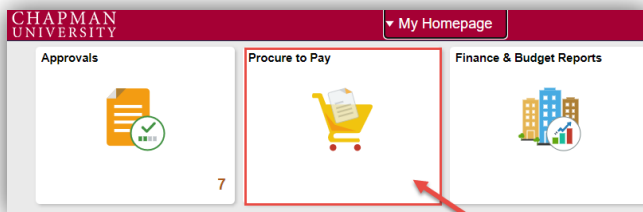
PO Review Information - Purchase Order Overview

The Review PO Information - Purchase Order pages are used to view general PO information and also provides links to other components to further drill down into PO details.

PO Review Information – Purchase Order Page Navigation

Tile

Procure to Pay tile > Inquires > Purchase Order Inquiry



Navigation

Navigator Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Order

- Enter the Business Unit and Purchase Order number
- Click the Search button

Purchase Order Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all

[Find an Existing Value](#) [Keyword Search](#)

▼ **Search Criteria**

Business Unit = ▼ 01

PO ID begins with ▼ P000066053

Contract SetID begins with ▼

Contract ID begins with ▼

Release Number = ▼

Purchase Order Date = ▼

PO Status = ▼

Short Supplier Name begins with ▼

Supplier ID begins with ▼

Supplier Name begins with ▼

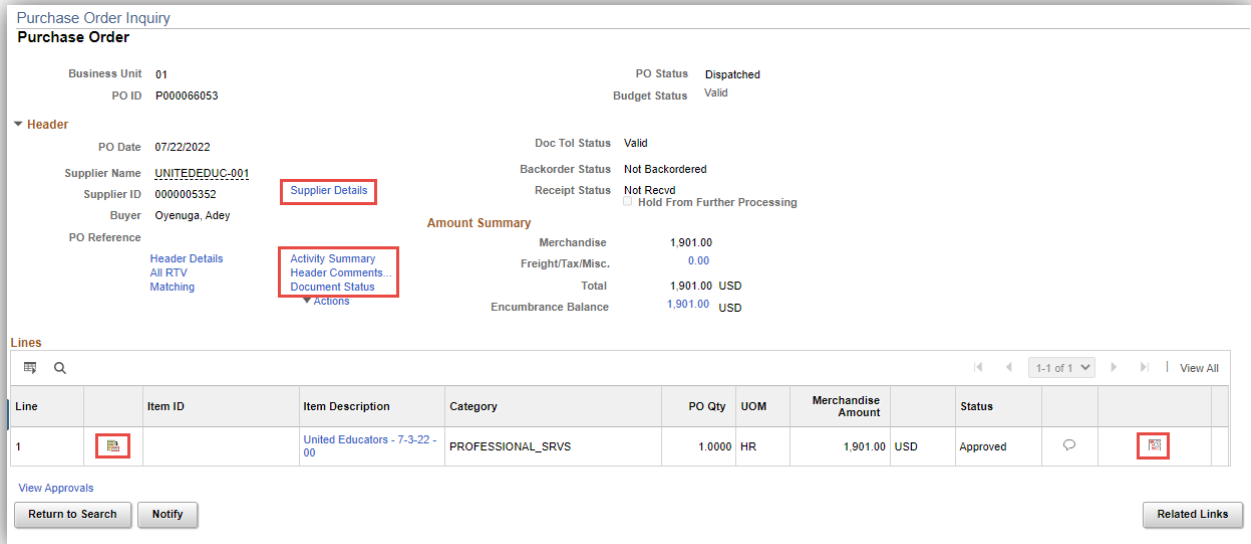
Buyer begins with ▼

Buyer Name begins with ▼

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

The system will display the PO Inquiry screen. Some of the useful links have been highlighted



Purchase Order Inquiry
Purchase Order

Business Unit 01 PO ID P000066053 PO Status Dispatched Budget Status Valid

Header

PO Date 07/22/2022 Doc Tot Status Valid

Supplier Name UNITEDEDUC-001 Backorder Status Not Backordered

Supplier ID 000005352 Receipt Status Not Recvd ☐ Hold From Further Processing

Buyer Oyenuga, Adey

PO Reference

Header Details Activity Summary Header Comments... Document Status Actions

Amount Summary


Merchandise 1,901.00

Freight/Tax/Misc. 0.00

Total 1,901.00 USD

Encumbrance Balance 1,901.00 USD

Lines

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		United Educators - 7-3-22 - 00	PROFESSIONAL_SRVS	1.0000	HR	1,901.00 USD	Approved

View Approvals

Return to Search Notify

Related Links


[Supplier Details](#) – This link will display the supplier address and phone number



[Activity Summary](#) – This link will take display the summary and details of related financial transactions applied towards a PO and displays remaining PO balances. Activity summary section of the training document for more details

[Header Comments](#) – This link will display the comments from the original PR and will give you access to any attachments.


[Document Status](#) – This link will show you the PR related to the PO. There is also a link to the accounting entries on the Related Info tab to see the chart fields for this PO

[View Approvals](#) – This link displays the approval workflow for the PO.

The Line Details Icon  - This icon provides details for the PO line

The Schedule Icon  - This icon takes you to the Schedules page. From the Schedules page, click on the Distributions/Chart fields icon  to see the chart fields for this PO.

Receipts Details and Drill Down

- To see Receipts details click on the Receipts tab
- Click on the Receipt Icon  to drill to Receipt information



Activity Summary

Business Unit	01	PO Status	Dispatched
Purchase Order	P000065825	Supplier	WASTE MANAGEMENT OF ORANGE COUNTY
Merchandise Amount	15,000.00 USD	Supplier Location	MAIN
Merchandise Receipt	1,299.24 USD		
Merchandise Returned	0.00 USD		
Merchandise Invoice	1,299.24 USD		
Merchandise Matched	1,299.24 USD		

Lines

1-1 of 1 | View All

Details **Receipt** Invoice Matched RTV

Line	Line Details	Item	Item Description	UOM	Open Amount	Currency	
1			Fund 170 FY 2022-2023 Blanket	LT	13,700.760	USD	

Return to Search Previous in List Next in List Notify

- Click on Receipt No hyperlink to drill to the Receipts screen

Unit 01 PO ID P000065825 Line 1 Item ID

Receipt

1-1 of 1

View All

Sched Num	BU Recv	Receipt No	Receipt Line	Status	Seq	Supp Rcpt Qty	Supp Reject Qty	Merchandise Amt	Currency		
1	01	0000146412	1	Received	1	1299.2400	0.0000	1299.240	USD	+	-

- This screen provides details on the receiving document
- The Header Details hyperlink will show you the Receiving details

Receipts

Unit 01 Receipt No 0000146412 Source On-line Receipt Status Received

Receipt Lines

1-1 of 1 | View All


Receipt Lines More Line Data Optional Input

Sel	Line	Item	Description	Price	Amt Only	Recv Qty	Recv UOM	Reject Qty	Device Track
<input type="checkbox"/>	1		Fund 170 FY 2022-2023 Blanket	1.00000	<input type="checkbox"/>	1299.2400	LT		<input type="checkbox"/>

[Header Details](#) Line Details Manufacturer Info Asset Information
[Document Status](#) Header Comments Display RTV Information Line Status
[Distribution](#) Putaway Information Device Tracking



Return to Search Notify

Invoice Details and Drill Down

- To see AP voucher details, click on the Invoice tab and scroll to the right.
- Click on the Invoice Icon  to drill to AP Invoice information

Lines

Details Receipt **Invoice** Matched RTV

Line	Line Details	Item	Item Description	UOM	Un-invoiced Amount	Currency	Invoice
1			Fund 170 FY 2022-2023 Blanket	LT	13,700.760	USD	

- Click on the Voucher number hyperlink to drill to the Voucher Inquiry screen

Invoice

Unit 01 PO No. P000065825 Line 1 Item ID

Invoice

1-1 of 1 View All

Sched Num	AP Unit	Voucher	Line	Quantity Invoiced	Amount Invoiced		
1	01	00250499	1	1299.2400	1299.240	+	-

- Click on the Actions drop down to view additional details such as Attachment, Accounting Entries or Payment Information. Also see the other tabs to view additional voucher details.

Voucher Inquiry

Search Criteria
Sort Criteria
Display Currency Criteria

Voucher Inquiry Results

Voucher Details Amounts More Details Supplier Details

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
<div> <div>▼ Actions</div> <div> View Attachments Review Accounting Entries Match Workbench Payment Information Voucher Details </div> </div>	01	00250499	0418508-2884-3	07/01/2022	0000005594	Postable	<input type="checkbox"/>	Matched	

Requisition Inquiry

PeopleSoft provides multiple ways to navigate and inquire on documents through menus and pages and also through hyperlinks within a page.

Tile

Procure to Pay > Transactions > Add Update Requisitions

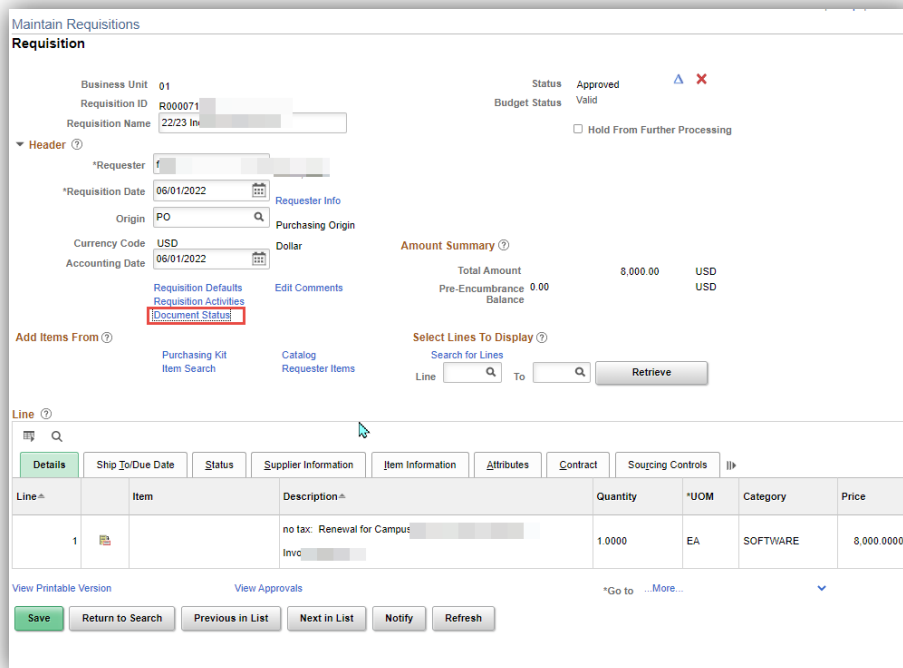
Navigation

Navigator Menu > Purchasing > Requisitions > Add/Update Requisitions

- Click on the Find an Existing Value tab
- Enter the Requisition ID and click search

Document Status

- Click on the Document status hyperlink



Maintain Requisitions
Requisition

Business Unit 01 Status Approved
Requisition ID R000071 Budget Status Valid
Requisition Name 22/23 In...
☐ Hold From Further Processing

Header

*Requester
*Requisition Date 06/01/2022
Origin PO
Currency Code USD
Accounting Date 06/01/2022

Amount Summary

Total Amount 8,000.00 USD
Pre-Encumbrance 0.00
Balance USD

Requisition Activities
[Document Status](#)

Add Items From
Purchasing Kit
Item Search

Select Lines To Display
Search for Lines
Line To Retrieve

Line

Line	Item	Description	Quantity	*UOM	Category	Price
1		no tax: Renewal for Campus	1.0000	EA	SOFTWARE	8,000.00000

View Printable Version View Approvals *Go to ...More...

Save Return to Search Previous in List Next in List Notify Refresh

- The Document Status page shows the corresponding PO, receipts, voucher and payment numbers and a hyperlink to drill further into the documents for additional details.

Document Status

Business Unit 01
Document Date 06/01/2022
Currency USD
Requester Fa

Req ID 172
Status Approved
Document Type Requisition
Merchandise Amt 8,000.00
Budget Status Valid

Requisitions Inventory Sourcing Events Procurement Contracts **Purchase Orders(1)** Service Work Orders Receipts(1) Returns Vouchers(1) Payments(1)

Show All

Associated Document

Documents

Related Info

||>

Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		01	Purchase Order	P0000 2	Dispatched	06/01/2022	0000002489	MAIN	
▼ Actions		01	Receipt	00001 3	Received	06/02/2022	0000002489	MAIN	
▼ Actions		01	Voucher	00247	Posted	06/01/2022	0000002489	MAIN	
▼ Actions	01		Payment	00203	Posted	06/29/2022	0000002489	MAIN	

Return to Search