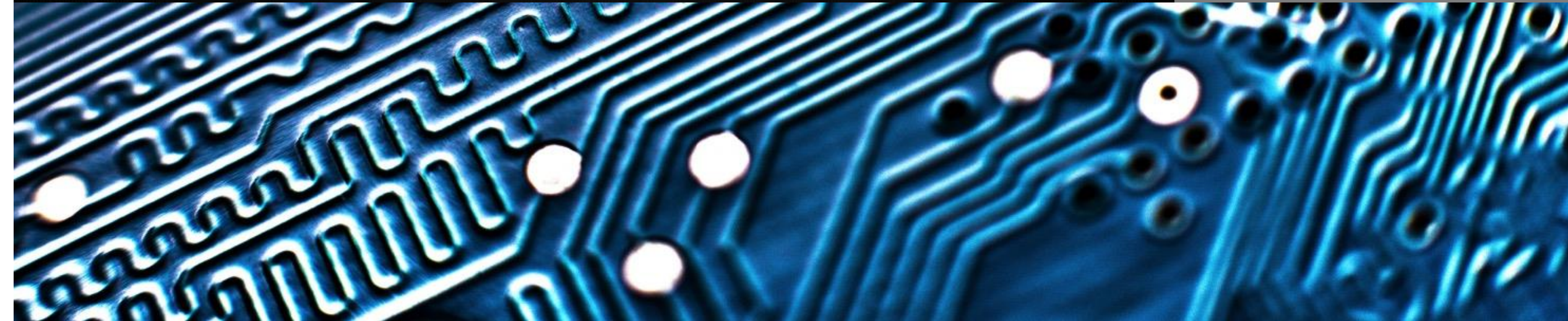


# Georgia *FIRST* Financials

## eProcurement & Purchasing Birds-of-a-Feather

September 14,  
2023



# Agenda

- Governor's Initiative: Supplier Reporting
- Matching Review: Relationship between Purchasing and AP
- Georgia *FIRST* Marketplace: Helpful Hints
- Expediting Reqs with multiple Supplier Locations
- Amount Only vs Quantity PO
- PO Approval Levels
- Using the PO Distribution Worksheet
- eVerify: Capturing information
- Preview of updated PeopleSoft User Interface
- Other Tips and Tricks

# Supplier Reporting

In support of the Governor's Small Business and Supplier Diversity Initiative, ITS is updating the information we collect from suppliers and the way in which we report that information.

## Release 5.90:

- Additional/Updated options will be available on the Supplier Identifying Information > Additional Reporting Elements section.
  - This is modeled after functionality that DOAS has introduced in their instance of PeopleSoft and will allow us to better report on supplier categories.
- Introducing a new Supplier Spend by Category Report, which will capture spend for suppliers who select one or more of the options provided.

More Information to come in the [Fall In the Know](#) session, Thursday, October 12, 2023, at 10:30 a.m.

# Supplier Reporting

- > Supplier Rating
- > Supplier Logo
- > Additional ID Numbers
- > Duplicate Invoice Settings
- > Government Classifications
- > Standard Industry Codes
- ∨ Additional Reporting Elements

|  |                                |
|--|--------------------------------|
| Common Parent's TIN                              | <input type="text"/>           |
| Type of Contractor                               | <input type="text" value="v"/> |
| Sm Disadvantaged Business                        | <input type="text" value="v"/> |
| Other Preference Programs                        | <input type="text" value="v"/> |
| Ethnic Minority (51% or More)                    | <input type="text" value="v"/> |
| <input type="checkbox"/> Small Business*         |                                |
| <input type="checkbox"/> Women Owned Business    |                                |
| <input type="checkbox"/> Minority Owned Business |                                |

|                        |                                |
|------------------------|--------------------------------|
| Common Parent's Name   | <input type="text"/>           |
| Gross Annual Receipts  | <input type="text" value="v"/> |
| Number of Employees    | <input type="text" value="v"/> |
| Veteran Owned Business | <input type="text" value="v"/> |

- Georgia Resident Business\*\*  
 Not Applicable

\* A small business is defined as a business that is independently owned and operated. In addition, such a business must either have 300 or less employees or \$30 million or less in gross receipts per year.

\*\* Georgia resident business is defined as any business that regularly maintains a place from which business is physically conducted in Georgia for at least one year prior to any bid or proposal to the state or a new business that is domiciled in Georgia and which regularly maintains a place from which business is physically conducted in Georgia; provided, however, that a place from which business is conducted shall not include a post office box, a leased private mailbox, site trailer, or temporary structure.



# Supplier Reporting

## Field Label changes:

- SDB Program → Sm Disadvantaged Business
- Ethnicity → Ethnic Minority (51% or More). Drop down options changed
- HUBZone Program → Gross Annual Receipts. Drop down options changed
- Size of Small Business → Number of Employees. Drop down options changed
- VOSB → Veteran Owned Business. Drop down options changed

## Check Box changes:

- Added:
  - Small Business
  - Minority Owned Business
  - Georgia Resident Business
  - Not Applicable
- Removed:
  - Emerging Small Business
  - Veteran
  - Disabled

# Matching: Purpose

- Matching is the process used to compare Vouchers with Purchase Orders and, when required, Receipts to ensure that your institution pays for only the goods and services that have been ordered and received
- Two-Way Match: Voucher and Purchase Order
- Three-Way Match: Voucher, Purchase Order and Receipt

# Matching: Purchasing Responsibilities

- Quantity PO or Amount Only PO?
- Receiving Options (default defined by NIGP code):
  - Receiving is Required
  - Receiving is Optional
  - Do Not Receive
- Matching Options (tolerance defines by NIGP code):
  - Full Match
  - No Match
  - All lines on PO should have same Matching requirement.

# Matching: AP Responsibilities

- Understand how creating a PO Voucher can affect Matching results.
- Understand what the Match Exception means before deciding to override it, and what the effect will be if choice is to override.
- AP user can navigate to **Purchasing > Purchase Orders > Review PO Information > Purchase Orders** to review PO.
- If necessary, request that Purchasing Dept correct PO: Quantity vs Amount Only, Matching and/or Receiving settings.



# Matching: AP Responsibilities

- When creating a Voucher from a PO, which option should I choose?
  - Use the Copy PO option if you are FULLY vouchering all PO lines without making any changes.
  - Use the Copy Worksheet option if:
    - The Invoice amount or quantity is different than on the associated PO.
    - You only want to voucher certain lines of a PO.
    - If copying in multiple POs to one voucher.

# Georgia *FIRST* Marketplace: Helpful Hints

- Deleting Carts

The screenshot displays the Georgia FIRST Marketplace interface. A dark navigation sidebar on the left contains several icons, with the shopping cart icon highlighted by a red box. The sidebar menu is open, showing options like 'Shop (Alt+P)', 'My Carts and Orders', and 'Shopping Settings'. The 'My Carts and Orders' option is also highlighted with a red box, and its sub-menu is visible, including 'Open My Active Shopping Cart', 'View Carts', 'View My Orders (Last 90 Days)', and 'View My Orders (Last 5 Orders)'. The main content area shows a shopping cart with a table of items. The table has columns for 'Size/Packaging', 'Unit Price', 'Quantity', and 'Ext. Price'. One item is listed: '8.5" x 11" Copy Paper, 20 lbs., White, 5000 Sheets/Carton (324791)' with a unit price of 36.73 and a quantity of 1. A 'Summary' panel on the right shows the total amount of 36.73 USD. The bottom of the page includes a search bar, a contract number '99999-SPD-SPD0000167-0001', and a footer with the page number '10' and the University System of Georgia logo.

| Size/Packaging | Unit Price | Quantity | Ext. Price |
|----------------|------------|----------|------------|
| CT             | 36.73      | 1 CT     | 36.73      |

**Summary**

**Total (36.73 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 36.73

# Georgia *FIRST* Marketplace: Helpful Hints

- Deleting Carts

Shop ▶ My Carts and Orders ▶ View Carts ▶ Draft Carts

### Cart Management

Create Cart ?

Draft Carts Assigned Carts

Filter Draft Carts

| Type   | GeorgiaFirst Marketplace Shopping Cart Name | Cart Description | Date Created | Total     | Action               |
|--------|---|------------------|--------------|-----------|----------------------|
| Normal | <a href="#">2023-01-06 AFARIS 01</a>        |                  | 1/6/2023     | 0.00 USD  | <a href="#">View</a> |
| Normal | <a href="#">2023-09-01 AFARIS 01</a>        |                  | 9/1/2023     | 36.73 USD | <a href="#">View</a> |

View  
Delete

Show menu

Powered by JAGGAER | Privacy Policy

# Georgia *FIRST* Marketplace: Helpful Hints

- Deleting Carts

The screenshot displays the 'Cart Management' section of the Georgia FIRST Marketplace. A green success message box is highlighted with a red border, indicating that a cart has been deleted successfully. The message reads: 'Success The selected cart has been deleted successfully.' Below the message, there is a table with one row of cart data. The table has columns for Type, GeorgiaFirst Marketplace Shopping Cart Name, Cart Description, Date Created, Total, and Action. The row shows a 'Normal' cart with the name '2023-01-06 AFARIS 01', a date of '1/6/2023', and a total of '0.00 USD'. A 'View' button is visible in the Action column.

| Type   | GeorgiaFirst Marketplace Shopping Cart Name | Cart Description | Date Created | Total    | Action               |
|--------|---|------------------|--------------|----------|----------------------|
| Normal | <a href="#">2023-01-06 AFARIS 01</a>        |                  | 1/6/2023     | 0.00 USD | <a href="#">View</a> |



# Georgia *FIRST* Marketplace: Helpful Hints

- Finding Order Information – Status Tab

The screenshot displays the Georgia FIRST Marketplace interface for a Purchase Order. The browser address bar shows the URL: <https://solutions.sciquest.com/apps/Router/POStatusMaterial?poid=146964232&tmstmp=1694003181409>. The page title is "Purchase Order • Amazon.com • 530000000555020 Revision 0". The "Status" tab is selected, showing a summary of the order's progress: Summary, Revisions (1), Confirmations (1), Shipments (2), Invoices (2), Comments, Attachments, and History.

**General Information**

|                     |                                     |
|---------------------|-------------------------------------|
| PO/Reference No.    | 530000000555020                     |
| Revision No.        | 0                                   |
| Supplier Name       | Amazon.com                          |
| Purchase Order Date | 8/31/2023                           |
| Total               | 124.33                              |
| Owner Name          | Ashley Garrett                      |
| Owner Phone         | +1 999-999-9999                     |
| Owner Email         | Ashley.Garrett@ung.edu              |
| Owner Business Unit | University of North Georgia (53000) |
| F.O.B.              | Destination - Prepaid               |

**Document Status**

|  |  |
|--|--|
| A/P status   | Open   |
| Workflow   | ✓ Completed (8/31/2023 6:48 PM)  |
| The system distributed the purchase order using the method(s) indicated below the last time it was distributed: <a href="#">view</a> |  |
| cXML (Electronic Integration)  | no value   |
| Distribution Date/Time   | 8/31/2023 6:48 PM  |
| Supplier   | Sent To Supplier Fully Shipped <a href="#">view confirmations</a> <a href="#">view shipments</a> |

**Summary**

**Completed**

**Details**

Supplier Status

Sent To Supplier Fully Shipped [view confirmations](#) [view shipments](#)

Supplier

Amazon.com

**Total (124.33 USD)**

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

|          |               |
|----------|---------------|
| Subtotal | 124.33        |
|          | <b>124.33</b> |

# Georgia *FIRST* Marketplace: Helpful Hints

- Finding Order Information – Confirmation Tab

The screenshot displays a web browser window with the URL `https://solutions.sciquest.com/apps/Router/POConfirmationsMaterial?pold=146964232&tmstmp=1694003187683`. The page title is "Purchase Order • Amazon.com • 530000000555020 Revision 0". The navigation tabs include Status, Summary, Revisions (1), **Confirmations (1)**, Shipments (2), Invoices (2), Comments, Attachments, and History. The "Confirmations" tab is active, showing "Records found: 1".

| Confirmation No                         | Notice Date | Note from Supplier |
|---|-------------|--------------------|
| 112-2655708-3727421,112-0335425-7539409 | 8/31/2023   |                    |

Below the confirmation table, the "Line Details" section is visible, showing two line items:

| Line                                    | Description  | Catalog No | Size / Packaging | Unit Price                | Quantity | Ext. Price          |
|---|--|------------|------------------|---------------------------|----------|---------------------|
| 1                                       | Hailo MK60 StandardLine   Steel step stool   Two large steps with non-slip mats   Folding safety mechanism with unlocking button   Carrying handle   Rustproof   Easy to store   White | B002SA904S | EA               | 43.99                     | 2 EA     | 87.98               |
|   |  |            |                  |                           |          |                     |
| Confirmation No                         | Notice Date  | Status     | Quantity         | Estimated Ship Date (ESD) | Status   | Note from Supplier  |
| 112-2655708-3727421,112-0335425-7539409 | 8/31/2023  | 2          | -                |                           | Accepted | 112-2655708-3727421 |
| 2                                       | MunchkinRTM High Capacity Dishwasher Basket, 1 Pack, Grey  | B07ZPMYKKS | EA               | 6.79                      | 3 EA     | 20.37               |
|   |  |            |                  |                           |          |                     |
| Confirmation No                         | Notice Date  | Status     | Quantity         | Estimated Ship Date (ESD) | Status   | Note from Supplier  |

# Georgia *FIRST* Marketplace: Helpful Hints

- Finding Order Information – Shipments Tab

Purchase Order • Amazon.com • 530000000555020 Revision 0

Status Summary Revisions 1 Confirmations 1 **Shipments 2** Invoices 2 Comments Attachments Histor

Records found: 2

| Shipment No     | Notice Date | Shipment Date | Delivery Date | Carrier | Tracking Number        | Note from Supplier |
|-----------------|-------------|---------------|---------------|---------|------------------------|--------------------|
| 22878793561025  | 9/1/2023    | 9/1/2023      | 9/5/2023      | UPS     | 1Z2EX8600353211794     |                    |
| 229553645153301 | 9/3/2023    | 9/3/2023      | 9/5/2023      | USPS    | 9361289675023384352914 |                    |

Line Details

| Line | Description  | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price | Status | Quantity | Status |
|------|--|------------|------------------|------------|----------|------------|--------|----------|--------|
| 1    | Hailo MK60 StandardLine   Steel step stool   Two large steps with non-slip mats   Folding safety mechanism with unlocking button   Carrying handle   Rustproof   Easy to store   White | B002SA904S | EA               | 43.99      | 2 EA     | 87.98      | 2      | Shipped  |        |
| 2    | MunchkinRTM High Capacity Dishwasher Basket, 1 Pack, Grey  | B07ZPMYKKS | EA               | 6.79       | 3 EA     | 20.37      | 3      | Shipped  |        |
| 3    | AmazonCommercial Mini Brush and Dustpan Set, Pack of 2, Gray   | B086WQF9SM | EA               | 7.99       | 2 EA     | 15.98      | 2      | Shipped  |        |



# Georgia *FIRST* Marketplace: Helpful Hints

- Finding Order Information – Invoices Tab

Purchase Order • [Amazon.com](#) • 530000000555020 Revision 0

Status Summary Revisions **1** Confirmations **1** Shipments **2** **Invoices **2**** Comments Attachments History

Records found: 2, Totaling: 124.33 USD

| Invoice No. ↓             | Supplier Invoice No. | Invoice Date | Due Date  | Invoice Type | Payment Status | Invoice Total | Invoiced By |
|---------------------------|----------------------|--------------|-----------|--------------|----------------|---------------|-------------|
| <a href="#">147537451</a> | 1DRK-WJRT-MY6P       | 9/3/2023     | 10/3/2023 | Invoice      | In Process     | 36.35 USD     | System      |
| <a href="#">147490383</a> | 1QPV-77CW-CPTH       | 9/1/2023     | 10/1/2023 | Invoice      | Payable        | 87.98 USD     | System      |

**Line Details**

| Line No. | Product Name   | Catalog No. | Unit Price | Qty/UOM | Extended Price | Invoice Qty/Cost | Status       |
|----------|--|-------------|------------|---------|----------------|------------------|--------------|
| 1        | Hailo MK60 StandardLine   Steel step stool   Two large steps with non-slip mats   Folding safety mechanism with unlocking button   Carrying handle   Rustproof   Easy to store   White | B002SA904S  | 43.99 USD  | 2 EA    | 87.98 USD      | 2 / 87.98 USD    | Net Invoiced |
| 2        | MunchkinRTM High Capacity Dishwasher Basket, 1 Pack, Grey  | B07ZPMYKKS  | 6.79 USD   | 3 EA    | 20.37 USD      | 3 / 20.37 USD    | Net Invoiced |
| 3        | AmazonCommercial Mini Brush and Dustpan Set, Pack of 2, Gray   | B086WQF9SM  | 7.99 USD   | 2 EA    | 15.98 USD      | 2 / 15.98 USD    | Net Invoiced |





# Expediting Requisitions with Multiple Supplier Locations

## Expedite Requisitions

### Search Requisition Schedule Lines

To locate requisition schedule lines that have been approved and are available for manual conversion into purchase orders, edit the criteria below and click the Search button.

\*Business Unit

Requisition ID

Requisition Name

Requester

Buyer

Category

Supplier Name

Include Lines With No Supplier

Origin

### Requisition Schedule Lines

1-2 of 2 | View All

| Include                  | Requisition ID | Line | Sched |  | Item Description | Select                   | Supplier Name                                   | Location                                  | PO Qty | UOM | Price | Curr. | Amount Only |
|--------------------------|----------------|------|-------|--|------------------|--------------------------|---|---|--------|-----|-------|-------|-------------|
| <input type="checkbox"/> | 0000573529     | 1    | 1     |  | True Clear Puri  | <input type="checkbox"/> | STAPLE-CAT-001 <input type="button" value="Q"/> | ORDER <input type="button" value="Q"/>    | 5.0000 | CRT | 6.98  | USD   | N           |
| <input type="checkbox"/> | 0000573529     | 2    | 1     |  | BIC Round Stic   | <input type="checkbox"/> | STAPLE-CAT-001 <input type="button" value="Q"/> | REMITACH <input type="button" value="Q"/> | 3.0000 | PKG | 5.31  | USD   | N           |

Include All/Exclude All

Select All/Deselect All

# Expediting Requisitions with Multiple Supplier Locations

## Search Results

[View All](#)

| Business Unit | PO ID      | Purchase Order Date | PO Status | Short Supplier Name | Supplier ID | Supplier Name | Buyer | Buyer Name |
|---------------|------------|---------------------|-----------|---------------------|-------------|---------------|-------|------------|
| 43000         | 0000576513 | 09/06/2023          | Approved  | STAPLE-CAT-001      | CAT0000010  | Staples       |       |            |
| 43000         | 0000576512 | 09/06/2023          | Approved  | STAPLE-CAT-001      | CAT0000010  | Staples       |       |            |



# Expediting Requisitions with Multiple Supplier Locations

Process List

Add/Update POs

## Maintain Purchase Order

### Purchase Order

Business Unit 43000  
PO ID 0000576512  
Copy From

▼ Header ?

\*PO Date 09/06/2023  
\*Supplier STAPLE-CA  
\*Supplier ID CAT000001  
\*Buyer

## PO Supplier Information

### Maintain Purchase Order

#### Supplier Details -- Staples

Business Unit 43000 PO ID 0000576512 Supplier S' Su

\*Location ORDER

\*Address 1 Show Address Details

Contact Show Contact Details

Salesperson Show Salesperson Details

Basis C

Supplier Details Message



# Expediting Requisitions with Multiple Supplier Locations

Process List

Add/Update POs

## PO Supplier Information

Maintain Purchase Order

### Purchase Order

Business Unit 43000

PO ID 0000576513

Copy From

▼ Header ?

\*PO Date 09/06/2023

\*Supplier STAPLE-CA

\*Supplier ID CAT000001

\*Buyer

---

Maintain Purchase Order

### Supplier Details -- Staples

Business Unit 43000

PO ID 0000576513

Supplier S' Su

\*Location REMITACH

\*Address 1

Contact

Salesperson

Show Address Details

Show Contact Details

Show Salesperson Details

Basis L

# Quantity PO

- Quantity Purchase Order: used for the purchase of items where the supplier would send an invoice that is based on a quantity of goods delivered

Lines ?

1-6 of 6 | View All

| Line | Item | Description                      | PO Qty | *UOM | Category | Price     | Merchandise Amount | Status   |  |  |     |   |
|------|------|----------------------------------|--------|------|----------|-----------|--------------------|----------|--|--|-----|---|
| 1    |      | Erection and Dismantle Labor     | 4.0000 | EA   | 03138    | 75.00000  | 300.00             | Approved |  |  | +.. | - |
| 2    |      | Transportation Surcharge         | 1.0000 | EA   | 96286    | 63.00000  | 63.00              | Approved |  |  | +.. | - |
| 3    |      | ENVIRONMENTAL /HAZMAT FEE        | 1.0000 | FEE  | 10031    | 33.16000  | 33.16              | Approved |  |  | +.. | - |
| 4    |      | DELIVERY CHARGE                  | 1.0000 | FEE  | 96286    | 175.00000 | 175.00             | Approved |  |  | +.. | - |
| 5    |      | PICK UP CHARGE                   | 1.0000 | FEE  | 96286    | 175.00000 | 175.00             | Approved |  |  | +.. | - |
| 6    |      | 8000 CFM OSCILLATING EVAPORATIVE | 4.0000 | EA   | 03138    | 425.50000 | 1,702.00           | Approved |  |  | +.. | - |

[View Printable Version](#)



# Amount PO

- Amount Purchase Order: used for the purchase of services where the supplier would send an invoice that is based on an amount of service provided rather than a quantity of items delivered
  - The Amount Only check box should NOT be selected for the purchases of items, where the supplier would send an invoice that is based on a quantity of items delivered

Lines ?

1-4 of 4 | View All

Details Ship To/Due Date Statuses Item Information **Attributes** RFQ Contract Receiving

| Line | Item | Description                                   | Physical Nature | *Price Qty | *Price Date | Amount Only                         |     |   |
|------|------|---|-----------------|------------|-------------|-------------------------------------|-----|---|
| 1    |      | Full Day & Half Day Package - Conference Room | Services        | Schedule   | PO          | <input checked="" type="checkbox"/> | +.. | - |
| 2    |      | Meals (Welcome Reception, Breakfast, Lunch)   | Services        | Schedule   | PO          | <input checked="" type="checkbox"/> | +.. | - |
| 3    |      | Parking                                       | Services        | Schedule   | PO          | <input checked="" type="checkbox"/> | +.. | - |
| 4    |      | Hotel Room                                    | Goods           | Schedule   | PO          | <input checked="" type="checkbox"/> | +.. | - |

[View Printable Version](#)  
[View Approvals](#)

[Close Short All Lines](#)

\*Go to ... More ...

# PO Approval Levels

Workflow approvals for Purchasing are only needed if certain criteria are met. There are three purchase order approval levels:

- Asset Approval (optional)
- Budget Reference Approval (optional)
- Buyer Approval (required)

**View Approvals**

> **Review Lines**

∨ **Review / Edit Approvers**

**Purchase Order Approval- Asset**

Line 1: **Approved** [View/Hide Comments](#)

MOBILE HEAVY-DUTY PACKING TABLE - 72 X 36" LAMINATE TOP - Item # H-8020-LAM

**Purchase Order Approval- Asset**

**Approved**

✓ [Chuck R Mason](#)  
POAssetApprover  
09/11/23 - 8:48 AM

**Comment History**

**PO Bud Ref Approval**

Line 1: **Approved** [View/Hide Comments](#)

MOBILE HEAVY-DUTY PACKING TABLE - 72 X 36" LAMINATE TOP - Item # H-8020-LAM

**PO Bud Ref Approval**

**Approved**

✓ [Hansen, Milton](#)  
POBudRefApprover  
09/11/23 - 8:50 AM

**Comment History**

Line 2: **Approved**  
SHIPPING

**Buyer Approval**

Purchase Order 0000554390: **Approved** [View/Hide Comments](#)

**Buyer Approval**

**Approved**

✓ [Hansen, Milton](#)  
PO Buyer Approval  
09/11/23 - 8:50 AM

**Comment History**

[Return to Purchase Order](#)

# PO Approval Levels

Workflow approvals for Purchasing are only routed if certain criteria are met. There are three purchase order approval levels:

- **Buyer Approval (required)**
  - If the PO is manually entered, it routes for Buyer approval and updates to a status of 'Pending Approval' or 'Open' depending on the Requester setup.
  - If the PO is sourced from a Requisition with the Build PO's as Approved option selected, it will not route for Buyer approval.
  
- **Asset Approval (optional)**
  - Account is an Asset account, and the Profile ID is blank
    - Account ranges 800000 – 899999
  - OR
  - Account ranges 743000 – 743999 AND Amount is greater than \$3,000
  - Profile ID exists, but account is NOT an Asset account



# PO Approval Levels

- **Budget Reference Approval (optional)**
  - Budget Reference entered on PO Distribution Line is different than current fiscal year.
  - The purchase order was created from a requisition, and the Budget Reference entered on the PO Distribution Line is different than what is on the Requisition Distribution Line.

# PO Distribution Worksheet

**Question:** What is the PO Distribution Worksheet used for?

Distributions for Schedule 1

Unit :  
PO ID 0000514833

Supplier IBMCORPO-001  
Item IBM SPSS Custom Tables Academic Authorized User Term License  
Subscription and Support 12 Mo

Line 1  
Schedule 1

Status Active

\*Distribute By

SpeedChart  Multi-SpeedCharts

Schedule Qty 11.0000  
Merchandise Amount 439.78 USD  
Doc. Base Amount 439.78 USD

**Distribution** Personalize | Find | View All | First 1 of 1 Last

| Chartfields | Details/Tax | Asset Information                     | Req Detail | Statuses   | Budget Information |           |                                |          |           |                |
|-------------|-------------|---------------------------------------|------------|------------|--------------------|-----------|--------------------------------|----------|-----------|----------------|
| Dist        | Status      | Percent                               | Req BU     | Req ID     | Req Line           | Req Sched | Req Dist                       | Open Qty | Requester | Requester Name |
| 1           | Open        | <input type="text" value="100.0000"/> |            | 0000503923 | 3                  | 1         | <input type="text" value="1"/> |          | Gracier   | Read           |

OK Cancel Refresh

# PO Distribution Worksheet

**Answer:** Use the PO Distribution Worksheet when you need to split a distribution line on a PO and want to carry the requisition information to the newly split distribution line.

See the [‘Using the PO Distribution Worksheet’](#) Job Aid for additional information.

# eVerify info on Supplier

Question: Do you refer to the eVerify information stored on the Identifying Information tab of the Supplier page? (Navigation: Suppliers > Supplier Information > Add/Update > Add/Update Supplier > Identifying Information tab > Government Classifications)

## Government Classifications

EEO Certification Date



HUB Zone

### Government Sources



1 of 1



View All

\*Certification Source

E-VERIFY



E-Verify Company ID Number



### Government Classifications



1 of 1



View All

Effective Date

01/25/2017



Certification Number

587413



Certificate Begin Date



Certificate Expiration

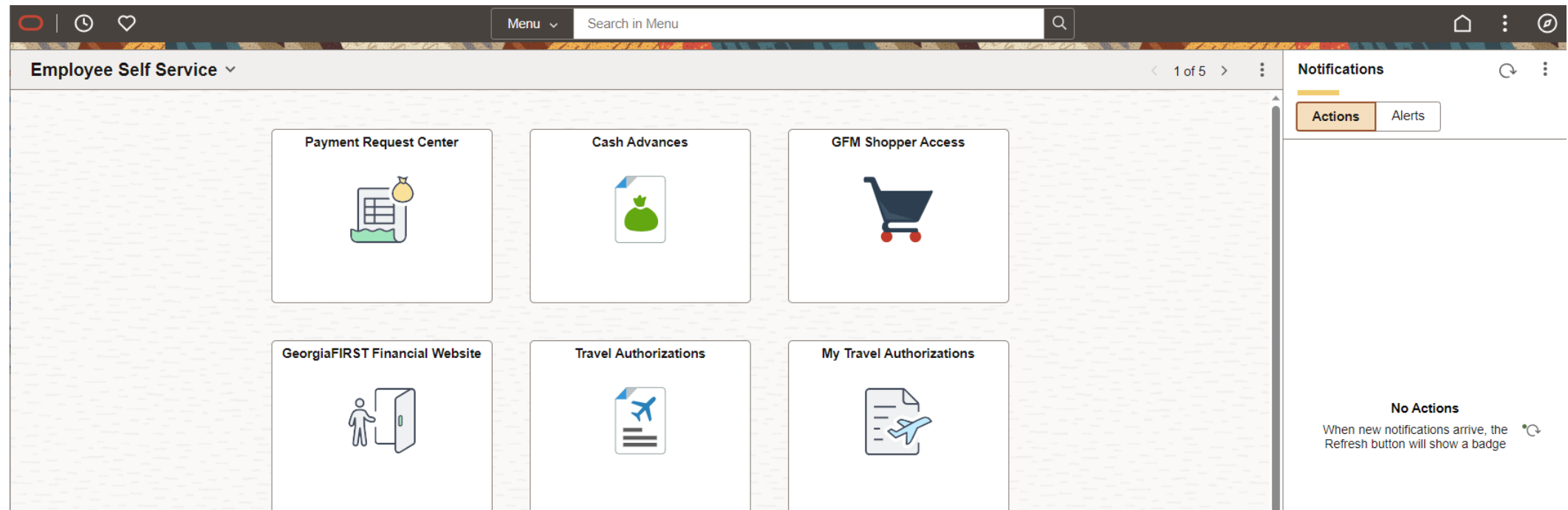


Government Classification



# New User Interface

Release 5.90, scheduled for 11/3/2023, includes updates through Image 47 and Ptools 8.60



# New User Interface

## Add/Update POs page

← | 🕒 | ❤️ | 🔍 Search in Menu | 🏠 | 🔔 | ⋮ | 🔄

**Purchase Order** [New Window](#) | [Help](#)

**Add a New Value** 🔍 Find an Existing Value

\*Business Unit  🔍

\*PO ID

← | 🕒 | ❤️ | 🔍 Search in Menu | 🏠 | 🔔 | ⋮ | 🔄

## Purchase Order

New Window | Help

### Find an Existing Value ➕ Add a New Value

▼ Search Criteria

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

🕒 Recent Searches Choose from recent searches ✎ 🔖 Saved Searches Choose from saved searches ✎

\*Business Unit = ▾  🔍

PO ID begins with ▾

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 ▾  🔍

PO Type = ▾  ▾

Purchase Order Reference begins with ▾

Hold From Further Processing

^ Show fewer options

Case Sensitive

**Search**



Nothing yet  
Your search results will appear here

Change to Search pages:

### Purchase Order

Supplier ID begins with  🔍

Supplier Name begins with  🔍

Buyer begins with  🔍

Buyer Name begins with  🔍

PO Type =

Purchase Order Reference begins with

Hold From Further Processing

^ Show fewer options

Case Sensitive

**Search**

▼ Search Results

100 rows - Business Unit "98000" PO Status "Dispatched" - Only the first 100 rows can be displayed. Refine your search to see more.

| Business Unit | PO ID      | Purchase Order Date | PO Status  | Short Supplier Name | Supplier ID | Supplier Name | Buyer | Buyer Name | PO Type    | Purchase Order Reference       | Hold From Further Processing |   |
|---------------|------------|---------------------|------------|---------------------|-------------|---------------|-------|------------|------------|--------------------------------|------------------------------|---|
| 98000         | 9800515352 | 12/11/2018          | Dispatched | UNIVOFGEOR-001      |             |               | F     | I          | Intergov   | IGA                            | N                            | > |
| 98000         | 9800514898 | 12/06/2022          | Dispatched | TEMPOHOLDI-001      |             |               |       | I          | Contr Pbk  | ACP - Piggyback                | N                            | > |
| 98000         | 9800514770 | 07/17/2023          | Dispatched | STATCOURIE-001      |             |               |       | I          | Agency     | ES-RFP-47200-199               | N                            | > |
| 98000         | 0081D2050A | 06/21/2022          | Dispatched | COMPUTERAI-001      |             |               |       | I          | Mandatory  | 99999-001-SPD0000149-0001      | N                            | > |
| 98000         | 00513061A  | 02/24/2023          | Dispatched | PUBLICRES-001       |             |               |       | \          | Contr Pbk  | (blank)                        | N                            | > |
| 98000         | 000522892A | 07/14/2023          | Dispatched | AMERIINST-001       |             |               |       | I          | Stat Exmpt | Exempt Non Profit              | N                            | > |
| 98000         | 000522888A | 06/22/2023          | Dispatched | CDW-003             |             |               |       | \          | Convenienc | SWCC: 99999-SPD-T20120501-0006 | N                            | > |
| 98000         | 000522815A | 06/20/2023          | Dispatched | REALPAGEIN-001      |             |               |       | \          | Stat Exmpt | Exempt Internet Database Subsc | N                            | > |
| 98000         | 000522527A | 05/19/2023          | Dispatched | IHEARTMEDI-001      |             |               |       | P          | Stat Exmpt | EXEMPT                         | N                            | > |
| 98000         | 000522150A | 05/31/2023          | Dispatched | FIRESYSTEM-001      |             |               | F     | F          | Open Mrkt  | OMP                            | N                            | > |








# Other Tips and Tricks




To populate today's date, enter a "T" or "t" in any date field in PeopleSoft Financials

Click Save and today's date will populate

**Pay Cycle Selection Dates**

|                  |            |   |     |
|------------------|------------|---|-----|
| Pay From Date    | 10/01/2008 |    | Wed |
| Pay Through Date | T          |   | Mon |
| Payment Date     | 07/30/2018 |  | Mon |

**Pay Cycle Selection Dates**

|                  |            |   |     |
|------------------|------------|---|-----|
| Pay From Date    | 10/01/2008 |    | Wed |
| Pay Through Date | 09/12/2018 |   | Wed |
| Payment Date     | 07/30/2018 |  | Mon |

thank you!





# UNIVERSITY SYSTEM OF GEORGIA

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## Information Technology Services