



South Carolina

PeopleSoft Tips

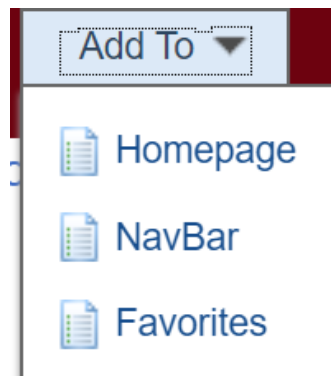
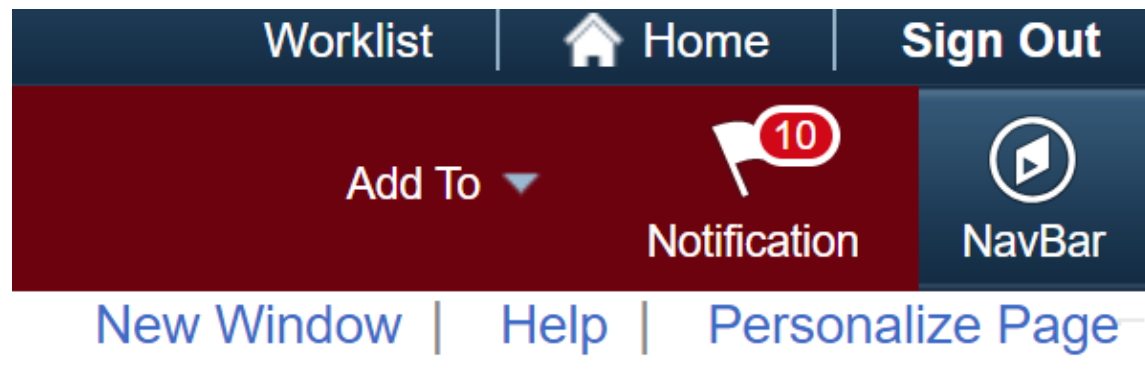
March 2019

- **Procurement Compliance & Quality Assurance Program**
- **Track financial transactions**
- **Analyzing Business Practices**

- **University community**
- **Comply with:**
 - **State of South Carolina Procurement Code and Regulations**
 - **University's Policies and Procedures**
- **Maximize time and effort**
- **Minimize costs**



Find a useful page in PeopleSoft **Add it to your Favorites**



Manage Requisitions

Main Menu > eProcurement > Manage Requisitions

- **Create requisitions**
- **Use the Lifespan**
 - **Requisition status**
 - **Approvals**
 - **Purchase order number and buyer**
 - **Payments**



Purchase Order Inquiry

Main Menu > Purchasing > Purchase Orders >
Review PO Information > Purchase Orders

- Encumbrance Balance
- Activity Summary
- Use the Actions drop down to see:
 - Activity Comments from the buyer
 - Voucher Totals – all vouchers for that purchase order



Payment Request Center

Main Menu > Employee-Self Service > Payment Request Center

- **Create a payment request**
 - **See pending approvals**
- **Use the Voucher ID number to get payment information on the**
 - **Voucher Inquiry page**
 - **Main Menu > Accounts Payable > Review Accounts Payable Info > Vouchers > Voucher**



Quality Assurance

Use Queries to improve
business practices



Queries

Use existing data to create reports to analyze purchasing practices

Purchasing Department

Helps with solutions



Use Queries as Reporting Tools

Main Menu > Reporting Tools > Query > Query Viewer

Download results to Excel SpreadSheet



**Use the Sort and Filter Tools
to analyze the data**

Use Queries as Reporting Tools

Main Menu > Reporting Tools > Query > Query Viewer

Query Viewer

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

[*Search By](#) begins with

[Advanced Search](#)

Use Queries as Reporting Tools

Main Menu > Reporting Tools > Query > Query Viewer

Query Viewer

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

*Search By

Description ▼

begins with

Search

[Advanced Search](#)

Analyze Business Practices

How are you spending your
time and **money**?



Purchase Orders

Query Name: SC_PO_ACTIVITY

Description: PO Dept/Fund Activity



Analyze Business Practices

Query Name: **SC_PO_ACTIVITY**
Description: **PO Dept/Fund Activity**

Run to HTML

1. Enter either **Dept ID** or **Oper Unit**
2. Narrow your search using:
 - Fund Code
 - GL Account
 - PO Status
 - Date Range
 - Category Code
 - Supplier ID



3. Download results into Excel Spreadsheet
4. Sort and Filter results as needed

Analyze Business Practices

Query Viewer

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

*Search By

Query Name ▼

begins with

SC_PO_ACTIVITY

Search

[Advanced Search](#)

Search Results

*Folder View

-- All Folders -- ▼



Analyze Business Practices


Query


Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
SC_PO_ACTIVITY	PO Dept/Fund Activity	Public	PURCHASING	HTML	Excel	XML	Schedule	Lookup References	Favorite
SC_PO_ACTIVITY_COMMENTS	PO's and Activity Comments I/A	Public	PURCHASING	HTML	Excel	XML	Schedule	Lookup References	Favorite




Analyze Business Practices


SC_PO_ACTIVITY - PO Dept/Fund Activity


Fund Code 


Department ID 


GL Account 


PO Status


PO Date From 

PO Date To 

Category Code 

Supplier ID 










Oper Unit 

Project 



Analyze Business Practices


SC_PO_ACTIVITY - PO Dept/Fund Activity


Fund Code	<input type="text"/>	
Department ID	<input type="text"/>	
GL Account	<input type="text" value="53005"/>	
PO Status	<input type="text" value="Dispatched"/> ▼	
PO Date From	<input type="text" value="07/01/2018"/>	
PO Date To	<input type="text" value="03/08/2019"/>	
Category Code	<input type="text"/>	
Supplier ID	<input type="text"/>	
Oper Unit	<input type="text" value="CL008"/>	
Project	<input type="text"/>	
<input type="button" value="View Results"/>		




Analyze Business Practices


SC_PO_ACTIVITY - PO Dept/Fund Activity


Fund Code 


Department ID 


GL Account 


PO Status ▼


PO Date From 

PO Date To 

Category Code 

Supplier ID 

Oper Unit 

Project 



[View Results](#)

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (354 kb)

[View All](#)

Payment Requests

Query Name: SC_AP_PAYMENT_REQUEST_DETAIL

Description: Payment Request Detail



Query Name: SC_AP_PAYMENT_REQUEST_DETAIL

Description: Payment Request Detail

Run to HTML

Defaults Request Status as Vouchered

1. Narrow your search using

- Date Range
- Account* (Range or Duplicate Code)
- Supplier ID
- Oper Unit
- Dept ID
- Fund Code

*Use the same GL Account Code in both boxes for one code

2. Download results in Excel Spreadsheet

3. Sort and Filter results as needed




Analyze Business Practices

SC_AP_PAYMENT_REQUEST_DETAIL - Payment Request Detail

Request Status

Entered From 

Entered To 

Account From 

Account To 

Supplier ID 

Oper Unit 

Dept ID 

Fund Code 

Project 

[View Results](#)



Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (868 kb)

Purchasing Cards

Query Name: SC_EX_PCARD_TRANS

Description: P-card Transactions by User



Query Name: **SC_EX_PCARD_TRANS**
Description: **P-card Transactions by User**
Run to **HTML**

1. Narrow your search using

- Cardholder Name
- Dept ID
- Project ID
- GL Account
- Oper Unit
- Trans Date Range

2. Download results in Excel Spreadsheet


**3. Sort and Filter results as needed
(Supplier Name, Cardholder, etc.)**





Analyze Business Practices


SC_EX_PCARD_TRANS - PCard Transactions by User


Cardholder Name


Department ID 

Project ID 

GL Account 

Oper Unit 

Trans Date 

End Trans Date 

[View Results](#)



Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (2731 kb)

Projects & Grants



Search by **Project ID**

Query Name: SC_PO_ACTIVITY

Description: PO Dept/Fund Activity

Query Name: SC_AP_PAYMENT_REQUEST_DETAIL

Description: Payment Request Detail

Query Name: SC_EX_PCARD_TRANS or

Description: P-card Transactions by User



QUERY RESULTS IDENTIFY:

- ✓ **Potential Blanket Purchase Orders**
 - ✓ **Equitable Supplier Use**
 - ✓ **Potential P-Card Purchases**





Blanket Purchase Orders

Reduce Workload

Query:	SC_PO_ACTIVITY (PO Dept/Fund Activity)
Date Range:	July 1, 2018 – March 8, 2019
Oper Unit:	CL008 (Student Affairs)
GL Account:	53005
Results:	345 Purchase Orders



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Duplicate Supplier ID's removed in Excel spreadsheet

➤ **38 Unique Supplier ID values remain**

Conclusion

Potentially 38 Purchase Orders vs. 345 Purchase Orders

Analyze Business Practices

Query: SC_AP_PAYMENT_REQUEST_DETAIL
(Payment Request Detail)
Date Range: July 1, 2018 – March 8, 2019
Oper Unit: CL008 (Student Affairs)
GL Account: 53005
Results: 1176 Payment Requests



Duplicate Supplier ID's removed in Excel spreadsheet

- 302 Unique Supplier ID values remain
- 28 match potential Blanket PO's (617 transactions)



Conclusion

Potentially 559 Payment Requests vs. 1176 Payment Requests

Analyze Business Practices

Date Range: July 1, 2018 – March 8, 2019
Oper Unit: CL008 (Student Affairs)
GL Account: 53005
Actual: 1521 Transactions (PO's + PR's)
Potential: 597 Transactions



Conclusion

**Save time by not creating
924 Purchase Orders and Payment Requests,
which result in 924 additional electronic
approval workflow routings**



Blanket Orders

- **Reduce PeopleSoft transactions**
- **Simplifies ordering and receiving process**
- **One Chartfield Distribution, per purpose order line**



Journal Vouchers

- **Correct Chartfield Details**
- **Reference:**
 - **Purchase order**
 - **PeopleSoft receipt number**
- **Attach copy of invoice**



Journal Voucher eForm

Main Menu > USC Finance eForms > Journal Voucher eForm

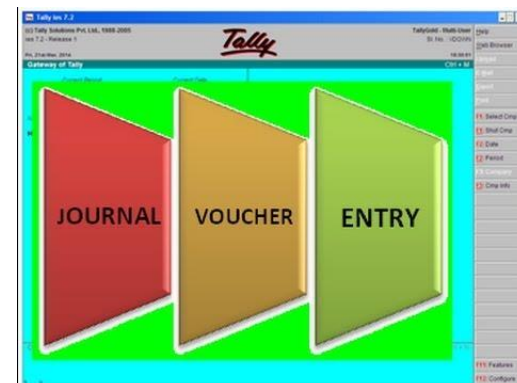
Search by:

Voucher ID

Begins With ▼

Search

Clear



Journal Voucher eForm

Main Menu > USC Finance eForms > Journal Voucher eForm

Search by:

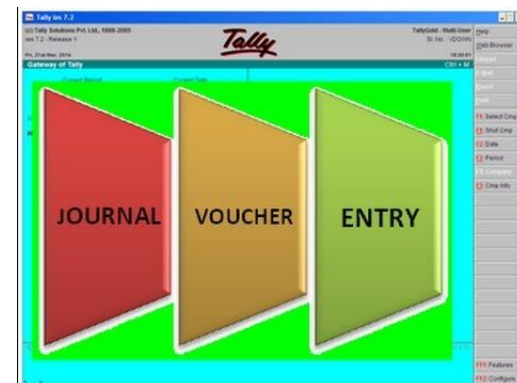
Voucher ID

Begins With ▼


01605600

Search

Clear



Track Financial Transactions

 Journal Voucher : Distribution Details

Transaction Information

Supplier ID 0000033285 STAPLES BUSINESS ADVANTAGE

From Voucher ID 01605600

Invoice Number 01605600 JV

*Effective Date 03/13/2019 

Requested By FOUNTAI3 Tracy Fountain

Current Distribution

	Merchandise Amount	Operating Unit	Department	Fund Code	Account	Class Field	PC Business Unit	Product	Cost Share	Select
1	130080.52	CL012	622300	A0001	19004	603				<input type="radio"/> No


New Distribution

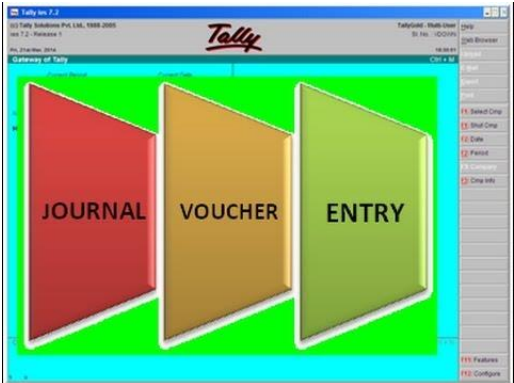
Copy Down	*Merchandise Amount	*Operating Unit	*Department	*Fund Code	*Account	*Class Field	PC Business Unit	Product	Cost Share	Insert A Row
1 <input type="button" value="Copy Down"/>	<input type="text" value="0.00"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/>

Justification

*More Information

File Attachments

Status	Action
1 	<input type="button" value="Upload"/>



Queries identify:

- a) Need for blanket orders**
- b) Fair and equitable purchasing**
- c) Need for term contracts**
- d) Methods of procurement for individual reimbursements**
- e) Identify split purchases or non-compliance**





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