HOW TO BUY THINGS AT UMBC

UMBC has multiple ways in which to make a purchase, whether it is for new equipment, paying for a catered event or compensation for a guest speaker.. All these activities have specific rules as well as methods with which we can quickly complete a transaction and maintain compliance with the State of Maryland.

This training provides a high level overview for campus users to understand what payment methods, supporting documentation and approval process will allow the purchasing and payment to be accomplished quickly and correctly.

UMBC Payment Tools

P-Card

P-Cards are credit cards that offer flexibility and convenience to make occasional purchases for a department. As a tax-exempt institution, the card has the UMBC tax ID number printed on the face of the card. The vendor/supplier must process all transactions with the tax exemption. There are also restrictions on what kind of purchases can be made on the card (i.e. no alcoholic beverages).

There are two training sessions that are required for all users of the P- Card in order for Procurement to authorize a user. The myUMBC Training page will be the location for the registration of upcoming sessions if you are interested in obtaining a P-Card for your department.

If you do not have a P-Card but think it would be a good method to make limited purchases and avoid the paperwork and time needed for a personal reimbursement, other P-Card holders on campus can make a purchase for you and apply the expense to your department's Chartstring.

P-Card Administrative Contact: David Sohns dsohns@umbc.edu

Purchasing Programs

UMBC has special pricing programs for Apple and Dell computers. These programs are administered by Department of Information technology (DoIT). There are discounts available for institutional and personal purchases

Apple Institutional Purchases
Purchases under $5,000 can be made using a P-Card through Apple's online store directly. Purchases over $5,000 will require a requisition.

For personal purchases, please visit
https://doit.umbc.edu/services/recommended-technology/apple/

Dell (All Purchases)
Please visit the dedicated DoIT page https://doit.umbc.edu/dell/ for detailed information regarding the products offered.

Travel Expenditures

UMBC has two approved travel vendors who can book travel and submit invoices directly to the University for payment. This will reduce the amount of out of pocket expense burden to the employee. Please review https://businessservices.umbc.edu/travel/ for details.

PEOPLESOFT 9.2 PAYMENT REQUEST ENTRY

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PAYMENT REQUEST OVERVIEW

Payment Requests should be opened for:

- Invoices less than $600, that are ***NOT*** recurring
- Miscellaneous reimbursements (out of pocket expenses that are ***NOT*** Travel)
- Tuition Reimbursement
- R*STARS Payments
- Honorariums
- Stipends
- Refund of Revenue
- Memberships (where P-card is not accepted)
- Registrations (where P-card is not accepted)
- Student Cultural Events (where P-card is not accepted)
- Alcohol (PO's cannot be opened for alcohol related purchases)

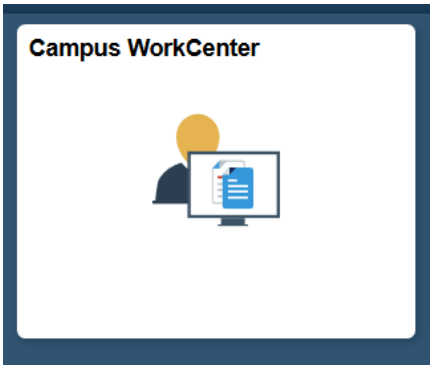
Payment Requests should ***not*** be opened for:

- Invoices over $600
- Travel Expenses (when using accounts 7040100, 7040300, 7040330, etc.)

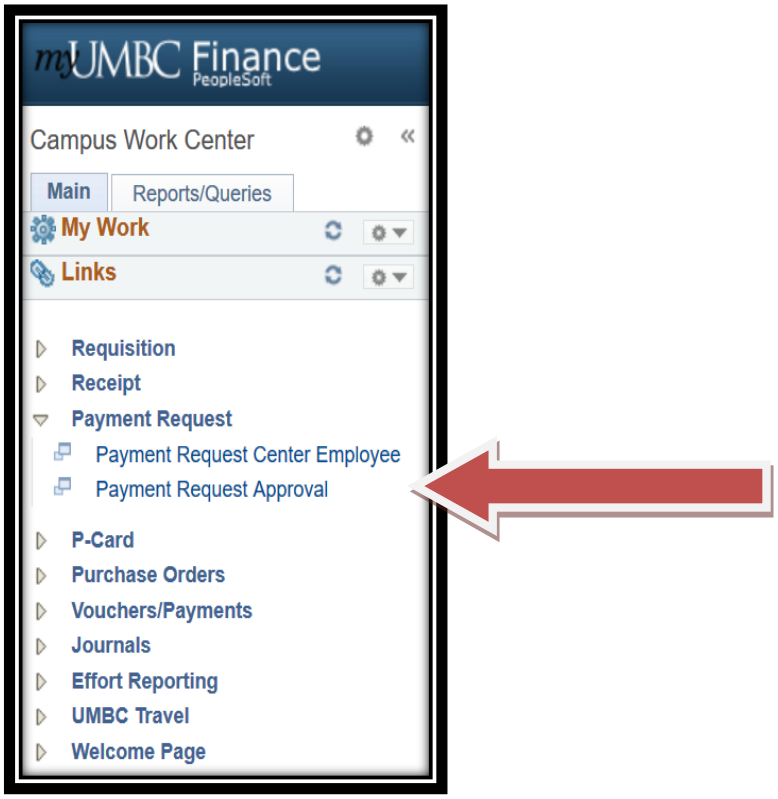
CREATING A PAYMENT REQUEST

CAMPUS WORKCENTER: PAYMENT REQUEST

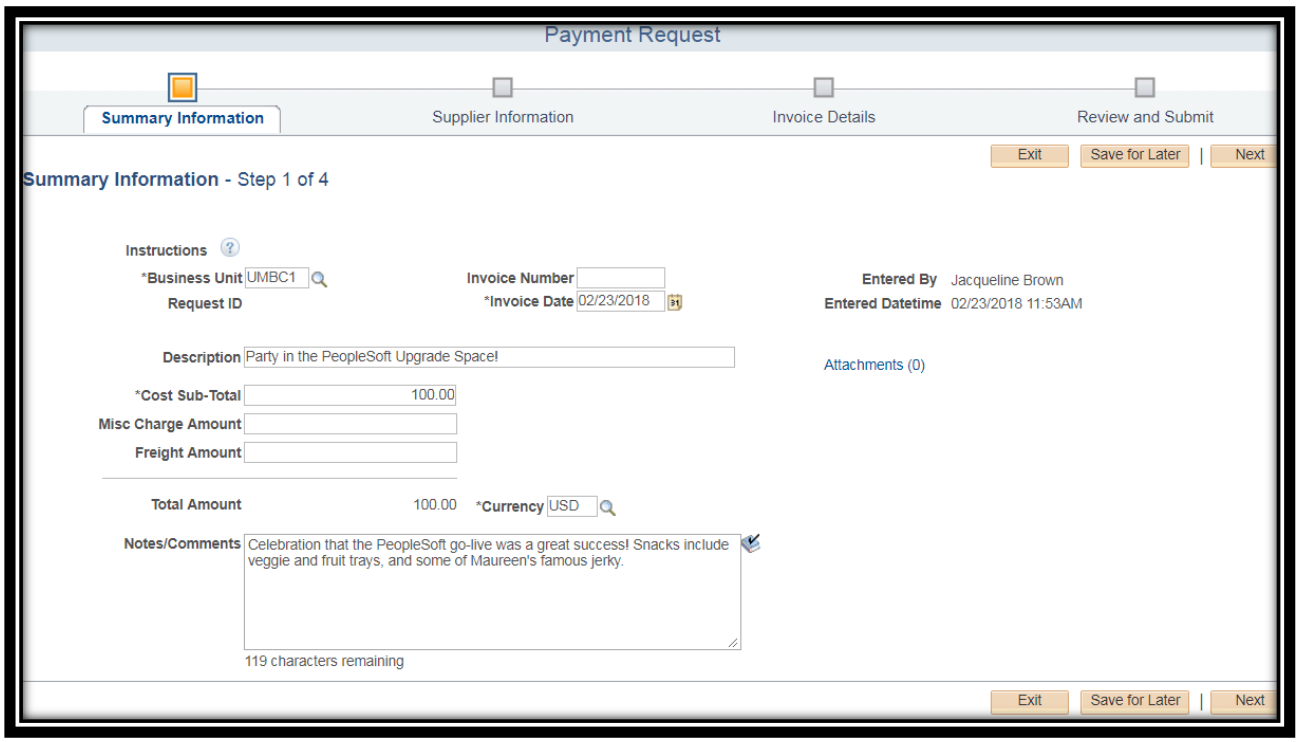
After logging in, go to the Campus WorkCenter.



On the left hand side, under Links, select the dropdown arrow next to Payment Requests. Select Payment Request Center Employee and click Create.



STEP 1: SUMMARY INFORMATION



Invoice Number - fill in the Invoice Number if it is needed - it is only needed if there is an invoice.

Invoice Date - change the invoice date if it is not the current date.

Description - Fill in the basic description based on the specific Business process outlined in the Payment Requests in 9.2 website or in the APPENDICES of this document. For example:

- Honorarium
- Stipends
- Refund of Revenue
- Membership
- Registrations
- Student events
- R*STARS

Cost Sub Total - Fill in the Cost Sub Total. Note that the formatting requires only a number and no symbol. This should be the actual total of expenses needing to be reimbursed.

Ignore the fields "Misc. Charge Amount" and "Freight Amount". These will not be used and will be hidden in the future.

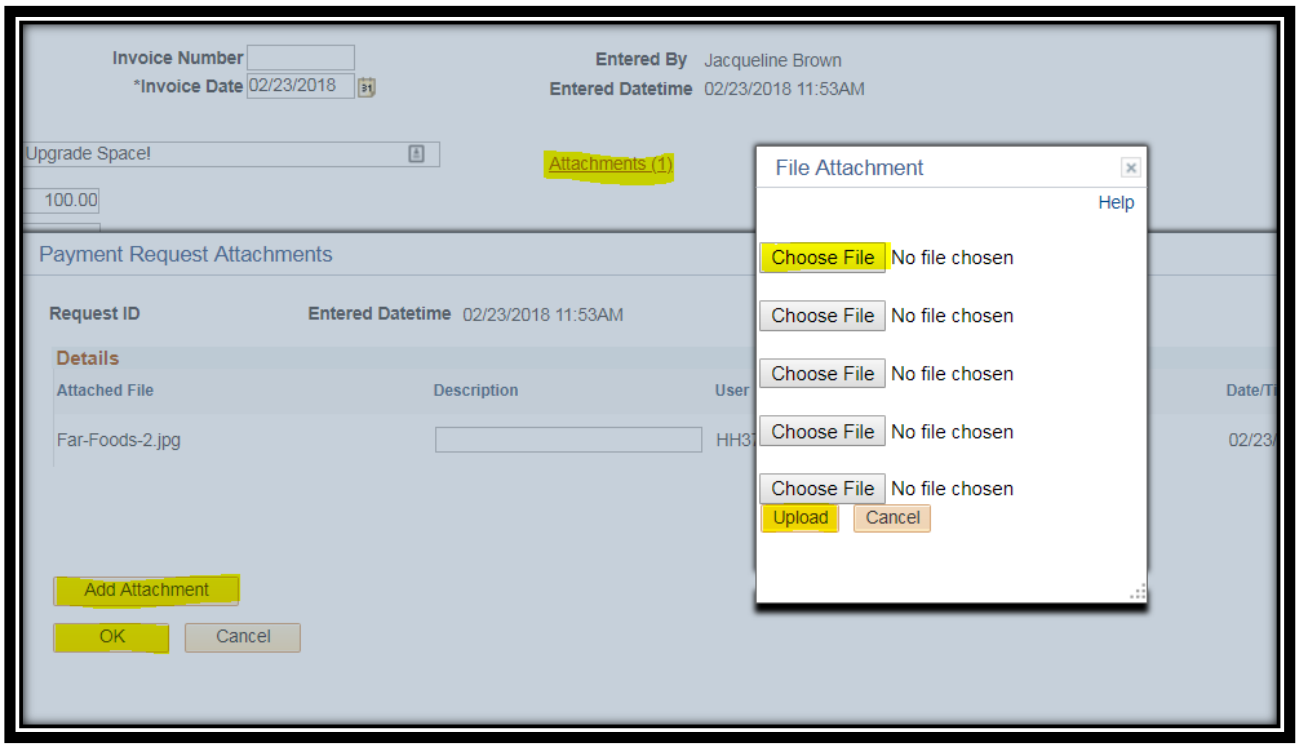
Notes/Comments -this should house any information that could not fit in the description. If this is an R*STARS payment, the R*STARS transfer information should be provided in the notes.

Attachments - Add the required supporting documentation by clicking on the attachments hyperlink on the right hand side beneath your name and entry date-time. Attachments are required

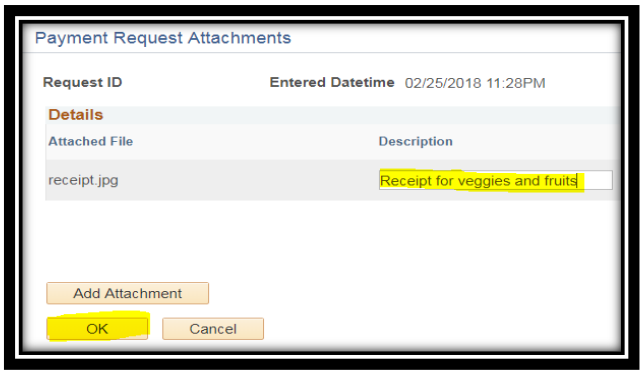
as supporting documentation, see Payment Requests in 9.2 for requirements. Examples of documentation are:

- **Invoices** – must have the Goods and Services stamp on invoice with appropriate signature
- **Detailed, Itemized, Paid Receipts** – copies of all receipts for reimbursements
- **Other items** – supporting documentation depending on the situation

You can add up to five files as attachments.

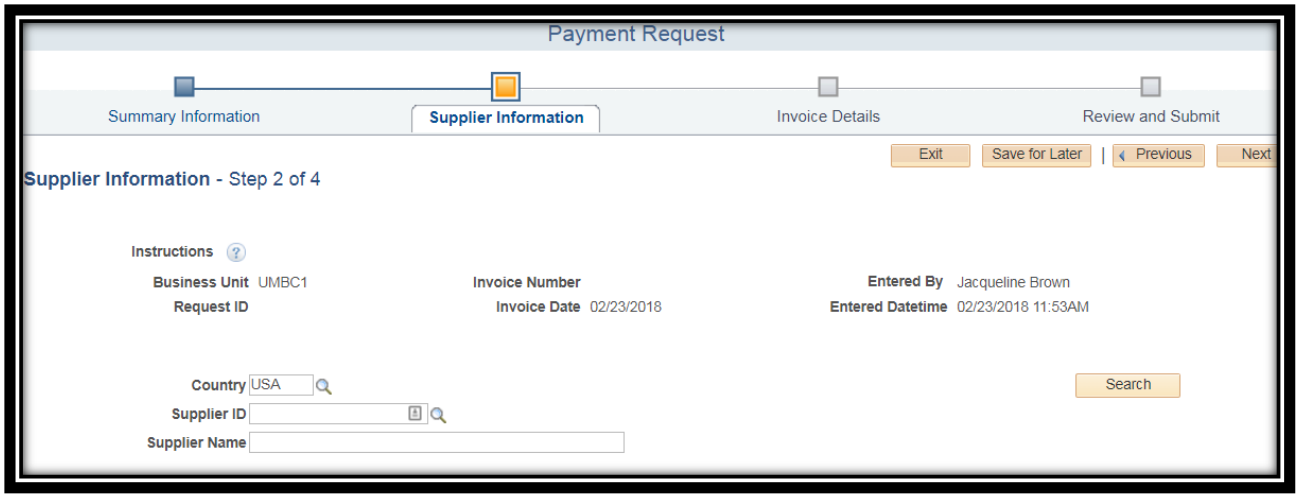


After attaching the files, fill in the description of what the attachment is for, and click ok to go back to the Payment Request.



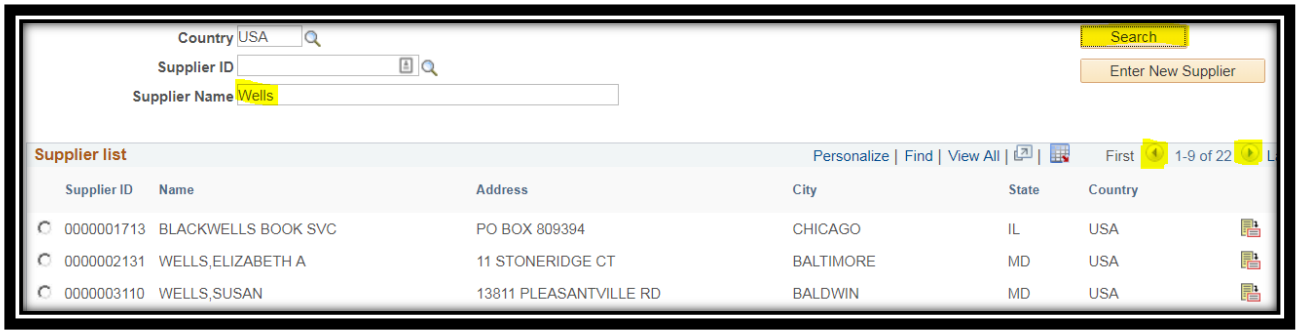
Click Next.

STEP 2: SUPPLIER INFORMATION



Supplier Information - If you know the Supplier ID or Supplier Name, or a partial of either of those fields, enter it into the corresponding field, and click **Search**.

Use the arrows in the top right hand corner of the search results table, to sift through all results available.

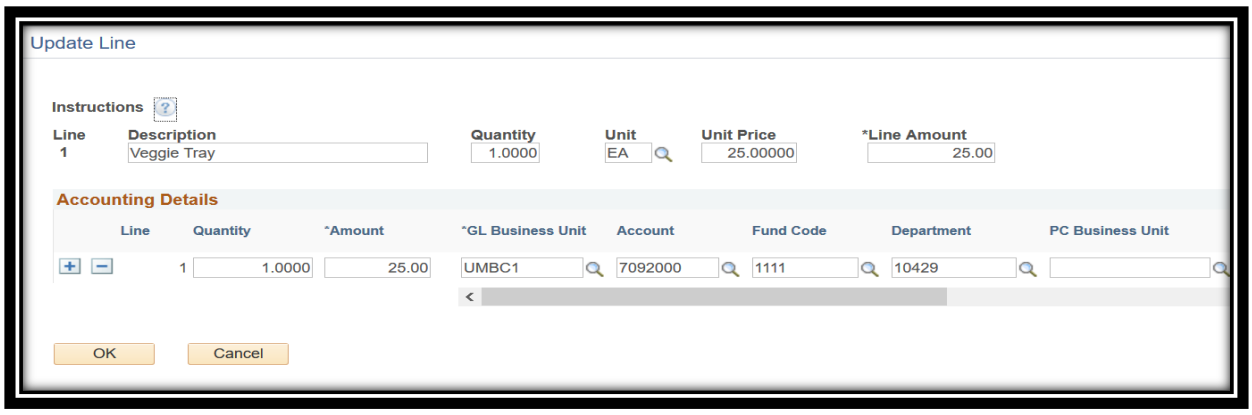


Click on the magnifying glass next to Supplier ID to search for Supplier by either Supplier ID or Short Supplier Name. Click on the link of the supplier to have it added to the Payment Request.

See Appendix A to "Enter New Supplier" at this step.

STEP 3: INVOICE DETAILS (ADD LINES)

Click Add Lines while on the Invoice Detail Page. Fill in the Description, Quantity, Unit, Unit Price, and Line Amount.



Fill in the Chart String that correlates to the Payment Request. Verify with your Supervisor if you are unsure what Chart String you should be using.

- GL Business Unit = UMBC1 (default)
- Account
- Fund Code
- Department
- PC Business Unit - this needs to be entered before entering the Project id or Activity.
- Project id
- Activity
- Prog Fin -the field Prog Fin is far to the right, because it will be auto-populated in the future.

Click OK after finishing the line. Review the details on the main page, and add more lines if needed. Once finished, click Next.

STEP 4: REVIEW AND SUBMIT

On the final page, review all the information present and verify it looks correct. Click on the Previous button to go back and edit any information if necessary.

Once reviewed, click Submit. It will be forwarded for approval. Please note that if entering a New Supplier, it may take AP some additional time to process the payment request, because they have to enter the supplier in the system and configure it before the Payment Request can be approved and finalized.

CHECKING THE STATUS

To check the status of any Payment Request you have submitted, go to the Payment Request Center Employee page from the Campus Workcenter.

This page shows all Payment Requests you have submitted, and what stage they are in. If it says Pending Approval, it could be in any of the three approval stages mentioned in the Approving a Payment Request Section.

PAYMENT REQUEST APPROVAL SECURITY

PEOPLESOFT ONLINE APPROVAL FOR DEPARTMENT FORM 9.2

Security for Payment Request Approval is granted via the PeopleSoft Online Approval For Department 9.2 Form.

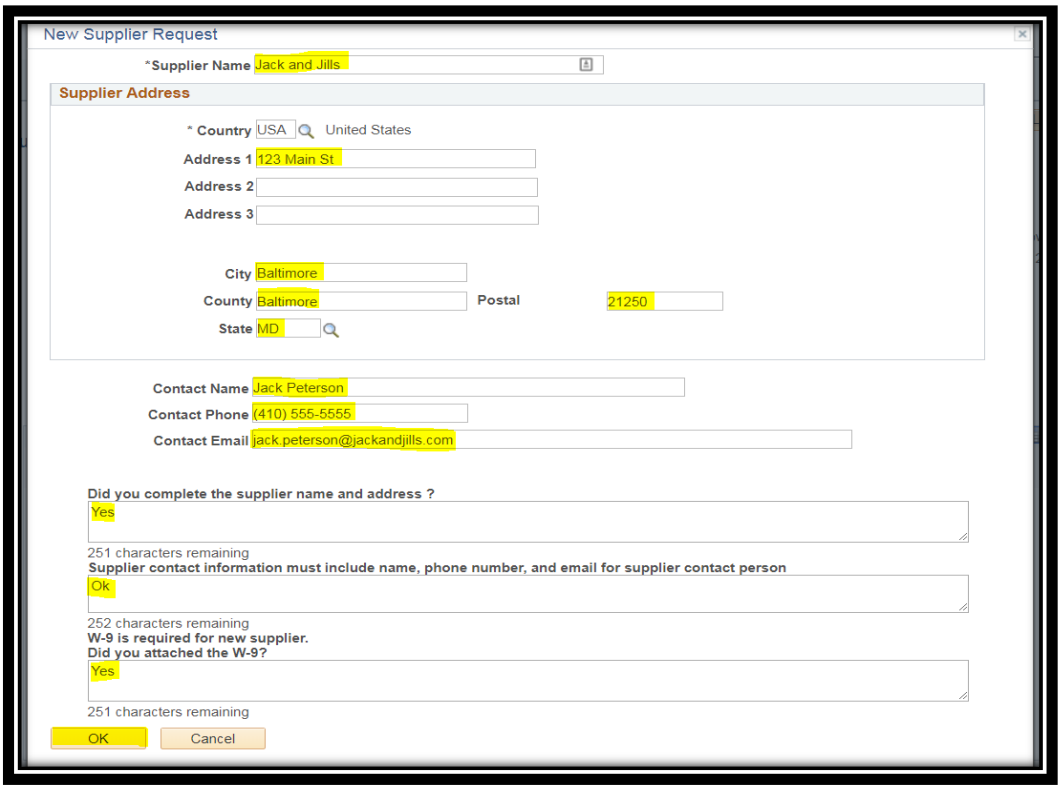
The approvers for that department(s) listed in the Payment Request will be notified based on this form.

APPENDIX A: ADDING A NEW SUPPLIER

If the name of the supplier you need cannot be found because it is a new supplier, click on the Enter New Supplier from the main Supplier Information Page.

Note that this button only appears after you have clicked Search to find a supplier. This is to ensure that you check the system to make sure that the supplier does not already exist.

Fill in the Supplier Name, Address, City, County, Postal Code, State, Contact Name, Contact Phone, Contact Email, and answer the three questions at the bottom. The questions are a checklist of everything that needs to be completed to enter a new Supplier.



The last question asks if you attached a W-9 for the Supplier. Say yes, click OK, and make sure to add it to the attachments on the previous page. You can do this by selecting the Previous button at the bottom of the screen from the Supplier verification page.

After adding the attachment for a new supplier, click Next and Next again on the bottom of the page.

APPENDIX B: BUSINESS PROCESS | REQUIRED DOCUMENTATION

HONORARIUM

The State of Maryland Ethics Commission defines honorarium payments as the payment of money or anything of value for: 1) speaking to, participating in, or attending a meeting or other function; or 2) writing an article that has been or is intended to be published.

An honorarium payment is provided as a token of appreciation for participation in an activity or event, and not as a contractual obligation to pay for services rendered. Honorariums are usually one-time payments made to an individual (not a corporation, business or partnership) who is not an employee of the University, for a special and non-recurring activity or event.

"Usual Academic Activity" means activity conducted for the benefit of the honorarium-paying Institution and includes lecturing, teaching, readings, and performances, conducting research, attending meetings, symposia or seminars, or otherwise sharing knowledge.

Determination of Honorarium Payments:

1. Is the individual a business, corporation or partnership?
2. Was the payment amount negotiated between the University and the individual?
3. Is there a contractual agreement?
4. Are the individual's services recurring?
5. Is the individual a UMBC employee or student employee?
6. Did the individual set the price?

If you have answered **"yes"** to any of the above questions, the payment **does not** qualify as an honorarium.

Please Note: Under IRS regulations, honorarium payments are considered taxable income. Therefore, as a matter of policy, the recipient of an honorarium may not transfer the payment to another organization or individual. If the honorarium recipient wishes to transfer the payment to another organization or individual, he or she must receive the money and then donate it.

REQUIRED DOCUMENTATION:

- Honorarium Form **https://businessservices.umbc.edu/files/2018/03/Honorarium-Form.xlsx**
- Please review the UMBC Guide for Honorarium Payments before submitting the Payment Request

STIPEND PAYMENTS

A stipend is a fixed sum of money paid periodically for services or to defray expenses. It is often distinct from a wage or a salary because it does not necessarily represent payment for work performed. Instead it is often paid to individuals who are participating in an internship, apprenticeship, graduate work, or a fellowship, just to name a few. A stipend may also be paid out on a less frequent basis than a regular paycheck; often, stipends are given once per month, or even as a lump sum once per semester. **Please Note:** The income from stipends is reportable, per IRS regulations.

INVOICES

- Every invoice should clearly be invoiced to UMBC 1000 Hilltop Circle, Baltimore MD 21250.
- The invoice must sufficiently describe the details of the goods or services being paid including the state that the goods or services were rendered and the state of the invoice.
- Each invoice must contain the vendor's name, remittance address and federal taxpayer identification number or, if owned by an individual, his/her social security number.
- Goods and services stamp must be on the invoice with the appropriate approval signature.
- https://businessservices.umbc.edu/paymentrequest92/

MISCELLANEOUS EXPENSES

Miscellaneous Expenses (Out of Pocket Expenses)

- Detailed, itemized receipt showing payment and the method of payment (cash, debit/credit card, etc.)
- Meal Approval Form, if applicable
- List of attendees and their affiliation, if applicable
- Moving Expense Worksheet and a signed appointment letter, if applicable
- UMBC Inventory Tag Number, if applicable
- Flyer and/or posting for an event, if applicable
- https://businessservices.umbc.edu/paymentrequest92/

TUITION REIMBURSEMENT

- Approved Application for Tuition Reimbursement from Human Resources
- Copy of grades, showing a grade of "C" or better
- Itemized bill with proof of payment

R*STARS PAYMENTS

- Invoice or other detailed documentation (memorandum, etc.) Invoices need the goods and services stamp with the appropriate approval signature.
- R*Stars Transfer Information, which includes the Agency #, PCA, Object and T-Code.
- https://businessservices.umbc.edu/paymentrequest92/

STIPENDS

- Detailed documentation of stipend amount
- Please review the UMBC Guide for Stipend Payments before submitting the Payment Request
- https://businessservices.umbc.edu/paymentrequest92/

REFUND OF REVENUE

- Documentation showing the original deposit of funds
- https://businessservices.umbc.edu/paymentrequest92/

MEMBERSHIPS

- Membership form from vendor
- https://businessservices.umbc.edu/paymentrequest92/

REGISTRATIONS

- Registration form from vendor
- https://businessservices.umbc.edu/paymentrequest92/

STUDENT CULTURAL EVENTS

- Contractual Agreement
- https://businessservices.umbc.edu/paymentrequest92/

PEOPLESOFT 9.2 REQUISITION ENTRY

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REQUISITION OVERVIEW

Requisitions should be opened for:

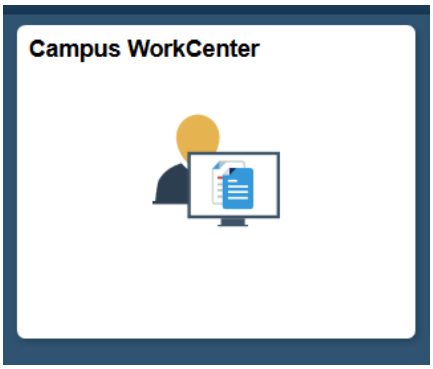
- Invoices over $600
- Recurring payments

Requisitions should *__NOT*__ be opened for:

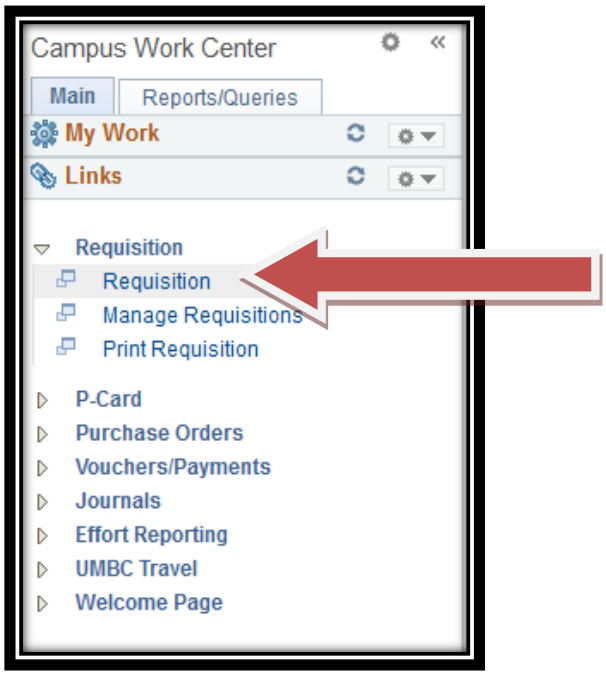
- Invoices less than $600
- Miscellaneous reimbursements
- Small dollar amounts
- Tuition Reimbursement
- R*STARS Payments
- Alcohol (PO's cannot be opened for alcohol related purchases)
- Travel
- Moving expenses

CAMPUS WORKCENTER: REQUISITION

After logging in, go to the Campus WorkCenter.



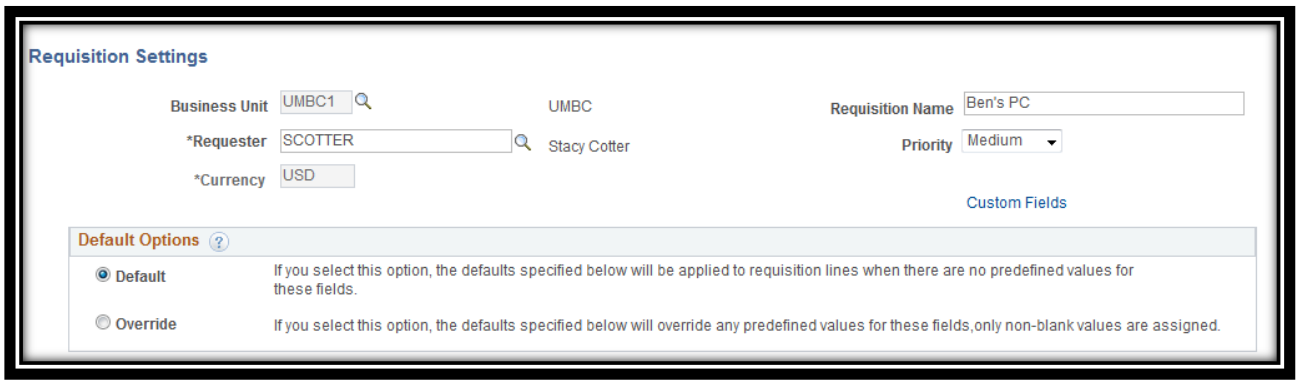
On the left hand side, under Links, select the dropdown arrow next to Requisition. Requisition, fill in the appropriate Requestor information and click OK.



REQUISITION SETTINGS

UMBC1 Business Unit will Default, along with the name of the default Requestor's name. A magnifying glass is available to search for other names.

In 9.2, instead of submitting a requisition on behalf of someone else, you can now leave the Requestor as yourself, and put in details of what the requisition purpose in the Requisition Name field.



Default:

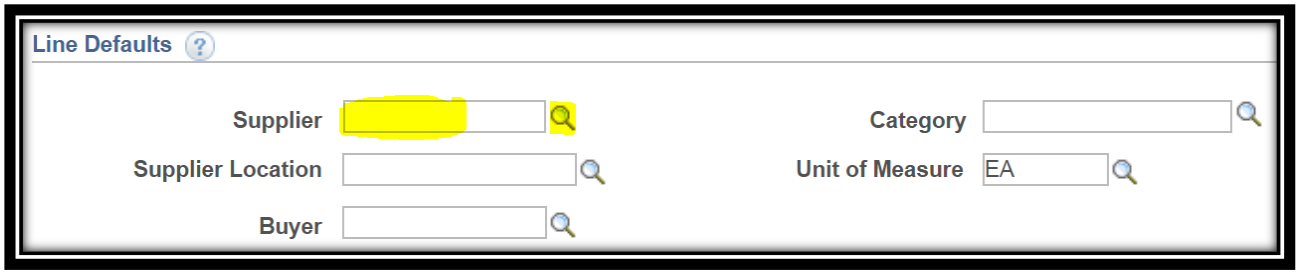
The values specified in the Supplier, Shipping, and Distribution (Accounting) sections will carry over to the requisition lines when there are no predefined values for those fields.

Override:

Select Override to update the values specified in the Supplier, Shipping, and Distribution (Accounting) sections will override any predefined values for those fields. Only non-blank values are assigned. This may need to be done more than once if multiple lines are entered.

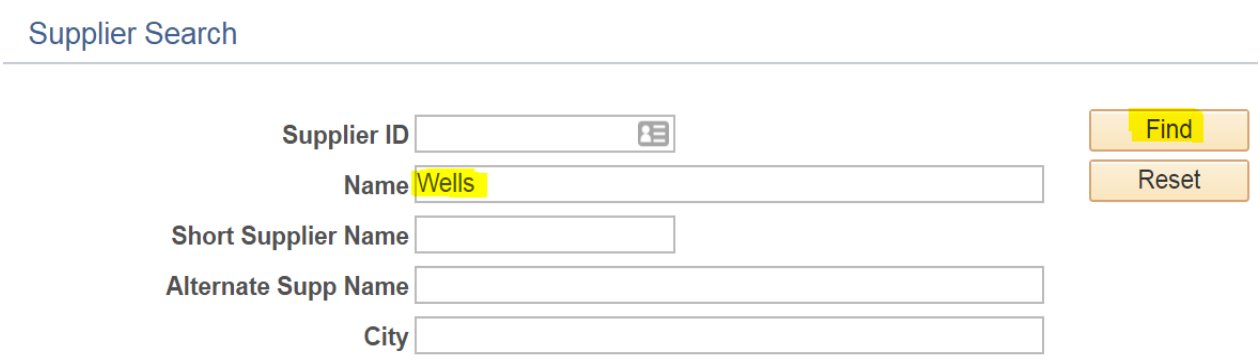
LINE DEFAULTS

Enter the Supplier ID if you know it. If you do not know it, click on the magnifying glass icon to do a formal lookup.

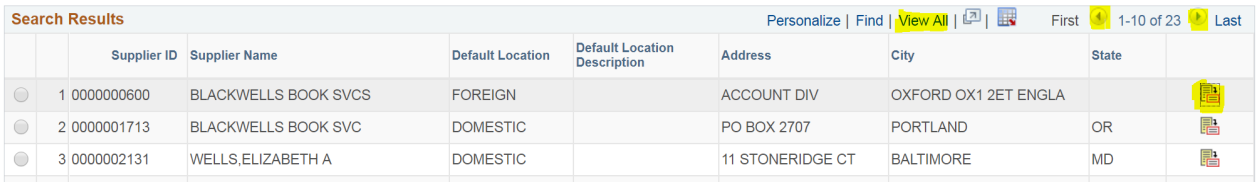


From here you can put in a partial name in the name field, or data in any of the other fields to help narrow down your search results.

Click Find to have the search results populated beneath the search fields.



If what you are looking for does not show up right away, click on the left and right arrows to scroll through all search results, or click View All to have all search results show up in the same window.



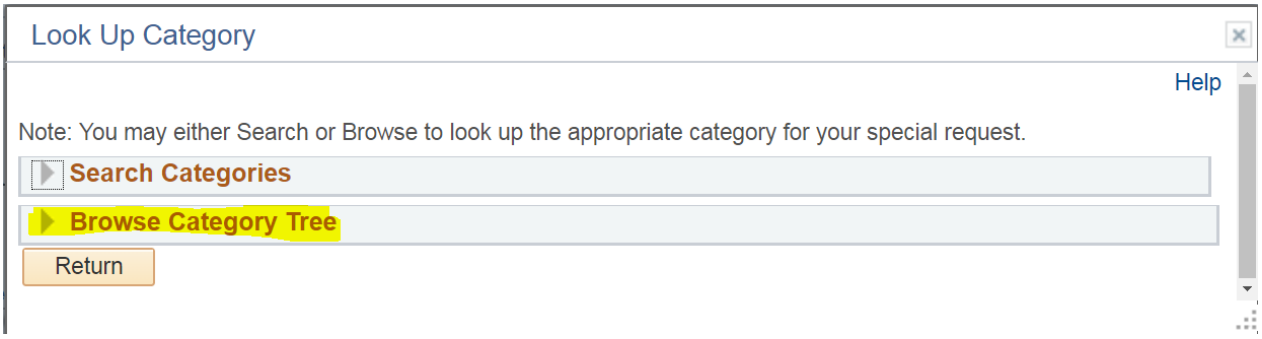
Select the **Radio button** next to the appropriate supplier and click Select to have the correct information populated on the Requisition Entry page.

Notice that both the Supplier ID and the Supplier Location is now filled in on Line Defaults.

Next, enter the Category number if you know it. Please note that categories and their associated numbers have recently changed. As a result, for the first couple of Requisitions entered, it might be beneficial to double check the Category by using the look up tool.

If you do not know the category number or if you would like to verify you have the correct Category ID, click on the magnifying glass next to Category to do a more formal lookup

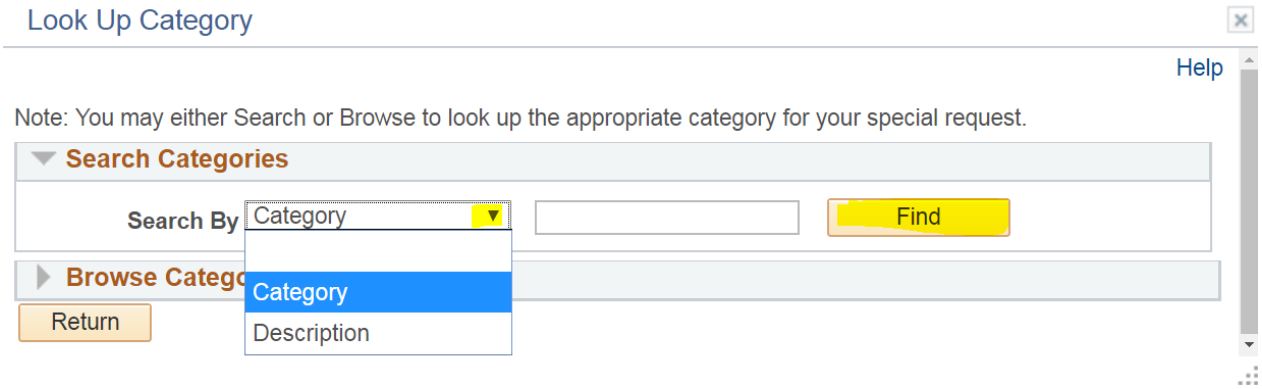
Ignore the Browse Category Tree section for now. It only pulls back a tree we do not currently use.



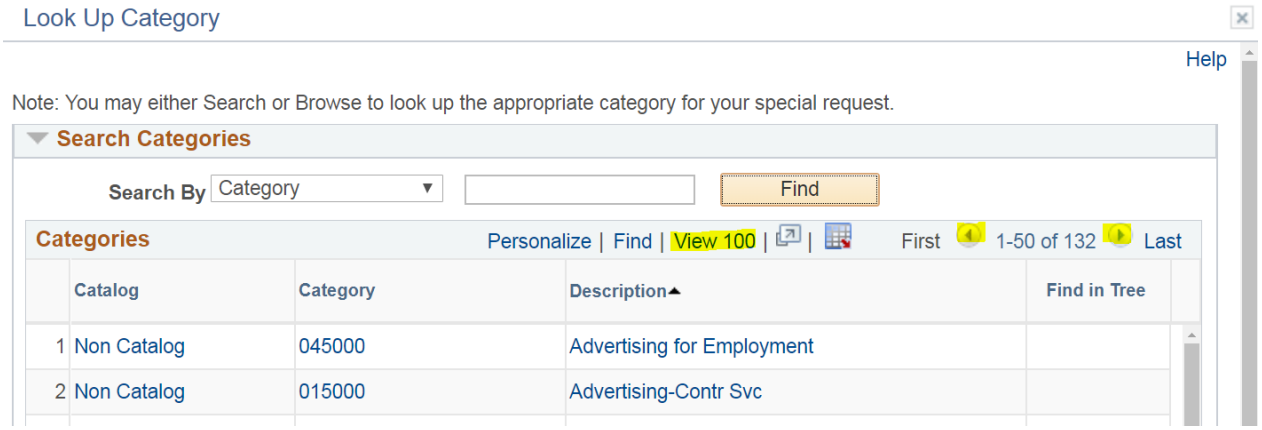
Instead, focus on the Search Categories section.

From here, you can specify search terms for Category or Description, or you can leave the field blank to find all Categories.

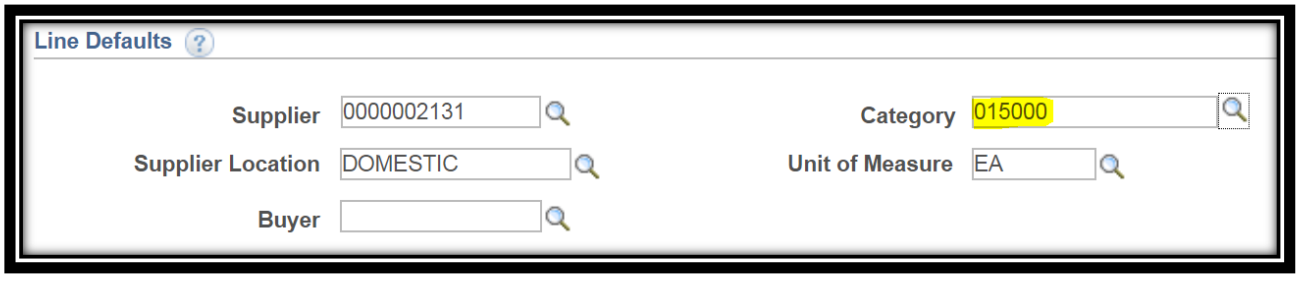
Click Find to show results.



You can click on View 100 to display 100 top results instead of 10. You can also select the right or left arrows to scroll through the pages to locate a category that is not listed in the top results.



Once you locate the appropriate category, click on any field that is clickable that relates to it (the Catalog Number, Category Number, or Description.) This will bring you back to the Requisition entry page, and will populate the Category field with the appropriate Category ID for you.



Unit of Measure will default to EA for Each. In most cases, this will be acceptable, however, use the magnifying glass to search for an appropriate code.

The system will now automatically assign a buyer based on the category code selected and the dollar amount on the PO. While the buyer field will remain blank after selecting a Category code, know that if left blank the system will still assign the requisition to the appropriate buyer.

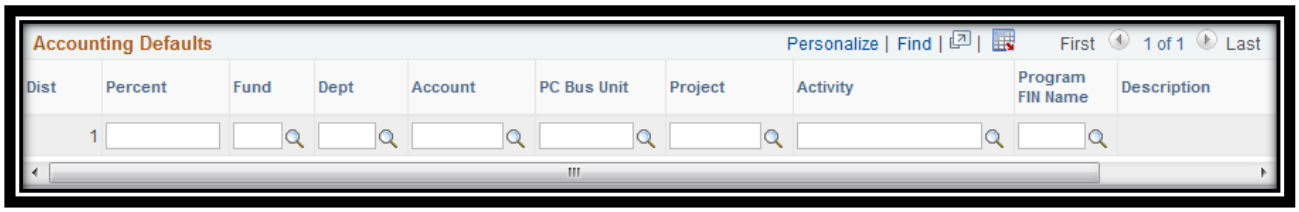
If you would like to put in a specific buyer for those rare occasions when the situation calls for a non-default selection, you can input that buyer's User ID in the Buyer field to override the system default buyer for that category code.

- Use the magnifying glass next to Buyer to search for a buyer's name.
- Avoid buyers with (RETIRED) next to their name, which will soon be deactivated.
- To select an active buyer, click on the hyperlink for the User ID or Name of the buyer to be assigned. This will populate that Buyer's User ID on the Requisition Settings page.

SHIPPING AND DISTRIBUTION DEFAULTS

UMBC's Shipping Default is WHSE.

The Attention field holds the "Attention To" information for the shipping label.

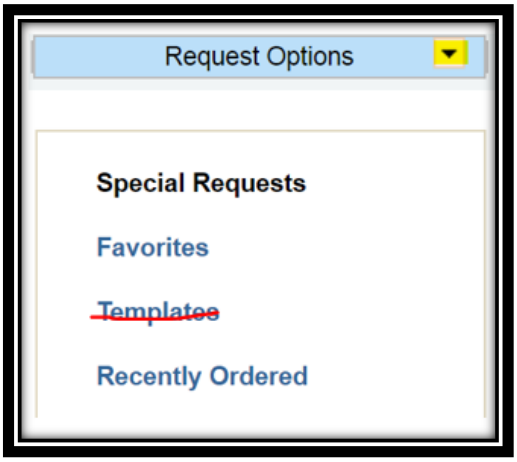


Input your chartstring in the Distribution Defaults section.

- Fund
- Department
- PC Business Unit (PC Business Unit Must be populated BEFORE entering Project ID.)
- Project
- Activity
- Program FIN
- **Account will populate from the Category selected**
- **Click OK**

EDIT REQUISITION PAGE

Once you have clicked OK, you are brought to "Edit Requisition" page. If menu is collapsed, click on Request Options to have a menu brought up.



Special Requests is the default option to create requisition request.

Favorites or Recently Ordered: To create a request based on a favorite previous requisition or recently ordered item, select the corresponding menu item. Each option will bring you to a page where you can select the template or previously created requisitions.

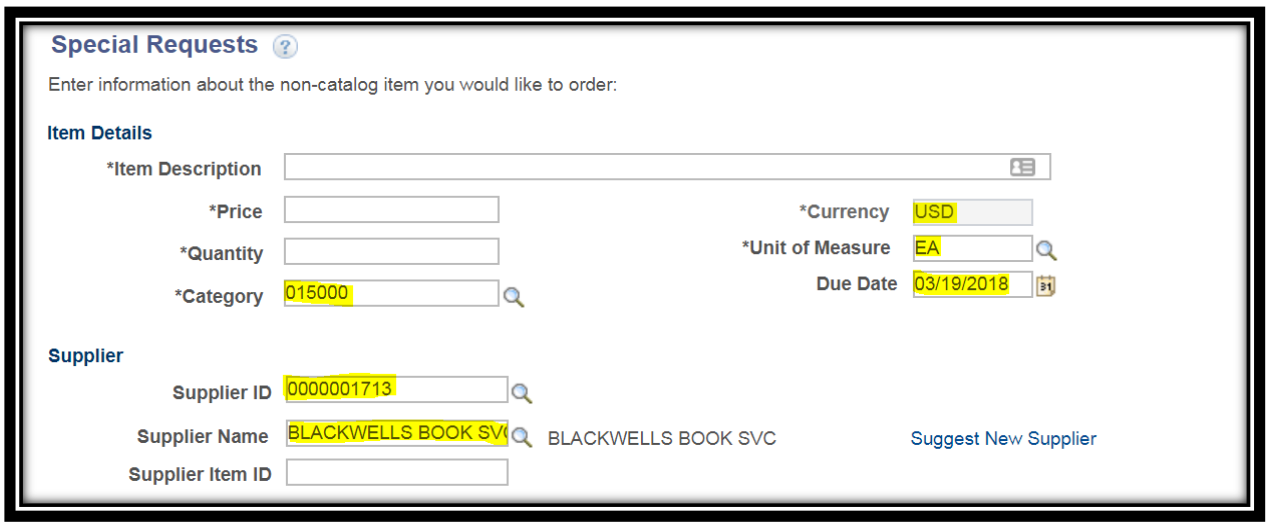
Ignore the Templates link. Templates will not be supported at UMBC and link will soon disappear.

For now, we will create a **Special Request** (new name for requisition).

Currency, Unit of Measure, Due Date, Category, Supplier ID, and Supplier Name all carried over from the Requisition Settings page. It can be selected here if you skipped the first screen.

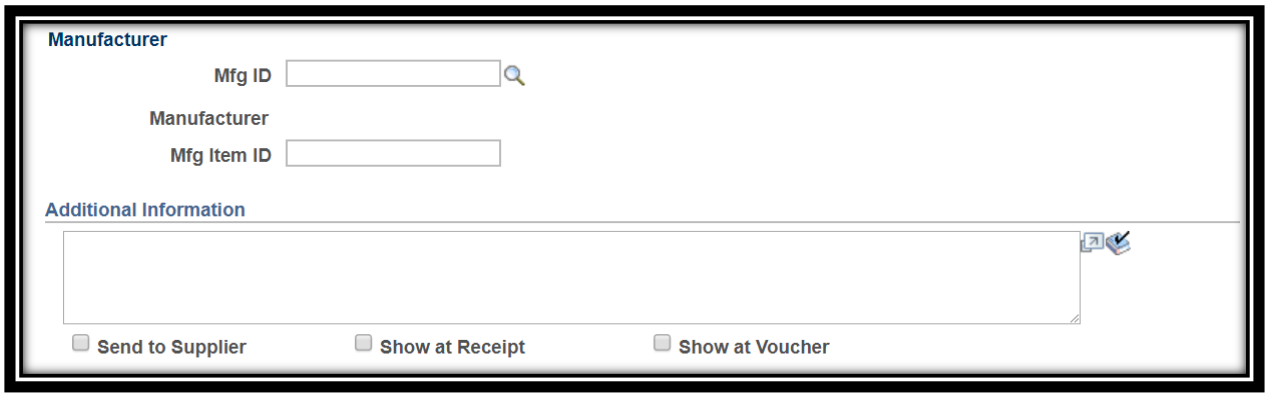
Item Description will appear on the Purchase order, please be detailed.

Price and Quantity. The price can have two decimal places but the quantity should be a whole number. No special characters can be used in the price field (such as "$").



Below: Manufacturing IT and Manufacturing Item ID leave blank.

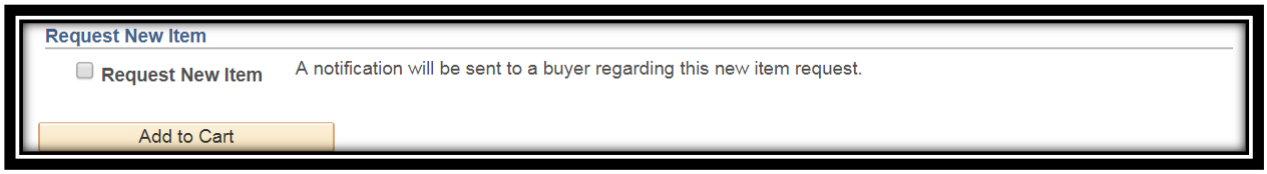
Additional Information for any additional information you have about the item in this field.



Select the checkboxes next **to Send to Supplier, Show at Receipt**, or **Show at Voucher** if these apply.

At the bottom of the screen is **Request New Item.**

If this is a new item, select the checkbox next to Request New Item. A notification is sent to the buyer regarding the request.



When finished, click **Add to Cart** at the bottom of the page.

Once added to the cart, the Special Request page clears out and you will see that the cart icon in the top right hand corner has a number next to it. Every time you add an item, the number increases. You can click on the cart icon to review all items added to the Requisition.

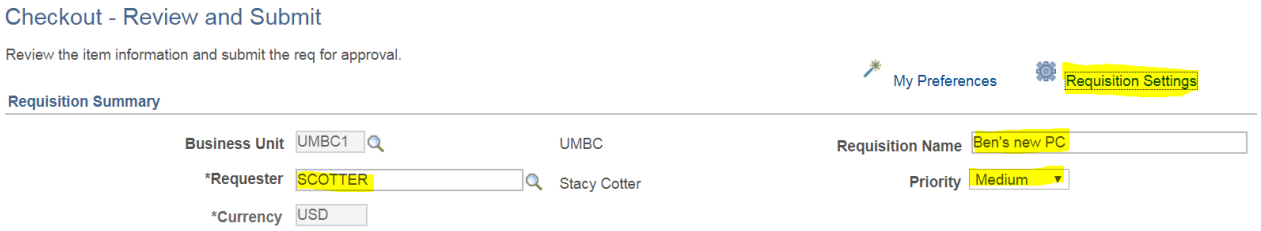
Fill in the fields that are blank for each new item on the Requisition.

When finished, click on the Checkout button at the top right hand corner.

CHECKOUT - REVIEW AND SUBMIT

REQUISITION SUMMARY

In the Requisition Summary section, you will see a review of the Requisition Settings again. From here you can change the Requestor and the Requisition Name.

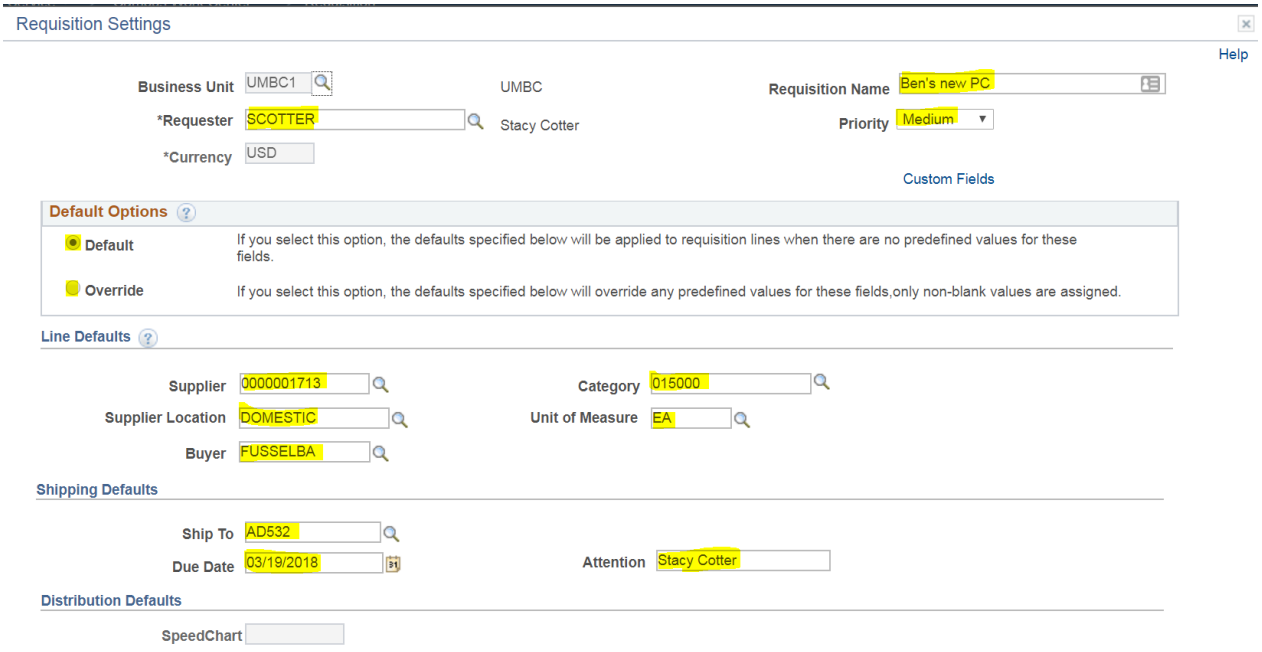


CHANGE REQUISITION SETTINGS

You can change the Requisition Settings by clicking on the Requisition Settings hyperlink in the top right hand corner.

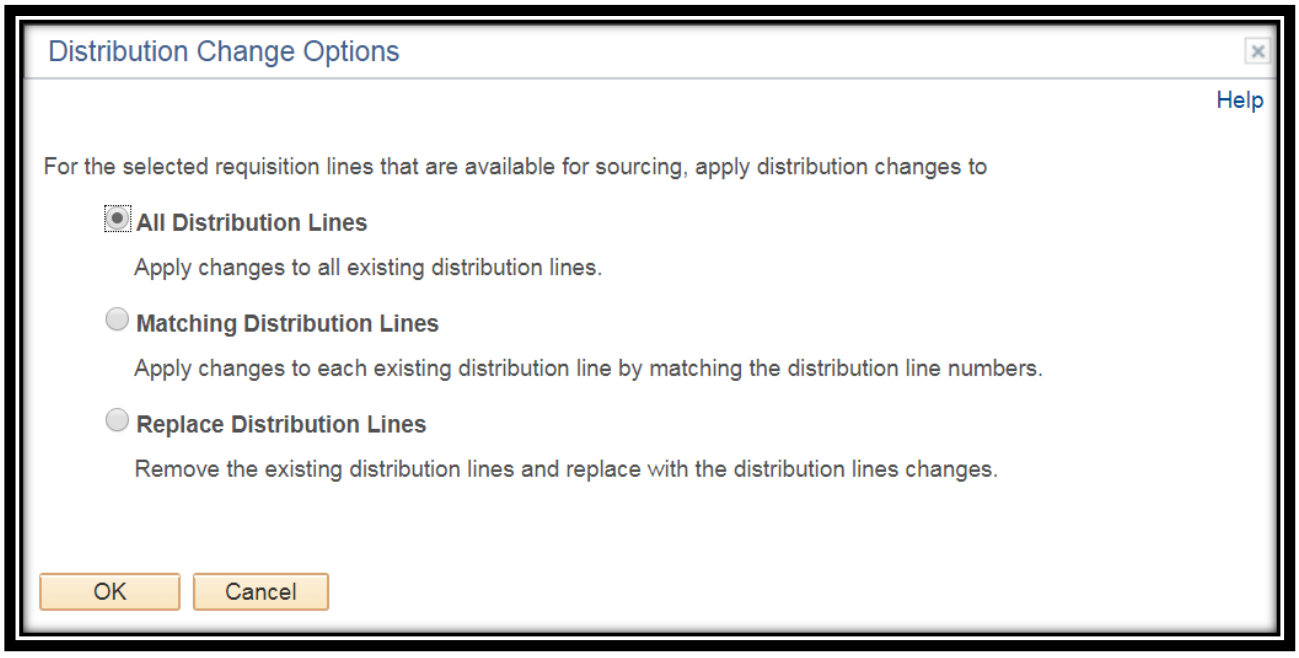
From here you can change the Requestor, Requisition Name, Default Options (Default or Override), Supplier ID, Supplier Location, Buyer, Category, Unit of Measure, Ship To field, Due Date, Attention

field, and any part of the chartstring that was provided on the initial page one sees when creating a requisition.



Click OK to save the changes. Click Cancel to cancel the action.

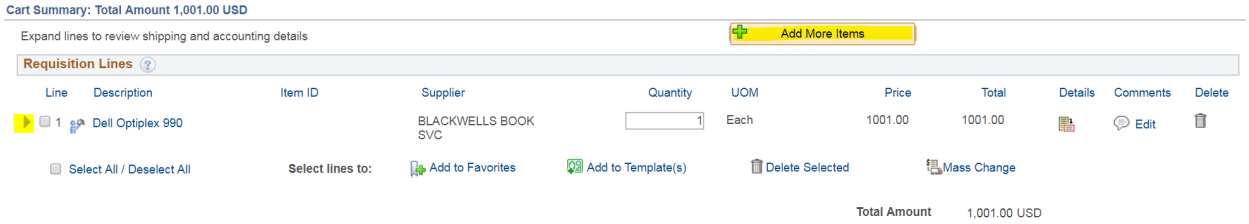
If you click OK, you will get the following popup:



Select the radio to which action you would like to take. Read option carefully.

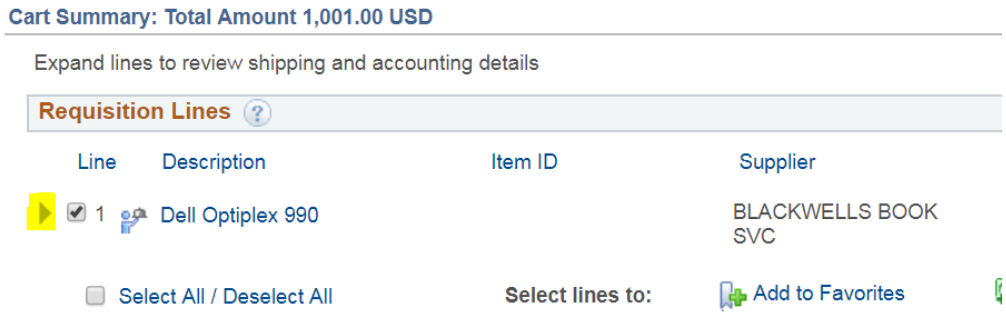
CART SUMMARY

When you get to the final page, you can see all lines that you have added to the order. Verify the information is accurate on this page.

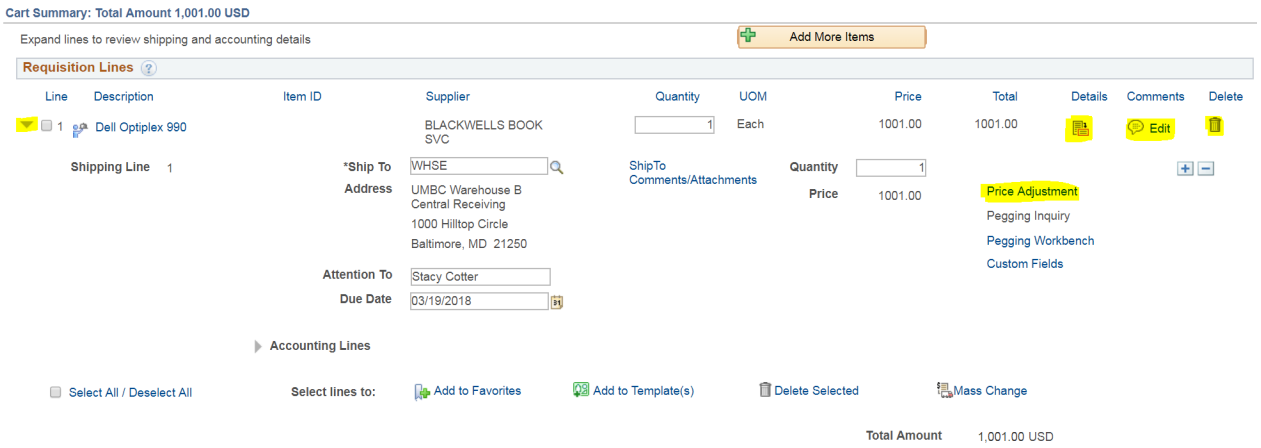


In the Cart Summary section, you can add more items by clicking on Add More Items. Clicking Add More Items will bring you back to the Special Request page, where you can add additional lines and then come back to the checkout screen by clicking the Checkout button.

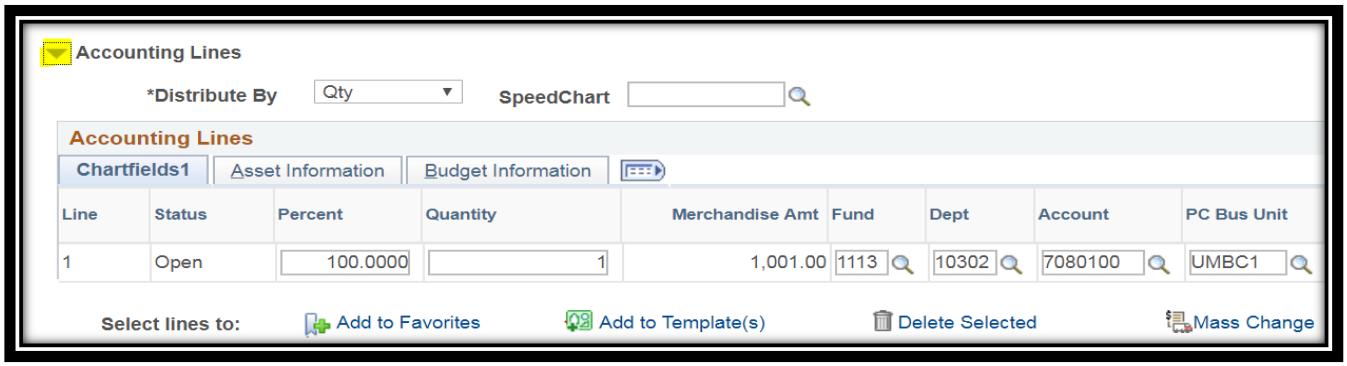
Back on the Final Checkout page, you can see all the line details by clicking the dropdown arrow next to the individual lines.



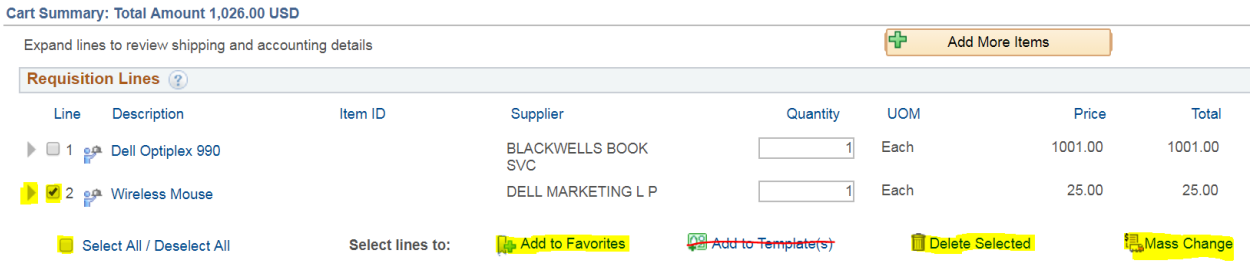
In addition, you can see the full details by clicking on the details icon. You can edit comments on the line by clicking the Edit button under the Comment column. And you can delete the line by clicking on the trashcan icon under the Delete column.



You can also view and edit the accounting line by clicking the dropdown arrow next to Accounting lines in the Line Details section.



Collapse the line fully by clicking on the dropdown arrow next to the Line Number checkbox

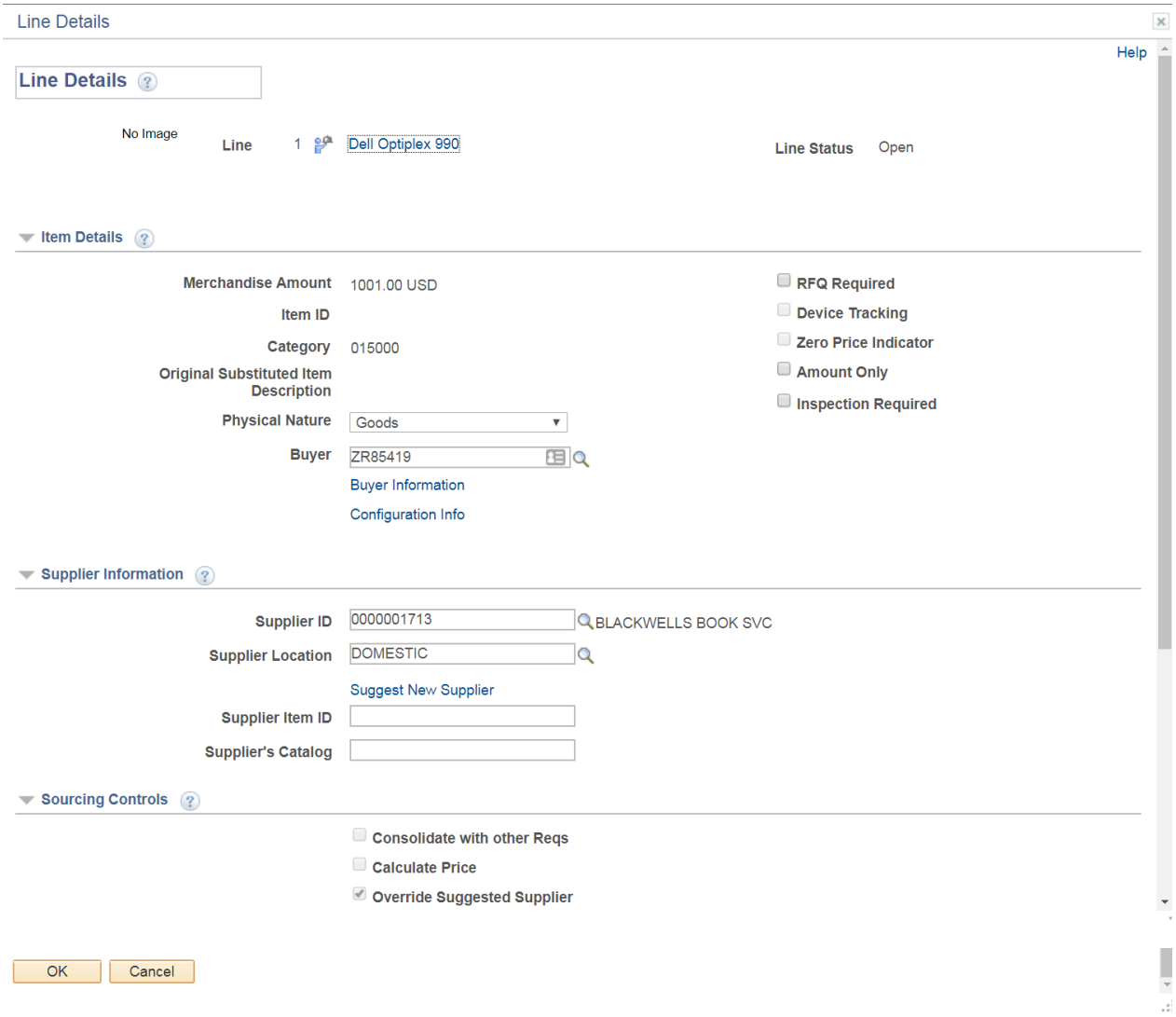


From here you can add lines to your favorites, delete one or multiple lines, and mass change all lines. To do this, select one or multiple lines by clicking on the checkboxes next to the line number under the Line column. Then click on the hyperlink of the action you would like to perform.

Ignore the hyperlink Add to Template(s). Templates will not be supported, and this link will be removed in the future.

LINE ITEM DETAILS

With the Requisition lines collapsed, click on the Details icon of the line item you would like to see in detail. This will bring up a pop-up that shows the full details of the line - make sure you have popups enabled for this site.



Notice that some fields are editable here. In Item Details, you can select checkboxes next to RFQ Required, Amount Only, and Inspection Required.

You can change the Supplier ID, search for a new one.

Please IGNORE 'Suggest a New Supplier' and 'Custom Fields' Section on your screen.

You can change the Supplier Item ID, the Supplier's Catalog.

In addition, you can drill down even further. Click on the Line Description hyperlink at the top of the screen (in this screenshot, it's labeled as "Dell Optiplex 990").

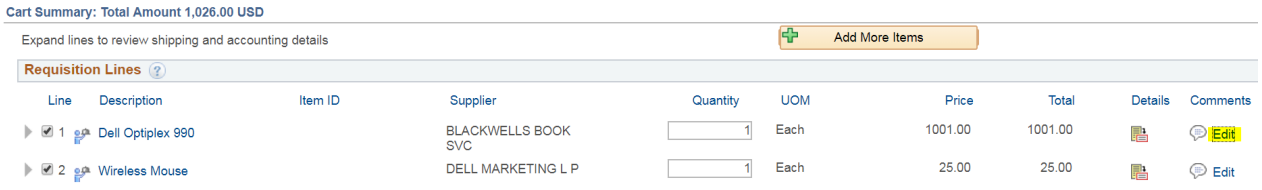
The item Description window pops up. Click on the More hyperlink at the bottom of this page, and an additional popup displays the Supplier's attributes if there are any; otherwise the page is blank.

Click Return and come back to the Line Item Details Page. In the Item Details Section, click on the Buyer Information hyperlink.

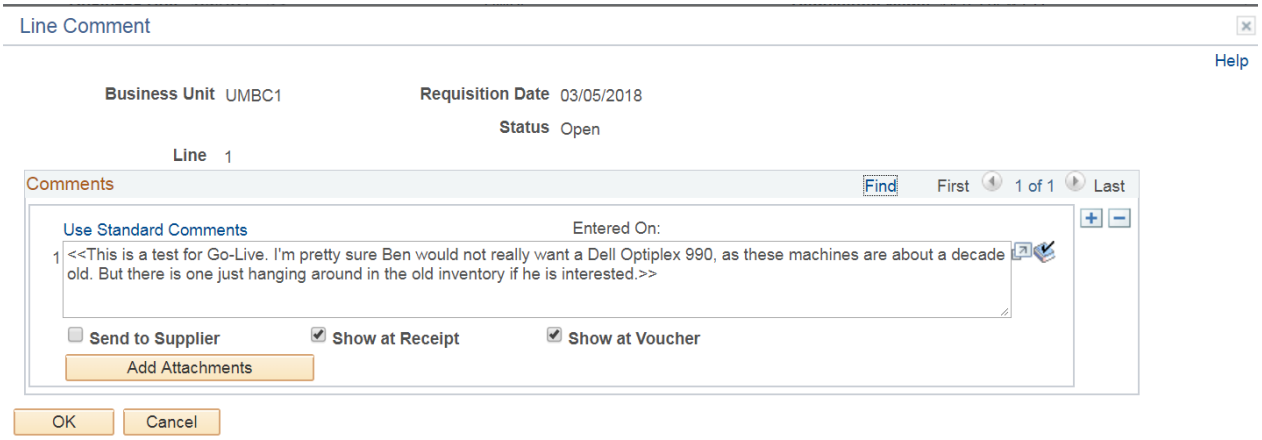
The buyer's contact information will appear in a pop-up. Click Return to go back to the Item Details popup again. Scroll to the bottom of that page and click OK to go back to the Final Checkout page.

EDIT COMMENTS

With the Requisition lines collapsed, click on the Edit link under the Comments column, for the line whose comments you would like to edit.



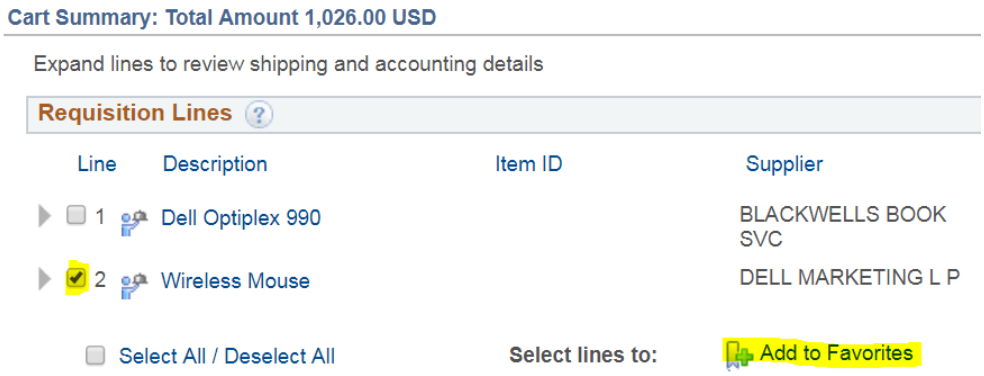
A popup will appear that allows you to edit the comments for that line. You can also add an attachment, or change the checkboxes next to Send to Supplier, Show at Receipt, or Show at Voucher from here.



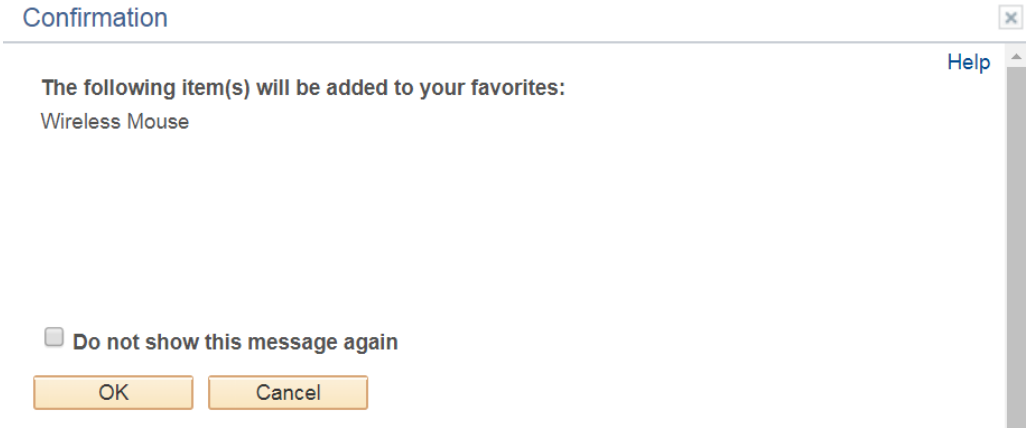
When finished, click OK to save the data and go back to the Final Checkout Page, or click Cancel to cancel the action.

ADD LINES TO FAVORITES

With the Requisition lines collapsed, select the checkbox next to the line item(s) you would like to add to your Favorites. Click on the Add to Favorites link.



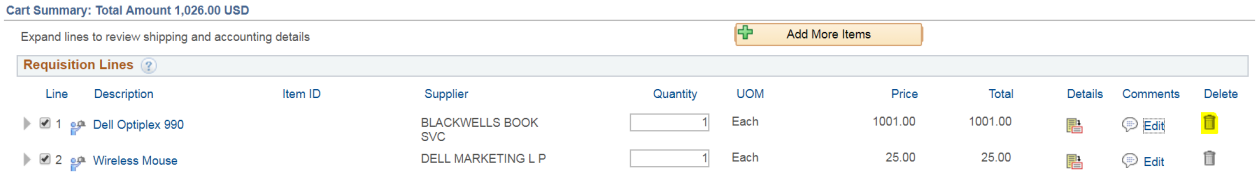
A pop-up will appear that will show a confirmation page - make sure your pop-up blocker is turned off for this site.



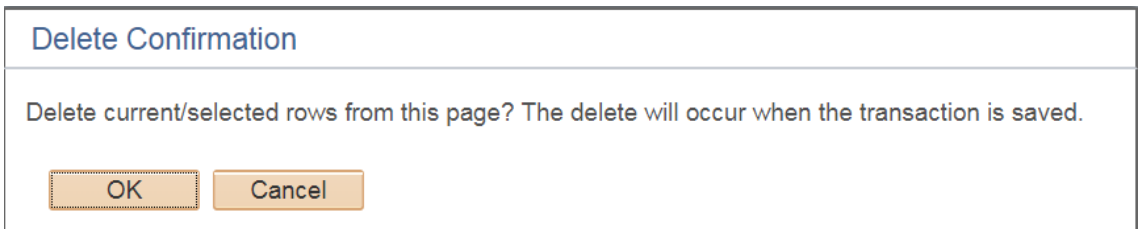
Click OK to add it to your favorites, Cancel to cancel the action. Be sure to select the checkbox next to "Do not show this message again" if you would like the system to automatically add items to your favorites without prompting you to do so in the future.

DELETE LINE(S) OR MASS CHANGE

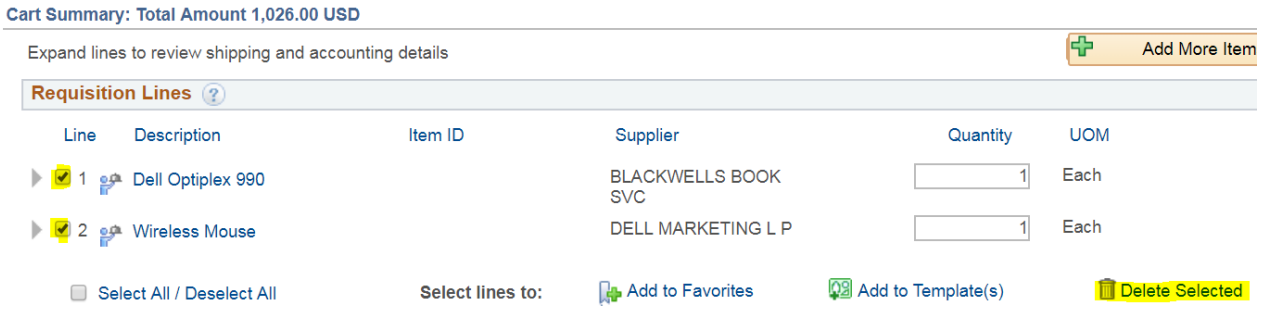
SINGLE LINE: With the Requisition lines collapsed, select the trashcan icon under the Delete column that corresponds to the line you would like to delete.



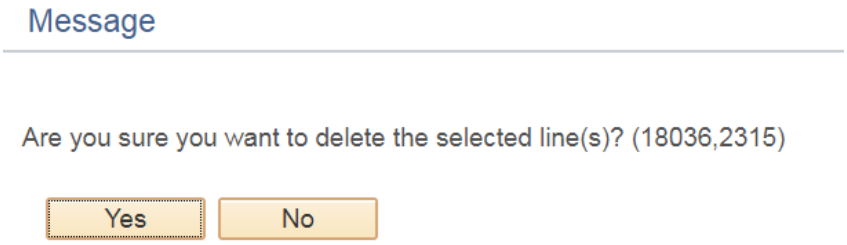
A confirmation popup will appear that asks if you're sure you want to delete the selected item. Click OK to delete the item. Click Cancel to cancel the action.



MULTIPLE LINES: With the Requisition lines collapsed, select the checkbox next to the line items you would like to delete. Click on the Delete Selected link.

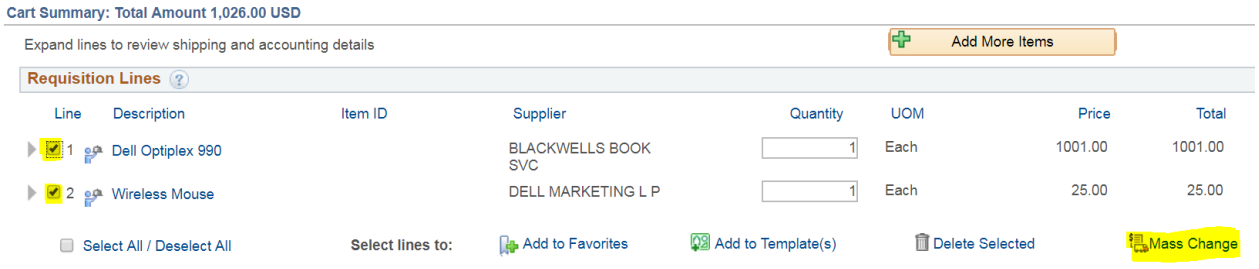


A popup will appear that will show a confirmation page - make sure your popup blocker is turned off for this site. Click Yes to delete the selected line(s) or No to cancel the action.

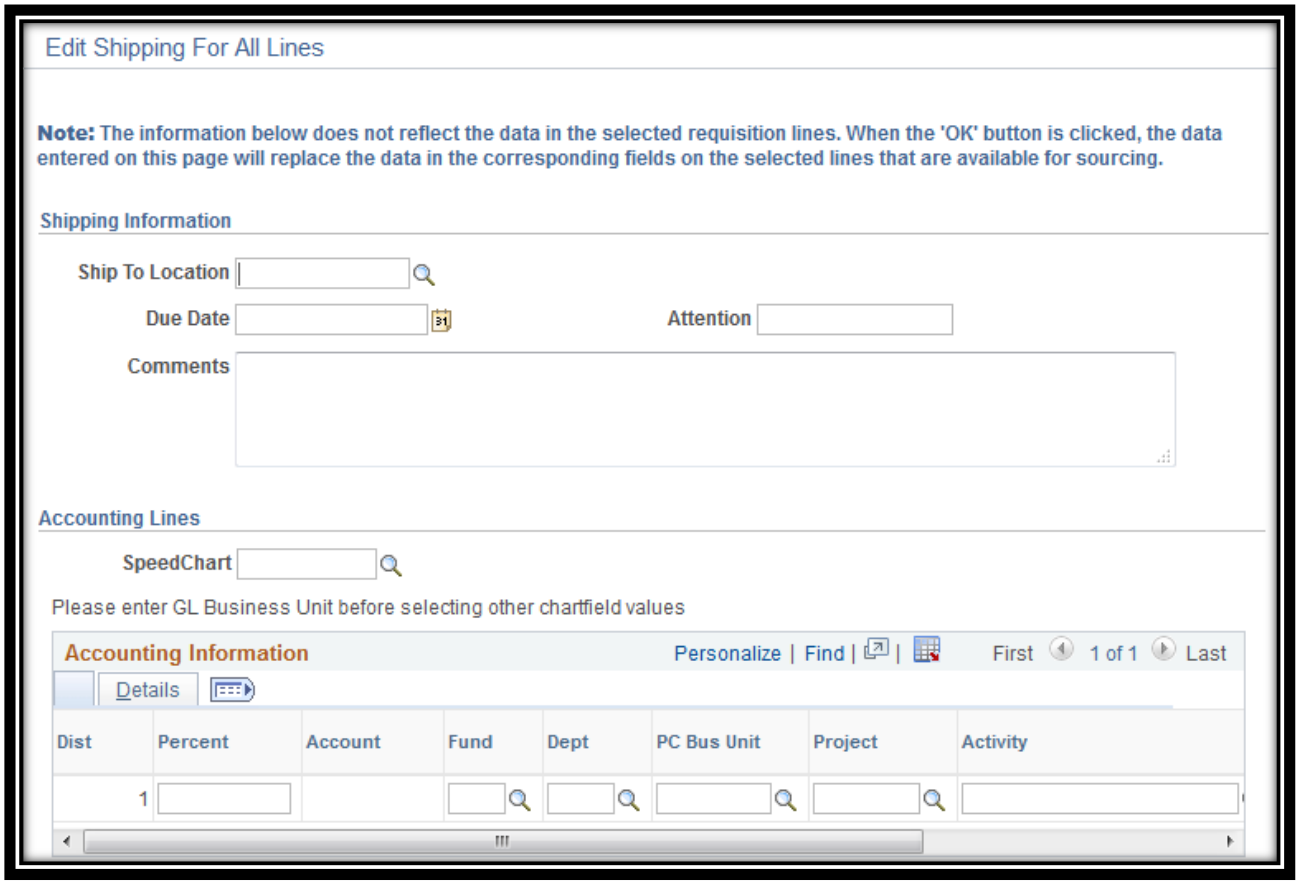


A **mass change** will allow you to change multiple lines of data using one form. You can change one or many fields for multiple lines using this popup page.

With the Requisition lines collapsed, select the checkbox next to the line item(s) you would like to mass change. Click on the Mass Change link.



As the Note says, the information in the popup form does not reflect the data in the selected requisition lines. When the "OK" button is clicked, the data entered on the page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

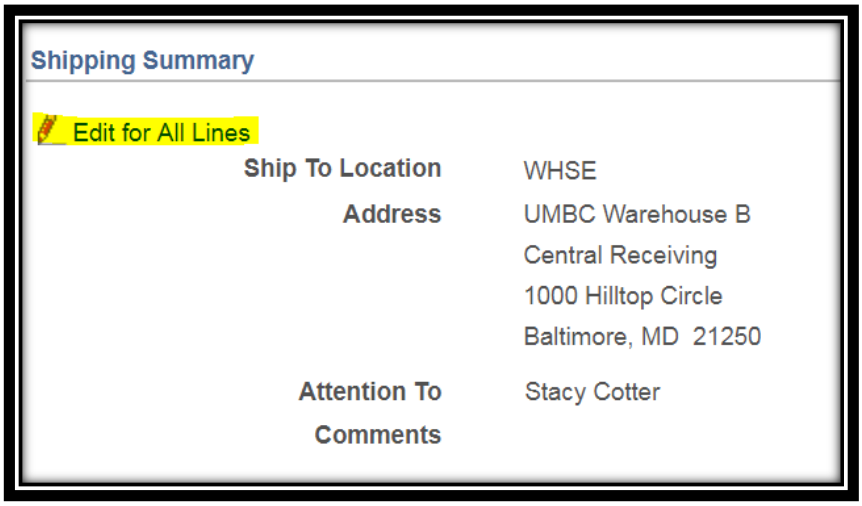


From here you can change the Supplier ID, Supplier location, Buyer, Category, Ship To Location, Due Date, Attention, Comments, and all Chartfield fields.

SHIPPING SUMMARY SECTION

To edit the shipping summary information, you have to edit it for all lines.

Click on the link Edit for All Lines



From here a popup will display with blank fields. You can enter new data related to the shipping and chartstring lines, and it will overwrite the data on all lines in the requisition.

As the Note says, the information in the popup form does not reflect the data in the selected requisition lines. When the "OK" button is clicked, the data entered on the page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

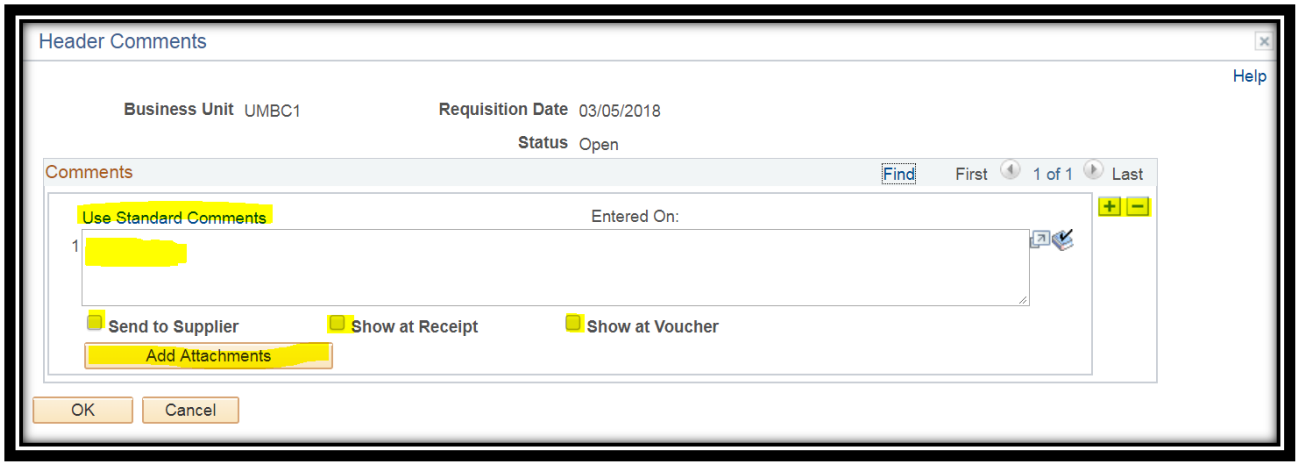
REQUISITION COMMENTS AND ATTACHMENTS SECTION

In the Requisition Comments and Attachments section, you can leave additional comments that apply to the requisition as a whole. These are labeled as Header Comments.

You can also select the checkboxes next to Send to Supplier, Show at Receipt, or Shown at Voucher if those apply to this comment.

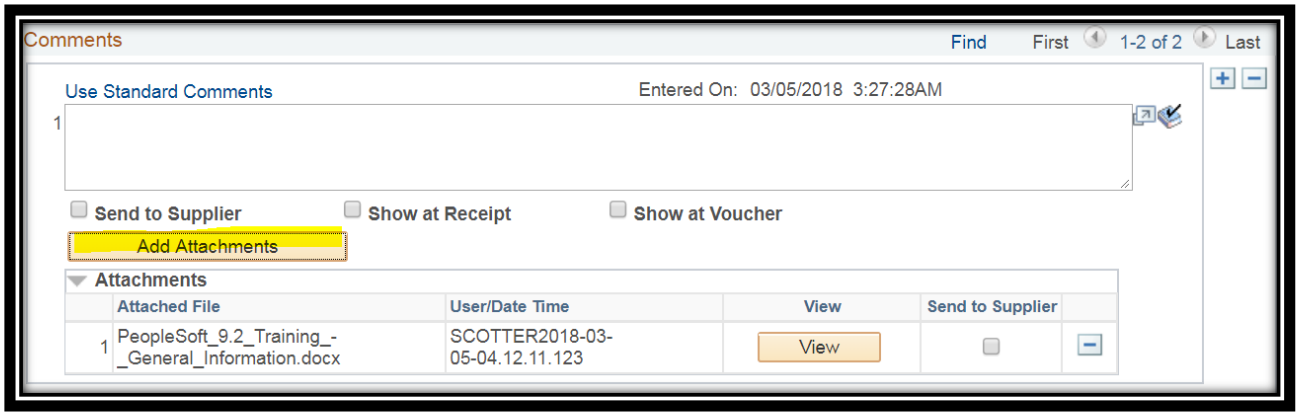
To add attachments, click on the link in the bottom right hand corner that says Add more Comments and Attachments.

This will produce a popup that allows you to leave multiple comments and to add attachments to each one. For each comment you can check the checkboxes next to Send to Supplier, Show at Receipt, or Shown at Voucher if it applies.



Click the + or – symbol if you would like to add or delete a comment.

Each comment comes with its own Add Attachments button. While you can only upload one attachment at a time, the Add Attachments button will remain so you can add multiple attachments for each comment if you would like.



PeopleSoft will store these attachments with the Requisition for the entire life of the Requisition. If an audit is performed, attachments related to the Requisition can be easily pulled up.

It is encouraged to include as much detail and as much related documentation you can to aid in the approval process.

REQUISITION SUBMIT OPTIONS

Save for Later allows you to save the Requisition in an **Open** status so that you can revisit it and edit it before submitting it for approval.

To do this, click on the Save for Later button. You will know it worked because it will say Saved in the top right hand corner after clicking on it.

Clicking **Add More Items** at the bottom of the Final Checkout page will bring you back to the Edit Requisition Page.

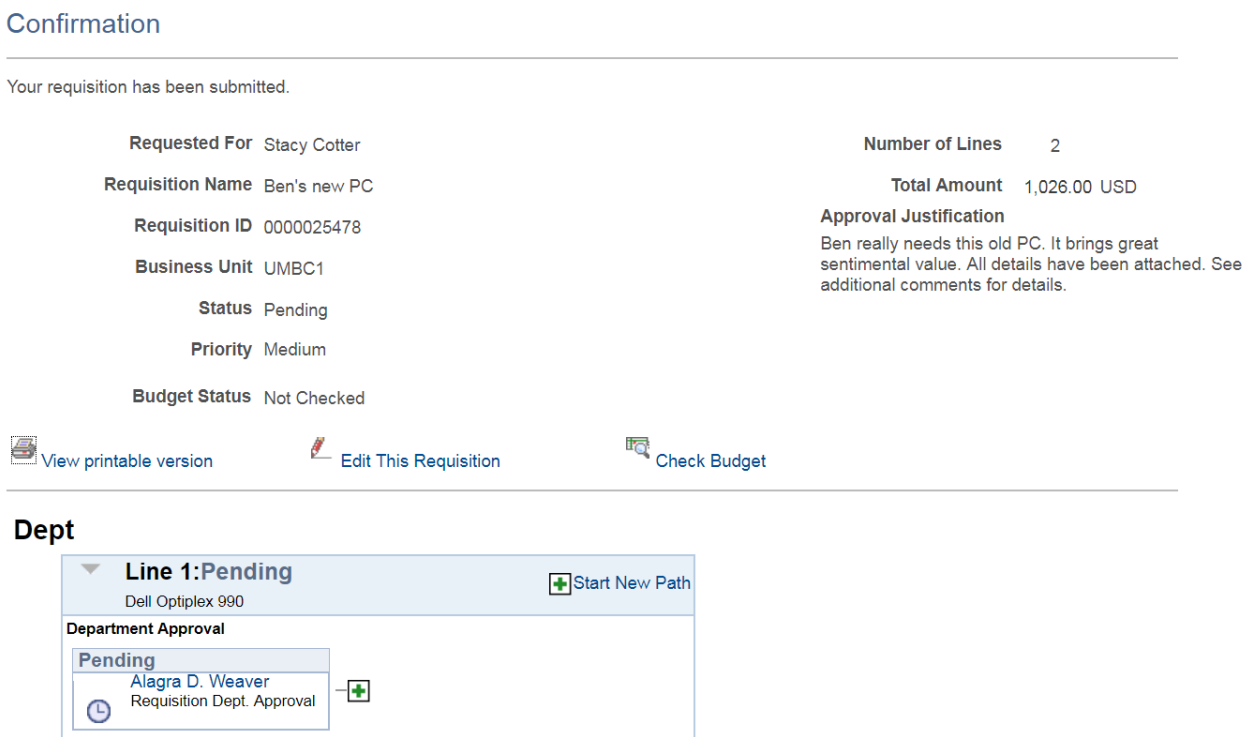
Save & Submit can be used after reviewing all of the data, making any final revisions, adding all comments and attachments, when you are ready for submitting the Requisition for approval**.**

Clicking **Save and Submit** will submit the Requisition for approval. Once this has been clicked, the Requisition can be edited, up until an Approver takes action on it. At that point, the Requisition will be locked and cannot be edited unless done by an Approver.

Changing a Requisition can cause it to have to go through the entire approval chain again. Because of how long approvals take, it is better not to make changes once the approval process has begun. It would be better to contact the approver, have them DENY the Requisition, and submit a new Requisition with the changed data for approval.

Once clicked you will be brought to a confirmation page.

CONFIRMATION PAGE



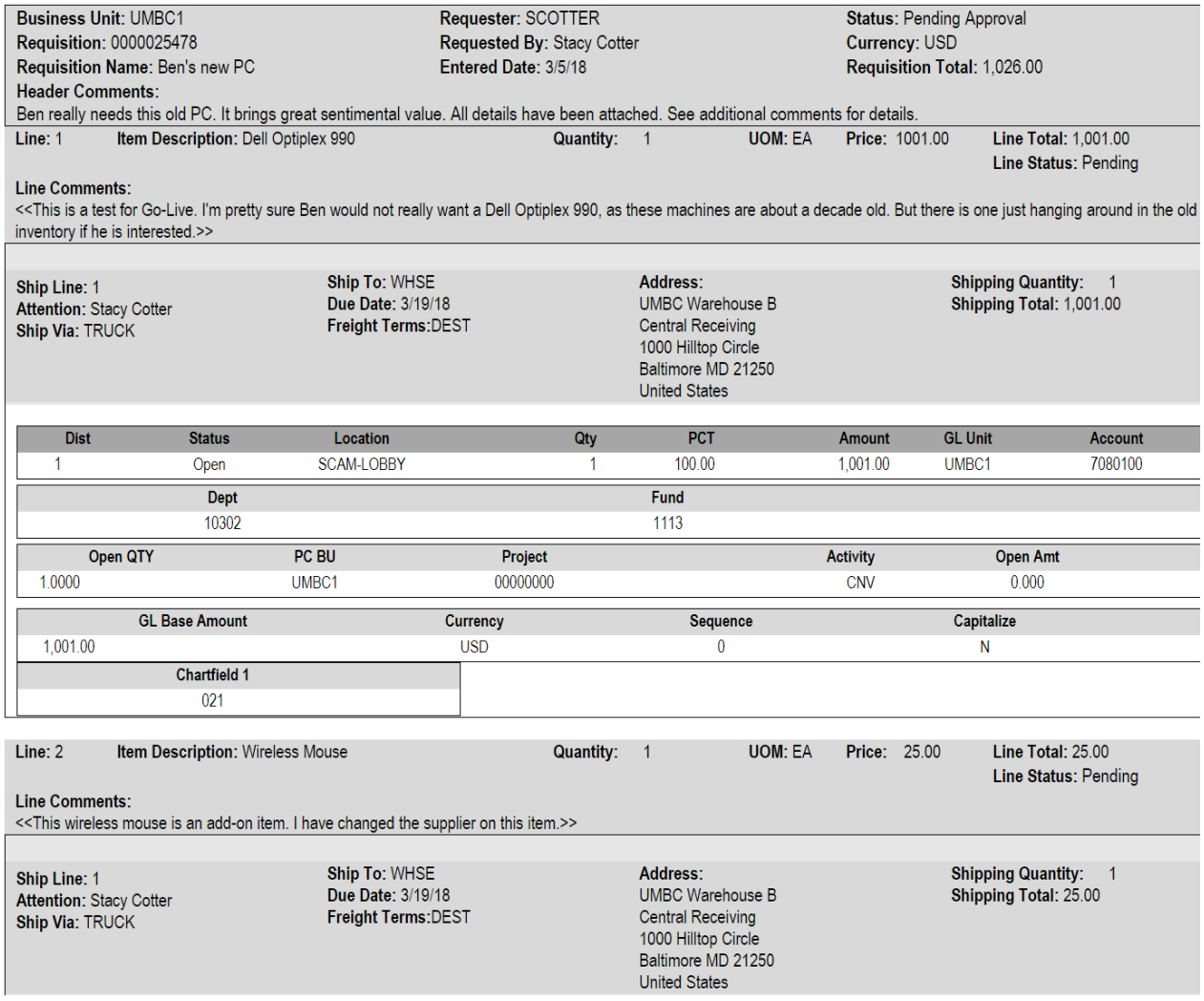
The Confirmation Page shows the basic details of the Requisition. There are a number of actions you can take from this page.

Edit This Requisition will take you back to the Edit Requisition Page.

Check Budget is an internal process that is required to run on this Requisition. Please run Check Budget.

View Printable Version will bring up the Requisition in another tab so you can print it from your browser for your records. The system will ask you if you want to print this Requisition with the distribution details. Click Yes if you do. Click No if you do not.

View Printable Version page displays something like this:



Business Unit: UMBC1 **Requester:** SCOTTER **Status:** Pending Approval
Requisition: 0000025478 **Requested By:** Stacy Cotter **Currency:** USD
Requisition Name: Ben's new PC **Entered Date:** 3/5/18 **Requisition Total:** 1,026.00
Header Comments:
Ben really needs this old PC. It brings great sentimental value. All details have been attached. See additional comments for details.

Line: 1 **Item Description:** Dell Optiplex 990 **Quantity:** 1 **UOM:** EA **Price:** 1001.00 **Line Total:** 1,001.00
Line Status: Pending

Line Comments:
<<This is a test for Go-Live. I'm pretty sure Ben would not really want a Dell Optiplex 990, as these machines are about a decade old. But there is one just hanging around in the old inventory if he is interested.>>

Ship Line: 1
Attention: Stacy Cotter
Ship Via: TRUCK

Ship To: WHSE
Due Date: 3/19/18
Freight Terms: DEST

Address:
UMBC Warehouse B
Central Receiving
1000 Hilltop Circle
Baltimore MD 21250
United States

Shipping Quantity: 1
Shipping Total: 1,001.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	SCAM-LOBBY	1	100.00	1,001.00	UMBC1	7080100

Dept	Fund
10302	1113

Open QTY	PC BU	Project	Activity	Open Amt
1.0000	UMBC1	00000000	CNV	0.000

GL Base Amount	Currency	Sequence	Capitalize
1,001.00	USD	0	N

Chartfield 1
021

Line: 2 **Item Description:** Wireless Mouse **Quantity:** 1 **UOM:** EA **Price:** 25.00 **Line Total:** 25.00
Line Status: Pending

Line Comments:
<<This wireless mouse is an add-on item. I have changed the supplier on this item.>>

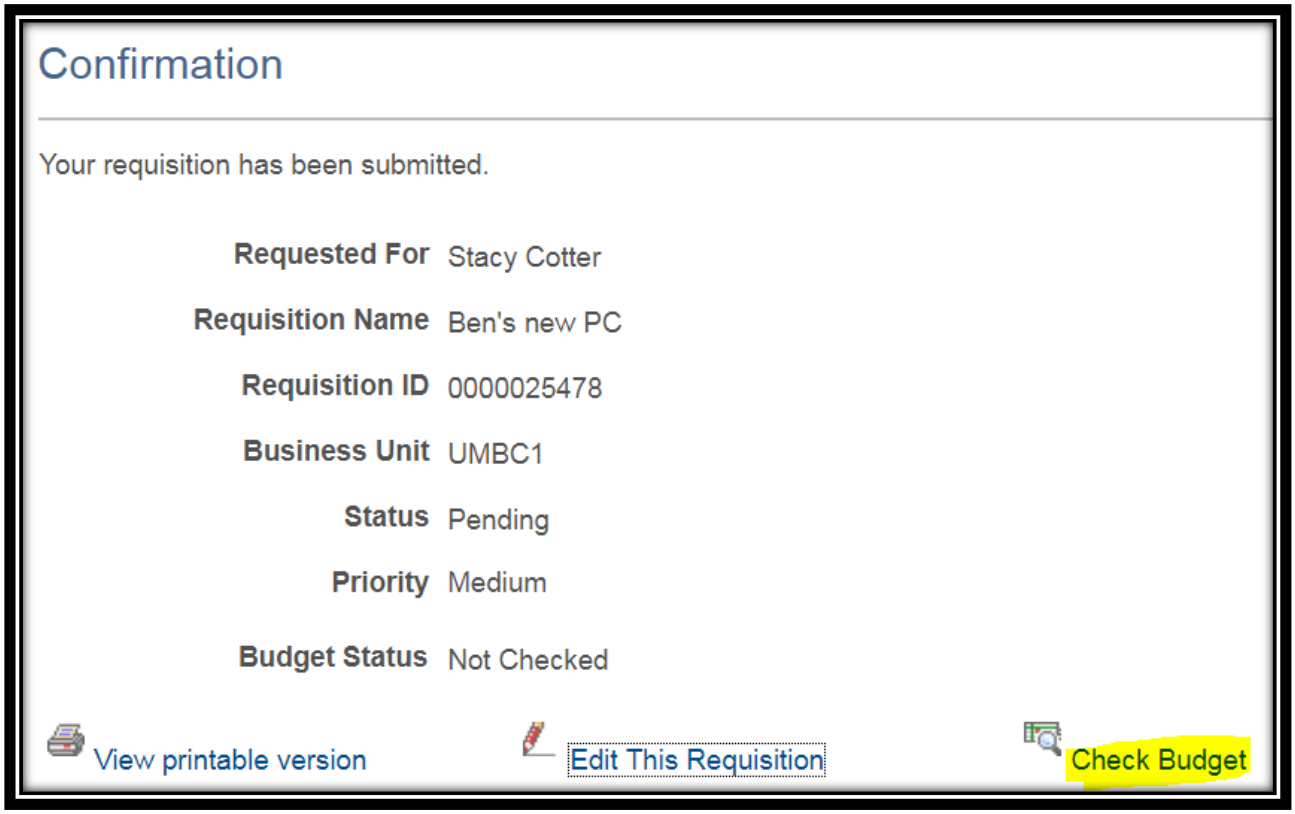
Ship Line: 1
Attention: Stacy Cotter
Ship Via: TRUCK

Ship To: WHSE
Due Date: 3/19/18
Freight Terms: DEST

Address:
UMBC Warehouse B
Central Receiving
1000 Hilltop Circle
Baltimore MD 21250
United States

Shipping Quantity: 1
Shipping Total: 25.00

CONFIRMATION PAGE - BUDGET CHECK



Check Budget is an internal process that is required to run on this Requisition. **Please click Check Budget.**

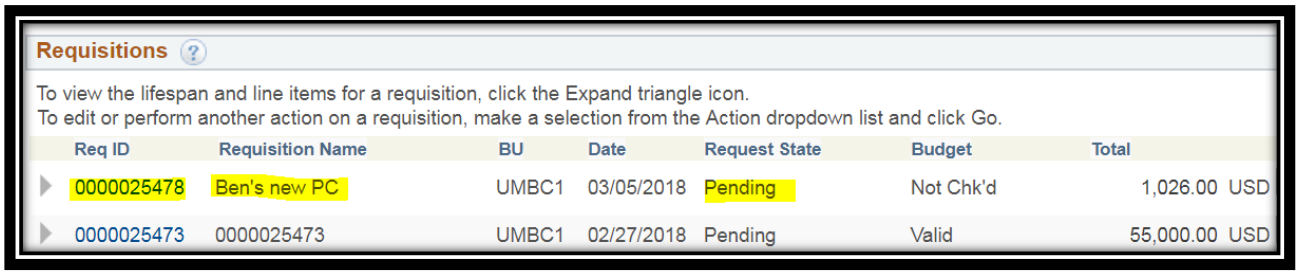
MANAGE REQUISTIONS

This menu option can be used to perform different functions on The Requisition.

Check Requisition Status

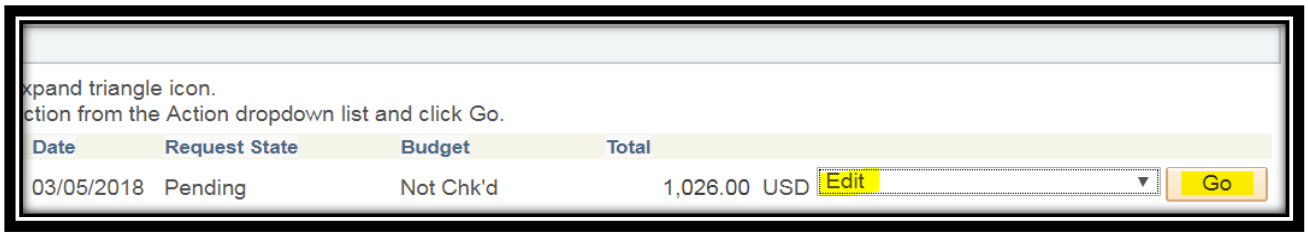
To check the status of any Requisition you have submitted, go to the Manage Requisitions link from the Campus Workcenter.

At the bottom of the page, under Requisitions, is a list of any Requisitions initiated or ones you are listed as an approver for, and what stage they are in. If it says Pending Approval, it could be in any of the three approval stages mentioned in the Approving a Payment Request Section.



Edit Requisition

This menu option can also be used to **Edit** a Requisition. Click on the dropdown menu that has the title [Select Action]. Select Edit, and then the Go button.



A popup will appear warning you that the Requisition is in the Pending Approval Status, and that by editing it, it will have to go through the approval process again.

Click OK to continue. Click Cancel to cancel the action.

REQUISITION APPROVAL SECURITY

PEOPLESOFT ONLINE APPROVAL FOR DEPARTMENT FORM 9.2

Security for Approval is granted via the PeopleSoft Online Approval For Department 9.2 Form.

The person keying the transaction enters the departments that will be paying for the Requisition. Approvers associated with those departments will be notified.