

PeopleSoft Training Activity Sheet

PO2: PURCHASE ORDERS

For use in training. Last updated August 29, 2016

Activity 1: Find Existing Purchase Orders

Directions: Find these Purchase Orders in the training database at District 020. Answer the questions for each.

Navigate to **Main Menu > Purchasing > Purchase Orders > Add/Update POs.**

Purchase Order	Questions		
0000009998	PO and Budget Status?	Who is the Supplier? Buyer?	Amount Only? Receiving Required?
0000009830	PO and Budget Status?	Payment Terms?	What is the ChartString for Line item 1?
0000009842	PO and Budget Status?	Is there a Change Order? How many change orders?	What is the receipt status?
0000009772	PO and Budget Status?	Freight? Sales tax amount?	What does the warning message mean?
B-1139	PO and Budget Status?	Is there a requisition attached to this PO? What is the requisition?	Encumbrance Balance? CHALLENGE: Why is it less than the Total Amount?

Have extra time?

1. How many purchase orders have the "Dispatched" status from 07/15/2016 to 07/31/2016? _____
2. How many purchase order(s) have Supplier *Amazon.com*? _____

Activity 2: Purchase Order for Items

Directions: You need to buy a lot of binders. Create a purchase order. You will order from School Specialty. Refer to pp. 26-28 of the PO2 guide.

Header	Line	Schedule	Distribution
<input type="checkbox"/> PO Date: Today's date <input type="checkbox"/> Supplier ID: 13240 <input type="checkbox"/> Payment Terms: Net 30 <input type="checkbox"/> PO Reference: Office Supplies	<input type="checkbox"/> Description: Binders <input type="checkbox"/> PO Qty: 20 <input type="checkbox"/> UOM: EA <input type="checkbox"/> Category: 44120000 <input type="checkbox"/> Price: 3.50	<input type="checkbox"/> Ship To: 000000813 <input type="checkbox"/> Due Date: Two weeks from today's date	<input type="checkbox"/> Fund: 0100 <input type="checkbox"/> Resource: 0000000 <input type="checkbox"/> Goal: 1110 <input type="checkbox"/> Function: 1000 <input type="checkbox"/> Object: 4300000 <input type="checkbox"/> Site: 110

Write down the PO ID #: _____

Activity 3: Purchase Order for Services

Directions: Create a purchase order for the service agreement with Copy Link (12236) in the amount of \$2,000 for the fiscal year 2016-2017. Refer to pp. 29-31 of the PO2 guide.

- Use **Category Code** 81101707.
- Use this ChartString: **Fund** 0100, **Resource** 0000000, **Goal** 1110, **Function** 1000, **Object** 5600000, and **Site** 559.
- Make sure you flag it as **Amount only**.

Write down the PO ID #: _____

Activity 4: Assets

Scenario: You will buy 3 laptops from Dell Computers in the amount of \$500 each. The e-waste fee is \$3 each and the freight charge is \$100.

Directions: Create a purchase order for laptops. Allocate freight charges, apply sales tax to the items and make the e-waste fee non-taxable. Refer to pp. 31-32, 52 and 53 of the PO2 guide.

- Use **Category Code** 43211500 and have it ship within two weeks.
- Use this ChartString: **Fund** 0100, **Resource** 0000000, **Goal** 1110, **Function** 1000, **Object** 4400095, **Site** 559.
- Make sure you enter the **AM Unit** and **Profile ID**.

Write down the PO ID #: _____

Activity 5: Copy and Modify a PO

Directions: Copy the purchase order that you created in Activity# 3 PO ID: _____. Look how fast it is!

Modify the PO by splitting the cost between site 130 and 140. Use the Resource 010000.

Write down the PO ID #: _____

Activity 6: Copy a Requisition to PO

Directions: Your instructor will assign a requisition number to you for each scenario below. Create your purchase orders from these requisitions and write down the PO ID on the space provided. Refer to pp.36-39 of the PO2 guide.

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1. Source all lines for Requisition ID: _____ PO ID: _____

 2. Source only 2 lines for Requisition ID: _____ PO ID: _____

 3. Source for less quantity and amount. Use the finalize function for Requisition ID: _____ PO ID: _____
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Activity 7: Budget Checking

1. Budget check the purchase orders from Activities 4 and 5.

- Activity 4 PO ID: _____
- Activity 5 PO ID: _____
- Budget Status: _____
- Budget Status: _____

2. When can you modify the ChartStrings? _____

Activity 8: Dispatch PO

Directions: Answer the three questions below.

1. You can only dispatch a PO that has a(n) _____ PO status and _____ budget status.
2. **True or False:** From the PO page, you can dispatch an individual PO. _____
3. **True or False:** You can dispatch multiple POs from the PO page. _____

Activity 9: View Change Orders

Directions: Find the Purchase Orders below. Answer the questions for each column.

Purchase Order ID	What is the Change Order Number?	What changes were made? Header or Line or Ship Changes?
0000009489		
0000009512		
0000009796		

Where did you go to find the changes made? _____

Activity 10: PO Change Orders

Directions: Create a change order on your POs.

1. Find the PO you created in Activity #2. Change the price to 3.00.
2. Find the PO you created in Activity #6. (#2) Order 5 more quantities.

Activity 11: Cancel Purchase Orders

Directions:

1. Cancel the PO you created in Activity #3.
2. Cancel the PO you created in Activity #6, #1. Select the option to re-source.

Activity 12: Put It All Together

Directions:

1. Find an existing PO with a Dispatched status.
2. Do a Change Order.
3. Budget check it.
4. Dispatch it.

Do you have extra time? Cancel the purchase order. Budget check and dispatch it.
