

# ST CLOUD STATE UNIVERSITY

## PCS USER TRAINING GUIDE

This training guide will help you complete a purchase order, locate vendor information, and enter memos. Additionally, contact information is provided for those associated with PCS.

A printable 36-page Purchasing Manual is also accessible at the following web address:  
<http://www.stcloudstate.edu/businessservices/purchasing/manual/default.asp>

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**ST CLOUD STATE PURCHASING DEPARTMENT**

<http://www.stcloudstate.edu/businessservices/purchasing/>

**Accounts Payable**--Marlene Walz Ext. 8-3135 for Information regarding:

Payment questions  
Locating Invoices  
Discrepancies

**Pre-Audit**--Jane Torborg Ext. 8-4120 for Information regarding:

General Pre-audit of PO's  
Object Codes, PCS Account Access  
Attachment Requirements  
Certificates of Insurance

**Purchasing Director**--Lisa Sparks Ext. 8-4788 Information/questions regarding:

Financed purchases, Land rental/leases  
"Lease to Own" equipment agreements  
Purchases over \$25,000, RFB's  
Vehicle/boat purchases, Sensitive items, Extraordinary requests, Joint Powers,  
Inter and Intra Agency Agreements

**Contracts**--Carol John Ext. 8-3136 for Information regarding:

Professional/Technical Contracts  
State of MN, "U of M" and other  
MnSCU approved contracts  
Targeted vendors  
Problems getting a PO released

<http://www.stcloudstate.edu/businessservices/purchasing/ptcontract/default.asp>

**Vendor Numbers** Sue Nelson Ext. 8-6463 for Information regarding:

Finding vendor numbers,  
Adding a new vendor,  
Checking on vendor status,  
Changes of address

**Direct Pays**--Mary Schneider Ext. 8-4000 for Information regarding 1400 forms,

Reimbursements, Special Expense Forms

**PCards**--Doris Frieler Ext. 8-4001 for Information Regarding: Purchasing Cards (VISA)

<http://www.stcloudstate.edu/businessservices/purchasing/purchasingcard.asp>

**PCS (Purchase Control System) Step by Step User Guide**

<http://www.stcloudstate.edu/businessservices/purchasing/manual/documents/PCSTrainingGuide.pdf>

**Forms can be found at** <http://www.stcloudstate.edu/businessservices/forms/>

## MnSCU Login Screen



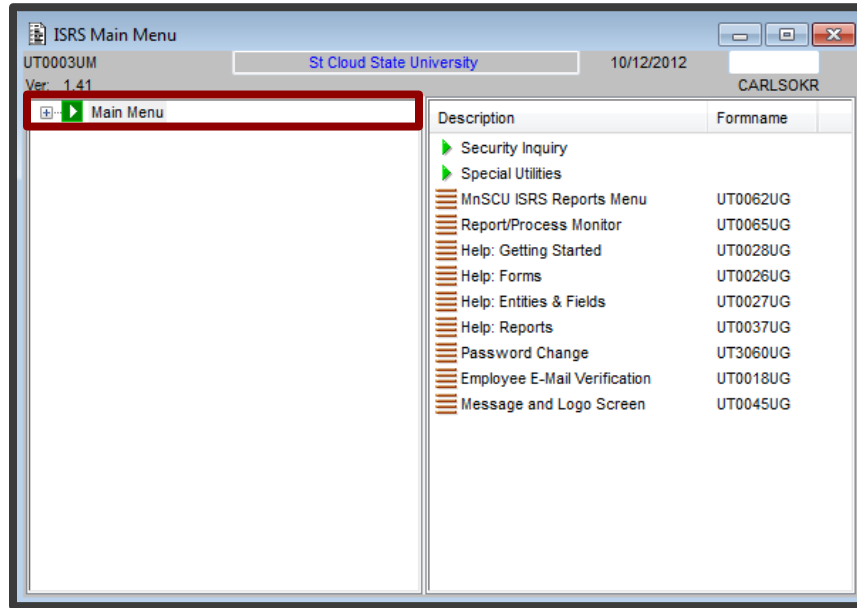
The screenshot shows a web browser window titled "MnSCU Login". On the left side, there is a logo for the Minnesota State Colleges & Universities, featuring a stylized sunburst design. To the right of the logo, the text "Integrated Statewide Records System" is displayed. Below this text, there are three input fields: "Node:" with the value "scsu.isrs.mnscu.edu", "User ID:", and "Password:". At the bottom of the form, there are two buttons: "OK" and "CANCEL".

### To login to ISRS:

1. Type in your User ID and Password.
  - a. For security purposes, the password or symbols will not appear on the screen.
  - b. The cursor will move along as you type in the password box.
2. Click on the *OK* button

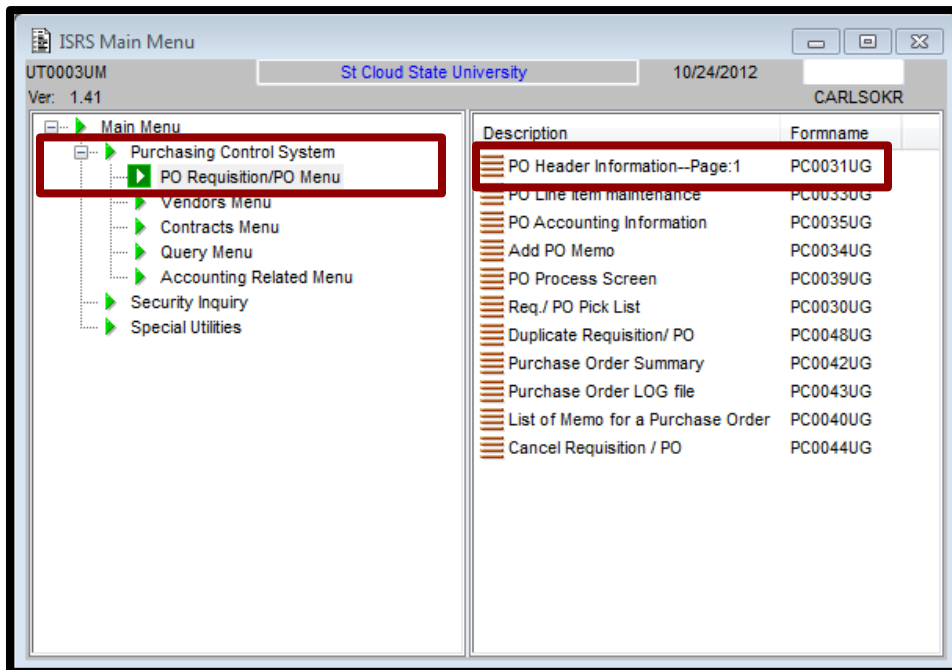
The MnSCU ISRS main menu will appear. Depending on which systems you have access to, you may have several choices at the Main Menu. Most people initially have access only to the Purchasing Control System.

## MnSCU Main Menu Screen

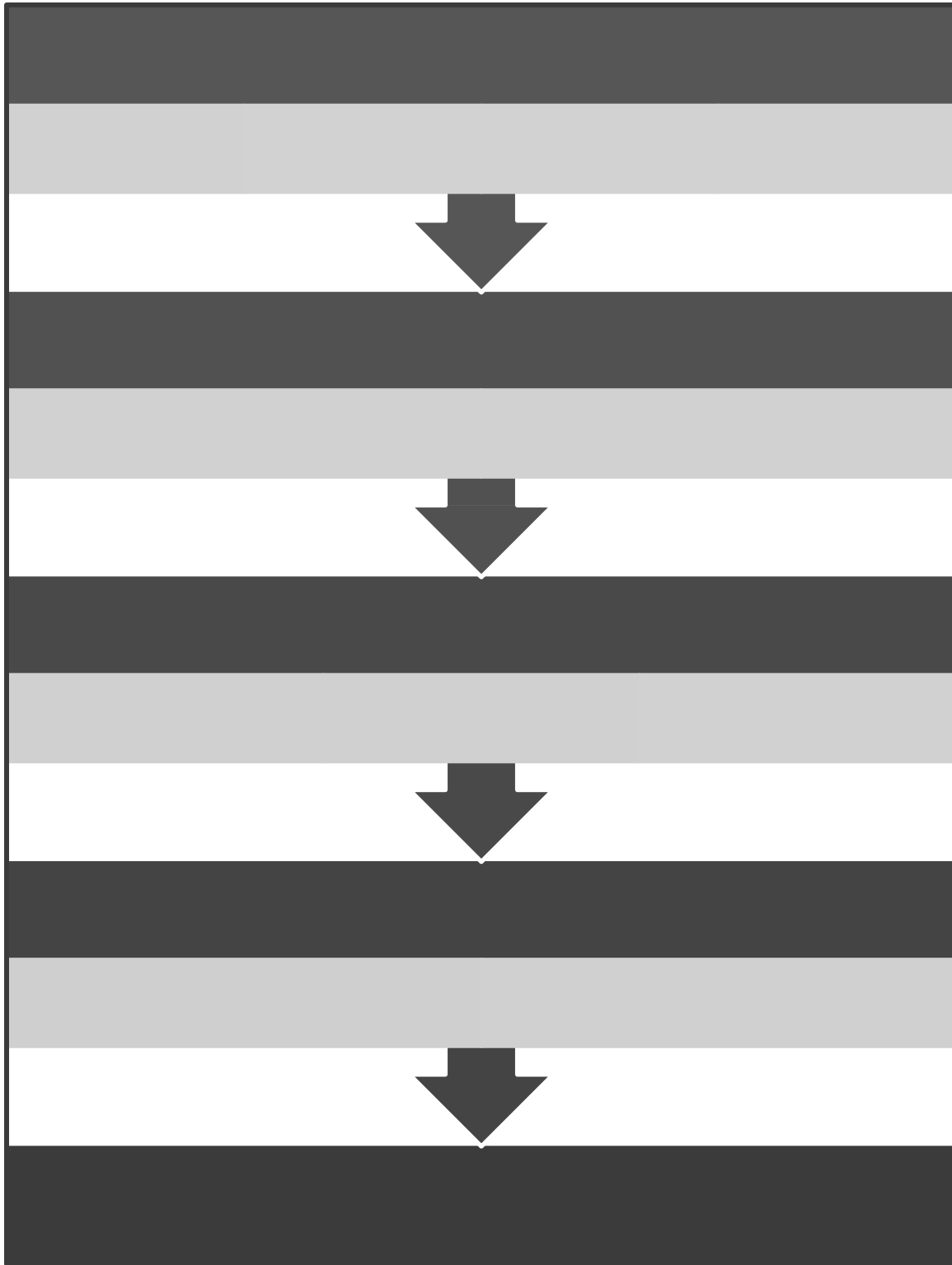


1. Double click on the *Main Menu* option, which will expand that file.
2. Under *Main Menu*, click on *Purchasing Control System*, which expands again.
3. Under *Purchasing Control System*, click on *P.O. Requisition/P.O. Menu*
4. Click on the first item, *P.O. Header information—Page: 1*.

This will allow you to begin filling in your new P.O.




## Overview of Creating a P.O.

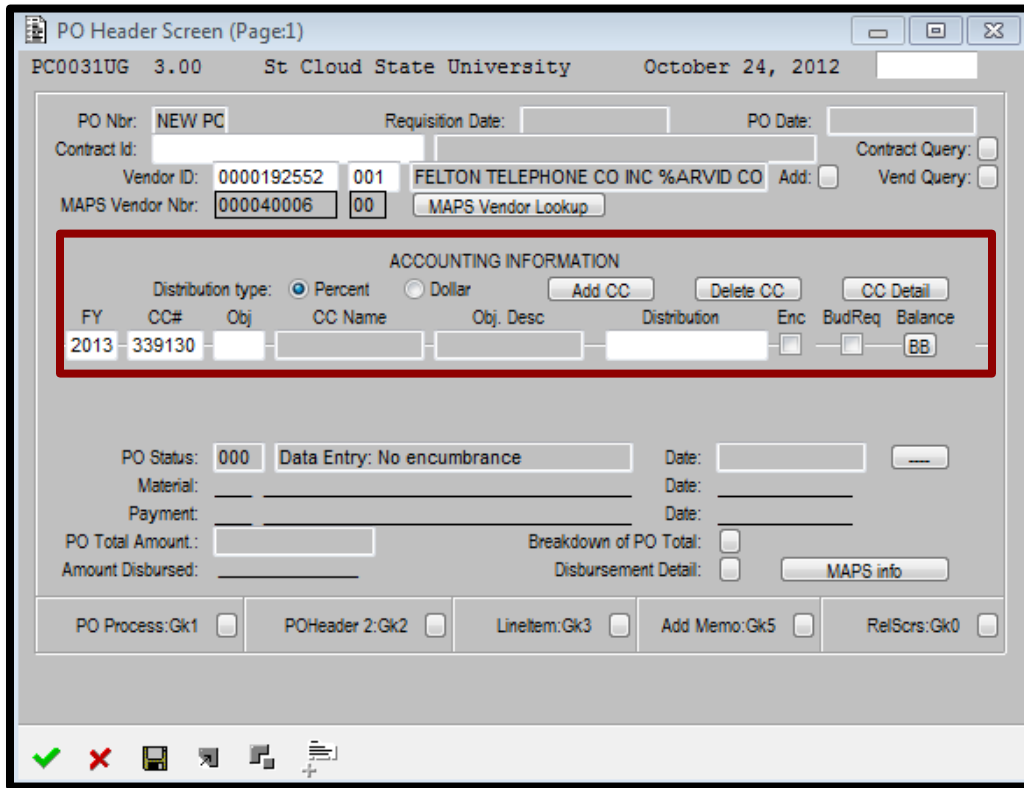


For detailed instructions, please continue to the next page.

## Create a new P.O.

From the PO Header screen (Page: 1)

1. Click the *Add Record icon* 
  - o The words “new P.O.” will appear in the P.O. number field.
  - o Make sure to write down the assigned P.O. Number; you will need this number to access the P.O. in the future.
2. Enter the Vendor ID.
  - o If you know the ID number, enter it.
  - o Don't know the ID? Run a “Vendor Query” (See page 13 for instructions)
3. Verify the correct information is populated for your vendor name.



4. Accounting information will auto Populate with the Fiscal Year (FY). If you only have access to 1 Cost Center (CC), that will also auto-fill.
  - o If you have multiple CC associated with you, be sure to type in the CC number.
5. Enter the object code for the specific item you will be purchasing.
  - o Object codes can be found in the [purchasing manual](#) or by double clicking in the obj box to view a list of choices.
6. Determine the percent or dollar distribution for the order.
  - o You may add or delete CC as needed.
  - o If multiple cost centers are sharing in the purchase, you will allocate a dollar amount or percentage to come from each cost center.

**Do I allocate with dollars or a percentage?**

**Percentage**

- Use 100% if you are funding the purchase from 1 cost center.
- Use percentage, if you know the exact percentage each cost center is contributing when multiple are used.

**Dollars**

- Use dollars if you need to split the amount between multiple cost centers. In the distribution box, enter how much of the total each cost center will pay.



PO Header Screen (Page:1)

PC0031UG 3.00 St Cloud State University October 25, 2012

PO Nbr: NEW PO Requisition Date: PO Date:

Contract Id: Contract Query:

Vendor ID: 0000192550 001 ASSOC FOR CAREER & TECH EDUC ACTI Add:  Vend Query:

MAPS Vendor Nbr: 000030000 00 MAPS Vendor Lookup

ACCOUNTING INFORMATION

Distribution type:  Percent  Dollar

FY	CC#	Obj	CC Name	Obj. Desc	Distribution	Enc	BudReq	Balance
2013	339130	3000	COMP CERTIFI	Supplies	50.00	<input type="checkbox"/>	<input type="checkbox"/>	BB
2013		3000			0.00	<input type="checkbox"/>	<input type="checkbox"/>	BB

PO Status: 000 Data Entry: No encumbrance Date: \_\_\_\_\_

Material: \_\_\_\_\_ Date: \_\_\_\_\_

Payment: \_\_\_\_\_ Date: \_\_\_\_\_

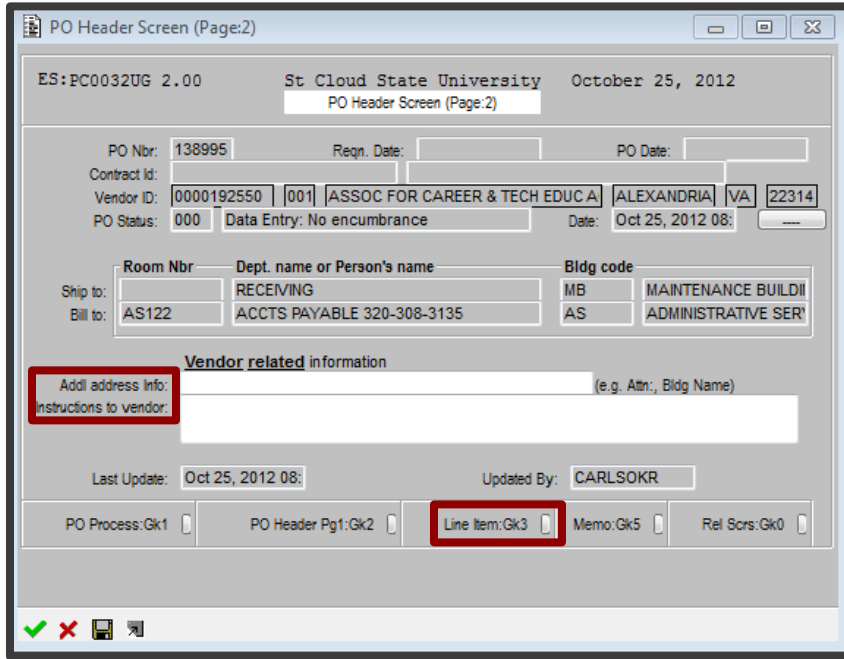
PO Total Amount: \_\_\_\_\_ Breakdown of PO Total:

Amount Disbursed: \_\_\_\_\_ Disbursement Detail:

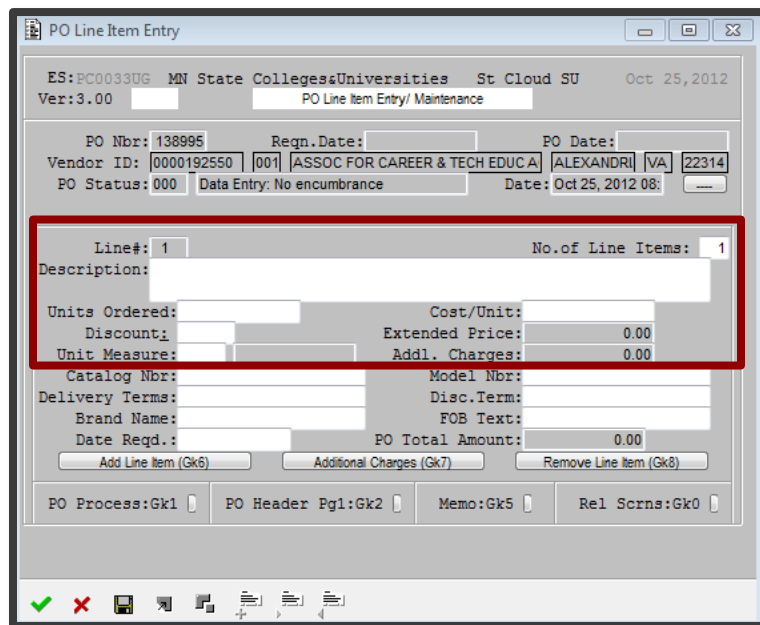
PO Process:Gk1  **POHeader 2:Gk2**  LineItem:Gk3  Add Memo:Gk5  RelScrs:Gk0

✓ ✗ 📁 📄 📋

7. To split a purchase order between more than one cost center, click the “Add CC” button.
8. A new line will appear, input the CC # and the distribution amount (dollar or percent)
9. Click the save icon to store the P.O. information.
- 10. Remember to write down the P.O. number. This is important!**
11. Next, click the “P.O. Header 2: Gk2” button near the bottom of the screen.

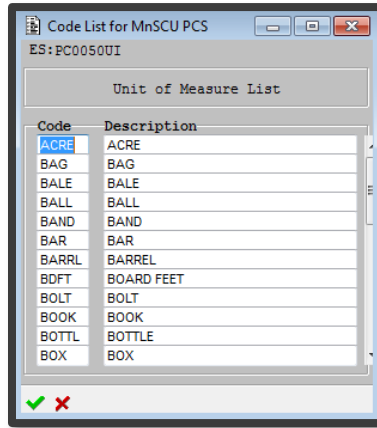


- 12. This page will allow you to give specific directions to the vendor.
  - o The Add'l Address Info is the Attn Line, for entering an individual's name at the company who should get the P.O.
  - o The Instructions to vendor box can include a quote number, date, other contract number, etc.
- 13. Click save if you have added instructions or a person's name.
- 14. Next, select "Line Item: Gk3". A new Pop-up window will appear.
- 15. Fill in the required information: **description, units ordered, cost/unit, unit measurement.**

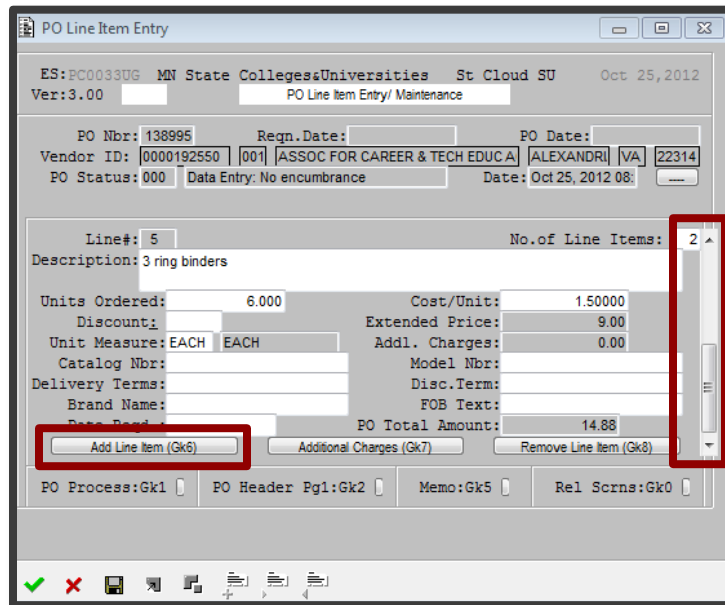


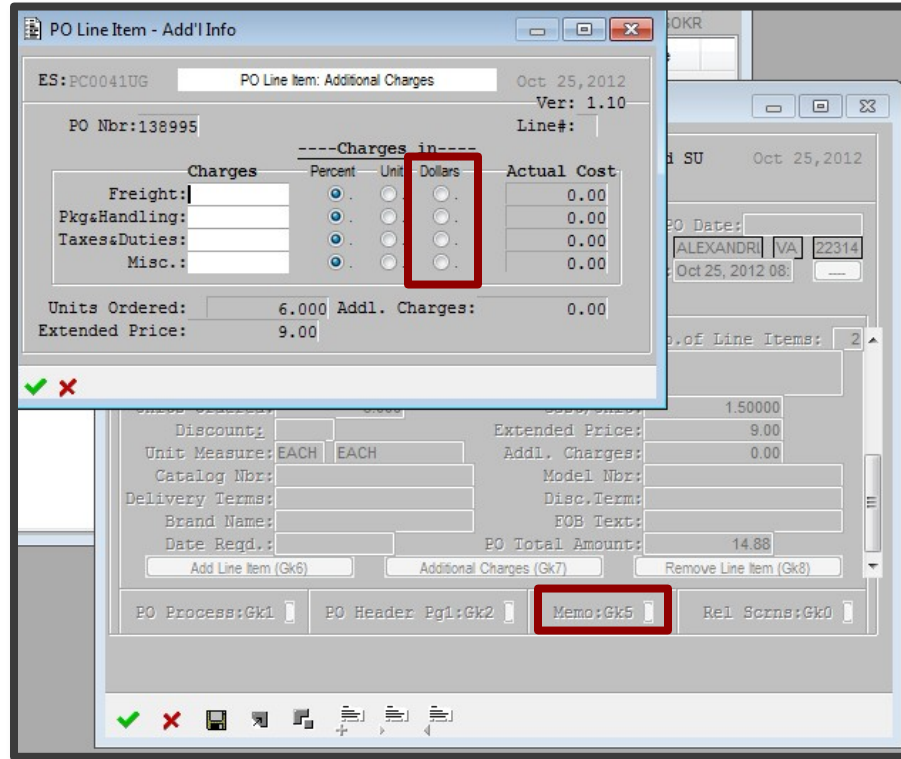
**Note:**

In the Unit Measure box, double click to see a list of measurement selections. To select the type of measurement that fits your purchase, click on the measurement and then the green check mark.

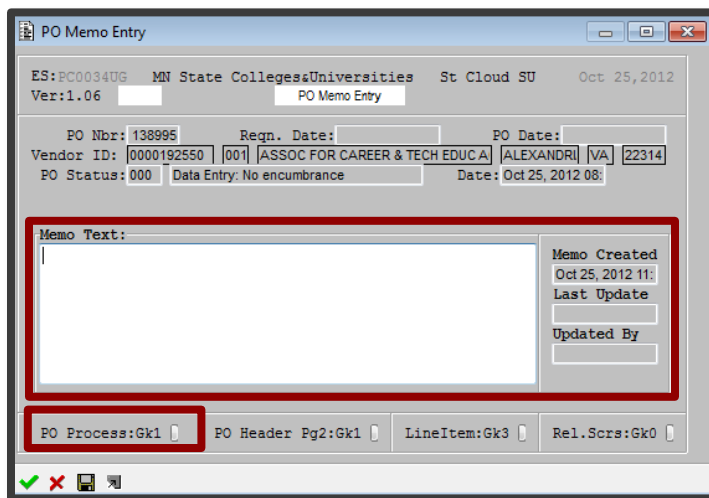


- 16. To add an additional line item, click the **“Add Line Item”** button.
  - o Please only add approximately 20 items per P.O. If you need to add more, please call Purchasing Pre-Audit at 8-4120.
  - o As you add items, you will be able to scroll to the previous items with the scroll bar on the right side of the screen.





17. Click the **“Additional Charges”** button to add charges such as tax, shipping, etc.
  - o The above Pop-up will appear. Enter the charge amount.
  - o Be sure to change the Charges In category to **“Dollars”**. Click the green check mark to save your additional charges.
  - o Do not enter any charges in the **“Misc.”** category.
18. Back on the Line Item screen again, select **Memo: Gk5** to create a PO Memo. A memo entry box will appear.



In the Memo Text:

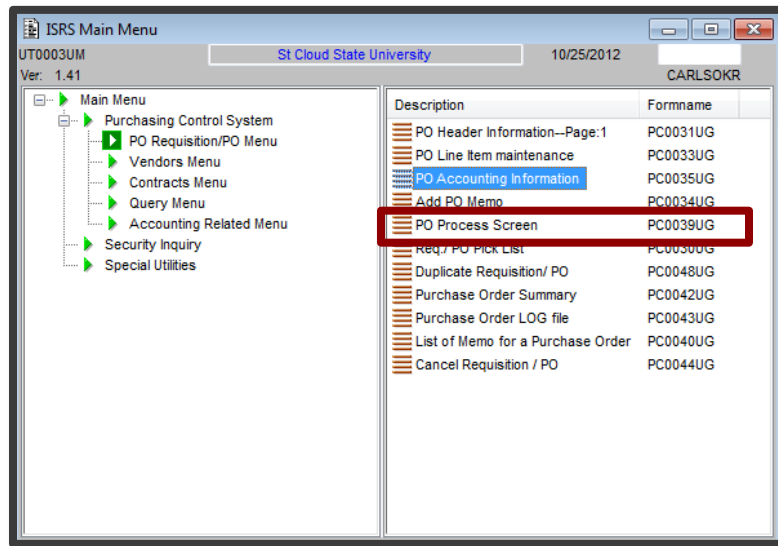
Enter any information you want the SCSU Business Office to see. The information in the memo box will not appear on the Purchase Order sent to the vendor.

Examples include quotes being sent, certificate of insurance, contract sent for signature, etc.

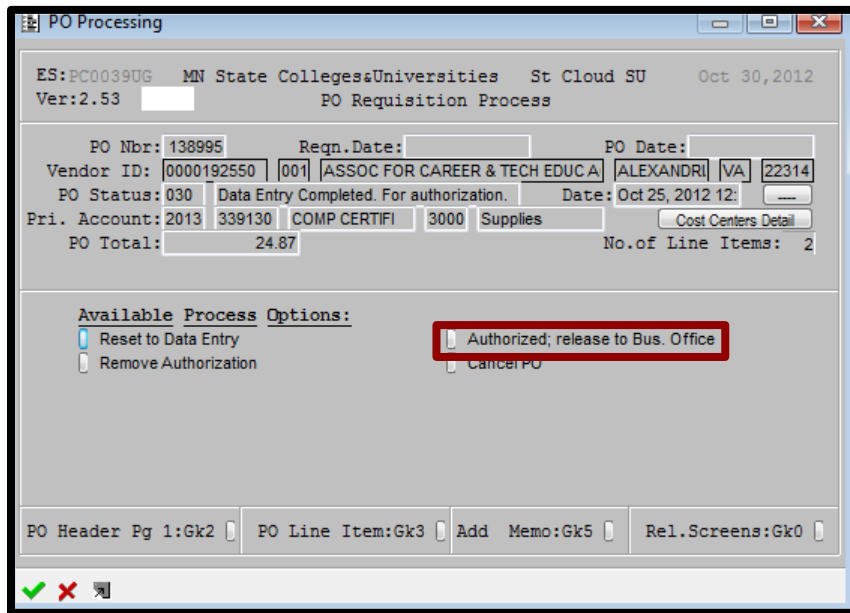
Remember to click **“Save”** and then the green check mark.

(See next page)

19. You will be returned to the ISRS Main Menu screen. Double-click on the **“P.O. Process Screen”**.
  - o You may also click the **“PO Process: GK1”** button from within your PO. (See the bottom of page 11)



20. The P.O. Processing screen will allow you to see your process options.

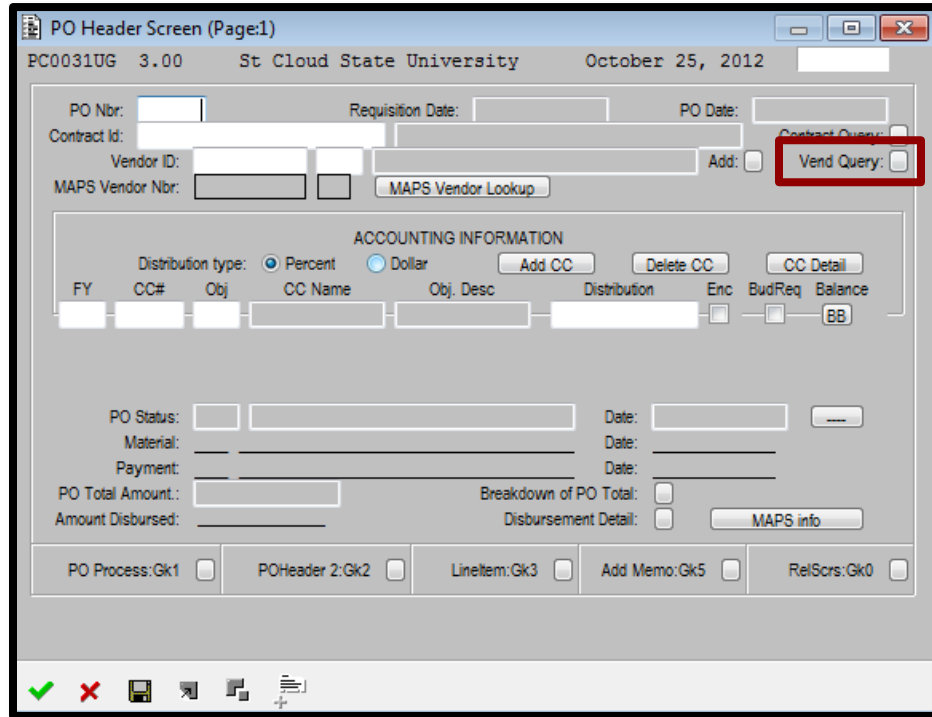


21. To process the P.O., you must click the button that states **“Authorized; release to Bus. Office”**.
  - o This will cause the status to change to 050\*. Refer to page 24 for status code details.
  - o The P.O. will not be ready immediately to send to the vendor; it must first be approved by the business office (450 status) before being sent to the vendor.
  - o If you have a PO that is split between multiple cost centers, each cost center will need to release the PO. Then the PO originator will have to release the PO to the business office. Contact the Purchasing Pre-Audit at 8-4120 with any questions that arise.

## Vendor Query

### Searching for a vendor

If you do not know the vendor ID, on the P.O. Header – Page 1 screen, select “Vendor Query”.



A new Pop-up window will appear.

Type in the keyword(s). To create a wild card: key the + sign from the number pad, then press shift+8 to get the asterisk to appear. The asterisk will act as the wild card.

If you want to narrow the search, include additional information such as the zip code.

Click **“Execute Query”** to run the search.

Note:

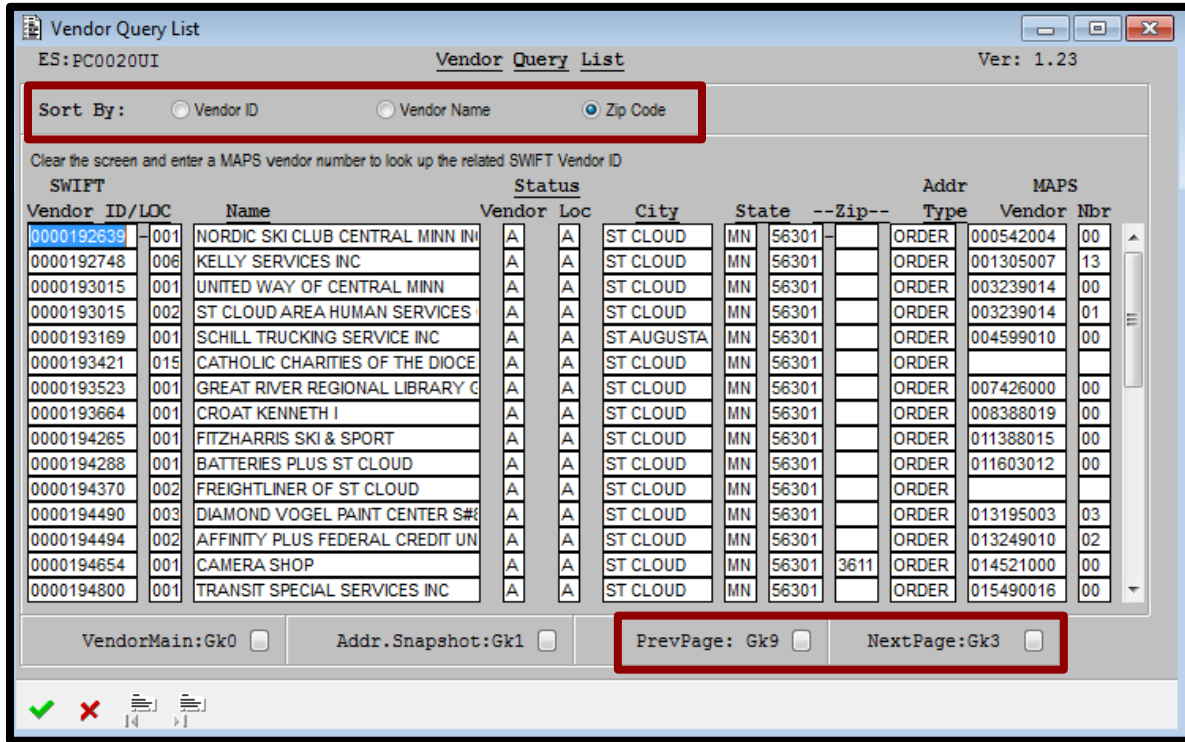
- o All vendors will appear in upper-case letters, do not try to change them to lowercase.
- o There are no punctuation marks used when writing an abbreviation. Using them will return zero search results.

(next page: Query Results)

## Query Results

On the vendor query list screen, you may scroll through the results using the scroll bar on the far right. If you have multiple pages of results, use the PrevPage and NextPage buttons to move between screens.

To alphabetize the list, click on “Vendor Name” in the sort by row.



### Found your vendor?

1. When you have located your vendor, click on the vendor name.
2. Then, select the green check mark.
3. The chosen vendor will populate on your P.O. Header Screen.

### Can't find the correct vendor?

1. Close the vendor query list screen by selecting the red X in the upper right hand corner.
2. Run another, more specific, vendor query from the main menu.
3. If you do not see the vendor you are looking for, please download the “Vendor Request Form” from the Purchasing website. Fill it out and mail/fax it to Purchasing. Your new vendor number will be ready in 2-3 days. If you have other questions, contact Sue Nelson at 8-6463.

### To find vendor information from the Main Menu, click on the following:

*Vendor Menu, Vendor Main, “MAPS Vendor Look-up”*

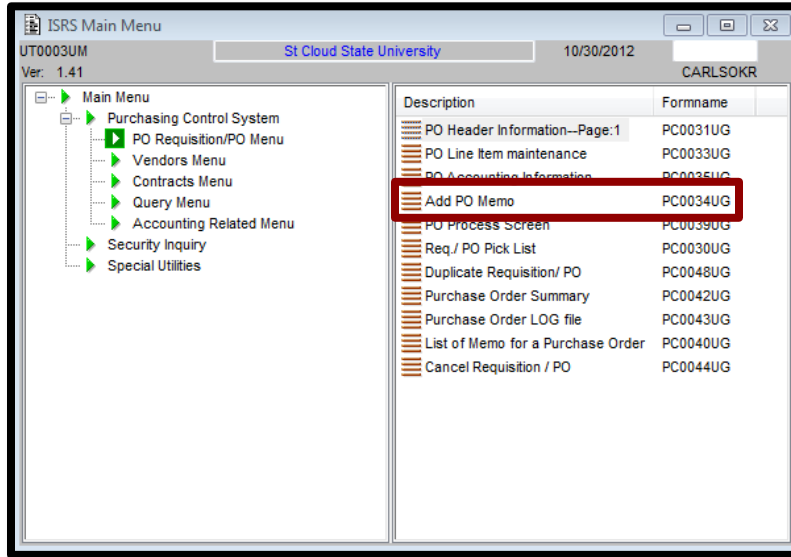
You can enter the vendor number to get a vendor name and vice versa. Enter the information you have, right click and select “Retrieve”. Select the vendor you were looking for and a new box will open with the vendor information.



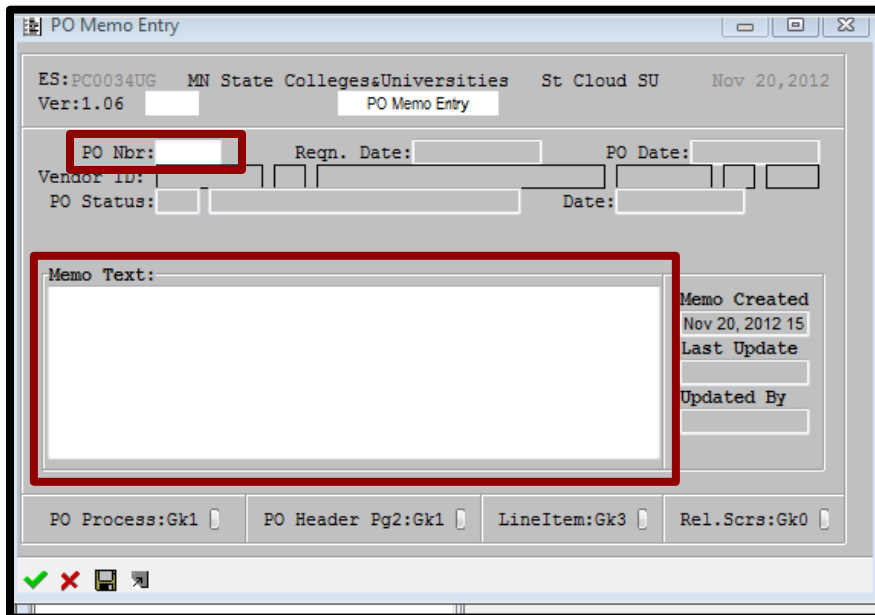
## Memos and Purchase Orders

### Add a Memo

If you need to add a memo, double click the “Add P.O. Memo” from the Main menu or from within your P.O. click the “Add Memo: GK5” button.



1. After opening “Add P.O. Memo”, enter the P.O. number.

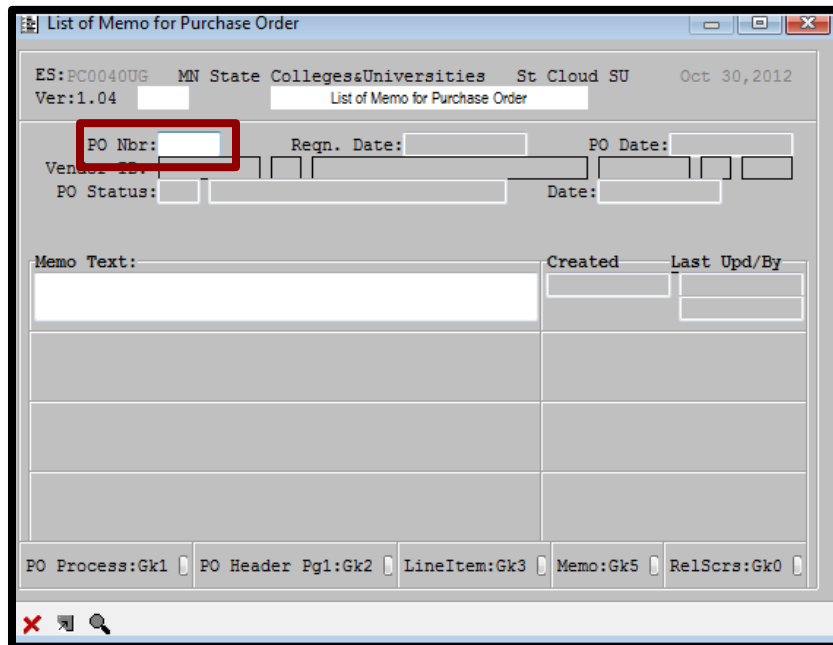
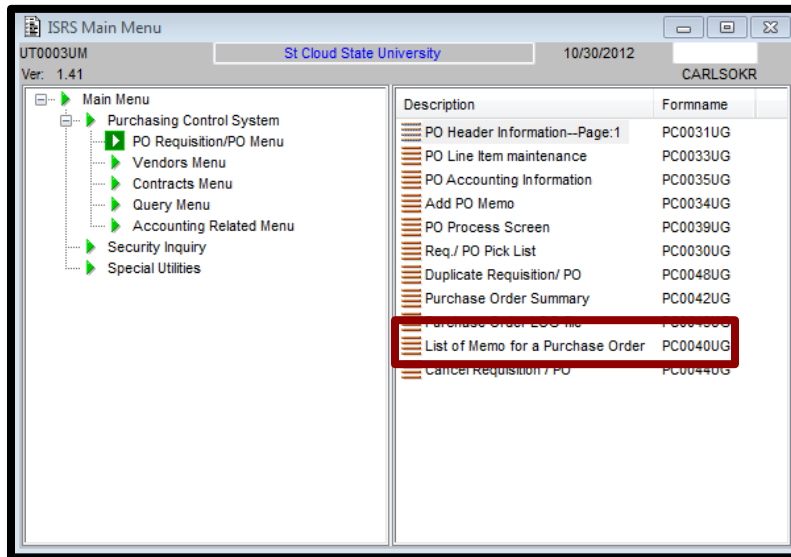


2. Then enter the memo information into the **Memo Text** box. Then click “Save” and “Close”

### Viewing the Memo on a P.O.

You can view an already existing memo from within a P.O. by clicking on the “memo” box from the right hand side of the screen.

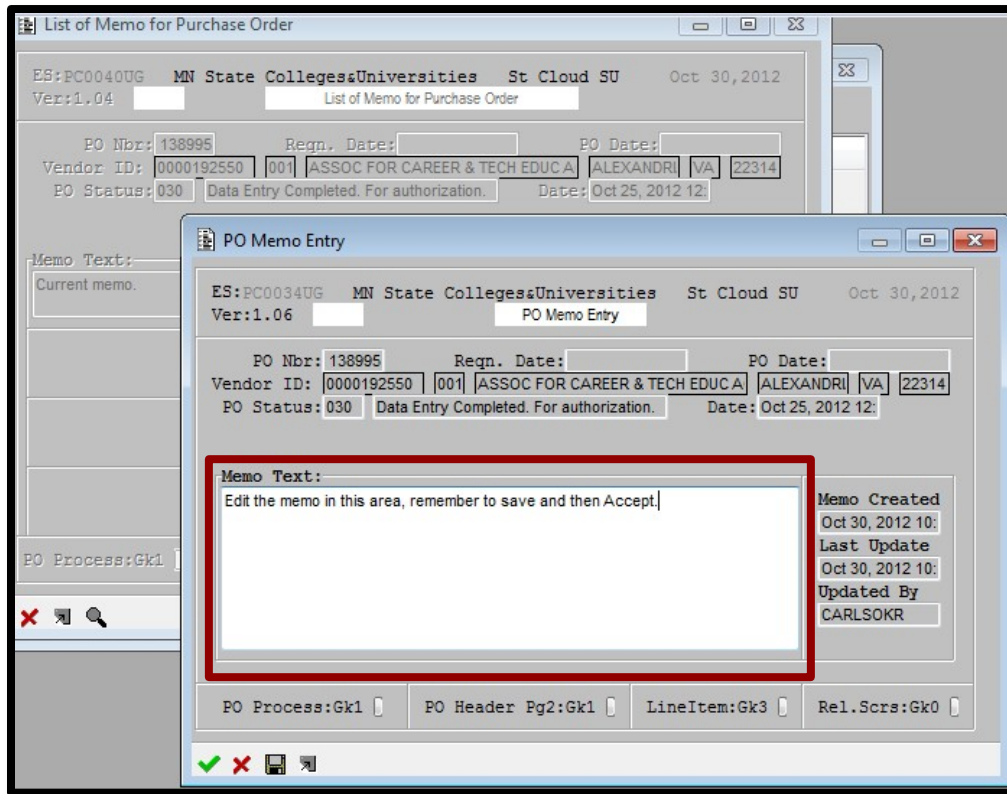
Double click on “List of Memo for a Purchase Order”



Enter the P.O. number; the memo will appear immediately. If the memo is too long, double click in the memo text box to open the memo box.

### Editing a memo

If you need to make changes to a memo you have entered, open the “List of Memo for a Purchase Order” from the Main menu.



1. To edit the selected memo, double click within the **Memo Text** box. This will open an editing window.
2. Remember to select the “save” button when you are finished making your changes.
3. To see the changes, you will need to close the memo are and re-open to refresh the screen.

**\*Please remember to indicate if you are sending any type of attachment to Business Services\***

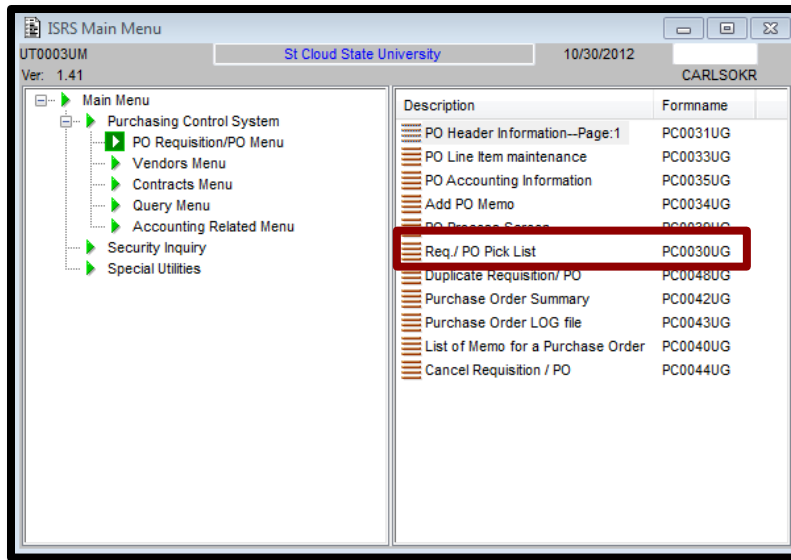
Note: You may also edit the memo text from within the P.O. To do this, select the “memo” screen of the PO and double click the memo text. Make any changes and click save.

## How to Find a P.O. Number

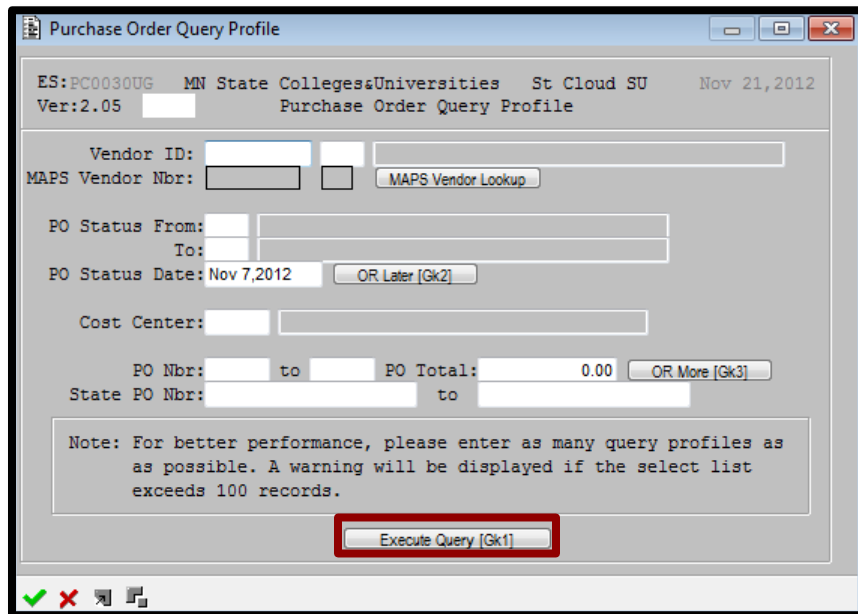
### Pick List

If you need to search for a specific P.O., locate a vendor ID, cost center, or check the status of a P.O., you can run a **Requisition/ P.O. Pick List** query.

From the main menu, select, **“Req. /P.O. Pick List”** from the right hand column.

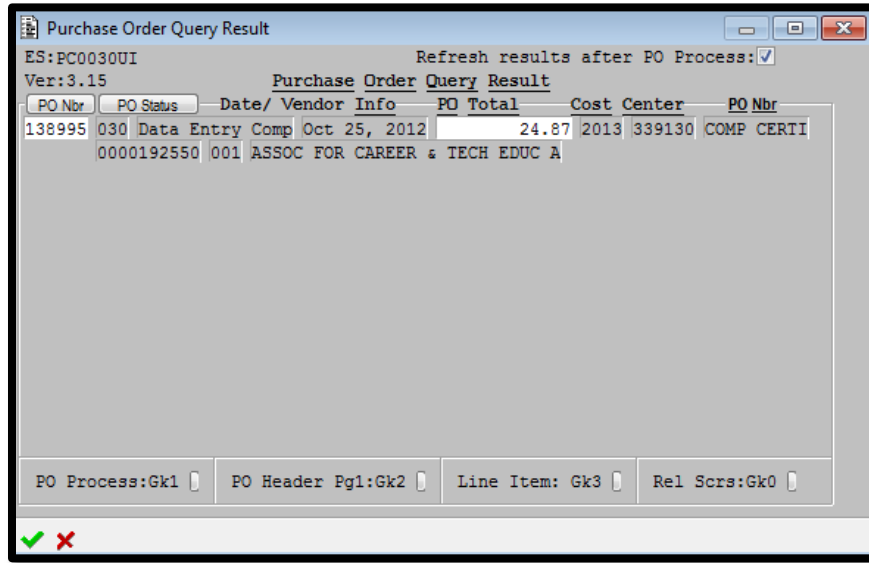


1. A new window will open. To run the query, type in the information that you have.  
*\*Remember, this can be the vendor number, P.O. status codes, cost center, P.O. number, etc.\**



2. Click on the **“Execute Query”** button.

- 3. The results of the query will appear.

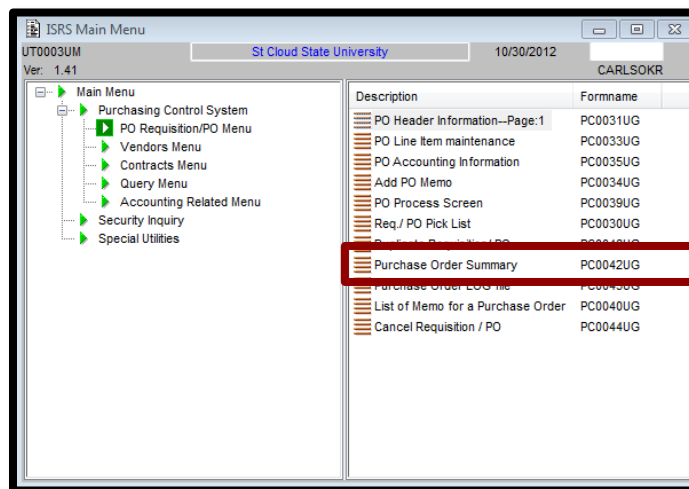


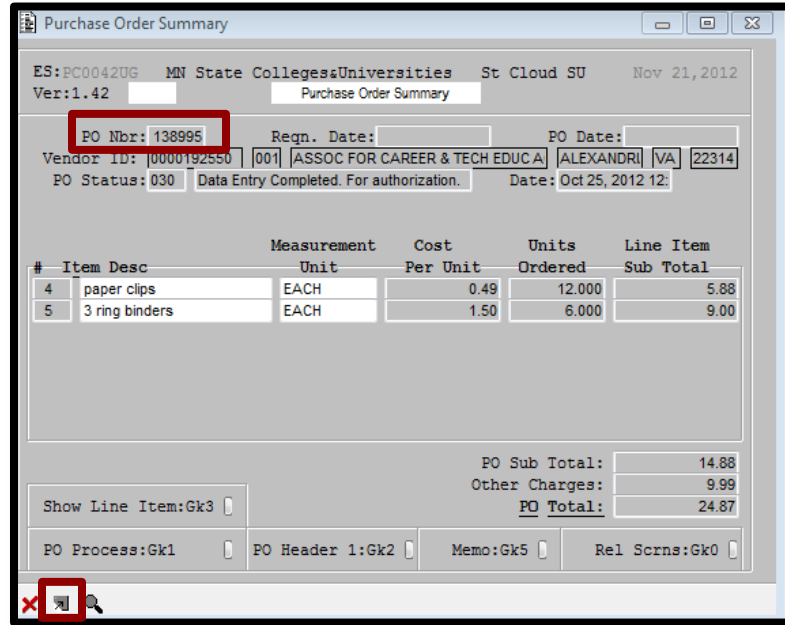
- 4. When the query results appear, you will see a summary of the P.O. (P.O. number, status, dollar amount, cost center, and date created). **If you would like to see more information about the P.O. you were searching for, double-click on the P.O. number. Then choose an option from the bottom of the screen (Process, Header, Line item, Related screens).**


### Purchase Order Summary

The Purchase Order summary screen will show you a list of the items that are on the P.O.

To view this, from the main menu, click “Purchase Order Summary”.

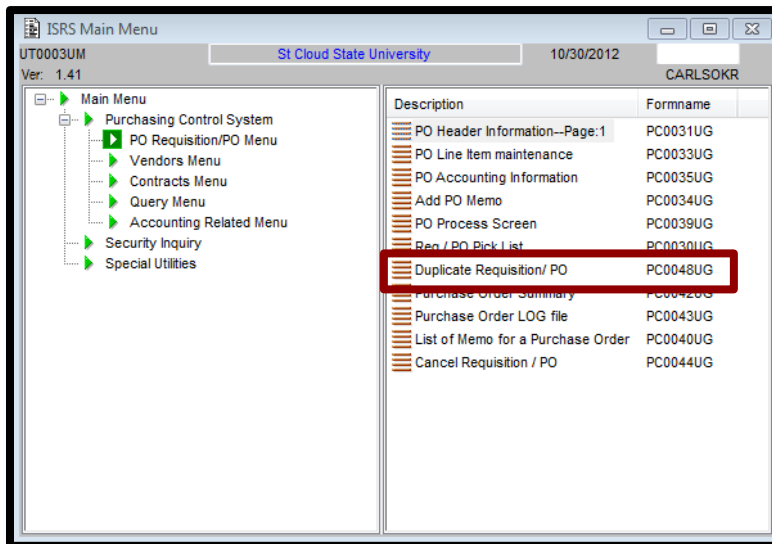





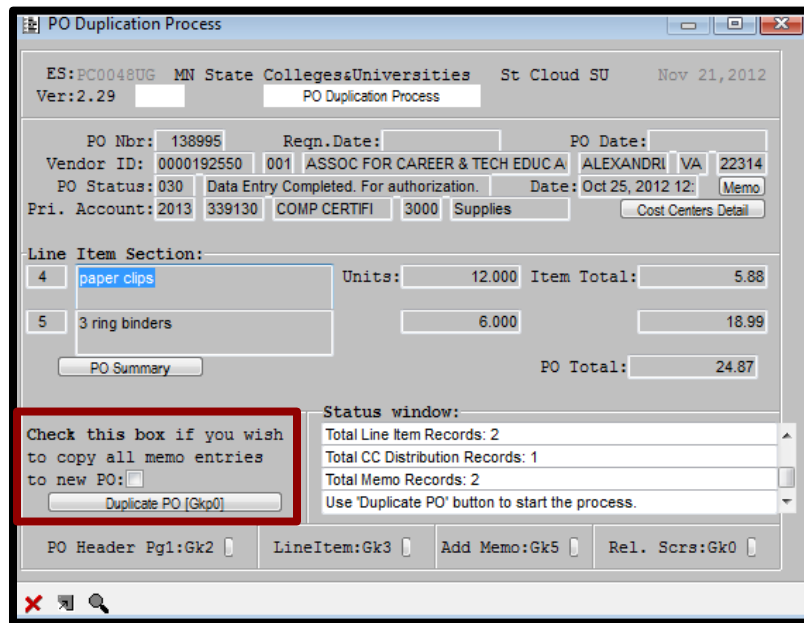
1. After opening the “Purchase Order Summary” screen, if it is pre-populated with information, clear it using the clear button. 
2. Type in the **P.O. number** you are looking for; the screen will automatically update with your information.


### Duplicating a P.O.

If you would like to duplicate a P.O., click “Duplicate Requisition/P.O” from the main menu.



Your most recent P.O. will populate in the window that opens. If you do not want to duplicate this P.O., remember to click the clear button. 



1. Enter the P.O. number that you would like to duplicate. Your P.O. information should appear.
  - a. You may want to copy all prior P.O. memos, in which case check the box above “Duplicate PO”.
2. Click the “**Duplicate PO**” button.
3. The P.O. will be duplicated and the information for the new P.O. will appear, with a new P.O. number.
4. You will see an update in the “**Status Window**” that a new PO has been generated.
5. The status window will show that the new P.O. is in 000 status.
6. “**Save**” your changes. 

**Need to make changes?**

To update the line items, change the quantity, price, etc. click “**Line Item: Gk3**”. Make your changes and click “**save**”

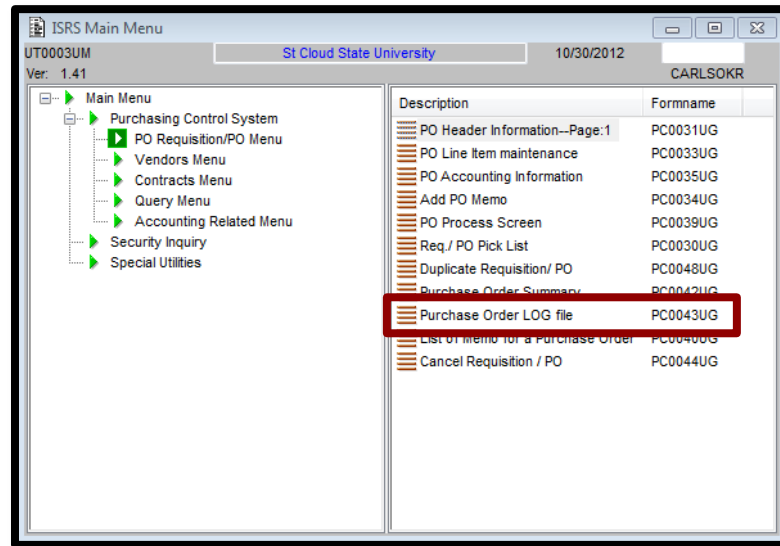
If you are ready to authorize it immediately, click on “**PO Process Screen:Gk1**”.


## P.O. Log File

### Purchase Order Log File

The Purchase Order Log File screen will show you the status level of your purchase order as well as the date and User ID of the person who last worked with the P.O.

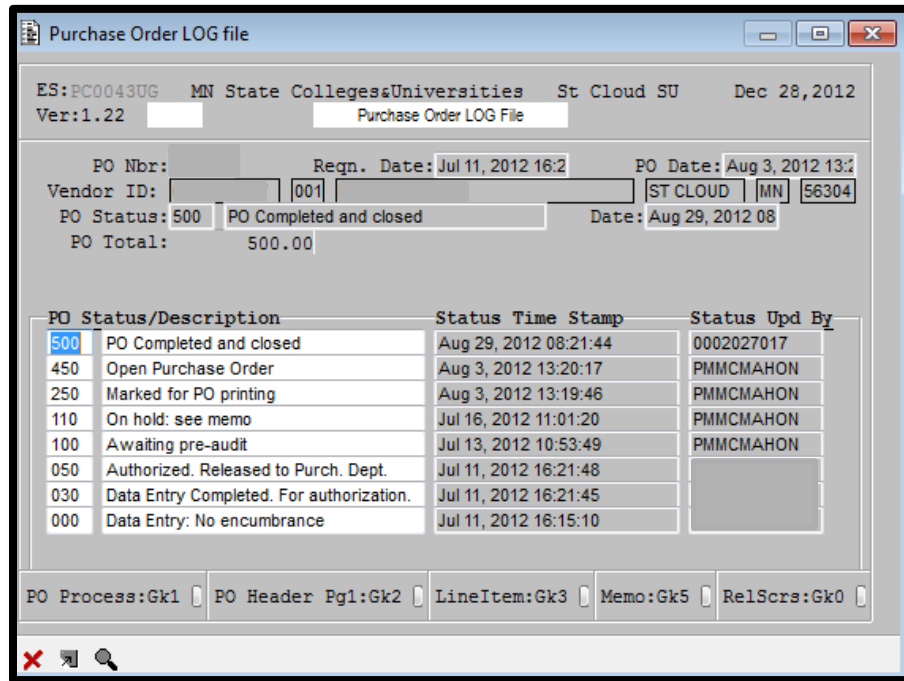
From the main menu, click “Purchase Order Log file”



1. After opening the “Purchase Order Log File” screen, if it is pre-populated with information, clear it using the clear button. 
2. Type in the **P.O. number** you are looking for; the screen will automatically update with your information.

Note: To see the Log file from within the PO, click “Rel. Screens” to move to #5 the P.O. LOG file.





The screen will show you the status codes that the P.O. has traveled through, the status description, the time stamp, and the user involved.

### PCS Status Codes definitions

See the link below for a detailed list of PCS status codes:

<http://www.stcloudstate.edu/businessservices/purchasing/manual/statuscodes.asp>