Southern Illinois University
CARBONDALE

Receipts: Selecting, Changing & Verifying Procurement Organizations

Overview

"Organization" refers to the purchasing Procurement Organization for your specific Campus. During initial log on to the Purchasing application, you MAY be prompted to select an organization in which to work. Or, when working in the application, you may find it necessary to change the organization in which you are working. The steps for selecting, changing, and verifying a procurement organization are provided in this learning cycle.

Selecting a Procurement Organization

- During the initial log on to the Purchasing application, the "Organizations" window may display prompting you to select the Organization in which you wish to work.

- The Organizations window contains six options, only four should be used by Department Receivers.
    - **CPO** - Cdale Procurement Organization for Carbondale
    - **EPO** - Eville Procurement Organization for Edwardsville
    - **PS** - PS Procurement Organization for School of Medicine (Physicians & Surgeons)
    - **SPO** - Spfld Procurement Organization for School of Medicine (other-than Physicians & Surgeons)

- To select the appropriate Organization for your campus, highlight it and click OK or double-click your selection.
    - The Find Expected Receipts window appears.
    - The Receipts window resides in the background.

- The three-letter acronym, in parenthesis, after the window name on the Title Bar, identifies the Organization selected.

- In Production, to verify the Organization you are working in, look at the acronym.

Changing a Procurement Organization

- In Production there may be times when you are required to change the Procurement Organization that you selected during the initial log on.

- You can make the adjustment using the "Change Organization" function on the Applications Navigator.

- To begin, highlight Change Organization on the Navigator and then click **Open**.

- The Organizations window displays.

- From the Organizations window, highlight the needed Procurement Organization and click **OK** to return to the Navigator window.

- VERIFY that the Organization was actually changed to'.
    - In Production, you must be receiving in the correct procurement organization to reflect accurate financial information.

- Begin the verification process by selecting **Receipts** and clicking **Open**.

- The Find Expected Receipts window displays.

- Verify the change by viewing the acronym in parenthesis, after the name on the window Title Bar.

MPORTANT
The two options, XPX PS Item Master and XXX Item Master should **NEVER** be selected as a Procurement Organization. These two options were used in the initial set-up of AIS.

- **NEVER** enter 'Receipts' to these Orgs. Selecting one of them may over- or under-state your accruals and financial accounting information will not be reported accurately.