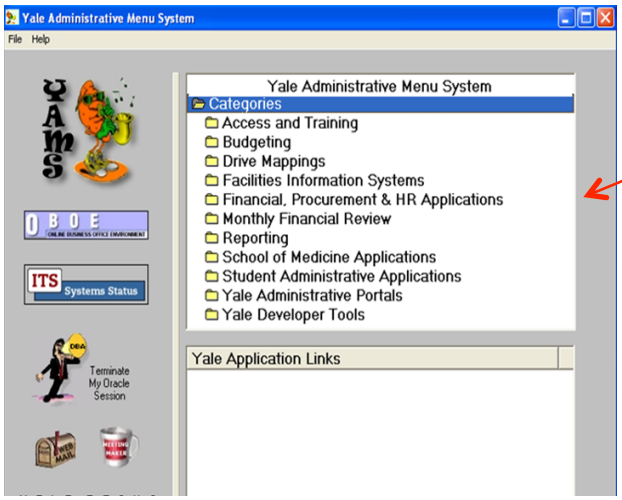
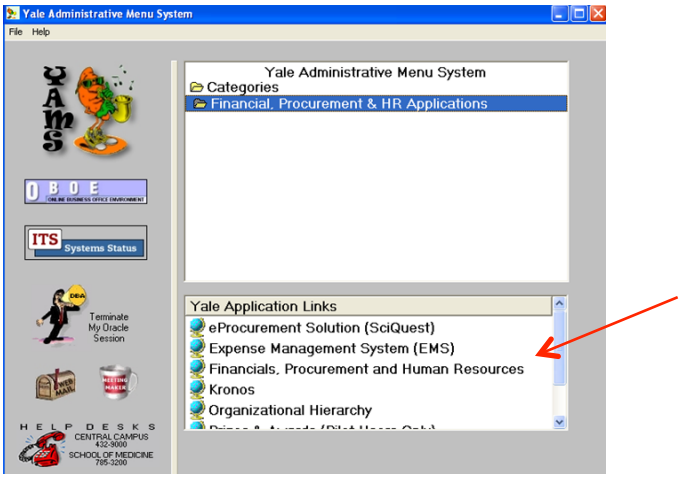
Procurement Inquiry

- **Procurement Inquiry is a web-based tool that allows University employees to query and view the status of a requisition, purchase order, invoice, check request, VIP or supplier.**
- **Log into www.yale.edu/start or open the START menu, click on "Yale Admin Menu"**
- **Click the "Financial, Procurement & HR Applications"**

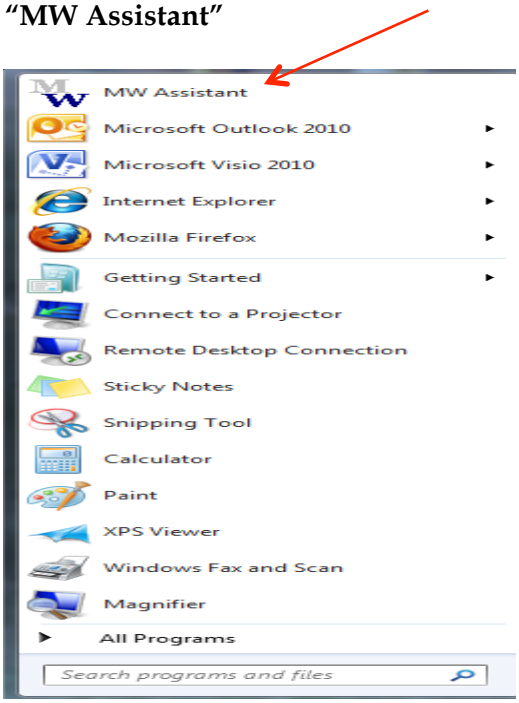


- **Double Click the "*Financials, Procurement and Human Resources*" under Yale Application Links**

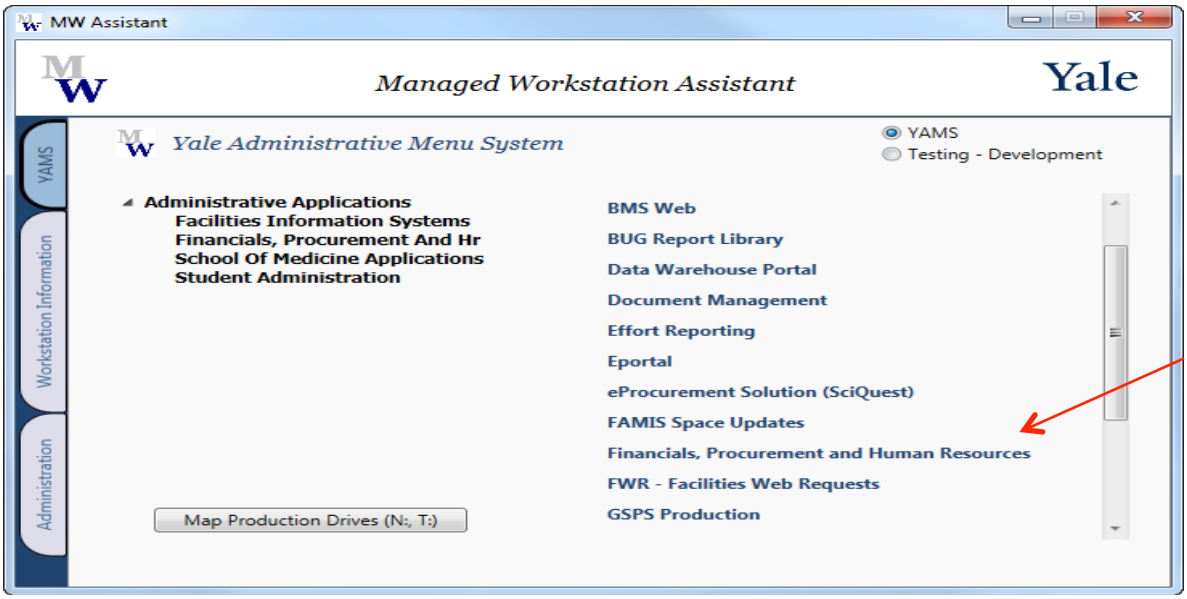


If you have an recently upated machine, please login by going to your START Menu

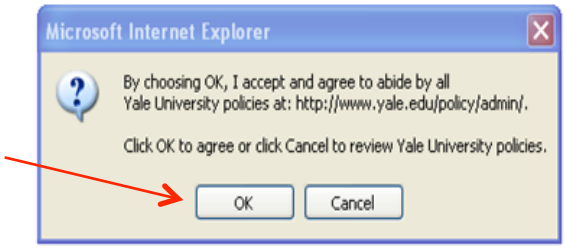
- **Click the "MW Assistant"**



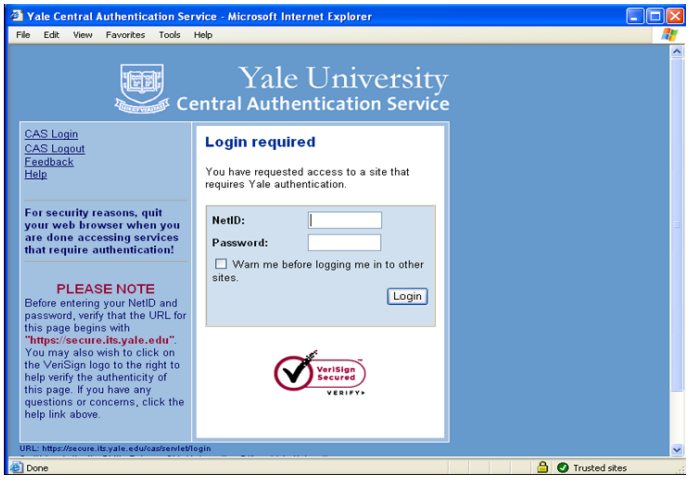
- **Click the "Financial, Procurement & Human Resource"**



- **A Dialog Box will appear – Click the OK button to Login.**



- **The CAS Login window opens, Enter your NetID and password**

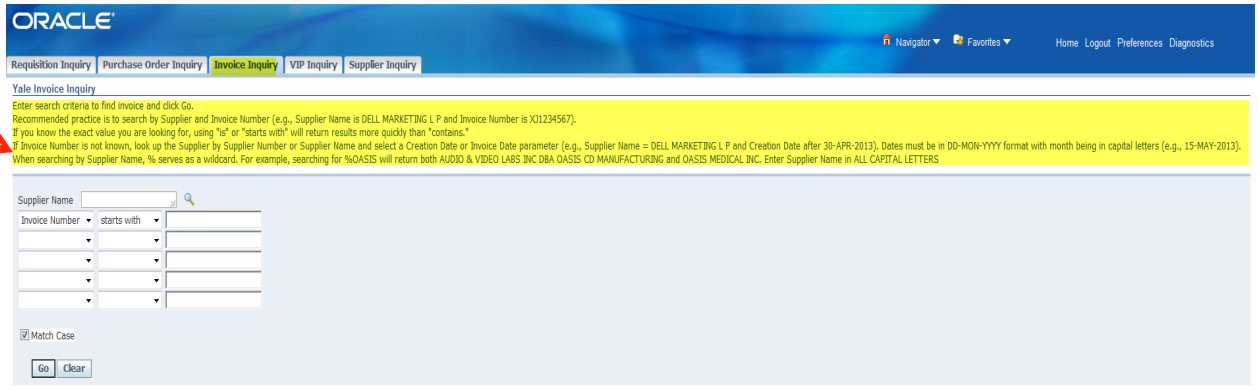


- **Select *Procurement Inquiry***

Select Specific Search in Procurement Inquiry

- **By Invoice, Check Request, Advances and Replenishments**

Tips to Search

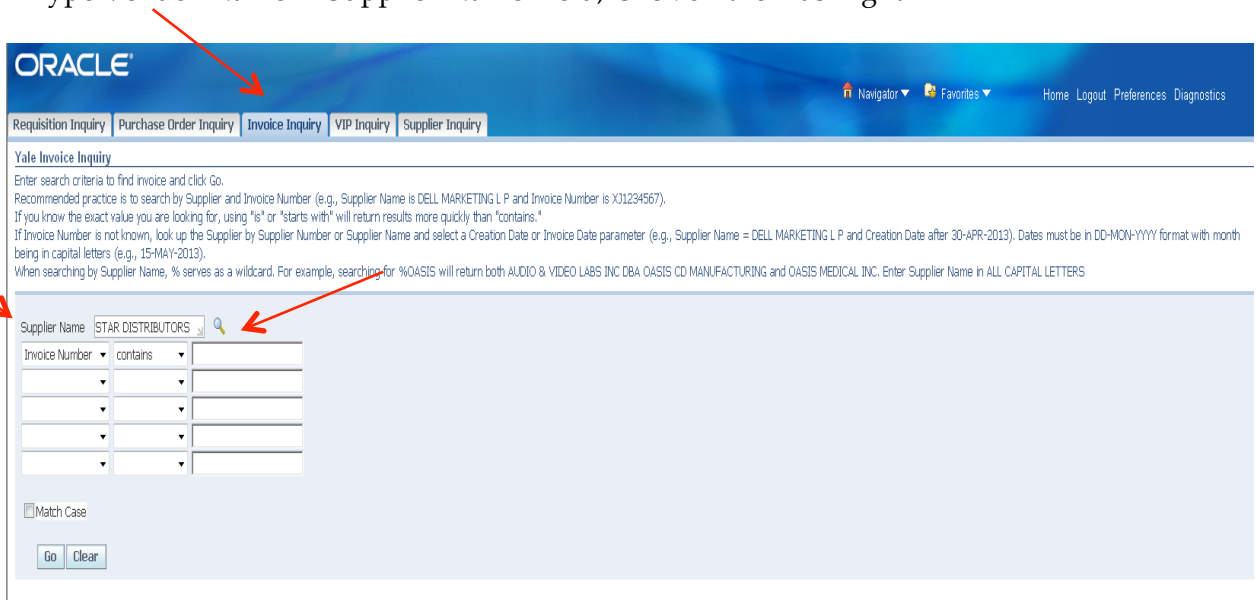


Helpful Tips:

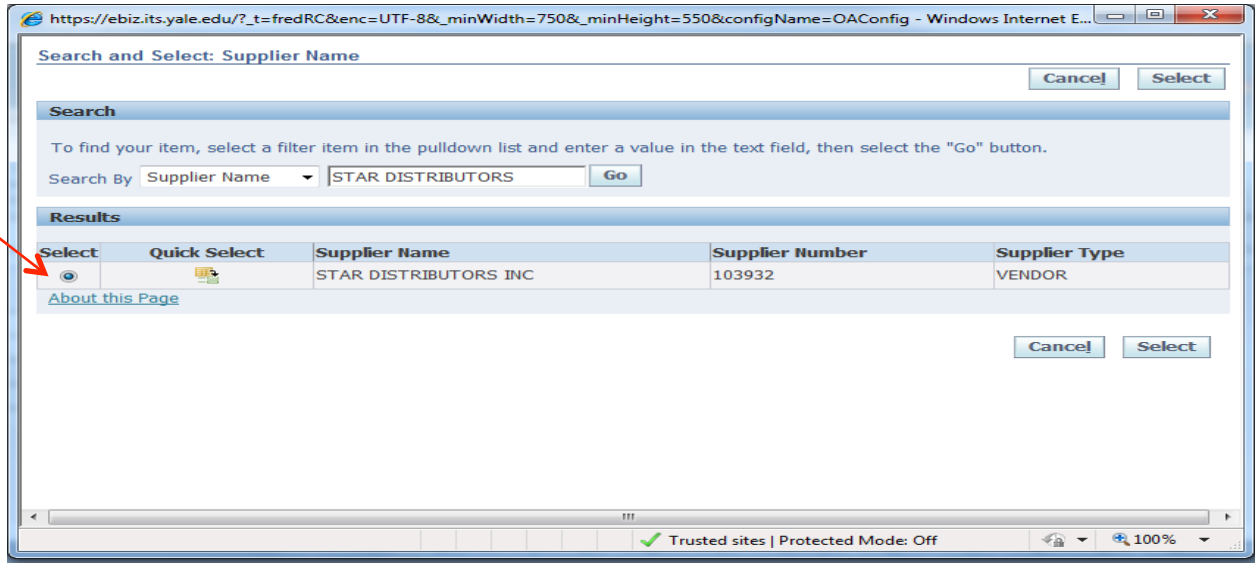
- ✓ Enter search criteria to find invoice and click Go.
- ✓ Recommended practice is to search by Supplier and Invoice Number (e.g., Supplier Name is DELL MARKETING L P and Invoice Number is XJ1234567).
- ✓ If you know the exact value you are looking for, using "**is**" or "starts with" will return results more quickly than "contains."
- ✓ If Invoice Number is not known, look up the Supplier by Supplier Number or Supplier Name and select a Creation Date or Invoice Date parameter (e.g., Supplier Name = DELL MARKETING L P and Creation Date after 30-APR-2013). Dates must be in DD-MON-YYYY format with month being in capital letters (e.g., 15-MAY-2013).
- ✓ When searching by Supplier Name, % serves as a wildcard. For example, searching for %OASIS will return both AUDIO & VIDEO LABS INC DBA OASIS CD MANUFACTURING and OASIS MEDICAL INC. Enter Supplier Name in **ALL CAPITAL LETTERS**

Scenario: Department is looking for the status of an invoice that was to be paid to Star Distributors. On the copy of the invoice they have for their records, only partial invoice number is showing.

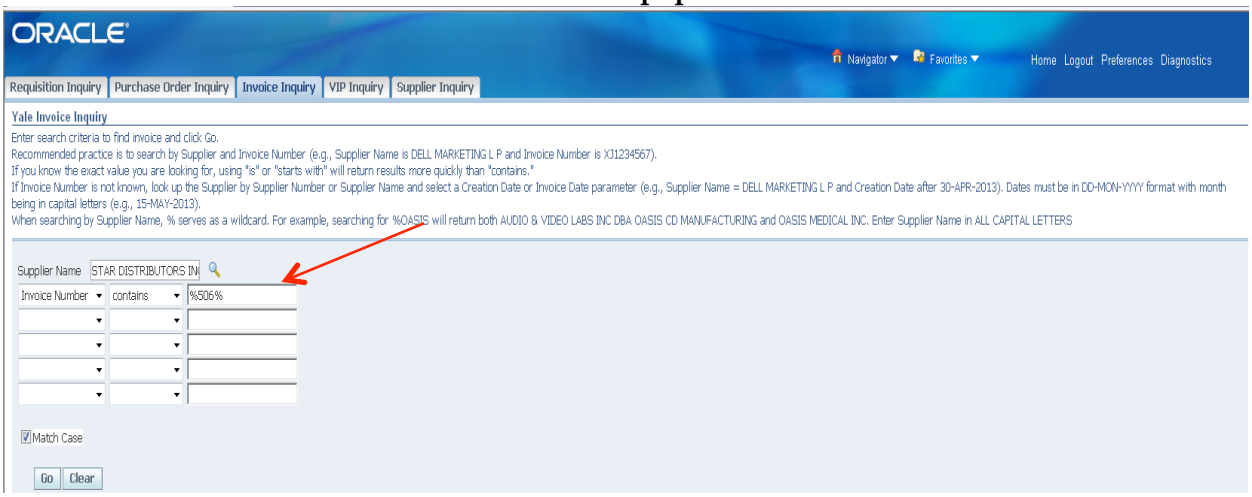
- Be sure you have chosen the "Invoice Inquiry" tab at the top of the page
- Type Vendor Name in Supplier Name Field, Click on the Flashlight

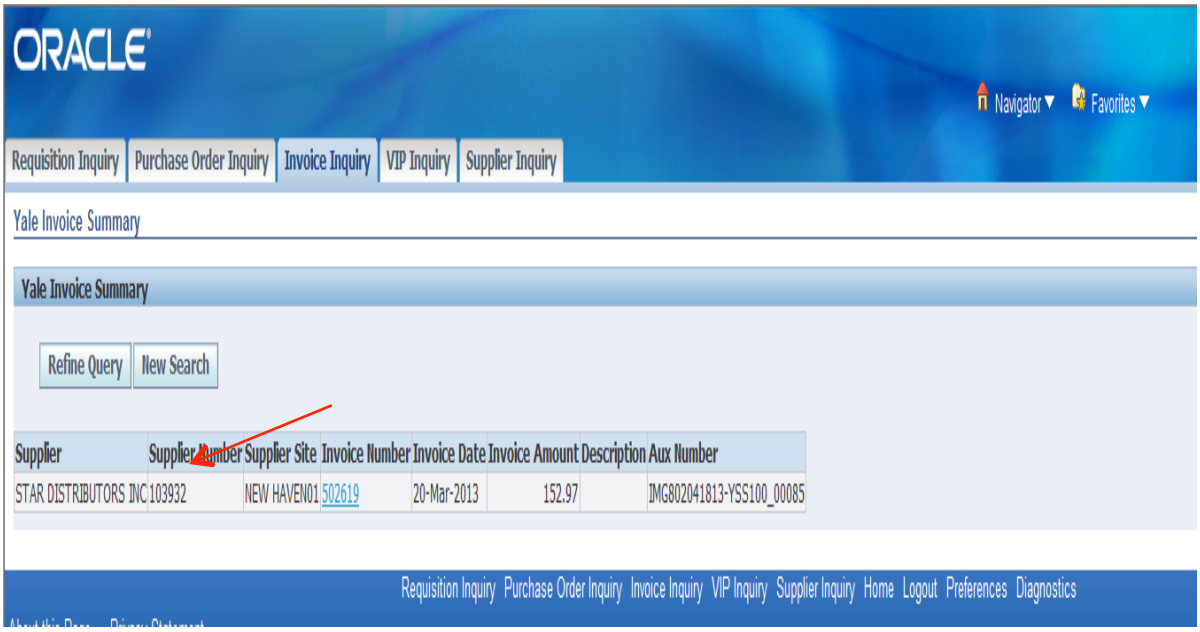


- **List of Vendor Names will appear.**
- **Click on Vendor Name, "Select"**

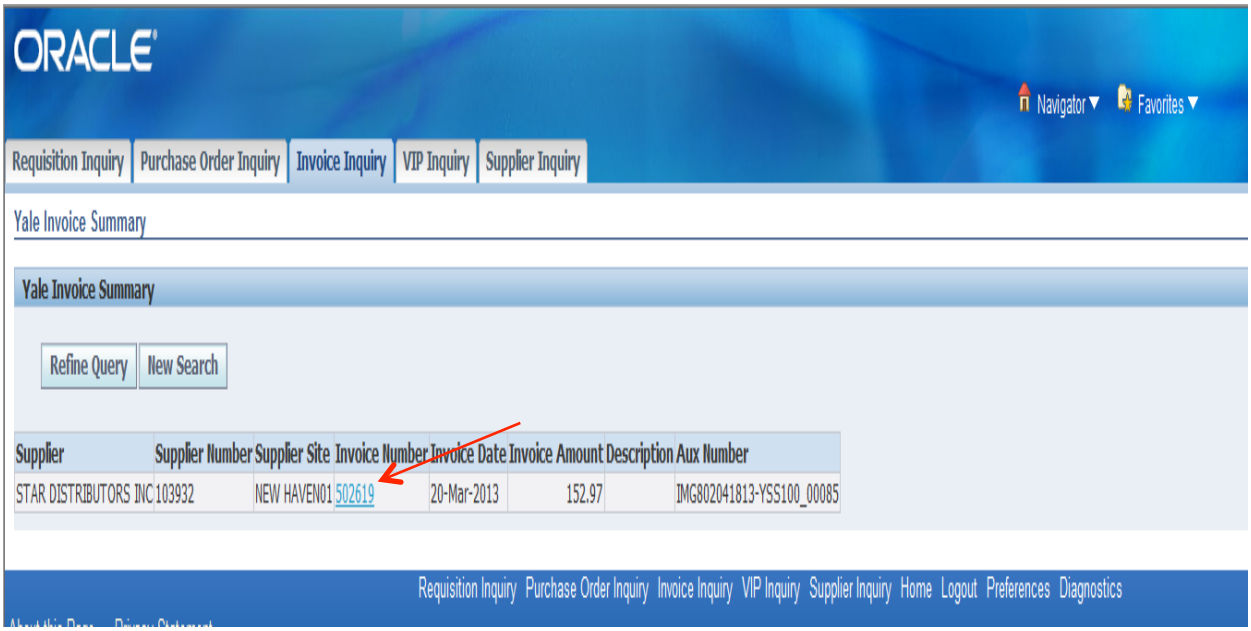


- **Select "Contains" in the middle box drop down list**
- **Put the partial number of the invoice in the field.**
- **Select "GO" and the information will populate**

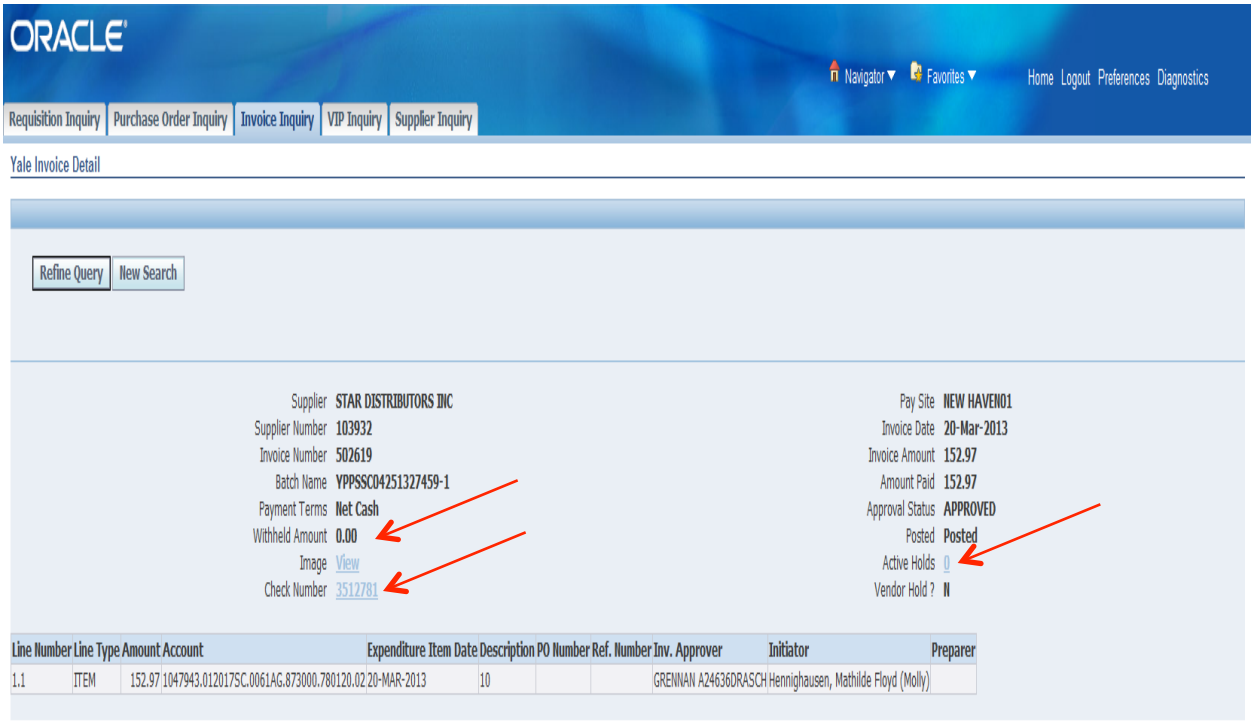




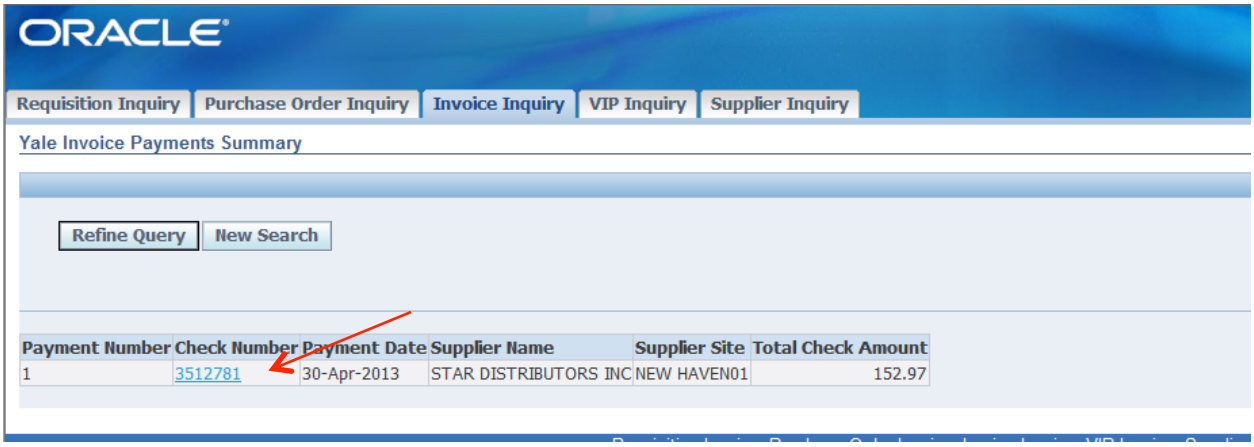
- **To get detailed affiliated with the invoice, click on the invoice number**



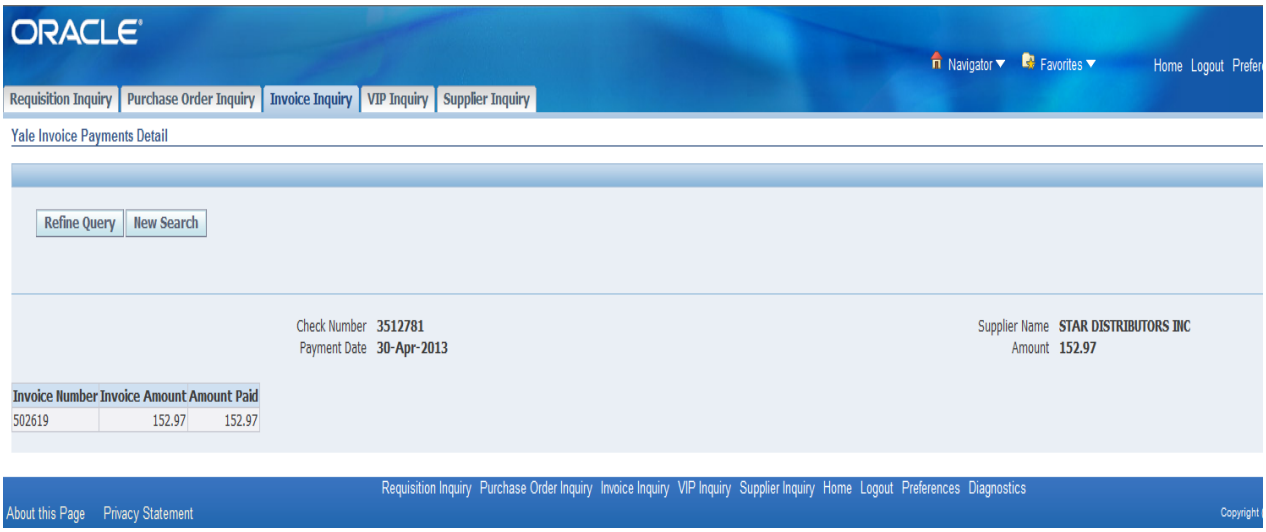
- **This screen will provide further information and links to view the image, check number and if there are any active holds. Click on that specific blue link.**



- **To view check number, date of payment and amount. Click on the check number.**



- **In this screen you are able to view detailed information pertaining to the payment of the invoice**
  - **Supplier Name**
  - **Invoice Number**
  - **Invoice Amount**
  - **Payment Amount**
  - **Payment Date**



Type of Payments identified in the *"Check Number"* Field in Procurement Inquiry

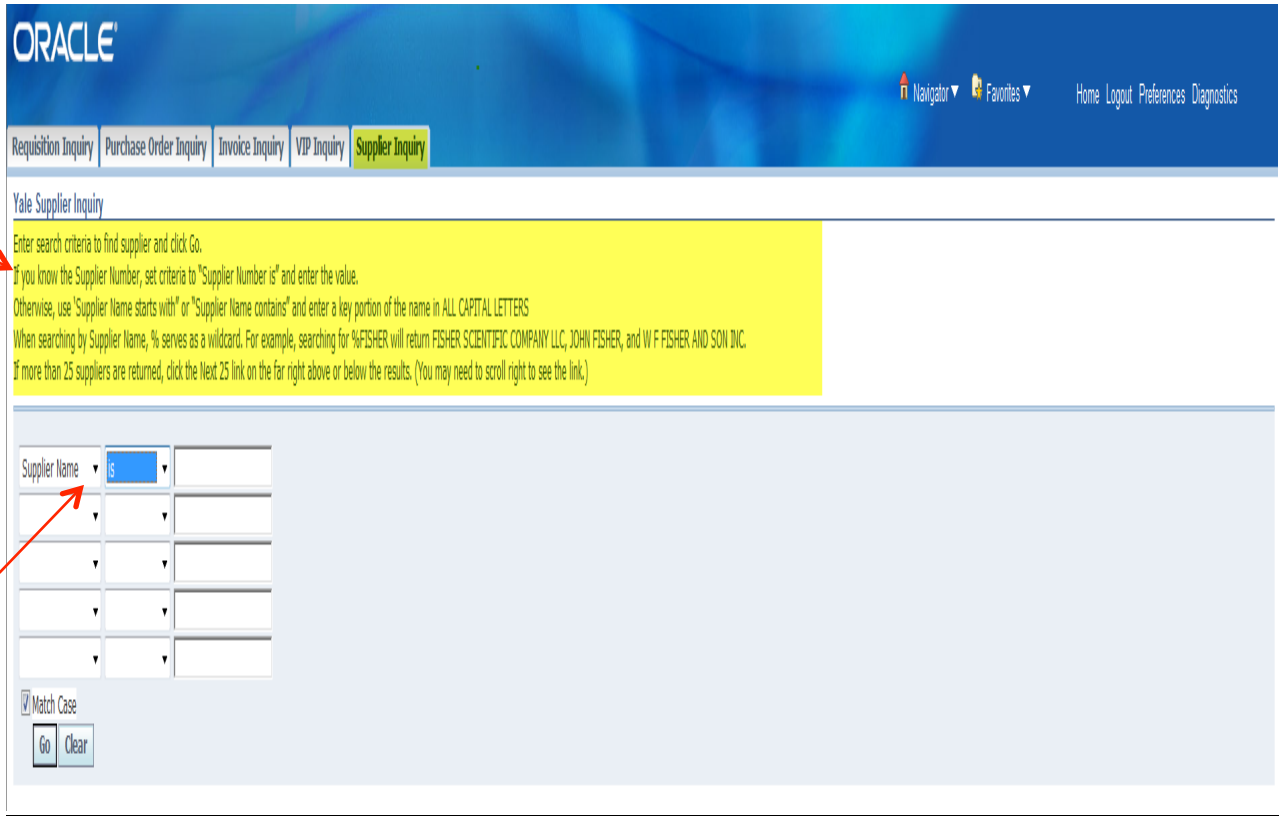
- **Payment Number Begins with:**
  - *i. 1- ACH/EFT (electronic) payment*
  - *ii. 3 – Actual Check has been cut*
  - *iii. 4 – Single Use Account (SUA)*

- **Payment Number is a *5 Digit Number* beginning with:**
  - *iv. 4 - is a Wire Payment*
  - *v. 1 - is a travel advance payment*

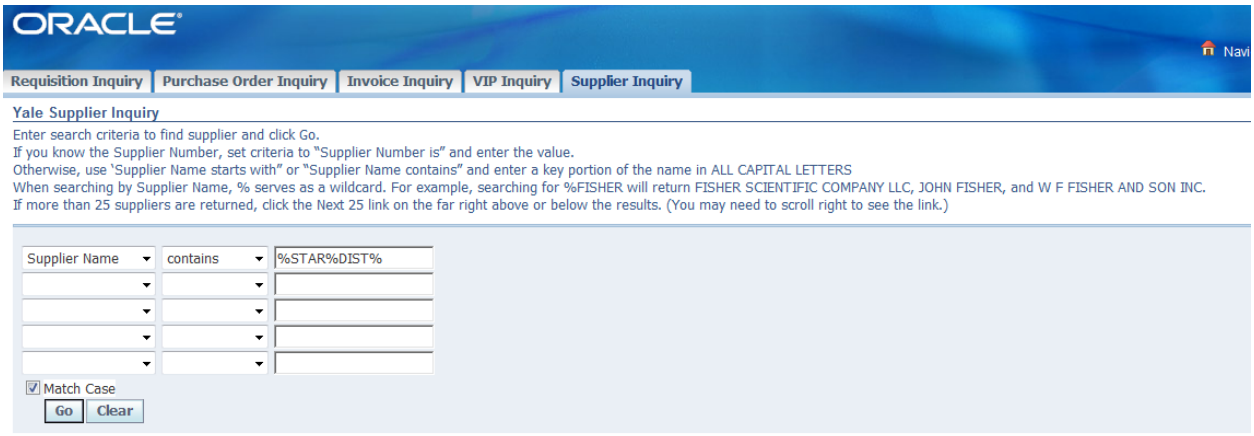
Select Specific Search in Procurement Inquiry

- **By Supplier/Vendor**
  - Be sure you have chosen the "Supplier Inquiry" tab at the top of the page
  - Can be searched by Supplier Name or Supplies Number (if known) by selecting your chose in the dropdown list next to ***Supplier Name.***
  - When searching by Supplier Name, % serves as a wildcard. For example, searching for %OASIS will return both AUDIO & VIDEO LABS INC DBA OASIS CD MANUFACTURING and OASIS MEDICAL INC. Enter Supplier Name in ALL CAPITAL LETTERS

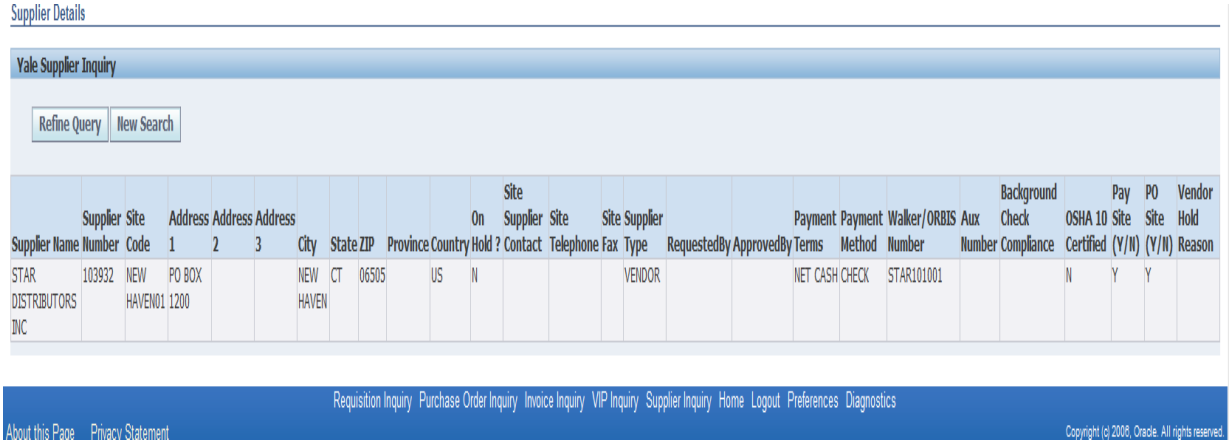
Tips to Search



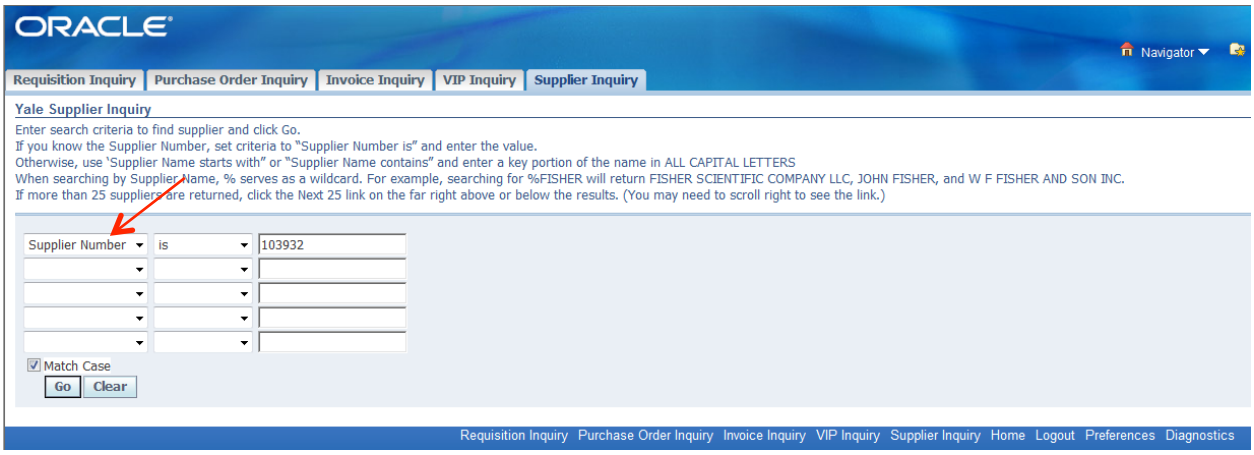
Example of Searching Supplier by Partial Name



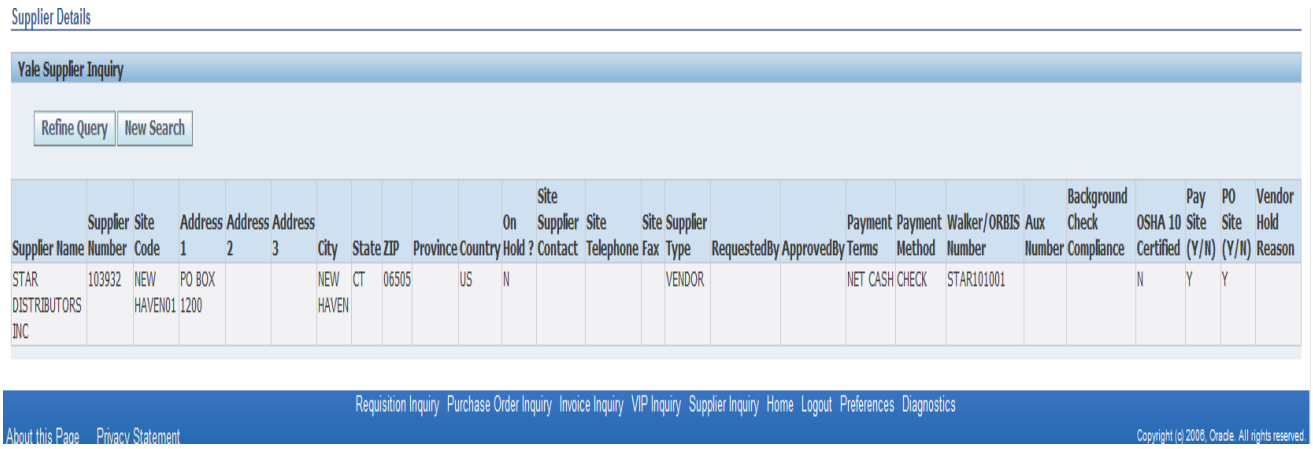
Results



Example of Searching by *Supplier Number*



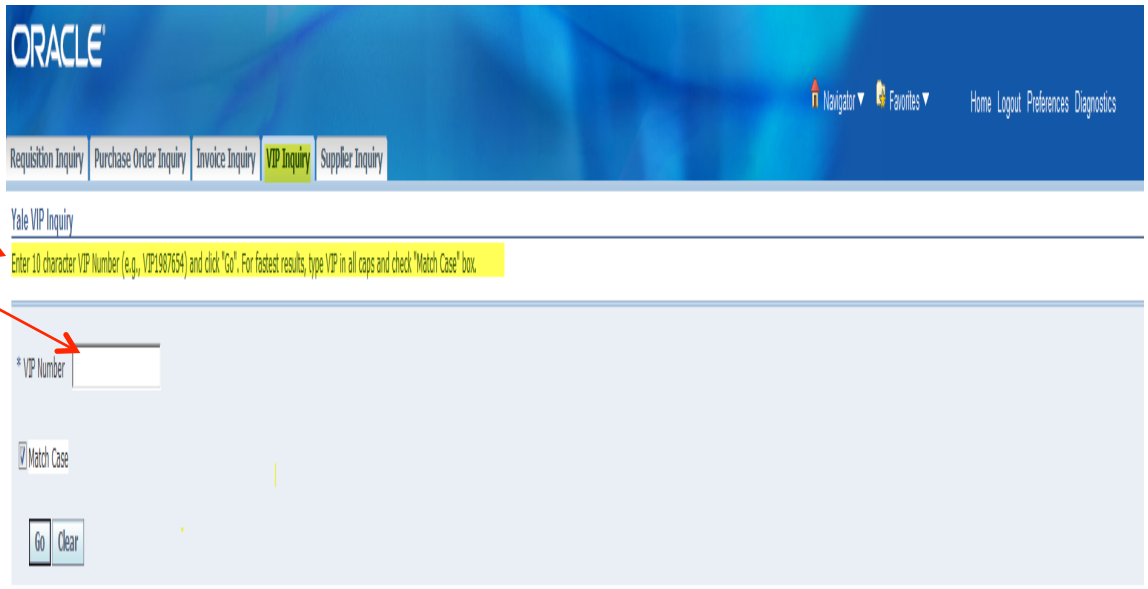
Results



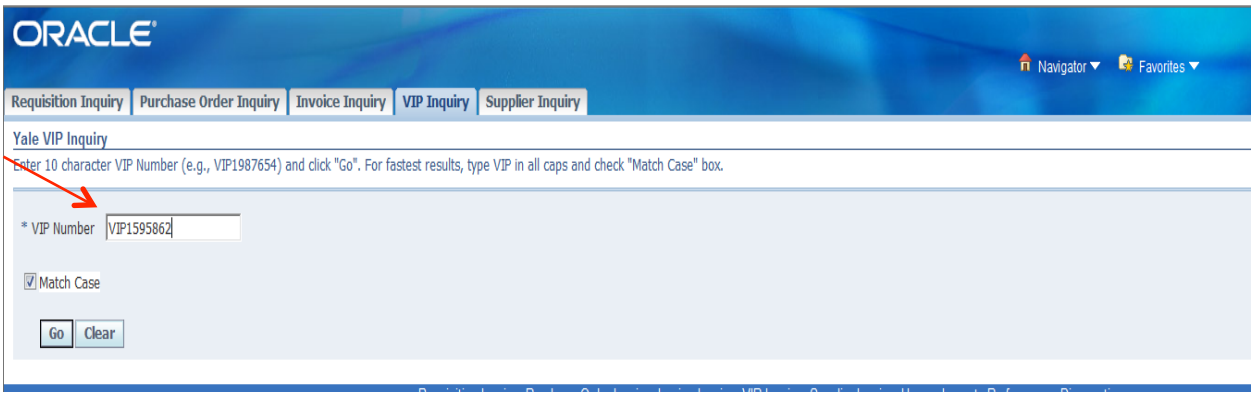
Select Specific Search in Procurement Inquiry

- **By VIP**
  - Be sure you have chosen the "VIP Inquiry" tab at the top of the page
    - Include "VIP" as a prefix before the 7 numerical digits.

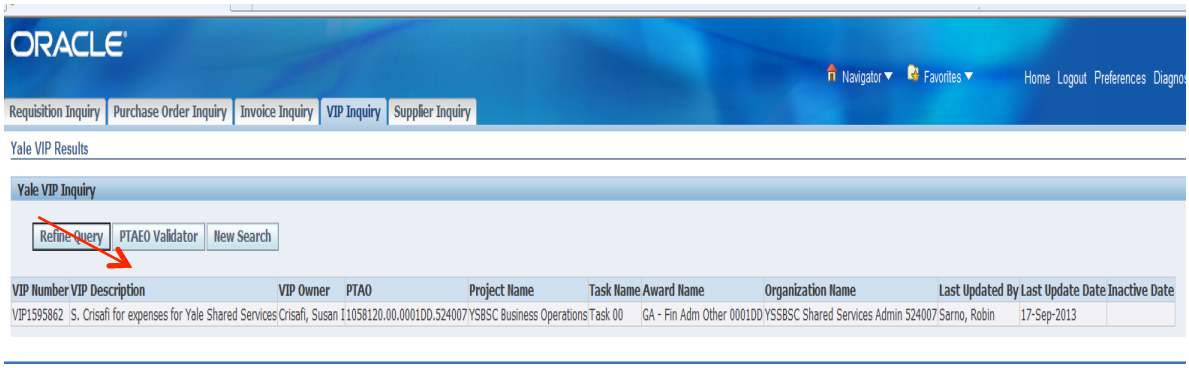
Tips to Search



Example

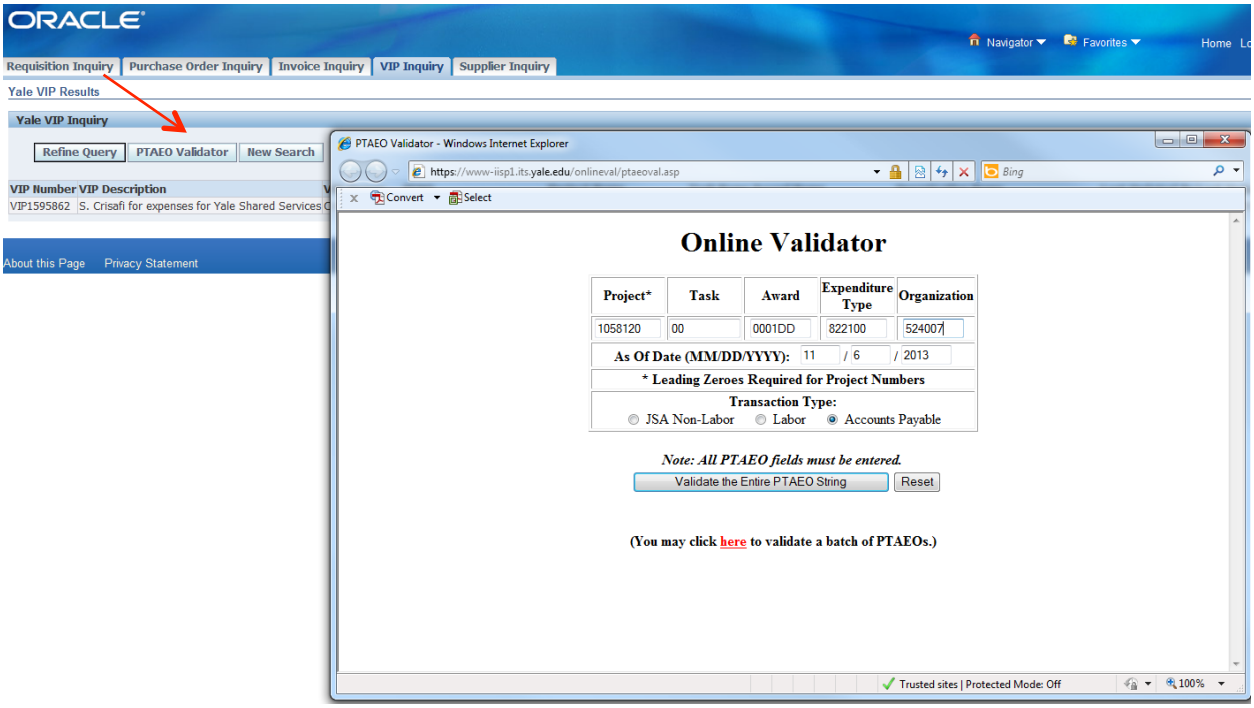


Results of VIP



Note: If the PTAEO linked to the VIP needs to be validated you can do so from this screen by clicking on PTAEO Validator. The PTAEO Validator will appear.

- Choose Accounts Payable
- Type in the date of the transaction
- Type in full PTAEO
- Click Validate the Entire PTAEO String



Results of PTAEO Validation

Online Validator

Project*	Task	Award	Expenditure Type	Organization
1058120	00	0001DD	822100	524007

As Of Date (MM/DD/YYYY): 11 / 6 / 2013

* Leading Zeroes Required for Project Numbers

Transaction Type: JSA Non-Labor | Labor | Accounts Payable

✓ Valid Project

✓ Valid Task

✓ Valid Award

✓ Valid Expenditure Type

✓ Valid Organization

Fields	Begin	End
Project Dates:	1-JAN-2010	
Task Dates:	1-JAN-2010	
Award Dates:	1-JUL-1998	30-JUN-2050
Expenditure Dates:	1-JUL-1998	
Organization Dates:	1-FEB-2010	
Project-Org Dates:	n/a	30-JUN-2050
Project-Award Dates:	n/a	30-JUN-2050
Pre-Award Dates:		n/a

Note: All PTAEO fields must be entered.

Validate the Entire PTAEO String | Reset

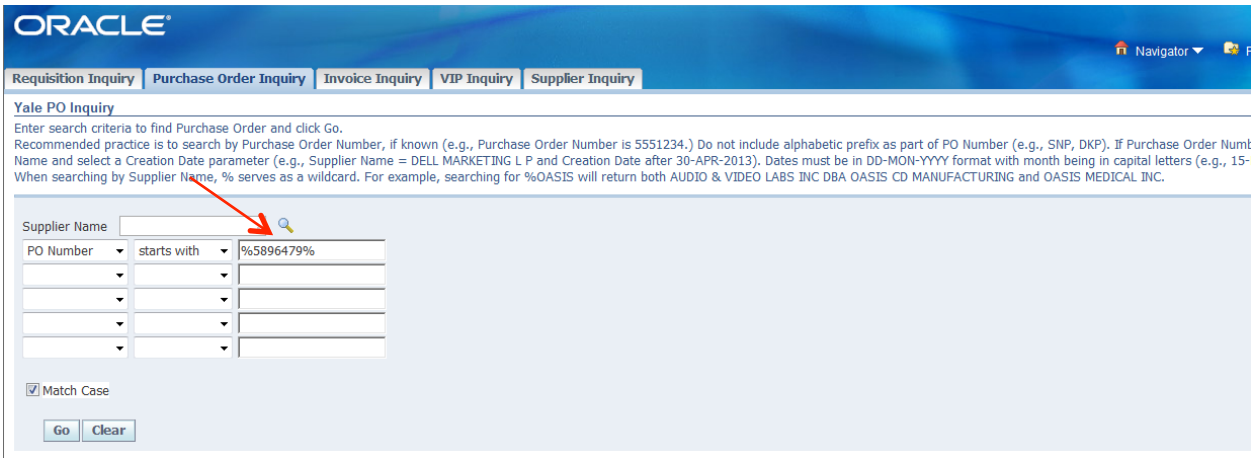
(You may click here to validate a batch of PTAEOs.)

Select Specific Search in Procurement Inquiry

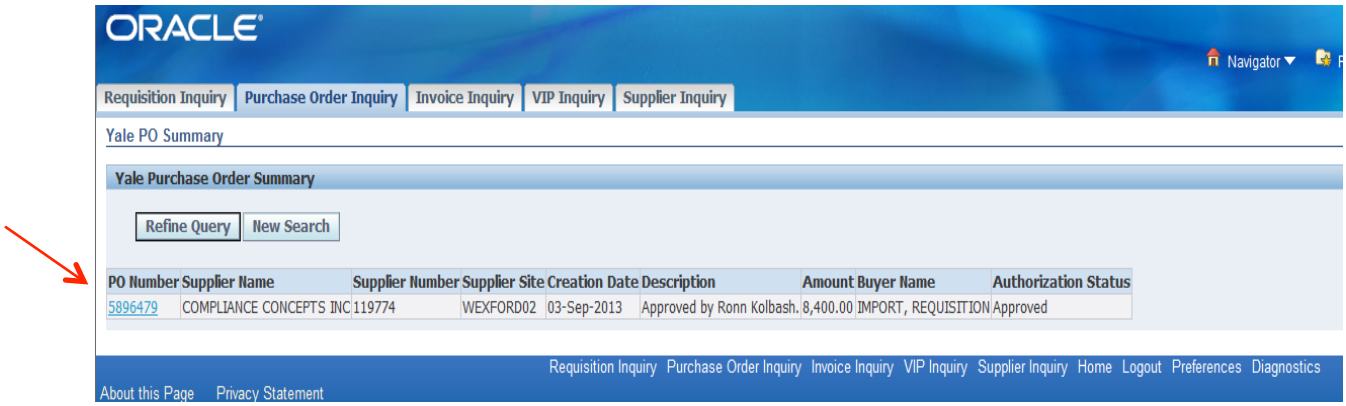
- **By Purchase Order**
  - Be sure you have chosen the "Purchase Order Inquiry" tab at the top of the page

Tips to Search

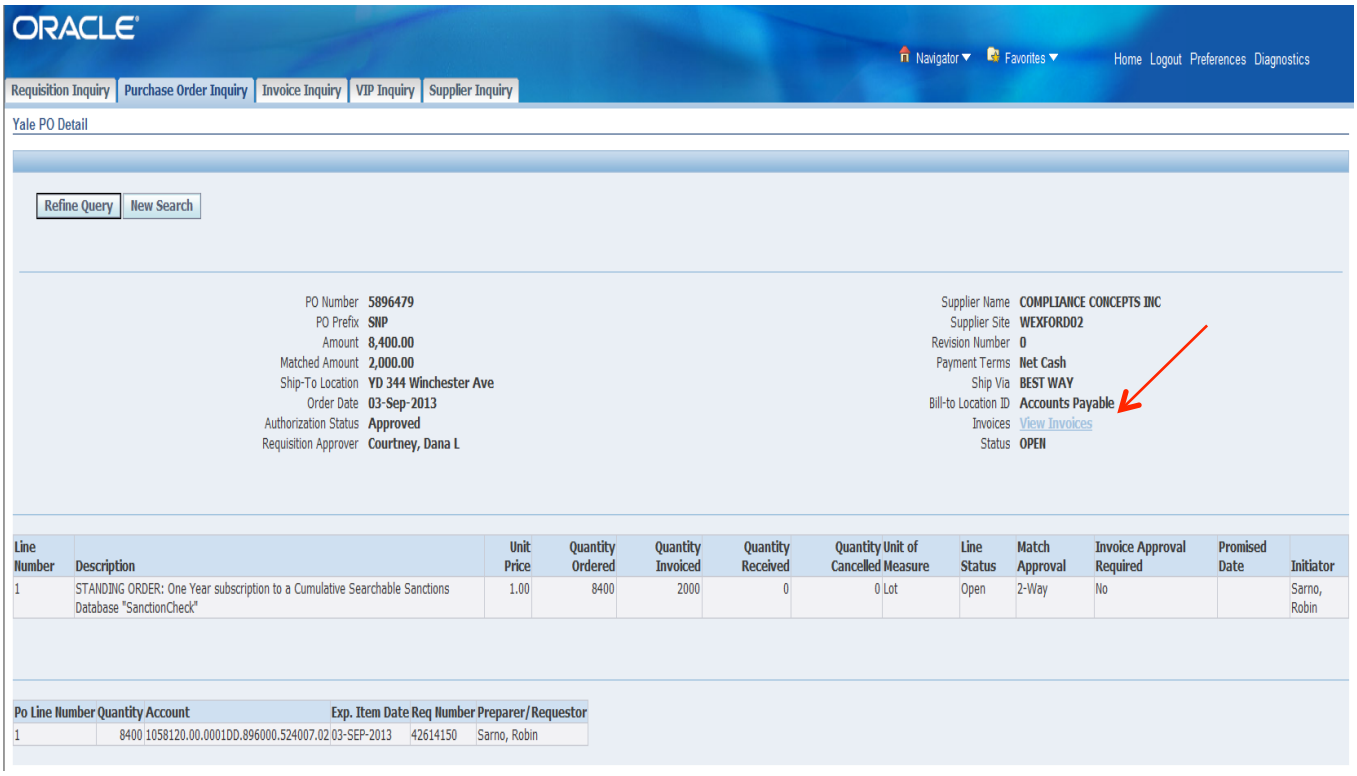
Example



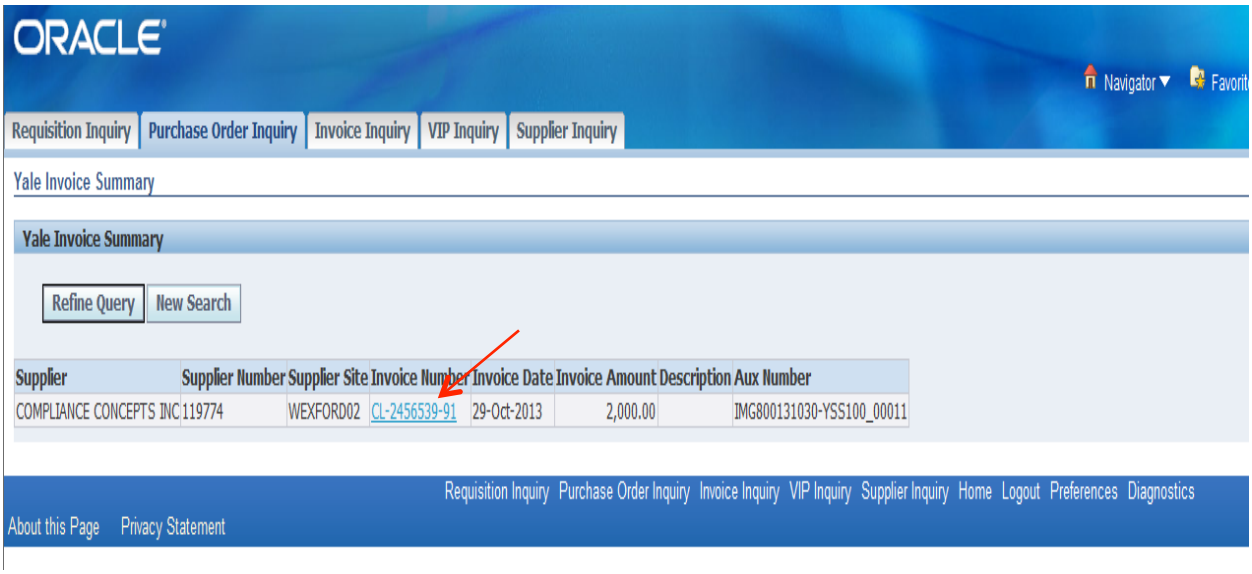
Results from Purchase Order Search



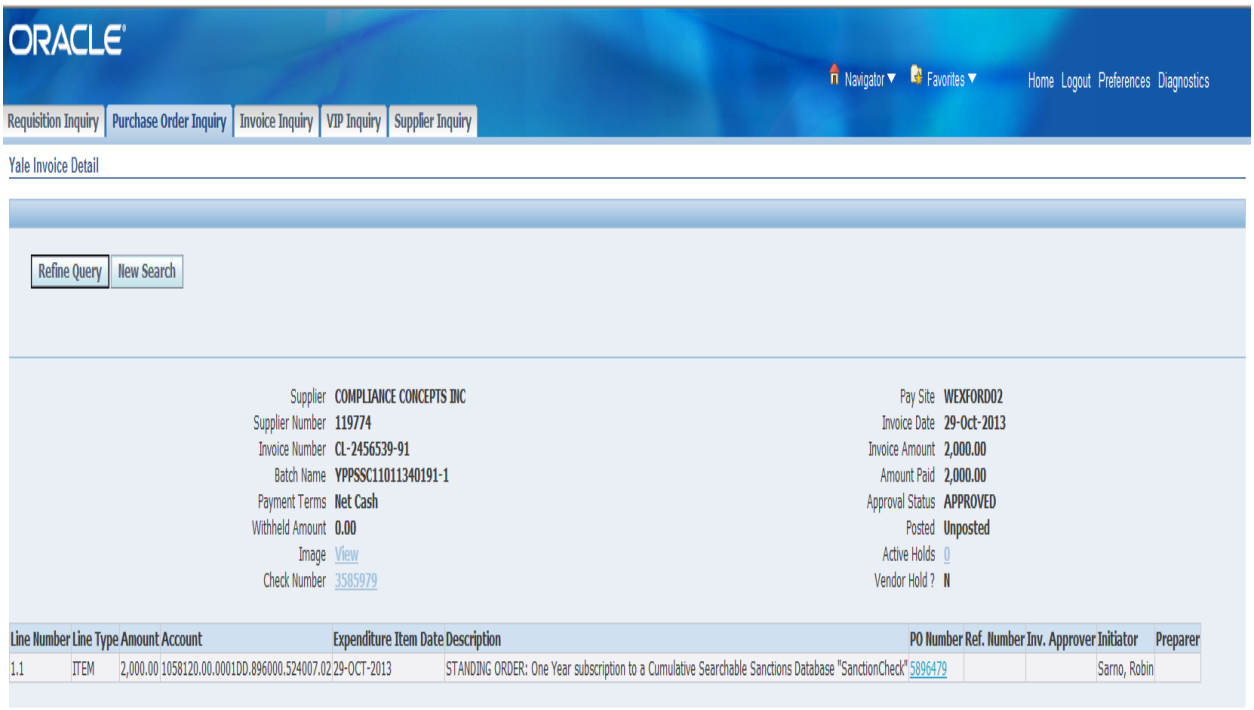
If you click on the blue PO number you are able to view the PO and have the option to view invoices attached to the PO



Click on "View Invoices" to see invoices



Click on Invoice number to see all the details you would see if you are using Invoice Inquiry



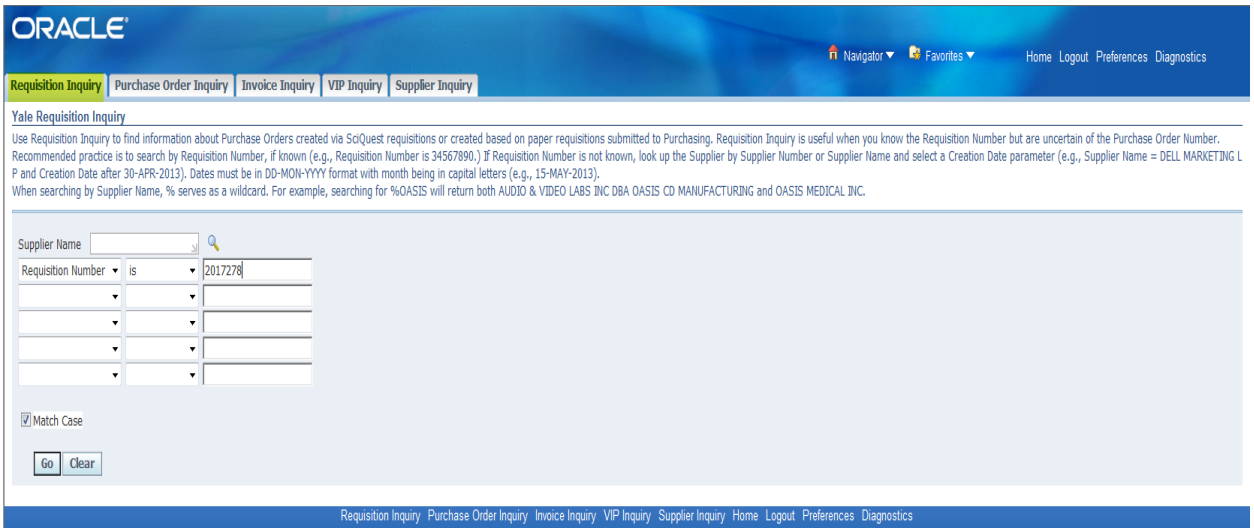
Select Specific Search in Procurement Inquiry

- **By Requisition Number**

  - Be sure you have chosen the "Requisition Inquiry" tab at the top of the page
    - Requisition is a request created in SciQuest before it has approved and validated as a Purchase Order that is sent to the vendor.
      - The requisition number is always different from the Purchase order and both can be viewed in SciQuest.

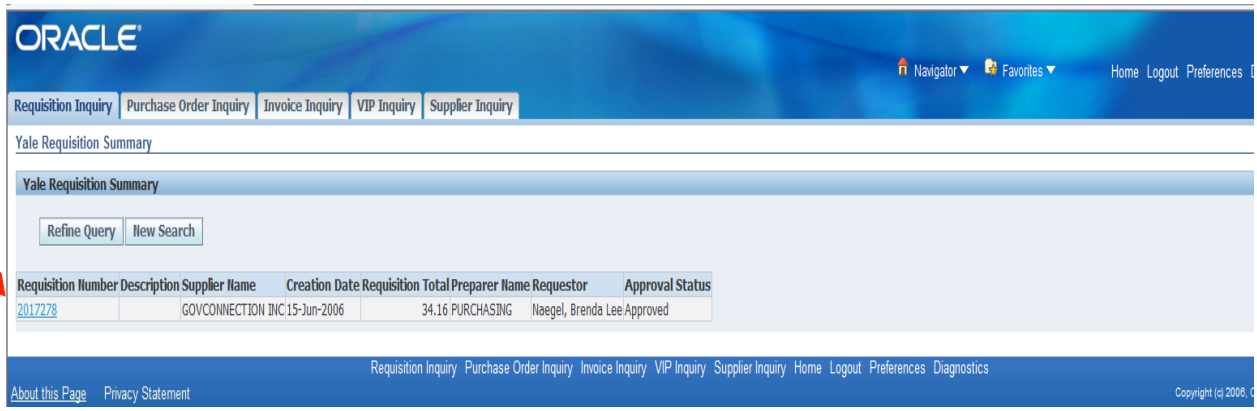
Tips to Search

Example



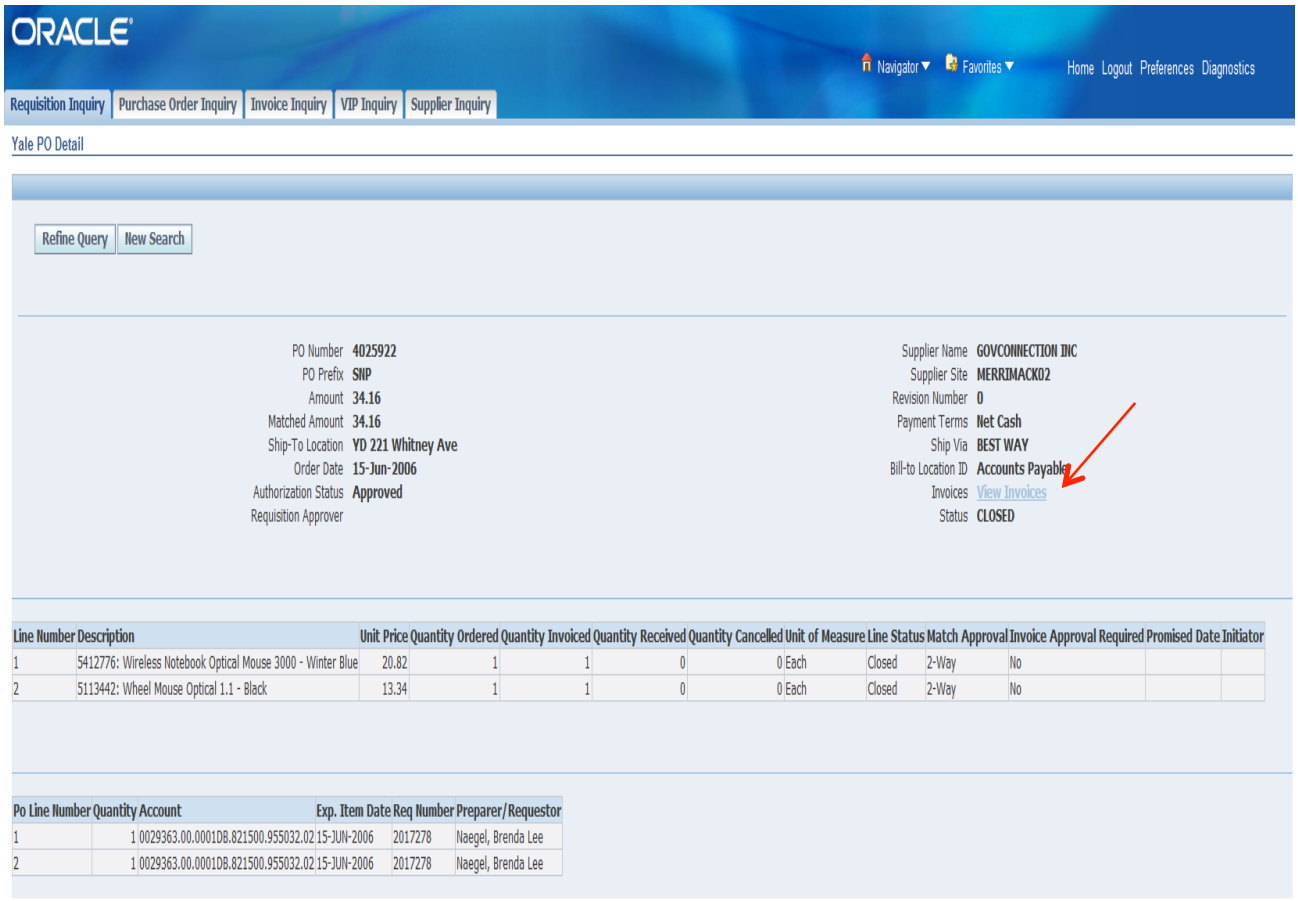
Results

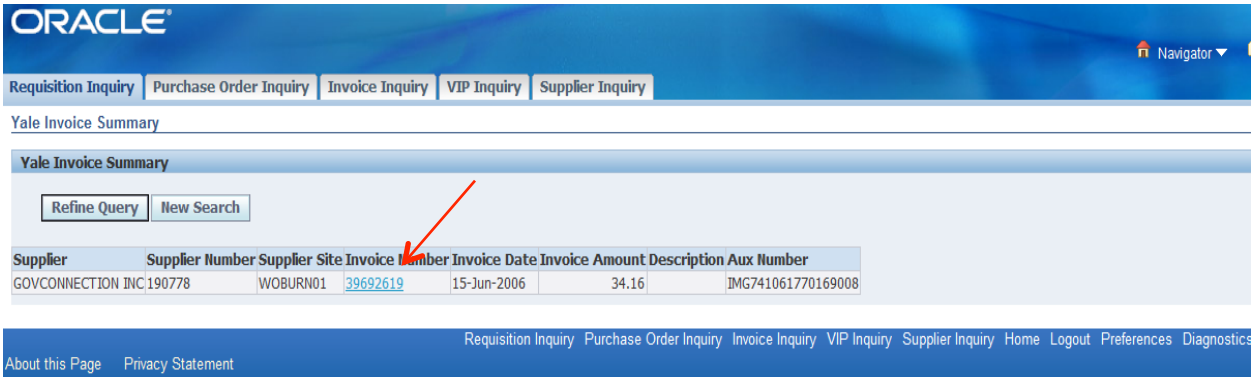
- For more information click on the Requisition Number



Detailed Results

- To research specific invoices affiliated with this Requisition, click on View Invoices



Invoice Information

- Click on Invoice number to see all the details you would see if you are using Invoice Inquiry