

Look up Purchase Orders in PeopleSoft

Looking up a Purchase Order (PO) in PeopleSoft will help you

- **Find the PO's status, including payment status**
- **Know if the PO is in active status**

Obtain Purchase Order number

If you have the purchase order (PO) number, skip to the next slide.

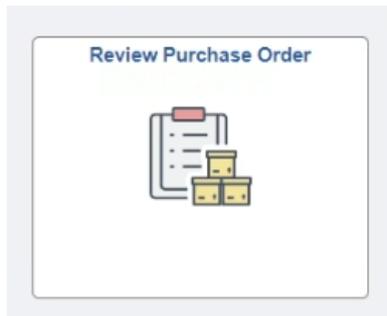
If you need to find the PO number, you can log in to [Rowdy Exchange](#) and scroll down to My Purchase Orders to find the PO number.

Review Purchase Order tile

Log in to PeopleSoft (you can find a link to PeopleSoft on [myUTSA](#)).

On the landing page

- Select Employee Self Service > Review Purchase Order
- Or, instead of Employee Self Service, you can select Procurement Operations > Review Purchase Order



Purchase Order Inquiry (1)

This takes you to the Purchase Order Inquiry screen.

Ensure the Business Unit field shows **UTSA1**.

Purchase Order Inquiry

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

*Business Unit = ▼ **UTSA1** 🔍

PO ID begins with ▼ 🔍

Contract SetID begins with ▼ 🔍

Contract ID begins with ▼ 🔍

Release Number = ▼ 🔍

Purchase Order Inquiry (2)

In the PO ID field, enter the full PO number.

If you want to enter a partial PO number, from the drop-down menu, you must select **contains** instead of the default **begins with**.

The screenshot shows the 'Purchase Order Inquiry' interface. At the top, it says 'Find an Existing Value'. Below that is a 'Search Criteria' section with a dropdown arrow. A note says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search history boxes: 'Recent Searches' and 'Saved Searches', both with 'Choose from...' dropdowns and edit icons. The main search area has several fields: '*Business Unit' with a dropdown set to 'UTSA1'; 'PO ID' with a dropdown set to 'begins with' and a text input containing 'PO0123456'; 'Contract SetID' with a dropdown set to 'begins with'; 'Contract ID' with a dropdown set to 'begins with'; and 'Release Number' with a dropdown set to '='. A red box highlights the 'PO ID' dropdown and its input field, with an arrow pointing to a callout box.

Note: This job aid uses dummy information (such as this dummy PO number) for the purposes of demonstration only.

Purchase Order Inquiry (3)

Select the Search button.

Purchase Order Inquiry

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches: Choose from recent searches Saved Searches: Choose from saved searches

*Business Unit =

PO ID begins with

Contract SetID begins with

Contract ID begins with

Release Number =

Purchase Order Date =

PO Status =

Short Supplier Name begins with

Supplier ID begins with

Supplier Name begins with

Buyer begins with

Buyer Name begins with

[^ Show fewer options](#)

Case Sensitive

Purchase Order Inquiry (4)

The Search Results now show the relevant PO. Select the PO.

▼ Search Results

1 rows - Business Unit "UTSA1" PO ID "PO0123456"

Business Unit	PO ID	Contract SetID	Contract ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID	Supplier Name	Buyer	PO Type
UTSA1	PO0123456	UTSHR	(blank)	08/07/2024	Dispatched	ABCDEFGG-001	0000022185	SUPPLIER ABCDEFGG	UTSA-FY-Buyer	General

Note: If the Search Results show no matching values, that means

- An incorrect PO number was entered, or
- The PO is closed/inactive

Purchase Order Inquiry (5)

This displays the PO Status.

If the PO Status here differs from the PO's known status, contact purchasing@utsa.edu.

Purchase Orders

Purchase Order Inquiry

Purchase Order

Business Unit UTSA1

PO ID PO0123456

Change Order 4

PO Status Dispatched

Budget Status Valid

▼ Header

PO Date 08/07/2024

Supplier Name SUPPLIER ABCDEFG

Supplier ID 0000022185

Supplier Details

Buyer UTSA-FY-Buyer

PO Reference 123456789-PurchaseOrderName

Header Details

Change Order

All RTV

Matching

Activity Summary

Header Comments...

Document Status

▼ Actions

Backorder Status Not Backordered

Receipt Status Not Recvd

Hold From Further Processing

Amount Summary

Merchandise	134,270.05
Freight/Tax/Misc.	0.00
Total	134,270.05 USD
Encumbrance Balance	94,229.95 USD

Purchase Order Inquiry (6)

You'll also see the PO's Receipt Status.

Purchase Orders

Purchase Order Inquiry

Purchase Order

Business Unit UTSA1
PO ID PO0123456
Change Order 4

PO Status Dispatched
Budget Status Valid

▼ Header

PO Date 08/07/2024
Supplier Name SUPPLIER ABCDEFG
Supplier ID 000022185 [Supplier Details](#)
Buyer UTSA-FY-Buyer
PO Reference 123456789-PurchaseOrderName
[Header Details](#) [Activity Summary](#)
[Change Order](#) [Header Comments...](#)
[All RTV](#) [Document Status](#)
[Matching](#) [▼ Actions](#)

Backorder Status Not Backordered
Receipt Status Not Recvd
 Hold From Further Processing

Amount Summary

Merchandise	134,270.05
Freight/Tax/Misc.	0.00
Total	134,270.05 USD
Encumbrance Balance	94,229.95 USD

Purchase Order Inquiry (7)

You'll also see the Encumbrance Balance. This is the balance remaining.

Note: An amount of 0.00 USD here means there is no further balance available.

Purchase Orders

Purchase Order Inquiry

Purchase Order

Business Unit UTSA1
PO ID PO0123456
Change Order 4

PO Status Dispatched
Budget Status Valid

Header

PO Date 08/07/2024
Supplier Name SUPPLIER.ABCDEFG
Supplier ID 0000022185 [Supplier Details](#)
Buyer UTSA-FY-Buyer
PO Reference 123456789-PurchaseOrderName
[Header Details](#)
[Change Order](#)
[All RTV](#)
[Matching](#)

[Activity Summary](#)
[Header Comments...](#)
[Document Status](#)
[Actions](#)

Backorder Status Not Backordered
Receipt Status Not Recvd
 Hold From Further Processing

Amount Summary

Merchandise	134,270.05
Freight/Tax/Misc.	0.00
Total	134,270.05 USD
Encumbrance Balance	94,229.95 USD

View payment status (1)

On the same screen, select Document Status.

Purchase Orders

Purchase Order Inquiry

Purchase Order

Business Unit UTSA1
PO ID PO0123456
Change Order 4

PO Status Dispatched
Budget Status Valid

▼ Header

PO Date 08/07/2024
Supplier Name SUPPLIER ABCDEFG
Supplier ID 0000022185 [Supplier Details](#)
Buyer UTSA-FY-Buyer
PO Reference 123456789-PurchaseOrderName

Backorder Status Not Backordered
Receipt Status Not Recvd
 Hold From Further Processing

Amount Summary

Merchandise	134,270.05
Freight/Tax/Misc.	0.00
Total	134,270.05 USD
Encumbrance Balance	94,229.95 USD

Header Details
Change Order
All RTV
Matching

Activity Summary
[Header Comments](#)
Document Status
▼ Actions

View payment status (2)

This displays the Document Status Purchase Order screen.

Document Status Purchase Order

Document Status Purchase Order

Business Unit	UTSA1	PO ID	PO0123456
Document Date	08/07/2024	Status	Dispatched
Currency	USD	Document Type	Purchase Order
Buyer		Merchandise Amt	134,270.05
		Budget Status	Valid

Requisitions Sourcing Events Procurement Contracts Purchase Orders Service Work Orders Receipts Returns Vouchers(3) Payments(3)

View payment status (3)

If needed, select the Show All button to display the next screen.

Show All

View payment status (4)

This displays any vouchers/payments.

Vouchers are documents your department enters to record payments.

Associated Document									
Personalize Find View All [Grid Icon] [Print Icon] First 1-5 of 6 Last									
Documents	Related Info [Filter Icon]								
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		UTSA1	Voucher	00123456	Posted	09/13/2024	0000022185	UTSA01	
▼ Actions		UTSA1	Voucher	00123457	Posted	08/13/2024	0000022185	UTSA01	
▼ Actions		UTSA1	Voucher	00123458	Posted	08/07/2024	0000022185	UTSA01	
▼ Actions	UTSHR		Payment	3112345678	Posted	10/04/2024	0000022185	UTSA01	
▼ Actions	UTSHR		Payment	3112345679	Posted	10/17/2024	0000022185	UTSA01	

Return to Search

Note: If you see no documents listed, or an empty table, this means no payments have been made yet.

View payment status (5)

To view the details of a voucher/payment, select its DOC ID.

Associated Document									
Personalize Find View All [Print] [Refresh] First 1-5 of 6 Last									
Documents [Related Info]									
Actions	SetID	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location	Go To Document Status Inquiry
▼ Actions		UTSA1	Voucher	00123456	Posted	09/13/2024	0000022185	UTSA01	
▼ Actions		UTSA1	Voucher	00123457	Posted	08/13/2024	0000022185	UTSA01	
▼ Actions		UTSA1	Voucher	00123458	Posted	08/07/2024	0000022185	UTSA01	
▼ Actions	UTSHR		Payment	3112345678	Posted	10/04/2024	0000022185	UTSA01	
▼ Actions	UTSHR		Payment	3112345679	Posted	10/17/2024	0000022185	UTSA01	

Return to Search

View payment status (6)

This displays the Voucher Inquiry screen.

Voucher Inquiry

▶ Search Criteria

▶ Sort Criteria

▶ Display Currency Criteria

▶ Late Interest Analysis

Voucher Inquiry Results Personalize | Find | View All | | First 1 of 1 Last

Voucher Details | Amounts | More Details | Supplier Details |

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	UTSA1	00123456	323644878	09/13/2024	0000040146	Postable	<input type="checkbox"/>	Matched	

View payment status (7)

Go to Voucher Inquiry Results > Actions > Payment Information

The screenshot displays the 'Voucher Inquiry Results' interface. At the top, there are navigation tabs: 'Voucher Details', 'Amounts', 'More Details', and 'Supplier Details'. The 'Voucher Details' tab is active. Below the tabs is a table with the following columns: Actions, Business Unit, Voucher ID, Invoice Number, Invoice Date, Supplier ID, Entry Status, Incomplete, Match Status, and Short Supplier Name. The first row of data is: Actions (dropdown), ITSA1, 00123456, 323644878, 09/13/2024, 0000040146, Postable, , Matched, and an empty cell. The 'Actions' dropdown menu is open, showing options: View Attachments, Review Accounting Entries, Match Workbench, Payment Information (highlighted), Voucher Details, and Review Document Status. The 'Payment Information' option is highlighted in yellow, and a mouse cursor is pointing at it.

Actions	Business Unit	Voucher ID	Invoice Number	Invoice Date	Supplier ID	Entry Status	Incomplete	Match Status	Short Supplier Name
▼ Actions	ITSA1	00123456	323644878	09/13/2024	0000040146	Postable	<input type="checkbox"/>	Matched	

- View Attachments
- Review Accounting Entries
- Match Workbench
- Payment Information
- Voucher Details
- Review Document Status

View payment status (8)

This takes you to the Voucher screen, which shows the payment status.

Voucher											
Back To Voucher Inquiry											
Business Unit		UTSA1		Voucher ID		00123456		Invoice Number		323644878	
Supplier Name				SUPPLIER ABCDEFG				Supplier Location		UTSA01	
Gross Invoice Amount			76.00			Transaction Currency		USD			
Details Personalize Find View All First 1 of 1 Last											
Bank SetID	Bank Code	Bank Account	Payment Reference ID	Applied Business Unit	Applied Voucher ID	Payment Date	Payment Amount	Payment Currency	Voucher Paid Amount	Payment Status	
UTSHR	CHASE	3AP1	3000268463			10/12/2024	76.00	USD	76.00	Paid	

Further information

Disbursements & Travel Services (rather than the Purchasing department) is your home for university vendor payments.

To learn more about payment processes, visit the [Disbursements & Travel Training](#) webpage to see the courses available to you.

Contact Us

If you have questions about this job aid, you can contact us at

Purchasing department

[Website](#)

Email: Purchasing@utsa.edu

Phone: (210) 458-4060

Thank you

The University of Texas at San Antonio

UTSA Financial Affairs

utsa.edu/financialaffairs