### Useful Inquiries

<table>
<thead>
<tr>
<th>This inquiry ...</th>
<th>Is best for ...</th>
<th>And to get there ....</th>
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</table>
| Manage Requisitions—Requisition Lifecycle | • Has my requisition been approved?  
• Which approver has my req?  
• What’s the PO number for my req?  
• What receipts have been entered and has it been fully received?  
• How can I see if vouchers have been created for my invoices?  
• Has it been paid and if so, what’s the check number? | FS Workcenter > EPRO/PO > Manage Requisitions  
Find the requisition you need, and click the grey arrow to the left of the requisition ID: |
| Requisition Inquiry | • I don’t know the req number, but I know the vendor, department, or item description  
• I want to see the related PO, vouchers, and payments for a requisition all on one page | Finance Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions |
| PO Inquiry | • What part of my PO has paid? | FS Workcenter > ePro/PO > PO Document Status  
Click the link to see payment details |
| Voucher Inquiry | • For this vendor, I want to see all vouchers that are scheduled to pay, paid, and not paid  
• I know the PO number—show me the vouchers  
• I know the invoice number—show me the vouchers | FS Workcenter > Voucher |

Note: FS Workcenter is under the blue Finance button on the ConnectCarolina homepage.
Setting up Delegates

Be Sure to Set Requester First
If you enter a purchase req for someone else, be sure to set the requester first thing (BEFORE starting your punchout order or going to the special items link). Entering the requester means both you and the requester can enter receipts for the purchase, but once you save (including when you budget check), you can no longer change the requester. So try to get in the habit of changing the requester as soon as you start the req.

Mark the Amount Only Checkbox if Needed
If you need to receive by amount, be sure to mark the Amount Only checkbox for each line that needs to be received that way. To get there, while you are entering the req, go to the Review & Submit tab. On the line item you need to receive by amount, click the Line Details icon (all the way to the right):

![Line Details Icon]

On the Line Details page that displays, mark the Amount Only checkbox in the bottom right corner of the page and click OK.

Budget Checking Required
Budget checking is now required on requisitions. If a requisition doesn’t pass budget checking, you can’t move forward.

Things to Remember When Entering Reqs

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Other Things to Remember

VISP for Invoices
Any time you have an invoice related to a purchase order, you need to upload it using VISP. Find instructions on the ccinfo.unc.edu website (http://ccinfo.unc.edu > Training > Resources).

Best Place for Receiving
The easiest place to do receiving is on the Campus Receiving page. This page shows only the requisitions that you created or that you were named as the requester on. To get to it, choose the Campus Receiving link on the Finance Workcenter, in the ePro/PO list:

![Finance Workcenter]

Match Exceptions
The number one cause of match exceptions is that the receipt hasn’t been entered. Once you receive an order, the nightly voucher matching process clears it for payment, unless there is another match problem with the price, quantity or unit of measure. A change order or new vendor invoice may be needed to resolve those issues.

Note: You don’t need to receive ePro vendor catalog orders, although it doesn’t cause problems if you do.

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<td>Payment Inquiry</td>
<td>• What payments have we made to this vendor? • When did we last pay them?</td>
<td>FS Workcenter &gt; Accounts Payable &gt; Payment</td>
</tr>
<tr>
<td>Voucher Search</td>
<td>• I want to quickly find a voucher and open it to see details</td>
<td>FS Workcenter &gt; Accounts Payable &gt; Voucher Search</td>
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