

How to verify if a supplier record exists in PeopleSoft (Active or Inactive) – Business or Individual (i.e. non-employee)

Getting Started: Confirm if a supplier record exists (active or inactive) in PeopleSoft (PS) before starting a requisition or PRQ.

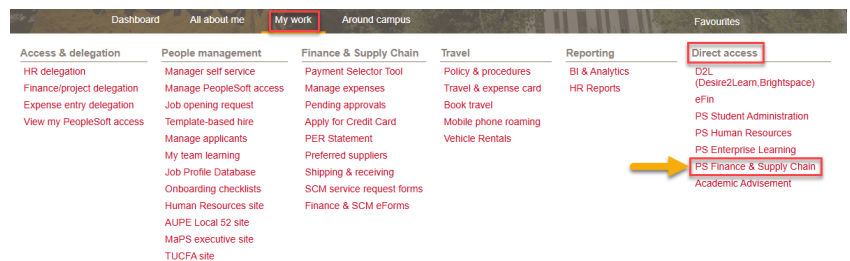
Searches are for any business or individual active or inactive

Below are detailed navigation steps, however for direct navigation please proceed to My Work >

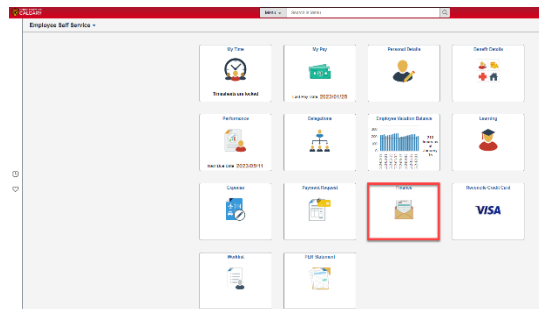
“PS Finance & Supply Chain > Finance tile > Supplier > Add/Update Supplier use the ‘Supplier Name’ field

Depending on your access, the views indicated may not be exactly as pictured

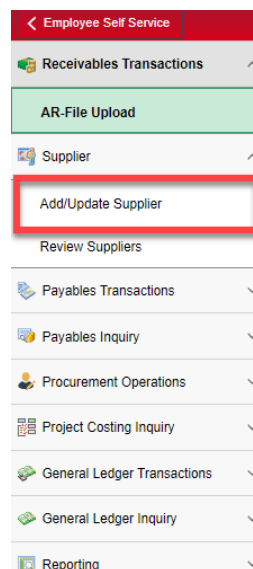
Step 1: Navigate to the PeopleSoft (PS) portal using
My work > Direct access > **PS Finance & Supply Chain (or FS PeopleSoft)**



Step 2: Within PS Finance navigate the Main Menu to the “Finance” menu



Step 3: Under the “Supplier” section
Choose “Add/Update Supplier”



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Step 4: Use the "Supplier Name" field. Change the drop down from "begins with" to "**contains**", and then use all or part of the supplier's name to search (not case sensitive)

TIP: using only part of the name generates more results (ie: last name only, in this case "seat")

Supplier Information

Find an Existing Value ⓘ Add a New 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

SetID = SHARE Q

Supplier ID begins with

Persistence =

Short Supplier Name begins with Q

Our Customer Number begins with Q

Supplier Name contains seat Q

Supplier Status =

Show fewer options
☐ Case Sensitive ☐ Include History ☐ Correct History

Search Clear

Step 5: Populate the supplier name field with all or of part of the supplier name (not case sensitive). Then hit enter or the "SEARCH" button. This results in a list of all records containing the name searched, or if "no matching values found" appears then proceed to next steps.

Step 6: The second column indicates the assigned Supplier ID number of the record. The search results mean that a supplier record exists in PS. The last column (Approved or Inactive) indicates the current status of the record.

Step 7: If the supplier status is "**Approved**", the record is **active**. Click into the record to verify if the supplier information is correct. If yes, then proceed and submit a requisition or payment request using the full Supplier ID number.

Step 8: If the supplier record is **Approved** but requires updating, please complete a **Supplier Change Request** form and send it to uofcsuppliers@ucalgary.ca. Please include any back-up documentation that indicates the refreshed data for the record (ie: invoice, quote, contract, email thread, website with supplier name - with the complete mailing address, email contact & telephone number)

Step 9: If the supplier record is **Inactive**, send an email request to uofcsuppliers@ucalgary.ca and include any back-up documentation that indicates the refreshed data for the record (ie: supplier name, complete mailing address, email contact & telephone number)

Reasons for inactive status:

- No payment issued over the last 18 months
- Missing supplier data (ie: banking information)
- Old supplier data that requires updating

For more information on a specific supplier please contact UService at (403) 210-9300 or finance@ucalgary.ca

Step 10: If there are no results or 'no matching values', a request will be required for a new supplier record (and supplier ID number). Please proceed to the **Suppliers to UCalgary - New Suppliers** steps outlined on the website. Submit the New Supplier eForm using the [link](#) provided (or through the PS Finance & Supply Chain module in PeopleSoft).

(END)

If you have any questions or need further assistance, please contact UService at (403) 210-9300 or finance@ucalgary.ca

Short Supplier Name begins with Q

Our Customer Number begins with Q

Supplier Name contains seat Q

Supplier Status =

Show fewer options
☐ Case Sensitive ☐ Include History ☐ Correct History

Search Clear Save Search

Search Results
16 results SetID "SHARE", Supplier Name "seat"

SetID	Supplier ID	Persistence	Short Supplier Name	Our Customer Number	Supplier Name	Supplier Status	
SHARE	00000988 97	Regular	CRASEA-001	(blank)	CRAMER SEATTLE M	Approved	>
SHARE	00001007 56	Regular	DRICAL-001	(blank)	DRIVERSEAT CALGARY	Inactive	>
SHARE	00000046 18	Regular	DUCSEA-001	(blank)	DUCHARME SEATING INTERNATIONAL	Inactive	>
SHARE	00000175 59	Regular	ERGSEA-001	(blank)	ERGOCENTRIC SEATING SYSTEMS	Inactive	>
SHARE	00000938 13	Regular	HGVHAN-001	(blank)	HGV HANSEATISCHE GESELLSCHAFT FUR VERLAG	Inactive	>
SHARE	00000218 62	Regular	PORSEA-001	(blank)	PORT OF SEATTLE	Inactive	>
SHARE	00000067 17	Regular	REPSEA-001	(blank)	REPEATSEAT	Inactive	>
SHARE	00000686 02	Regular	SEAERI-001	(blank)	SEATER ERIN	Inactive	>
SHARE	00000790 32	Regular	SEASOL-001	(blank)	SEATING SOLUTIONS	Inactive	>
SHARE	00000577 44	Regular	SEATU-001	(blank)	SEATING U LTD	Inactive	>