SAN DIEGO
COMMUNITY COLLEGE
DISTRICT

PEOPLESOFT USER MANUAL FOR PURCHASING

April 10, 2019

Revised

SAN DIEGO COMMUNITY COLLEGE DISTRICT

PEOPLESOFT USER MANUAL FOR PURCHASING

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SAN DIEGO
COMMUNITY COLLEGE
DISTRICT

November 6, 2018

To: Current and Prospective Suppliers/Vendors/Contractors/Consultants/Lecturers

Subject: Reminder – Notice on Gifts and Gratuities

The San Diego Community College District (District) values the services and products that are provided by your organizations. Those products and services allow the District to continue in our mission of providing accessible, high-quality learning experiences at an affordable price to meet the educational needs of the San Diego community.

As the end of the calendar year approaches, we would like to take this opportunity to remind you of the District's continued commitment to ethics and integrity throughout the procurement process – beginning with the individuals who request a product or service; to the District Buying and Contracts Staff; to the end-users and individuals who receive the service or product. This applies throughout the District.

The District encourages participation in the procurement process, whether your organization is large, small, or a non-profit entity -- we welcome you! Our goal is to find appropriate products and services at competitive prices, in a timely fashion, with efficiency, in a legal and professional manner.

It is the District's expectation that those who conduct business with San Diego Community College District refrain from offering gifts, gratuities, favors, entertainment, etc., either directly or indirectly to District employees. The "Conduct of Contractor" terms and conditions are located on the District website and referenced on each Purchase Order for your convenience (https://www.sdccd.edu/about/departments-and-offices/business-technology-services-division/business-support-services/purchasing-vendors/vendors-suppliers/general-terms-and-conditions.aspx)

We value your continued work with the District and thank you for your support and agreement with this expectation as we maintain uncompromising integrity and professionalism in all business transactions that support the San Diego Community College District's mission.

If you have any questions or concerns, please contact our office at (619) 388-6562.

Rochelle Lowe

Rochelle Lowe
Director, Business Support Services

San Diego Community College District
CAL-Card Program – State of California Purchasing Card

Reminder: The CAL-Card is issued to you, as an individual employee. You cannot transfer your CAL-Card credit card to another employee. You are responsible for all charges and can be held personally liable for purchases made via the CAL-Card that were not approved, in advance, by your Approving Official.

The CAL-Card is to be used only for authorized District Business. CAL-Card transactions are subject to review at any time by SDCCD Business Support Services, Purchasing and Contract Services, Accounts Payable, and external auditors.

Items purchased via CAL-Card are to be shipped to a District address. Shipment to a home address or other non-District address is not approved.

Misuse or fraudulent use of the CAL-Card credit card may result in suspension of credit card privileges, disciplinary procedures, termination of employment, and/or criminal prosecution.

CAL-Cards cannot be used to charge items for anyone other than the cardholder. Cards are issued in the individual Cardholder's name with a signature required on the reverse side of the card. If an attempt to purchase is made by a person other than the Cardholder, the transaction can be declined and the card can be confiscated.

Authorized Uses - The CAL-Card credit card should only be used for the purchase of administrative and instructional supplies that would be legitimately purchased within the 4000 object codes (See the Budget and Accounting Manual). The card MAY NOT be used to purchase minor equipment under $200.

The card can also be used for minor services within the 5000 object codes. Any services would have to fall under the District transaction limit of $200.

Prohibited Uses (not an all inclusive list)

Prohibited Purchases include:

- **Minor Equipment <$200**
- **Capital Outlay/Equipment >$200**
- **Alcoholic Beverages**
- **Restaurant Meals**
- **Travel Expenses**

Prohibited Practices:

Cash Advances
Cash Refunds - Requesting a cash refund for a credit card purchase
Splitting Transactions - Asking the merchant to put charges exceeding $200 on multiple charge slips.
Personal Purchases - Using the card to make a purchase of merchandise for personal use.

Cardholder Statement of Account -- At the end of a billing cycle, U.S. Bank will send each cardholder the Cardholder Statement of Account that shows all transactions they made during the billing cycle. The cardholder is required to review and attest to the accuracy of the statement and forward it along with their Purchase Log, Reconciliation Report, and receipts to the Approving Official within **five (5)** working days of receipt. If there are no transactions during the billing cycle, no statement will be sent.

Approving Official Report -- The Approving Official will review the Cardholder's Statement, Purchase Log, Reconciliation Report, and receipts for accuracy, completeness and appropriateness of the purchases. The Approving Official will then sign off on the log sheet and report, forwarding the packet to Accounts Payable for payment within the designated time period. Failure to forward the statement to the Approving Official or Accounts Payable within the designated time period may result in suspension of credit card privileges.

Cal-Card Agreement – the below statement was signed by all CAL-Card holders prior to receipt of the individual CAL-Card credit card:

AGREEMENT

I, the undersigned, request and acknowledge my responsibility for a District Purchasing Card. I have read and understand the terms and conditions for use of the credit card and the consequences to me personally for any misuse of it. I agree not to loan, give possession, misuse, modify, or alter the assigned card. I further agree to retain auditable copies of logs and receipts for the current year and the three previous years, to maintain monthly Purchase Logs and reconcile them to monthly Cardholder Statements of Account, to file timely disputes of any unauthorized charges on the appropriate forms, to submit any changes to my status (address, phone number, etc.) to my Approving Official , and to report immediately any lost, stolen, or misplaced card immediately to the bank, and, within one (1) working day, notify Purchasing & Contract Services and my Approving Official.

I understand that the card is to be turned over to my Manager or Approving Official upon resignation, retirement, termination for any reason, or when the reason/need to have the card is no longer valid (e.g. reassignment, promotion).

I recognize that the card is issued in my name and is only for my use in the performance of my job and only for authorized District business.

I have read and understand these terms, recognize that violation of these may be the cause for disciplinary action, and further acknowledge and authorize that any monies owed to me as an employee of the District, including any pay warrants, may be withheld until I return the card and all statements are satisfactorily reconciled. I also recognize that money owed to me personally by the District may be adjusted to compensate for any losses resulting from unauthorized use of the card.

If you have any questions contact Nancy Wichmann or Peter Hester.

Purchasing and Contract Services Department

Frequently Asked Questions (FAQs)

1. How is a supplier searched for in PeopleSoft?

Please refer to the Suppliers tutorial that starts on **page 8** of the PeopleSoft User Manual for Purchasing.

2. What if the supplier is not in PeopleSoft? How do I obtain a Supplier ID? What is the process for entering a supplier into PeopleSoft?

To establish a new supplier, a requester/initiator/end user who reviews the existing database in PeopleSoft and does not find the supplier must first send the blank SDCCD Supplier Intake form and IRS form W-9 to the new supplier for completion.

The supplier completes the Supplier Intake Form and returns it and the completed W-9 to the requestor/initiator/end user for review for completeness. Requester/initiator/end user inputs the supplier's information (from the Supplier Intake Form) into the PeopleSoft supplier database.

After input, notification is sent to Purchasing and Contract Services, who will review the data and approve or return (with comment). Be sure to email the completed Supplier Intake Form and W-9 to supplierintake@sdccd.edu.

After approval, the supplier may be used when drafting a requisition. A purchase requisition can be submitted without a supplier identified as a potential source of supply.

For instructions on how to set-up a supplier in PeopleSoft, please refer to the step by step tutorial that starts on **page 8** of the PeopleSoft User Manual for Purchasing.

3. What if the supplier is a consultant?

All suppliers, consultants, companies, lecturers, or performers who will be paid via check issued through PeopleSoft must have a current supplier profile. See above answers regarding checking for or obtaining a supplier profile.

Consultants, lecturers, performers, and those providing professional services to SDCCD will also have a services agreement included with their Purchase Order. To facilitate review and signature by Purchasing and Contract Services, it is recommended that the draft agreement, Scope of Work (SOW), and draft payment schedule be emailed to the Buyer.

The purchase requisition for the requested services should be completed through the workflow approval process in PeopleSoft. A copy of the draft agreement may be uploaded with the purchase requisition. When the Purchase Order is completed, the Buyer will upload the completely executed agreement in PeopleSoft.

See pages 30 and 31 for the AOPO process.

4. When requesting a quote for budgetary purposes, does the shipping or freight need to be included?

When a supplier sends a quote, 'freight' or 'shipping', if applicable, is to be shown as a separate line.

- ❖ Shipping/freight is not taxable
- ❖ Shipping and Handling is taxable.

Shipping may be estimated by the quoting supplier and may actually be a different amount on an invoice as opposed to the original quote.

If supplier adds shipping to the invoice but it was not previously part of the quote

- ❖ this may require a change order in order to pay the invoice
- ❖ this may have an impact on your budget
- ❖ this may delay payment, adding steps and revision of existing documents must necessarily be performed by the requester

Please clarify BEFORE the supplier provides a quote whether a shipping charge will occur.

5. **I am drafting a requisition, what is the expected lead time between the request for an item or service and when a purchase order is issued (dispatched) to a supplier?**

   Buyers perform many tasks as part of their purchasing responsibilities. Solicitation issuance, troubleshooting, negotiation, process application, and customer service follow-up are part of those responsibilities.

   It is asked that requesters and end users consider adding time for those activities when initiating a request and also have a reasonable expectation as to when the Purchase Order will be issued to a supplier and when the ordered items will arrive or the service period of performance will start.

   After a completed purchase requisition goes through the approval cycle, a pre-encumbrance budget check will occur to verify fund availability for the purchase request.

   Following the purchase requisition approval cycle, the Buyer will receive the request in their PeopleSoft queue for review. An example of checks made during the review -- complete description, proper category code, tagging information (if an asset is being purchased), review of any attached quote, clarification on any notes, and whether another source of supply is available that would benefit SDCCD or the end user (i.e., pricing, delivery, quality). Final location/destination for delivered items must be stated.

   Following the review and other Purchasing and Contract Services actions, the Buyer will use the purchase requisition, its budget, and line item(s) to complete the purchase.

   If for some reason the purchase requisition cannot be used, the Buyer will move the purchase requisition back to the requestor. The Buyer will add appropriate comments, identifying why the requisition was returned and what can be done to clear that issue.

   The purchase order queue lists those purchase orders ready for electronic print and email (dispatch) to appropriate supplier.

   The Buyer will perform an encumbrance budget check, review the purchase order content, and prioritize issuance (dispatch) of each purchase order. Order complexity, lead time, and shipping are considered by the Buyer when completing a purchase order.

6. **How do I enter a requisition?**

   Please refer to the step by step tutorial regarding requisitions that starts on **page 19** of the PeopleSoft User Manual for Purchasing.

7. **Whom do I contact if I am having trouble entering a requisition into PeopleSoft?**

   Each campus has a direct resource in their respective Business Services Office. Purchasing and Contract Services works with them directly, as well as with requestors and end users. In contacting your respective Business Services Office first, it allows for that office to determine if the Campus requires additional resources. All departments may reach out directly to your Buyer in the Purchasing and Contract Services Department.

8. **Where do I attach supporting documentation (i.e., quotes, scope of work, payment schedules)?**

   All supporting documents are to be attached as one single attachment to Line 1 of the requisition. Please refer to **page 32** of the PeopleSoft User Manual for Purchasing.

9. **How do I create a Blanket Purchase Order?**

   Blanket Purchase Orders are called "**Amount Only Purchase Order (AOPO)**" in PeopleSoft. Please refer to the step by step tutorial on how to enter a requisition as an Amount Only requisition that starts on **page 30** of the PeopleSoft User Manual for Purchasing.

10. **Can I create an Amount Only requisition for supplies?**

    No. Blanket Purchase Orders (Amount Only Purchase Order (AOPO)) are intended for service renewals, maintenance service agreements, rental services, professional services, and subscriptions/memberships. AOPOs are not to be used for the purchase of tangible products.

11. **How can I see if a purchase requisition has been approved?**

A confirmation will be emailed to the requestor once the requisition is final and approved. To check the status of a requisition in PeopleSoft, drill down into the Manage Requisitions screen. Enter the **Requisition ID** number and click search. To access **Manage Requisitions**, use the following navigation: **Financials 9.2>eProcurement>Manage Requisitions.** Click the gray triangle to the far left under **Req ID** to expand the details of the requisition.

This area will also show whether or not the Purchased Order has been dispatched to the supplier.

12. **How do I check the balance on a Blanket Purchase Order (Amount Only)?**

To check the balance of an AOPO in PeopleSoft, use the following navigation:
Financials 9.2>Purchasing>Purchase Orders>Review PO Information>Purchase Orders. To search for a purchase order, enter the **PO ID** number in the **Search Criteria** field. Click on the **Activity Summary** and a new window will open that provides the activity against the PO.

13. **How should I enter the description for each line item?**

The **ARMA format is recommended** for purchase requisitions. This helps to give some consistency to requisitions and purchase orders being processed. See the **ARMA Rules** on **pages 53 and 54** of the PeopleSoft User Manual for Purchasing. If you have further questions, please contact the **Central Distribution Center at 619-388-1180**.

14. **What end user contact information is needed on requisitions?**

The end user's name, email address, and location are required.

15. **If a supplier gives me an agreement to sign, what should I do?**

Forward the unsigned agreement to Purchasing and Contract Services. Please be sure to provide the applicable Purchase Order number and an email address for the supplier so the signed agreement can be attached to the Purchase Order and returned to the supplier.

16. **Why does purchasing change the supplier that the department entered on the requisition?**

The supplier entered on the purchase request is often a suggested source of supply, particularly when the request is for goods or supplies. The San Diego Community College District Buyers use techniques that maximize cost savings, take into consideration availability, and ensure full and open competition where practicable. For some products, the College District may utilize suppliers that have volume based purchase agreements.

17. **Does the supplier get a copy of the Purchase Order?**

Yes. All PO's are issued (dispatched) via email. All suppliers must have a current email address in PeopleSoft within the supplier database to receive the applicable Purchase Order

18. **How do I request that a Change Order be processed for a Purchase Order?**

All change requests to a purchase order must be initiated by the end-user at the requisition level. This allows for review and workflow approvals through PeopleSoft. Be sure to alert your Buyer prior to completing a purchase requisition to confirm that a requisition is needed. Once approved and processed, the PO will then be updated and the change order will be dispatched via email to the supplier. Please refer to the step by step tutorial for end users regarding change orders that start on **page 38** of the PeopleSoft User Manual for Purchasing.

19. **What happens if the supplier delivers directly to the requestor?**

All goods should be delivered to the campus **Stockrooms/Central Distribution Center**.

If possible, end users should not accept delivery; instead re-route the supplier to the Stockroom/Distribution Center so the ordered items can be received into PeopleSoft. District Office, DSC, and Continuing Education receiving needs to be done through the Distribution Center. To facilitate this, ensure that the Ship To location is identified on the requisition as the Central Distribution Center.

Please note that if the items ordered are oversized/heavy in nature, this information should be included on the initial purchase requisition so that Purchasing and Contract Services can add special notes for the driver to coordinate delivery with the end user.

If the supplier does not follow the instructions on the Purchase order and re-routing of the item is not possible, end users must notify the Stockroom or the Central Distribution Center within **48 hours** of receipt of goods.

As a reminder, end users are **NOT** to receive items in PeopleSoft. If the item(s) were delivered directly to the end user, then the end user will need to contact the appropriate Stock Room/Central Distribution Center to notify them that the order has been received. For a list of receiving contacts per location, please refer to **page 37** of the PeopleSoft User Manual for Purchasing or your campus Business Service Office.

20. What should the requestor do if they do not receive an item that was listed on the purchase order?

The end user/requestor should look up the Purchase Order number and contact the supplier to see if the item(s) were shipped. Next, the end user should obtain the tracking number from the supplier and track the order.

If the item(s) were delivered, the requestor will need to contact the appropriate Stock Room/Central Distribution Center to confirm receipt and coordinate delivery of the item.

21. What is the process for returns and Exchanges?

See Returns & Exchanges Policy at: http://bussrv.sdccd.edu/purchasing/employees.cfm.

22. Is there an occasion when a Confirmation Purchase Order is used?

A confirming purchase order is issued by Purchasing and Contract Services to document a verbal notice to proceed provided to a supplier by the Buyer in response to an emergency. See Board Policy 6330, AP 6330.14.

All authorized purchases will have a purchase order issued via PeopleSoft and transmitted (dispatched) to the supplier via email. Purchases made by individuals other than SDCCD Buyers are unauthorized purchases and may result in the individual being financially responsible for that unauthorized purchase or result in the supplier not receiving payment from SDCCD. The District requires regular purchase orders be issued pursuant to the California Education Code prior to the procurement of materials, supplies or services.

This does not apply to purchases made via approved processes related to CALCard usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current form to complete and have signed by your Campus VPA. This form details the unauthorized purchase and what steps will be taken to ensure only authorized purchases are made going forward. Please refer to **page 62** of the PeopleSoft user Manual for Purchasing.

Thank you for your contributions to this FAQ section! Please email us with questions at purchase@sdccd.edu

PEOPLESOFT (PS) SUPPLIER INTAKE PROCESS

When a requester/initiator decides to engage a 'new supplier' to purchase future products or services the requester/initiator will;

Verify whether this anticipated supplier currently is entered and approved in the PeopleSoft system and if so, use that Supplier ID number when creating the requisition.

If the intended supplier does not exist in PeopleSoft, then a new Supplier ID number will need to be established. Completing the Supplier Intake form and IRS form W9 form is required as the initial step by the requester/initiator (*It is recommended that these two blank forms be forwarded by the requester/initiator to the supplier to complete (supplier has all the necessary information, first hand).

Use the following link to access the most current forms: http://bussrv.sdccd.edu/purchasing/forms.cfm.

Upon completion, the supplier shall return the two forms to the requester/initiator.
The requester/initiator will review the forms for completeness, accuracy, and legibility.
If incomplete the requester/initiator will return the form(s) to the supplier.
If complete, the requester/initiator will perform the data entry into PS from the completed forms.
Thereafter, a Supplier ID is issued within PS. Enter that 10 digit Supplier ID number in the box (top right) of the Supplier Intake form.
The data as entered will remain in an 'unapproved' status within PS until purchasing is notified and reviews and approves the content.

The requester/initiator then emails the IRS W9 and the Supplier Intake forms to the public folder ("Vendor Intake") at supplierintake@sdccd.edu requesting approval by Purchasing. Enter ONLY the supplier name and ID number in the subject line of the email.

Purchasing will review and notify the requester/initiator via email when the supplier is approved.
Thereafter, the requester/initiator may obtain a quote and draft the requisition within PS, including the now approved supplier (ID).

Purchasing is responsible for reviewing the data entry performed by the requester/initiator and either approving in PS or sending the data back to the requester/initiator for revision.

The submitted W9 form is also (only) reviewed by Purchasing for completeness.

A cursory view is then performed by Purchasing as to the W9 content. The purpose of this task is to identify a possibility of the named supplier, individual or named partnership as potentially qualifying for Federal 1099 tax status.

No decision or recommendation is made by Purchasing as to the actual tax status of the named supplier.

The supplier intake form is placed in a public folder for filing and access by both Accounts Payable (AP) and Purchasing. A subfolder places the cursory Purchasing review for 1099 supplier status for analysis and determination by A/P staff. Generally Purchasing will notify A/P of document(s) being placed within the sub folder, or A/P may intermittently view the folder/subfolder.

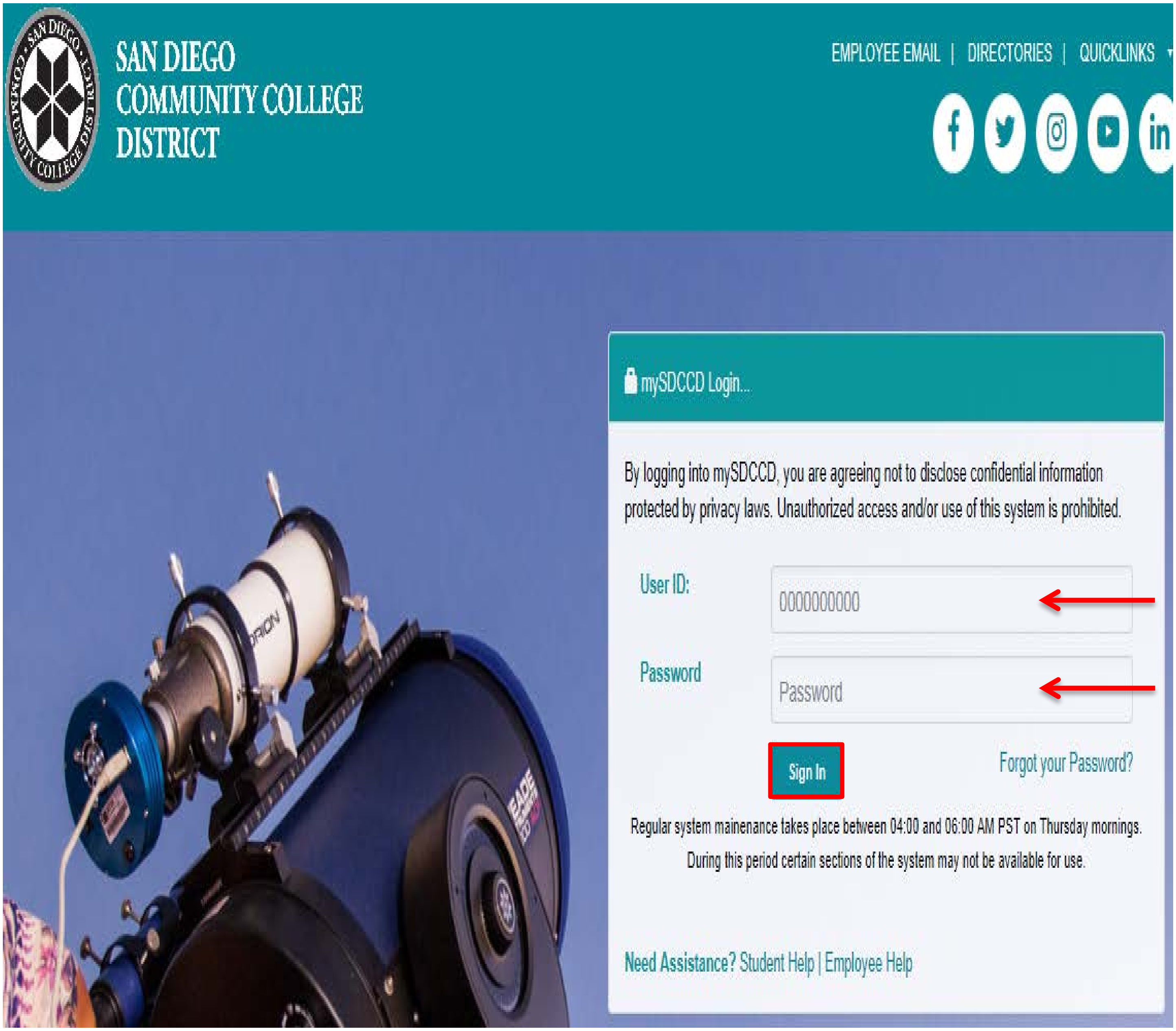
For assistance regarding entering a supplier, please contact the Purchasing and Contract Services Department at 619-388-6562.

SUPPLIERS

PeopleSoft can be accessed through the District website by selecting the **Employees** tab, and then navigating to the **My SDCCD Portal** link. You can also go directly to the link below.

Use the following link: http://myportal.sdccd.edu/

****NOTE: Add this website to your internet favorites for easy access.**



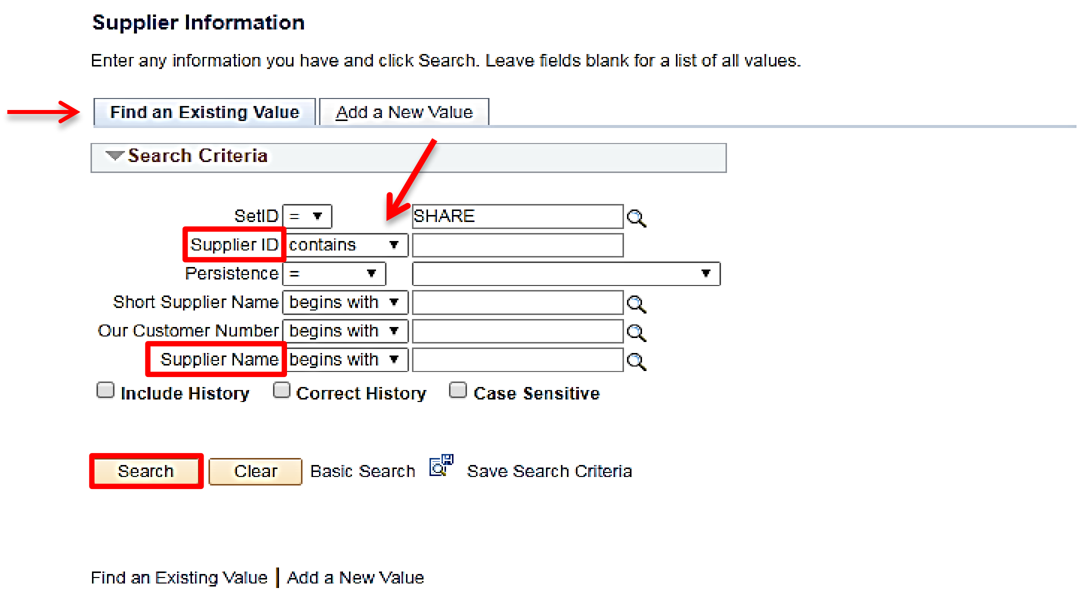
To access the **Supplier** database, click on the **NavBar** icon in the top right of the screen. Then click the blue **Navigator** icon and use the following navigation:

- **Financials9.2>Suppliers>Supplier Information>Add/Update>Supplier**

****NOTE: All fields MUST be completed in CAPITAL LETTERS; turn your keyboard Caps Lock on.**

To search for an existing supplier, enter the **Supplier ID** number or **Supplier Name** in the search field below and click **Search**. If searching with a Supplier ID number, click on the dropdown arrow in that field and click **contains** prior to searching.

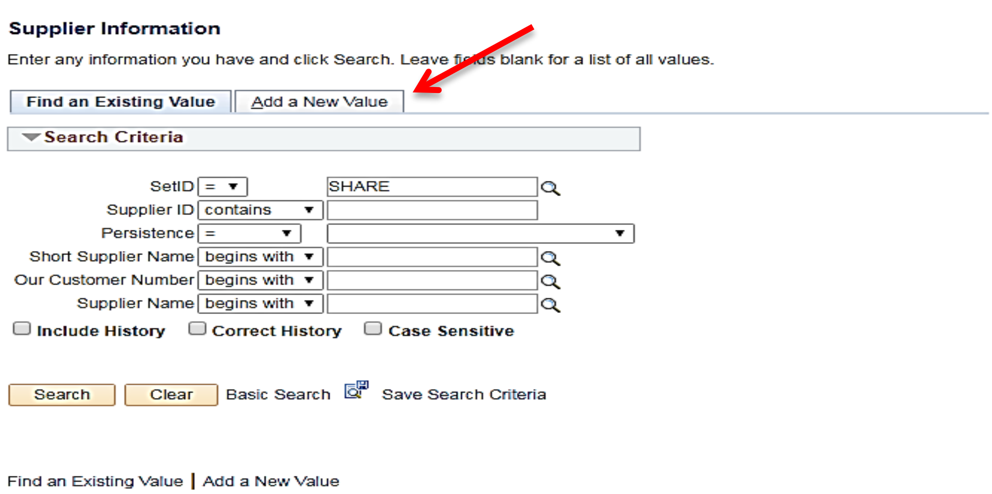
Supplier Information



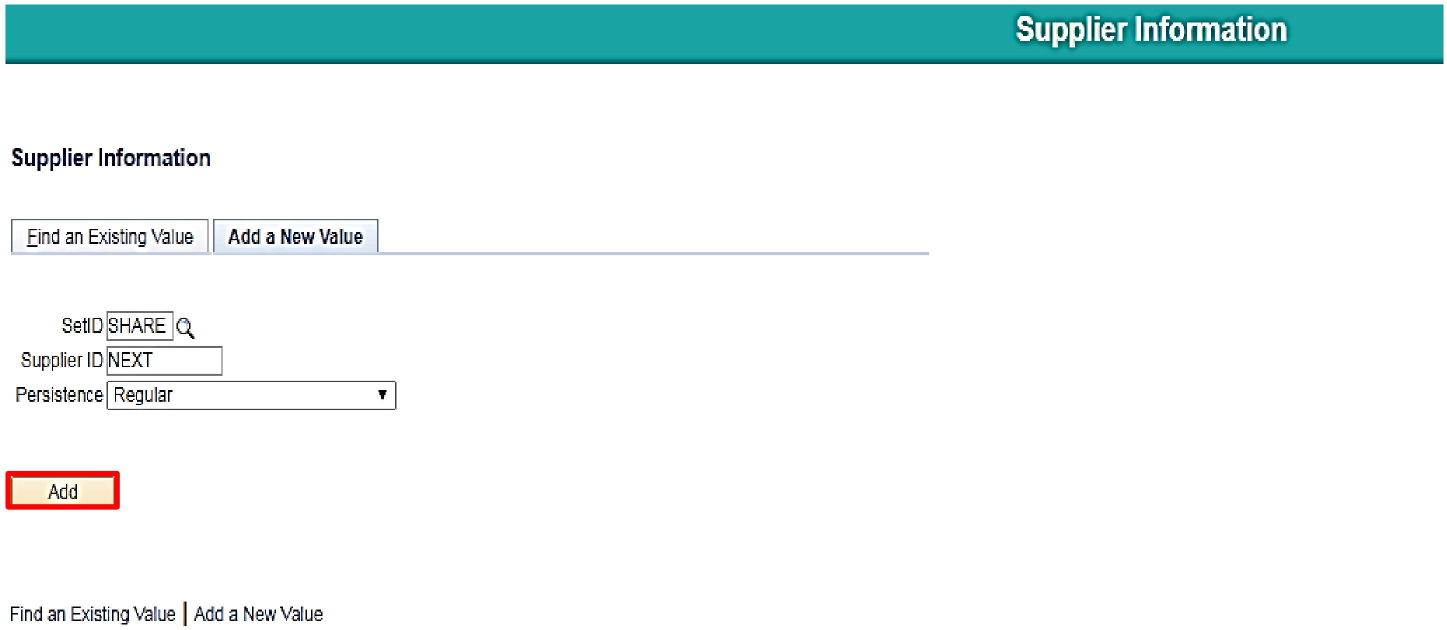
If the supplier does not exist in PeopleSoft, a new Supplier ID will need to be established. To add a new supplier, click on **ADD a New Value** and follow the steps below.

****NOTE: The Supplier ID number must be a 10 digit numerical number containing no alpha or characters. Do not manually enter an ID number. ID numbers should be auto generated from PS with the exception of an employee or student. To add an Employee/Student, see the screen below.**

Supplier Information

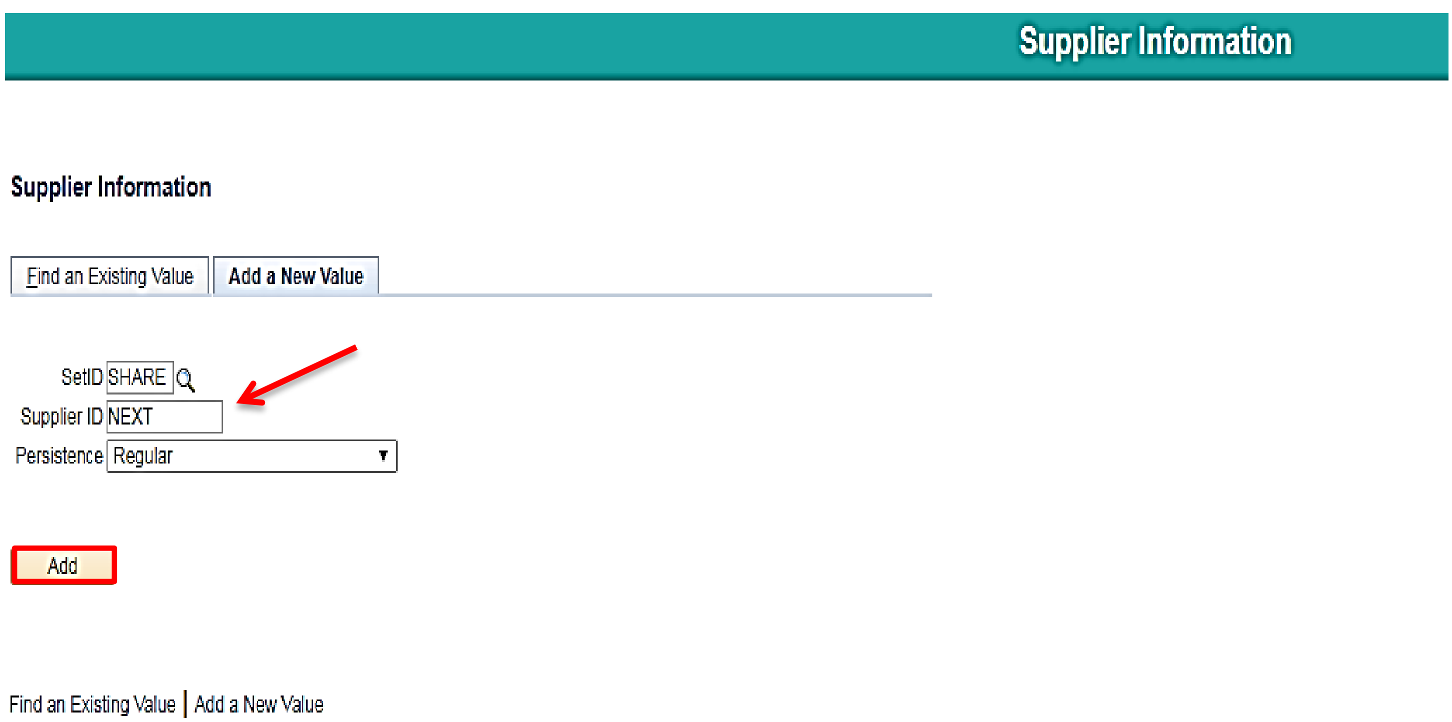


In the next screen, click **ADD** and PeopleSoft will automatically assign a new **10 digit Supplier ID number** once the supplier information is entered and saved in Peoplesoft.



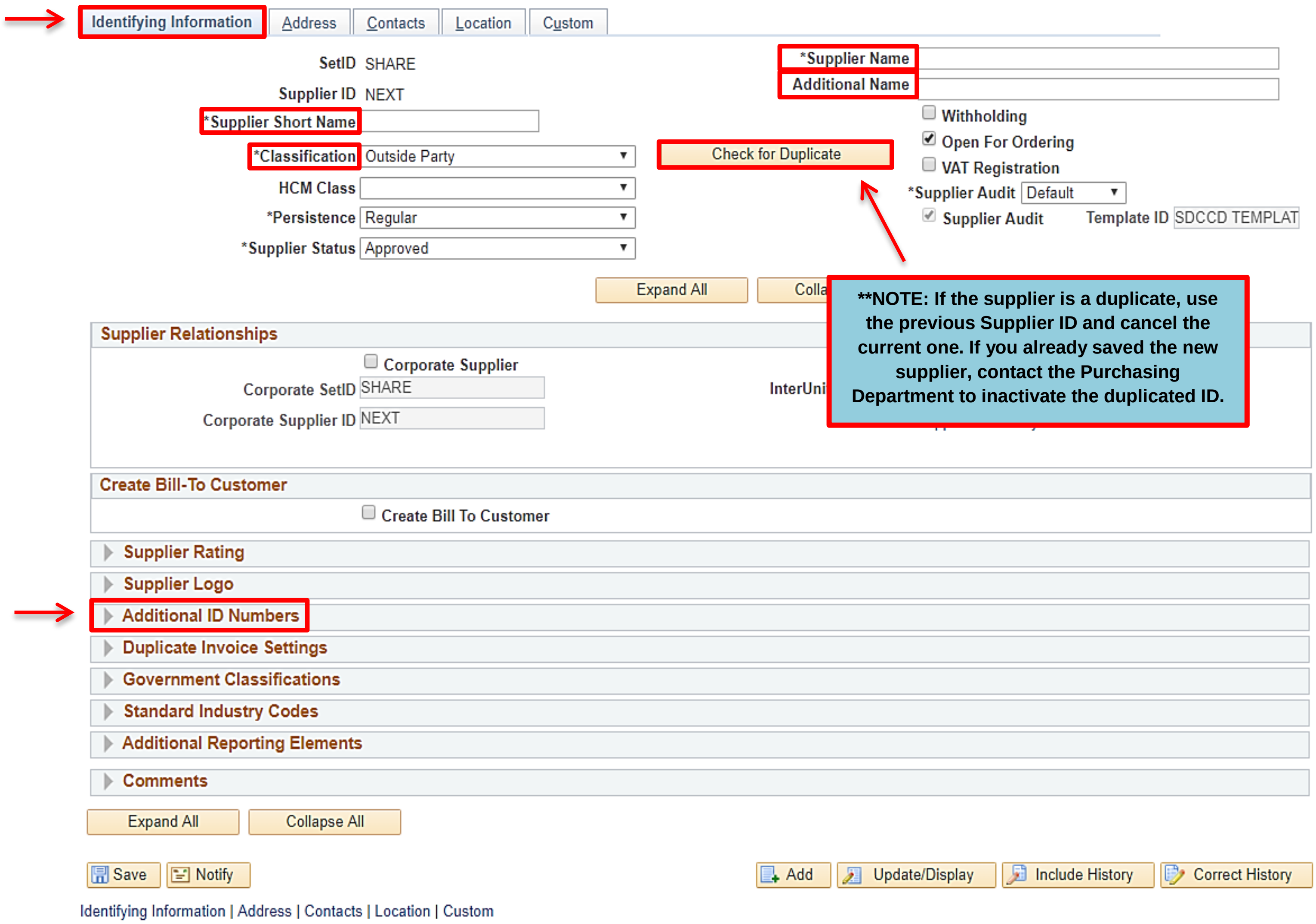
To add an **Employee or Student,** replace **NEXT** in the **Supplier ID** field with that **Employee or Students ID** number and add three leading zero's (000xxxxxxx) to the number. Ensure that there are 10 digits (numerical) and click **ADD**.

****NOTE: Employees with ID numbers that begin with 333 do not need 3 leading zeros added.**



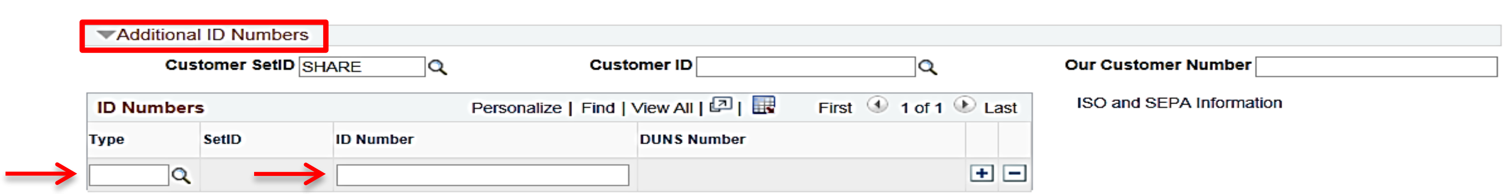
On the **IDENTIFYING INFORMATION** tab and complete all fields marked in **Red** below:

- **Supplier Name** – Enter the **Business Name** (**alpha only)** from Line 2 of the W-9 form. (If Line 2 is blank, enter the Name from Line 1 and skip to supplier short name).
  If entering an individual's name, enter the first name first, middle, and then last name with no comma.
- **Additional Name** – This field is a continuation of the **Supplier Name** field.
- **Supplier Short Name** – Enter the Supplier name, alpha only, no spaces. Please note that only 10 characters will fit into the field.
- **Classification** – Select the appropriate classification for the Supplier. (Note: HCM stands for Human Capital Management and this is selected for Human Recourses related suppliers)
- **Check for Duplicate** – Click on **Check for Duplicate** to verify if the supplier is already active in PS.
- **Additional ID numbers** – Click on and expand the **Additional ID Numbers** tab.



Expanding the **Additional ID Numbers** tab will bring you to the screen below and allow you to enter the **Supplier's Tax ID** number found on **Part I – Taxpayer Identification Number** on the W-9 form.
Enter the **TYPE** (select either **EIN** or **SSN**) and then enter the **ID NUMBER**. Ensure that there are 9 digits only with no alpha and no dashes.

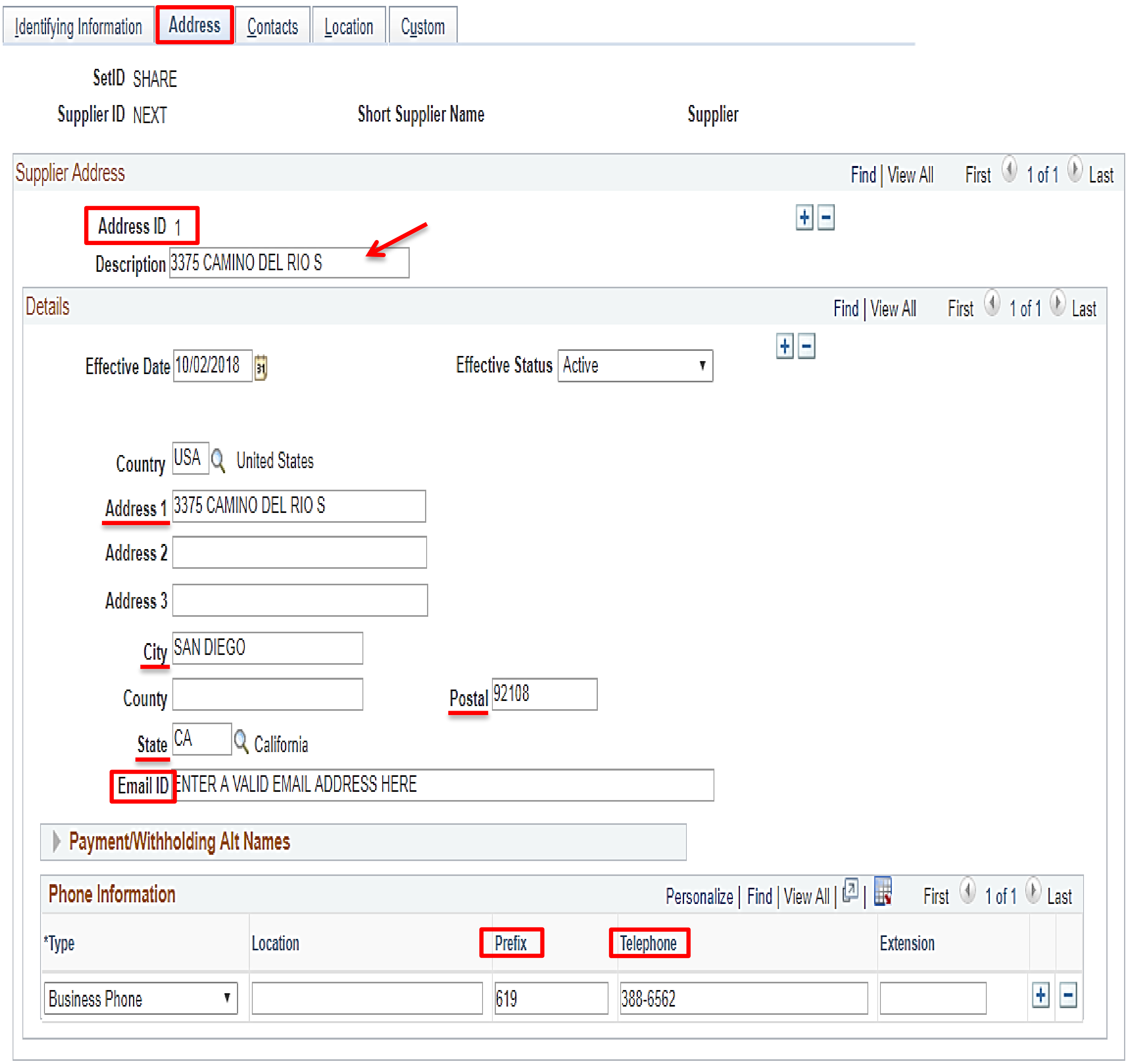
**NOTE: DO NOT ADD DASHES (-) to the ID number. Adding dashes will cause an error with the IRS.



Click on the **ADDRESS** tab and complete the fields marked in **Red** below:

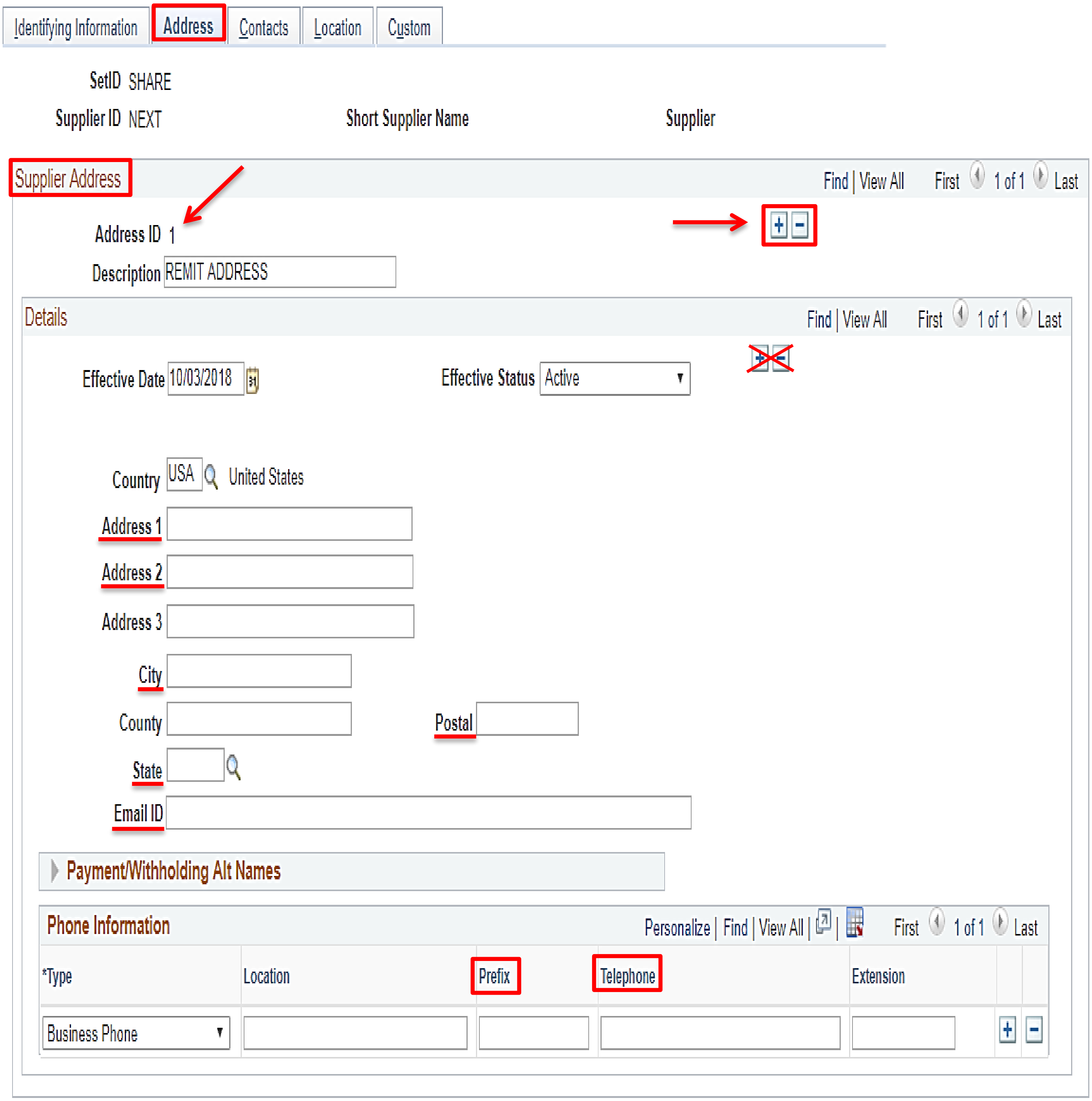
- **Description –** Enter the first line of the Supplier address if there is only one address. If there are two addressed to be entered, enter a description for each address. (i.e., PO address, mailing address, remit etc.)
- **Address 1** – Re-enter the first line of the supplier address. Complete with City, State and Postal.
- **Email ID (REQUIRED) –** Enter the supplier's email address **(not the web address)** that the Purchase Order will be dispatched to**.** Ensure that the supplier's email address is a current valid address
- **Telephone (REQUIRED) –** Enter the business phone number with area code.

****NOTE:** If the supplier included a **Payment Remittance Address** on the Supplier Intake form, see **page 15** for instructions on how to enter the additional **Remit To** address**.**



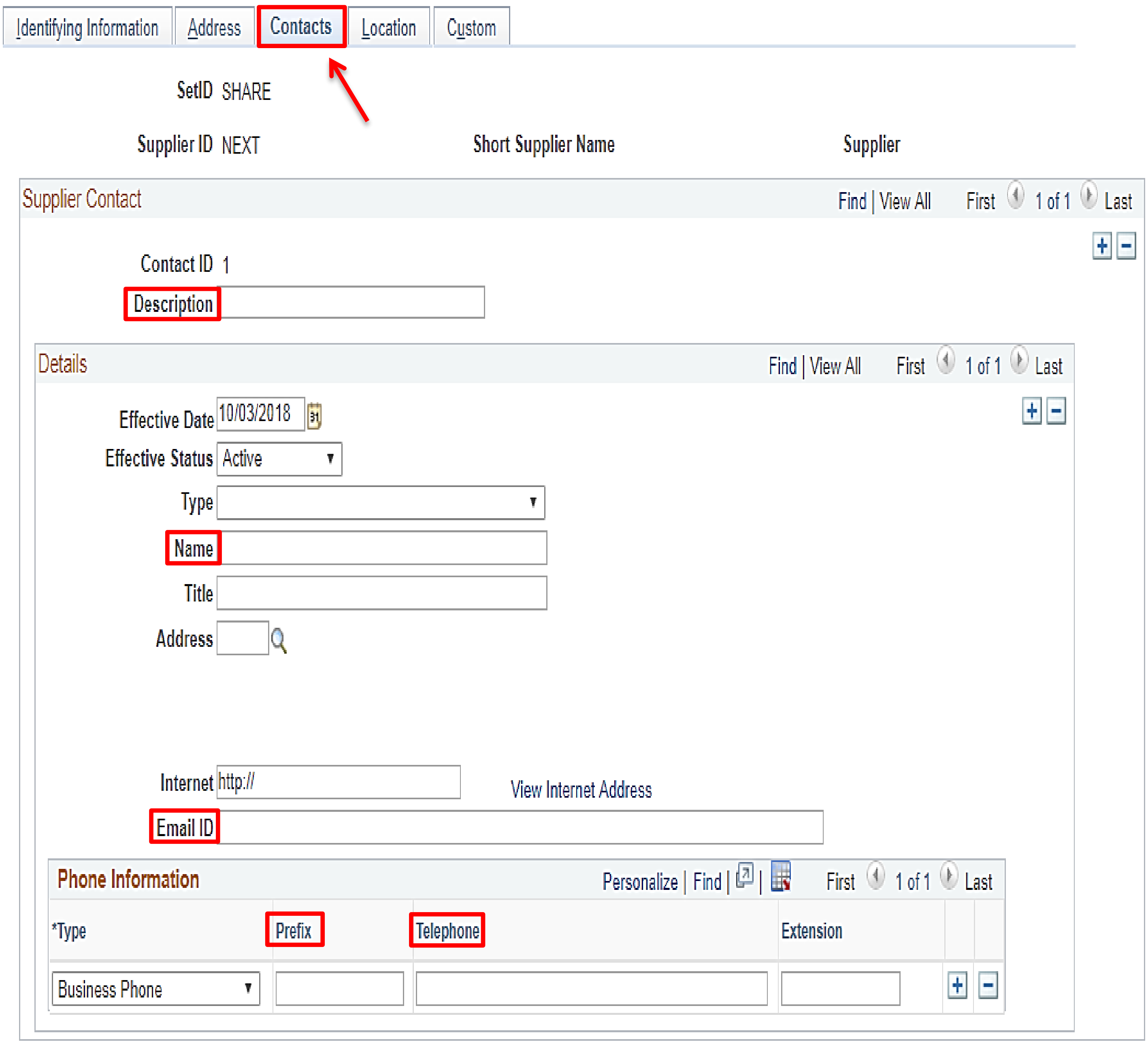
To add a second address such a **Payment Remittance Address** click on the **Plus Sign** (+) to the top right of the screen in the **Supplier Address** field to create an **Address ID 2** and complete the following fields marked in **Red** below:

- **Description –** Enter REMIT ADDRESS.
- **Address 1** – Enter the C/O information from the Supplier Intake form and then add the first line of the supplier address onto the **Address 2 line**. If there is no C/O indicated on the intake form, enter the first line of the supplier address and complete with City, State and Postal.
- **Email ID** – Enter the supplier's email address **(not the web address).**
- **Telephone –** Enter the business phone number with area code.



Next, click on the **CONTACTS** tab and complete the fields marked in **RED** below:

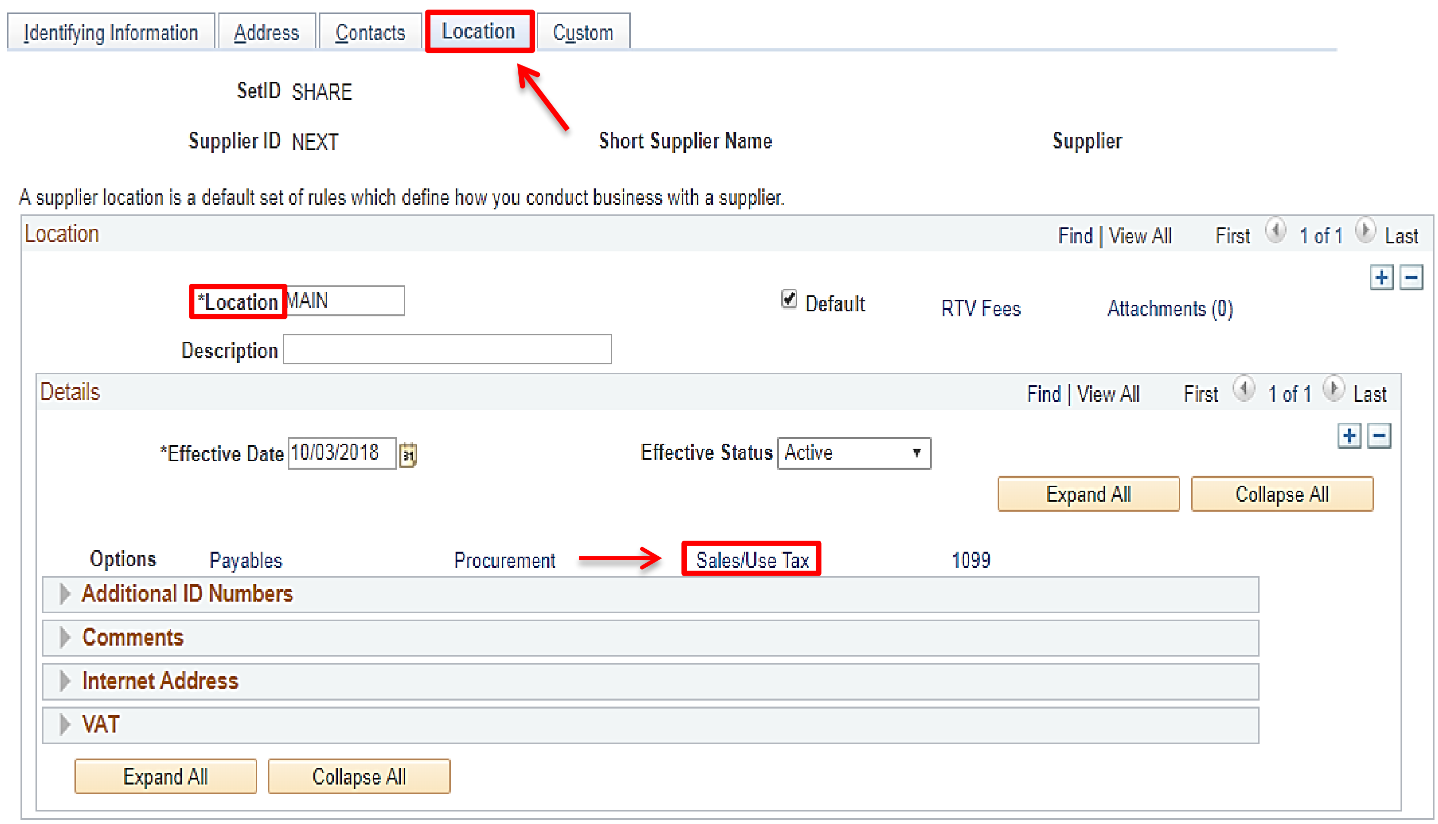
- **Description** – This field is a reference field; enter a reference to describe the type of supplier. (i.e., Goods, Professional Services, Student Stipend, 1099, Rent/Leases, etc.)
- **Name –** Enter the contact name for the supplier.
- **Email ID –** Enter the email address
- **Telephone** – Enter the contact telephone numbers.



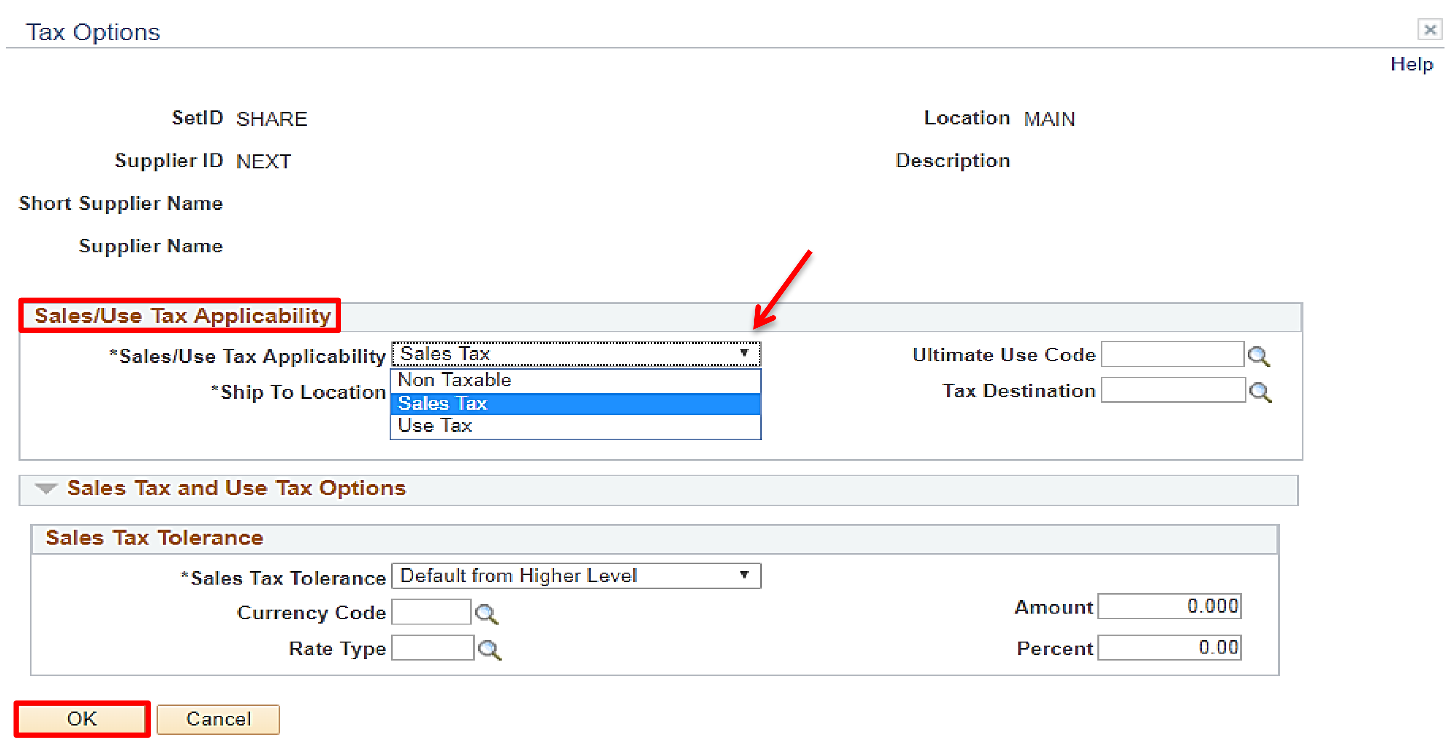
Click on the **LOCATION** tab and complete the fields marked in **RED** below:

- **Location** – Enter **MAIN**.
- **Sales/Use Tax** – Click on **Sales/Use Tax** and see the screen below if tax is applicable.

****NOTE: For questions regarding 1099 supplier set-up, contact Accounts Payable at 619-388-6554.**

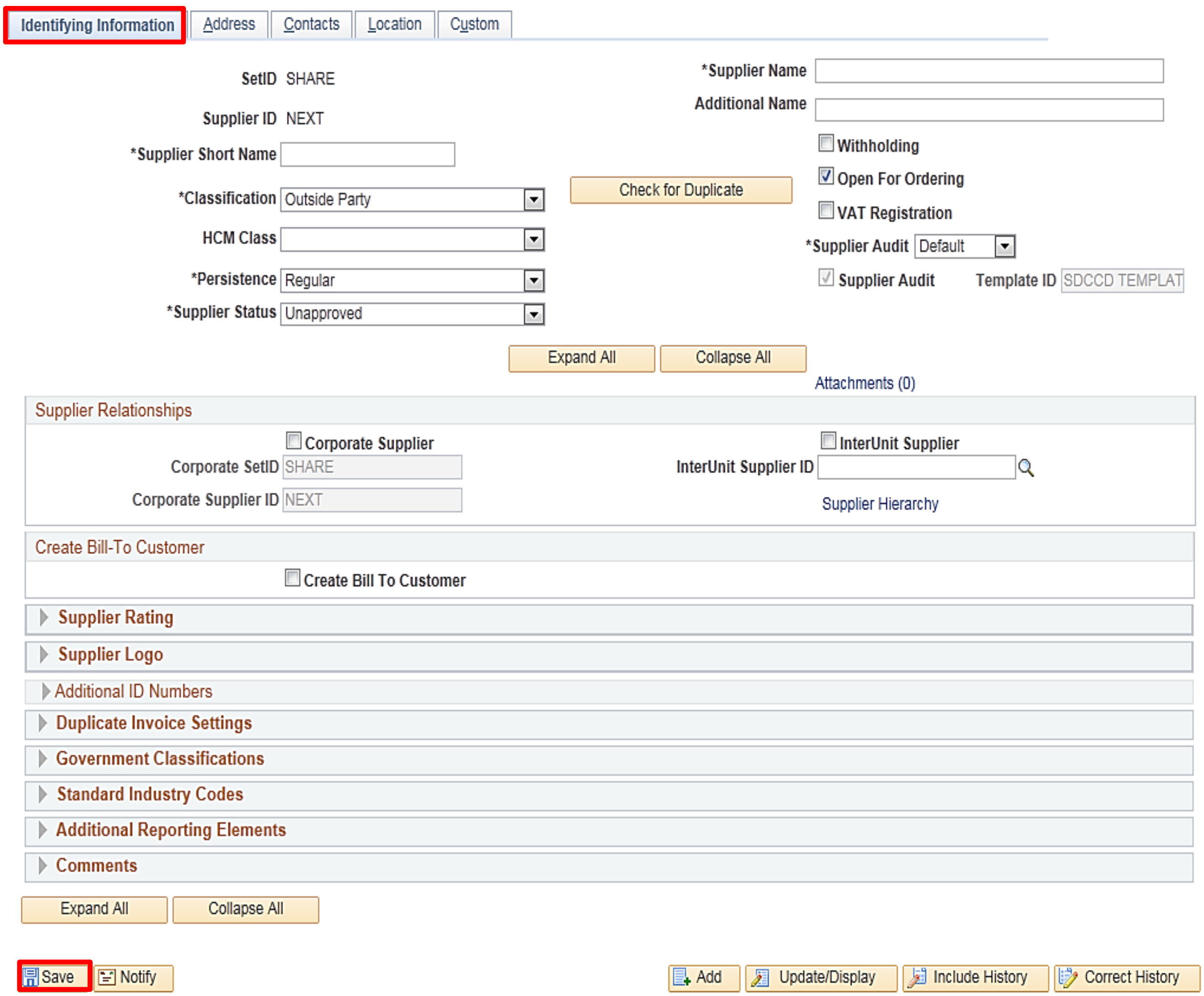


Click on **Sales/Use Tax Applicability** and select the tax classification indicated on the Supplier Intake form and click **OK**.



Once all information has been entered, return to the **Identifying Information** tab and click **SAVE**. The new **Supplier ID** number will be assigned automatically by PeopleSoft. The **Supplier ID** number can be found on the **Summary** tab once the supplier information is saved. **Note this ID number as it will be needed for the next step.**

****NOTE: The data as entered will remain in an 'Unapproved' status until purchasing is notified and reviews and approves the content.**



After establishing the Supplier in People Soft, enter the **10 digit Supplier ID** number in the box (top right) of the **Supplier Intake Form** that form along with the **W-9** form to supplierintake@sdccd.edu.

****NOTE: Enter ONLY the full name of the supplier and the ID number in the subject line of the email.**

To make changes to an existing supplier, email a completed Supplier Intake Form indicating the changes to supplierintake@sdccd.edu.

The Purchasing and Contract Services Department will review the data entered and send a notification to the requester via email indicating either that the supplier has been approved or whether additional information is needed.

Information to gather prior to creating a requisition in PeopleSoft

- Campus Business Unit, contact the campus Business Office to identify an approved supplier; DIS01 Business unit, contact the Purchasing and Contract Services Department to identify an approved supplier
- Formal, valid quote from supplier
- A current valid supplier email address where the PO will be dispatched to
- Appropriate chartfield and category code for the expenditure
- Delivery location, end location and departmental contact information
- Consultant/Professional or Lecture/Performance agreement, if applicable
- All documents, such as quotes, pictures, agreements, etc. are in one file for attachment to the requisition

Things to Remember

- The Purchasing Department must create a purchase order ***BEFORE*** *you* receive services, materials, and/or an invoice from the supplier. Purchases that have been initiated and processed by an end-user without a purchase order are **"ILLEGAL."** The District cannot be held liable for purchases made without a purchase order. All purchases **MUST** have an assigned purchase order number issued by the Purchasing and Contract Services Department prior to making a purchase. If a purchase is made without a PO, the payment cannot be made. **Potentially the end user can be held financially responsible for any order placed without a District authorized purchase order.**

  A requisition that is created after a purchase has been made is called a **Confirmation Requisition**. If approved, a justification form will need to be uploaded as a single attachment to line 1 of the requisition. (**See page 32**). Identify the requisition as a confirmation by stating "CONFIRMATION" as the first word in the description box on Line 1 of the requisition. An example would be "CONFIRMATION – PAYMENT FOR xxx" and then provide further details in the **Additional Information** field.

- **Amount Only** (AOPO) orders are intended for renewals, maintenance service agreements, rentals, professional services, and subscriptions/memberships. AOPO orders should not be used for the purpose of tangible product purchases.

- **Prepays:** On Line 1 of the requisition, identify if a prepayment is required by stating "PREPAY" as the first word in the item description box. An example would be "PREPAY – FOR xxx" and then provide any further details in the **Additional Information** field. The invoice/payment information must be attached to Line 1 of the requisition as well.

- **Special Handling**: For special handling, indicate on Line 1 of the requisition if the check needs to be mailed to the site (include the person's name, location, department, building, room number, and point of contact) or if someone needs to be called to pick up the check (include the person's name and phone number). The invoice/payment information must be attached to Line 1 of the requisition.

- **Ship To VS. Location**: **Ship To** is where the goods will be shipped and **Location** is where the end user is – where the goods will remain.

- **Catering:** All Catering requisitions must use **Category Code 901-00**.

- Add **Shipping/Freight** as a separate line item on the requisition. Use **Category Code 962-86** and check the **Amount Only** box for that line.

- **Sales Tax - DO NOT** add Sales Tax to the requisition; tax will be allocated to the PO automatically. Please ensure that the Chartfield used has sufficient funds to allocate tax.

REQUISITIONS

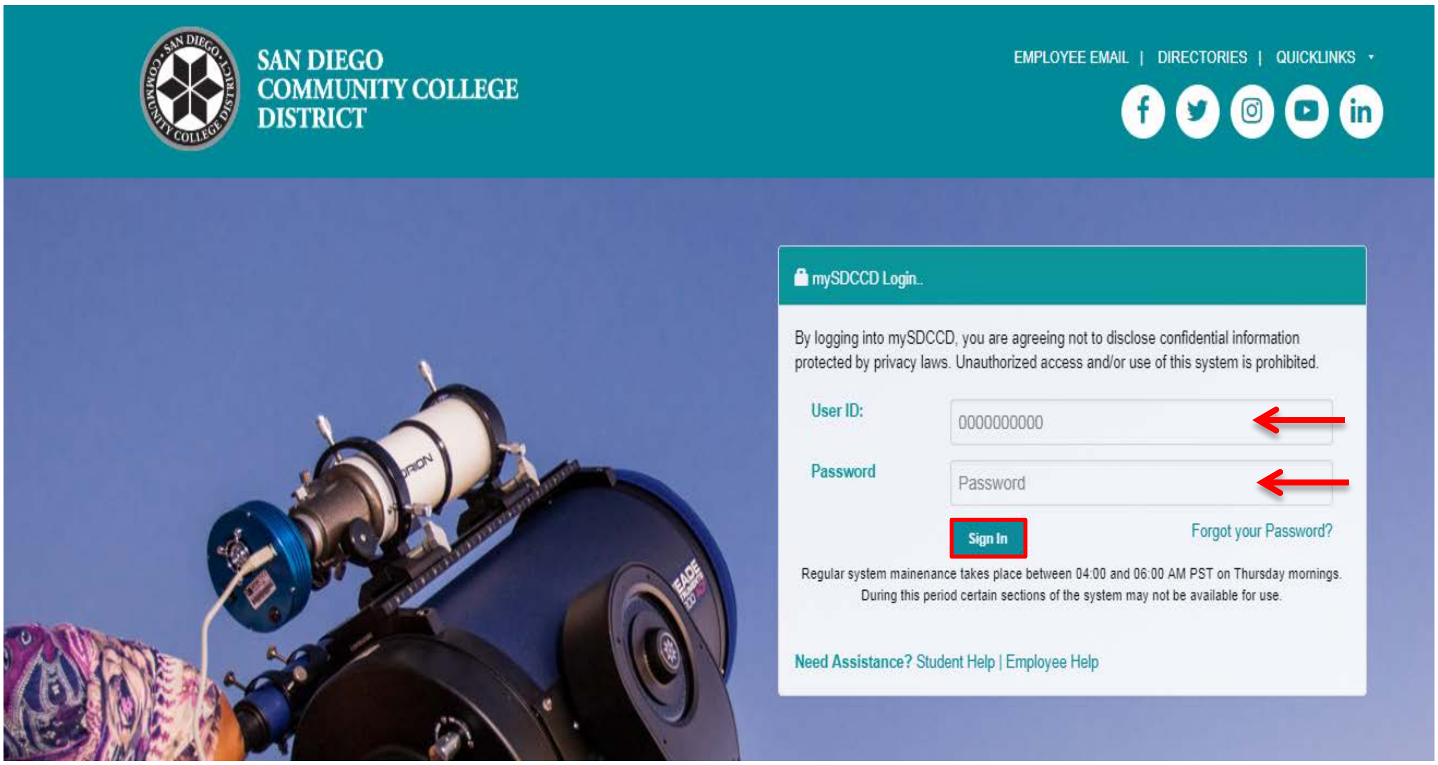
This Requisition Manual explains how to enter each component of a Requisition, and how they relate to each other. In PeopleSoft, Requisitions consist of four components:

- **HEADER** – Where general information pertaining to the entire order is stored and displayed. This includes data such as the suggested Supplier, Buyer, Ship-To, and Due Date.
- **LINES** – Where the description, unit of measure, category and quantity for each item you are ordering.
- **SCHEDULE** – Where the due date, ship to address and unit price are stored for each item on the order.
- **DISTRIBUTION** – Where the accounting information (i.e. the general ledger chartfield string) is entered.

You can access PeopleSoft through the District website by selecting the **Employees** tab, and then navigating to the **PeopleSoft My Portal** link. You can also go directly to the link below.

Use the following link: http://myportal.sdccd.edu/

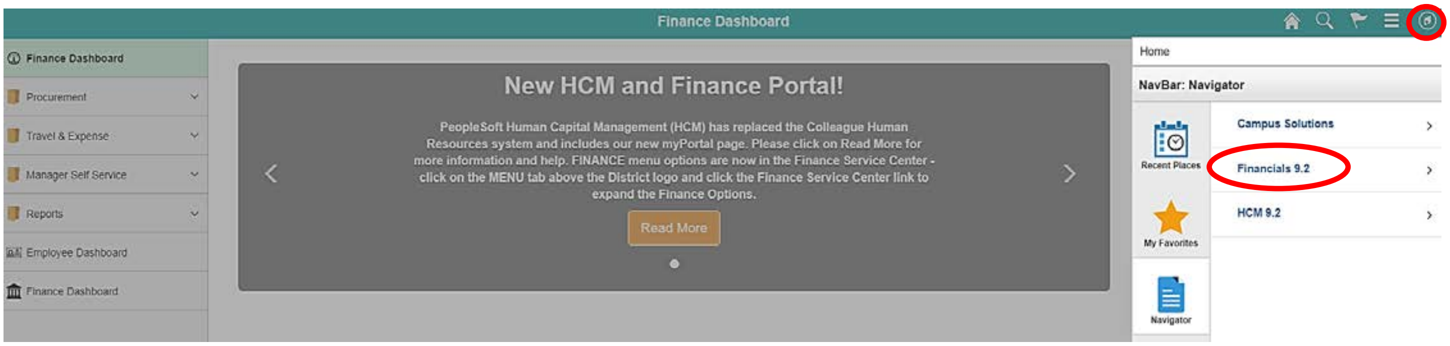
****NOTE: Add this website to your internet favorites for easy access.**

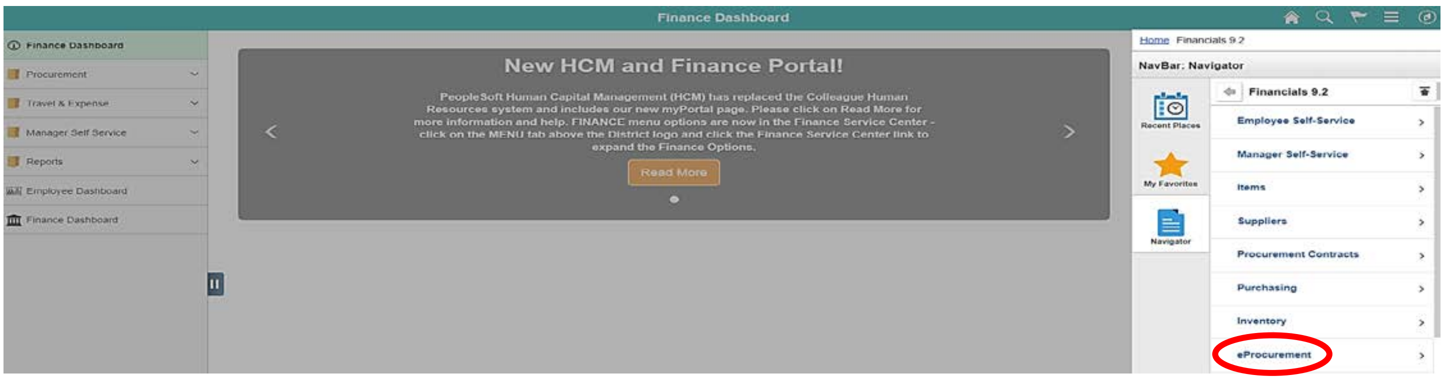


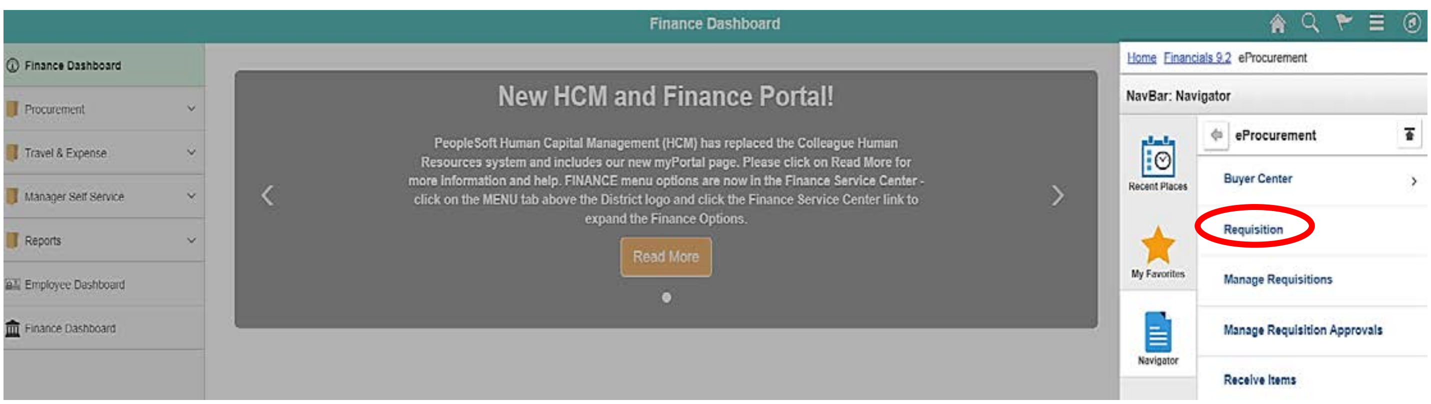
To access the **Create Requisition** screen, click on the Finance Dashboard icon.

To access **Create Requisitions**, click on the **NavBar** icon in the top right of the screen, then click the blue **Navigator** icon and use the following navigation:

- **Financials 9.2>eProcurement>Requisition**

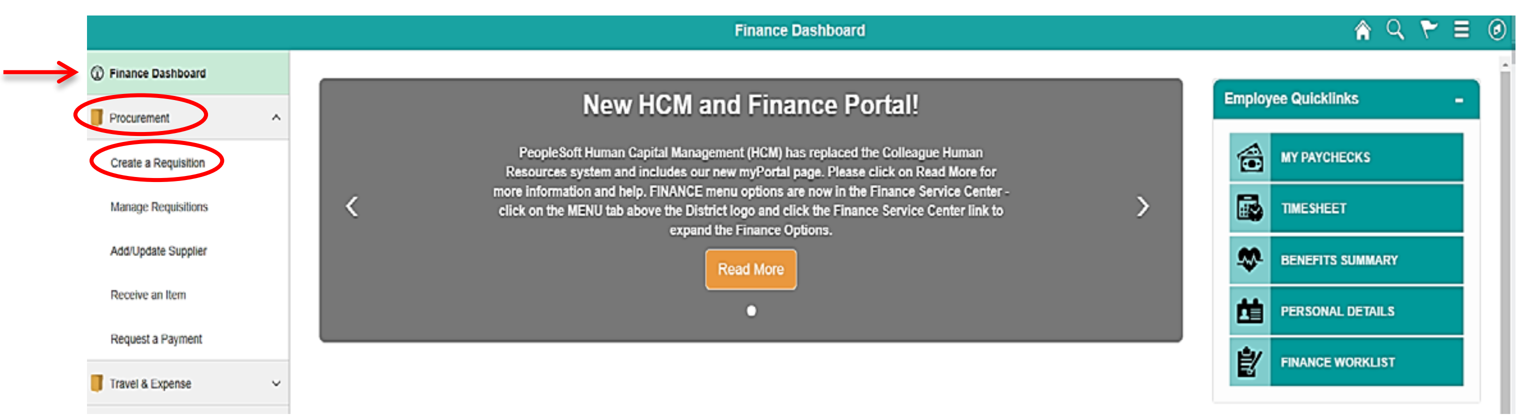






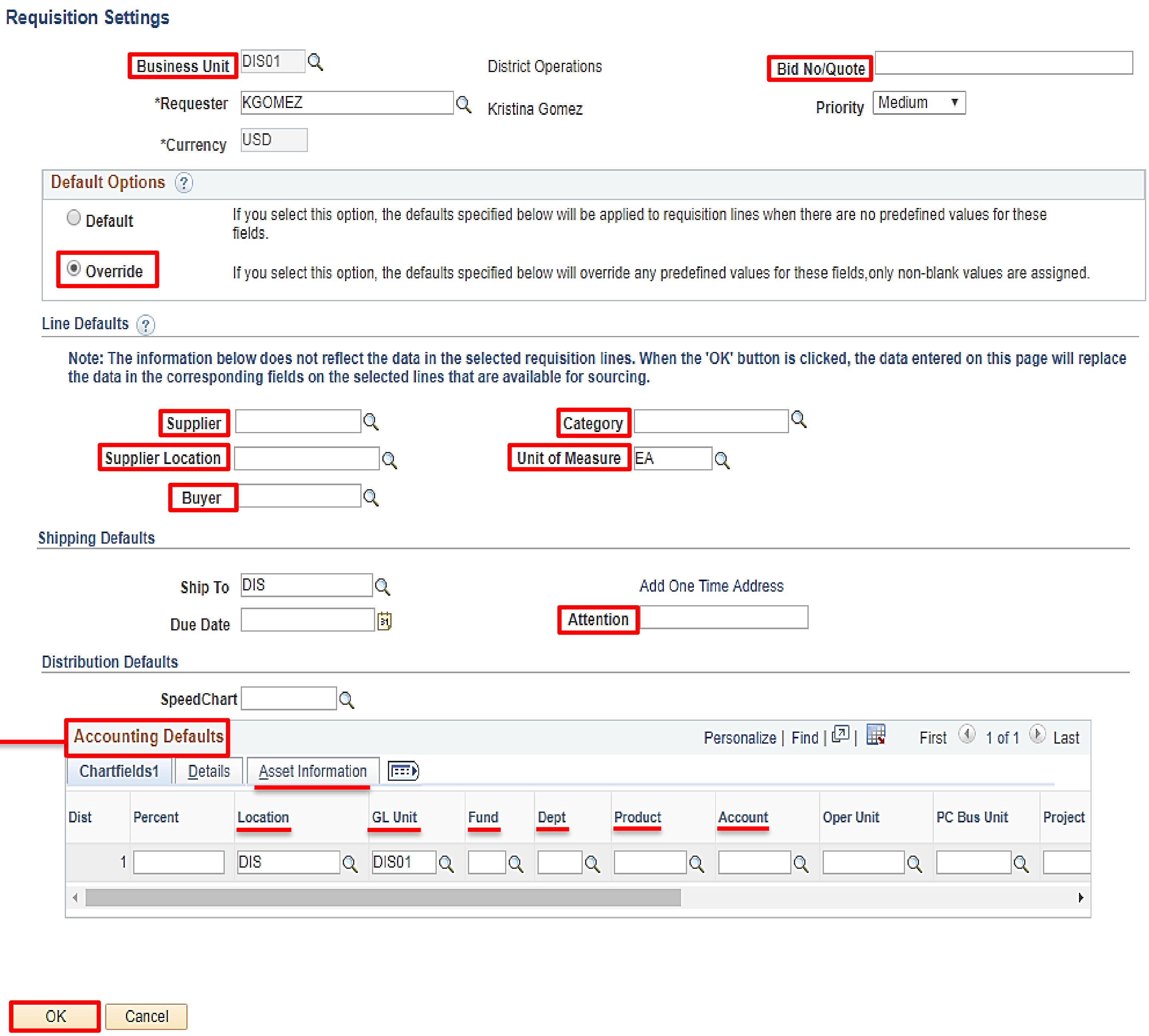
An alternative navigation to access the **Create a Requisition** screen is as follows:

- **Finance Dashboard>Procurement>Create a Requisition**



****NOTE: All fields MUST be completed in CAPITAL LETTERS; turn your keyboard Caps Lock on.**

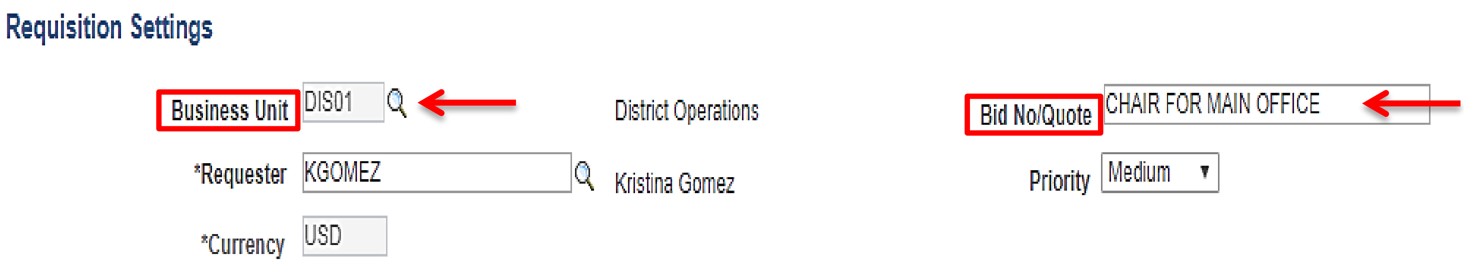
Below is the **Requisition Settings** page where all of the information contained in the Requisition Header is entered. Complete all fields marked in RED. See details for each field below.



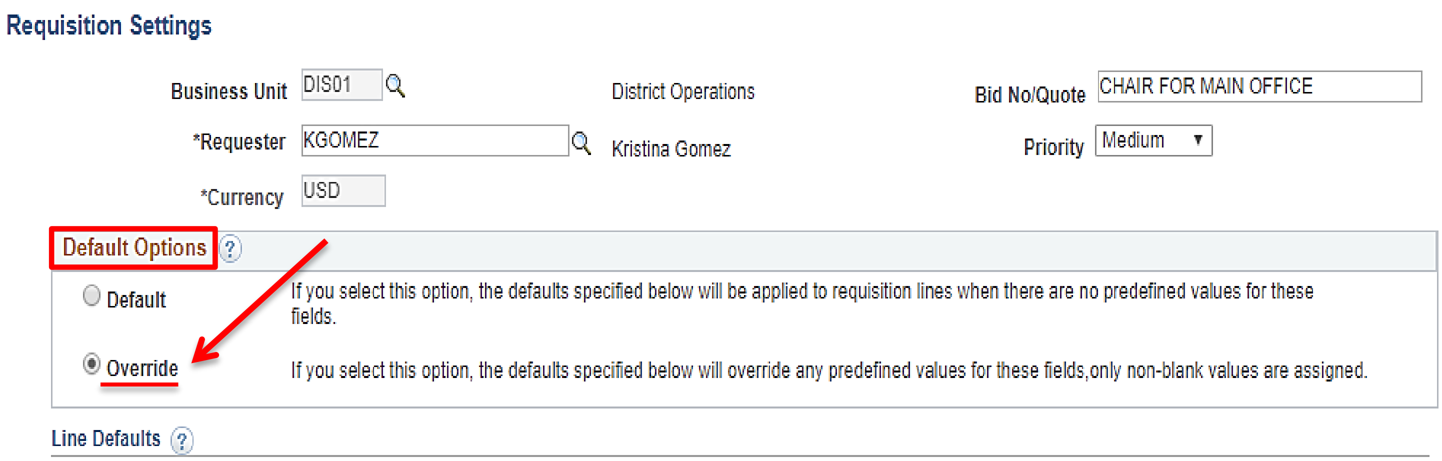
See details for **Account's** entry on **page 27.**

To look up the **Business Unit** (BU), click on the magnifying glass and select the correct BU. If this field has already defaulted to the correct BU, disregard this step.

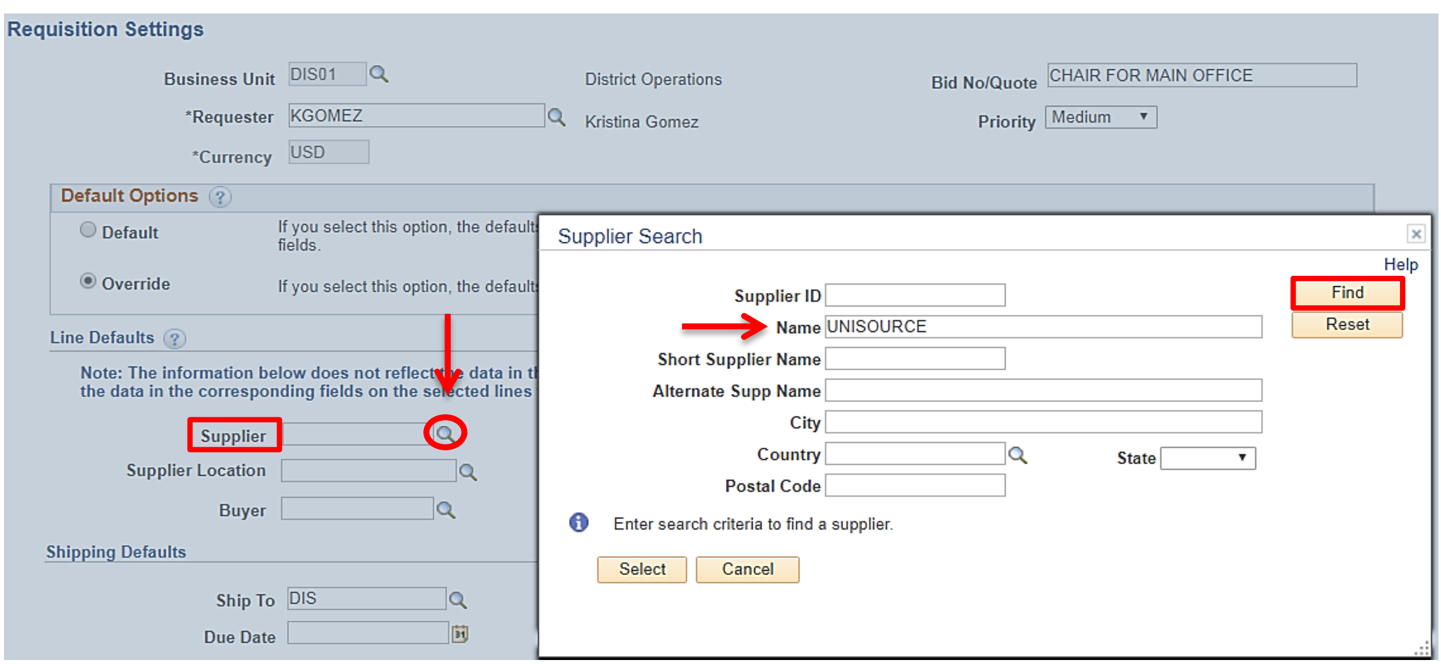
In the **Bid No/Quote** field, enter any helpful reference information regarding what the requisition entails.



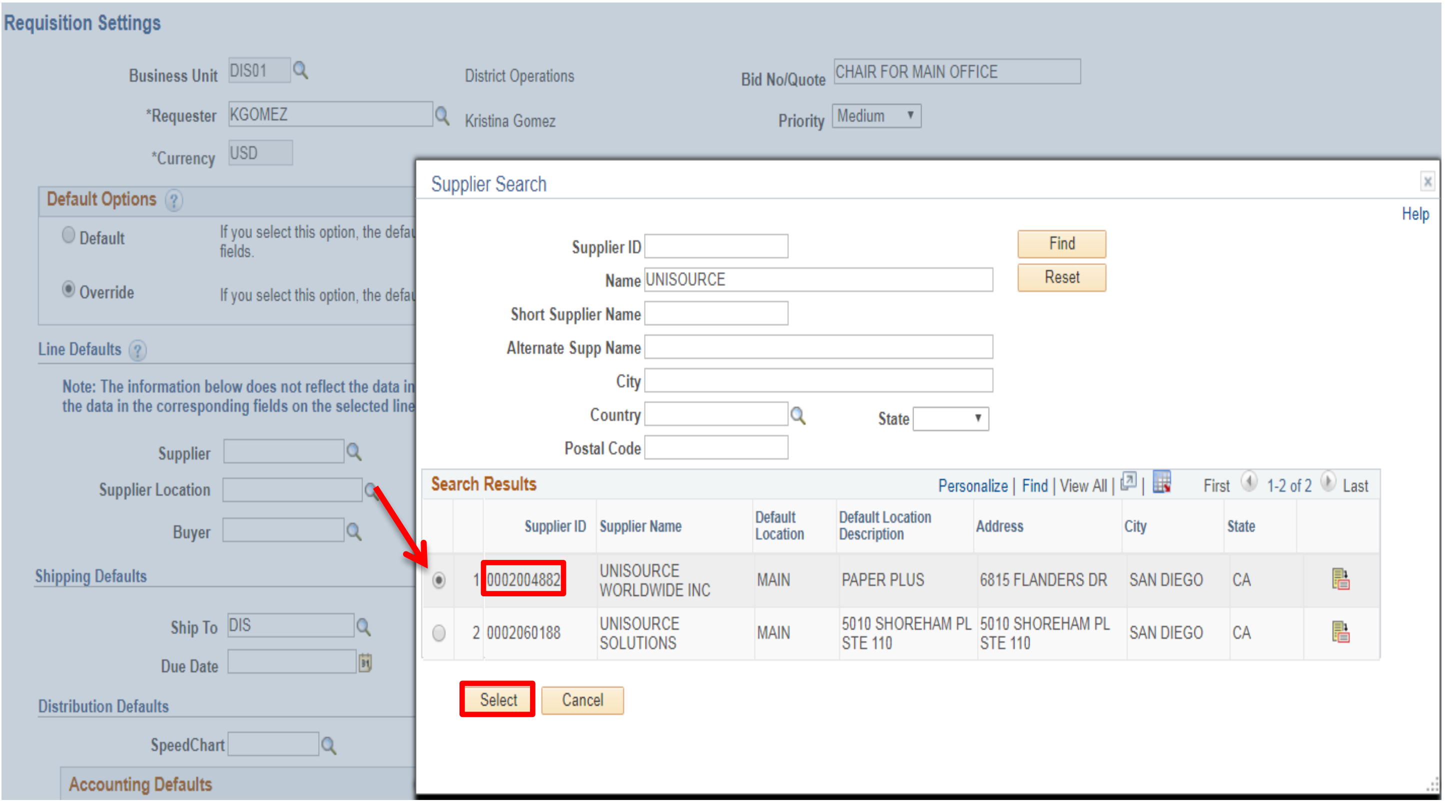
Under **Default Options**, click on **Override**. By clicking **Override**, all of the information that is completed on the **Requisition Settings** page will transfer to the requisition.



In the **Supplier** field, enter the **Supplier ID** number or to search for a supplier by name, click on the magnifying glass and enter the supplier name and click **Find**.

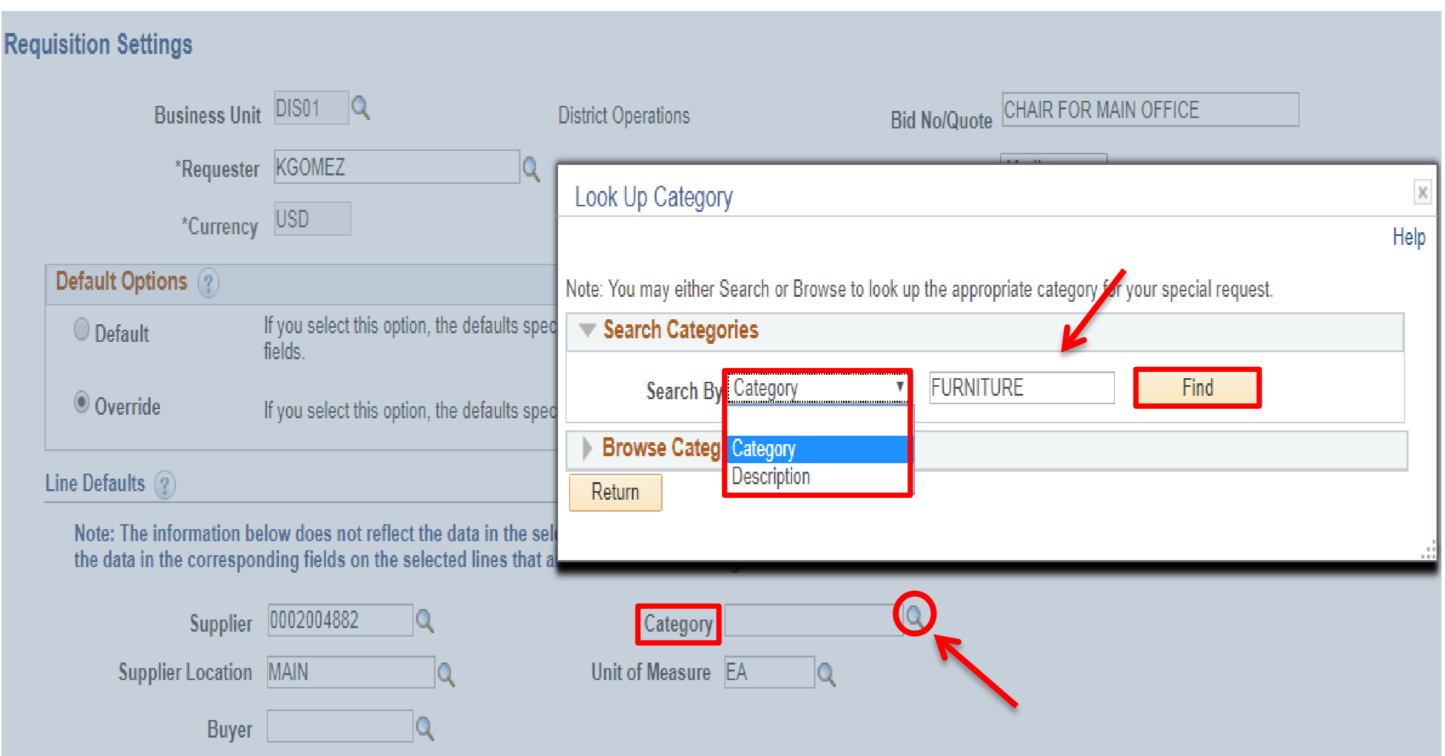


On the following screen, select the correct **Supplier ID** number from the menu and click **Select**.

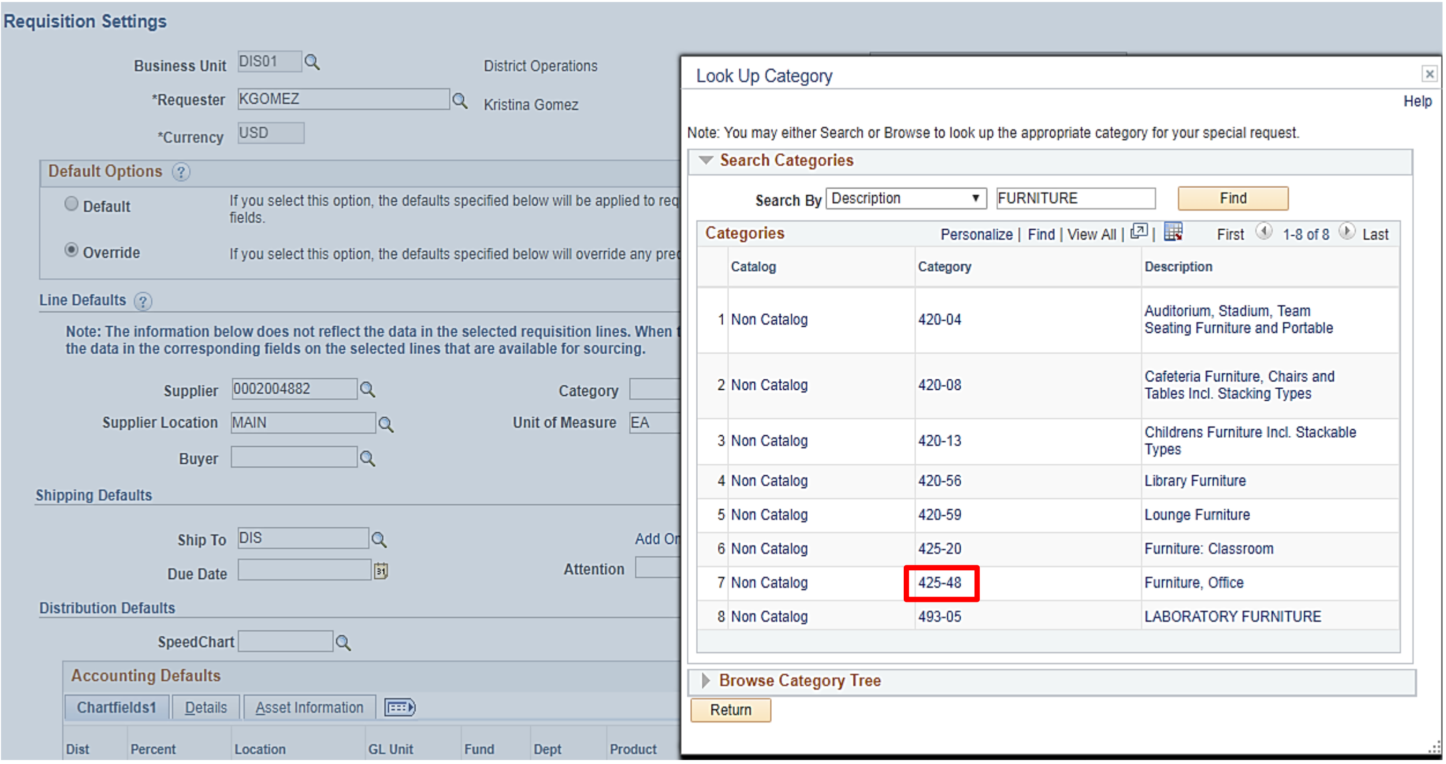


Next, indicate the **Category** which best defines the items that are being ordered. For a list of **Category Codes,** refer to **pages 55-61.**

- **Category** – Click the magnifying glass and enter a **Category** number or to search by description, click **Description** and enter a key word to search for the appropriate code.

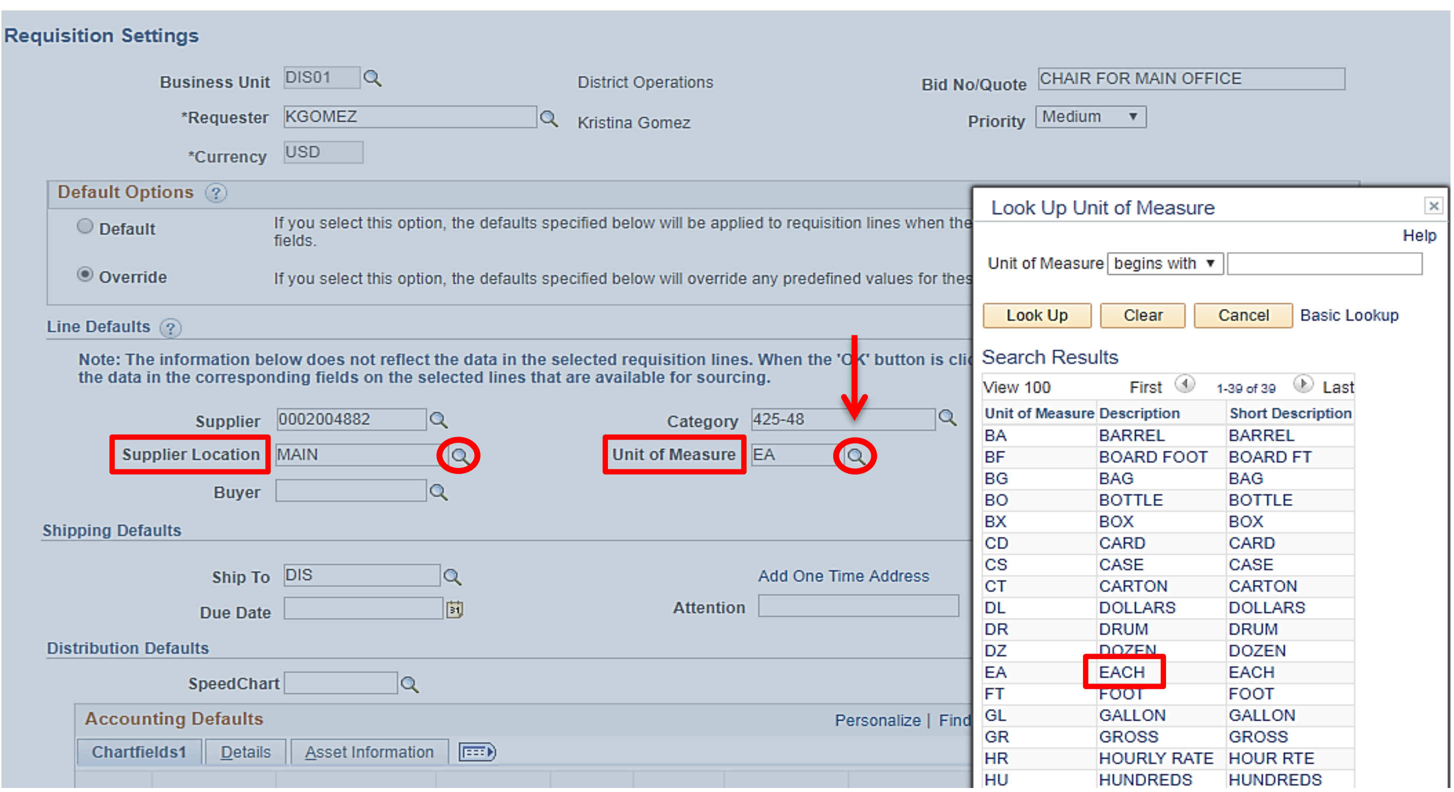


Double click on the correct **category number** to select the correct code.



****NOTE: Contact the Purchasing Department for issues selecting a Supplier Location.**

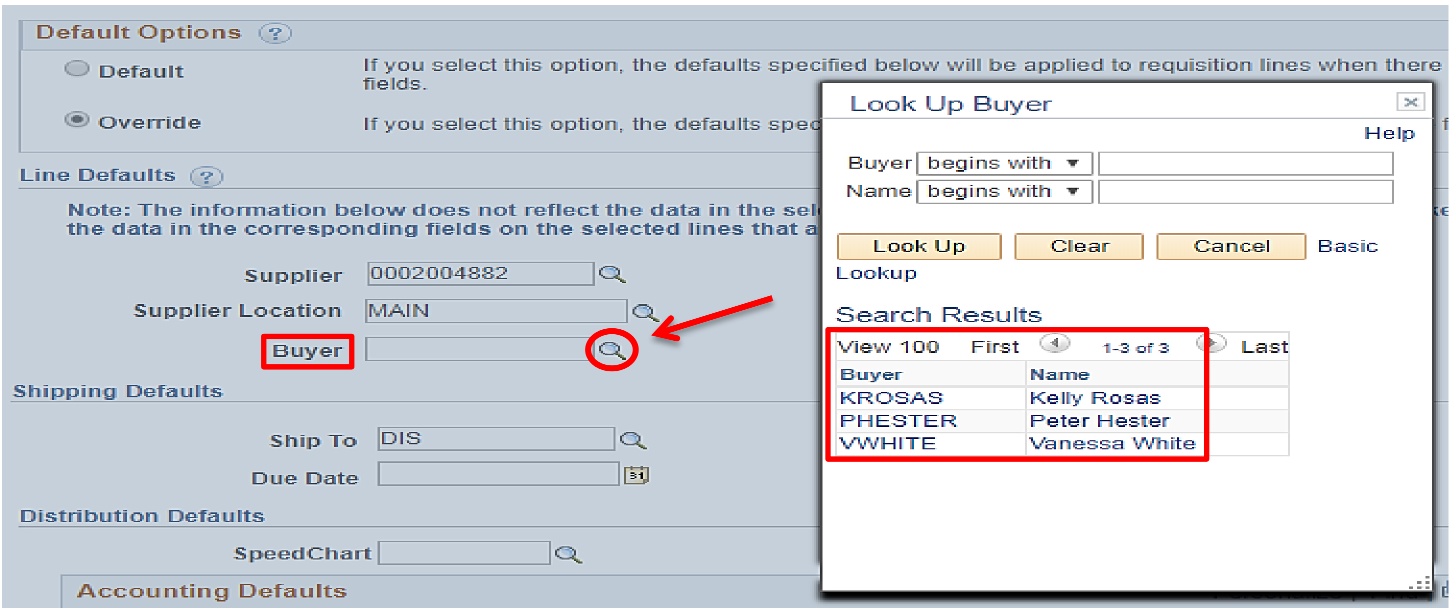
- **Supplier Location** – Click on the magnifying glass to select the current supplier address.
- **Unit of Measure** – Click on the magnifying glass to select the appropriate unit of measure.



Next, click on the magnifying glass next to the **Buyer** field to select the appropriate Buyer. All Buyers are assigned to a specific campus. If this field has defaulted to the correct Buyer, disregard this step.

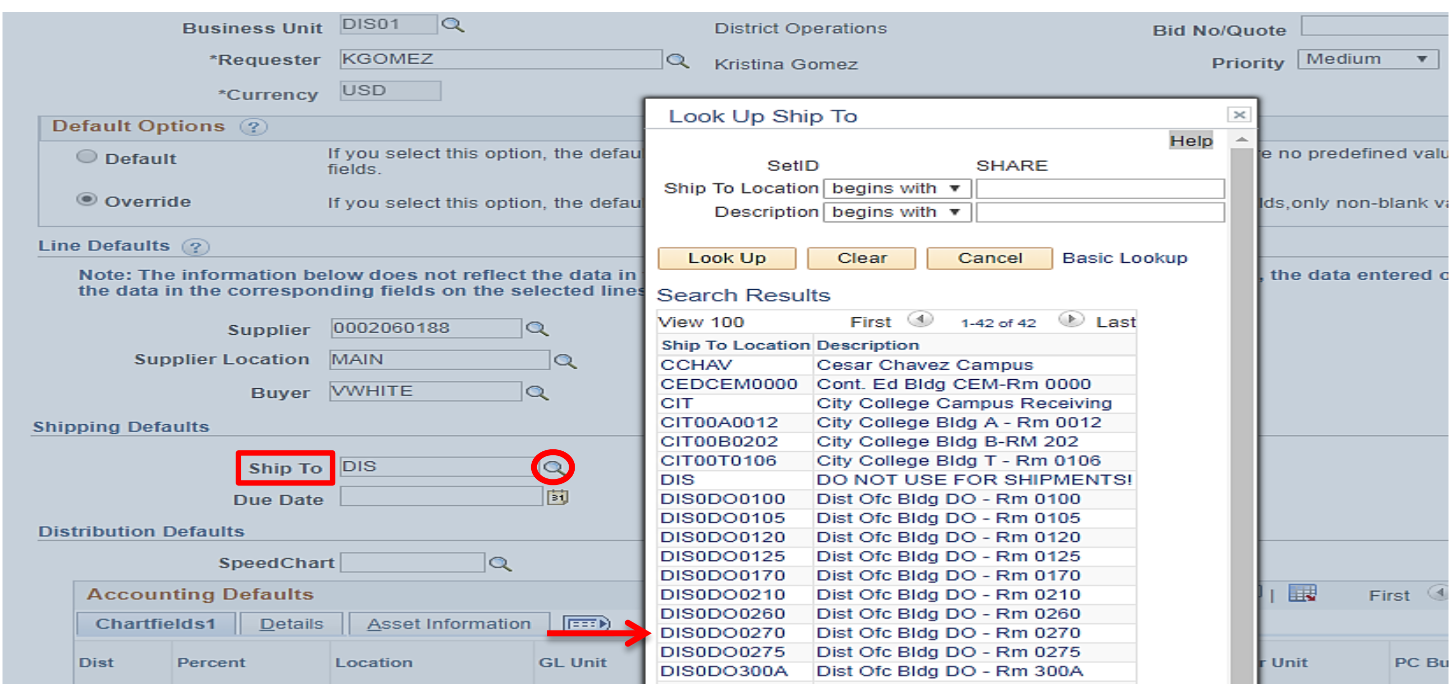
Buyer Assignment:

- Mesa College – **Peter Hester**
- Miramar & City College – **Kelly Rosas**
- District Office & Continuing Education – **Vanessa White**



If you know the **Ship To** location, enter the information into the **Ship To** field. To search for the Ship To location, click the magnifying glass to **Look up** and select a **Ship To** location.

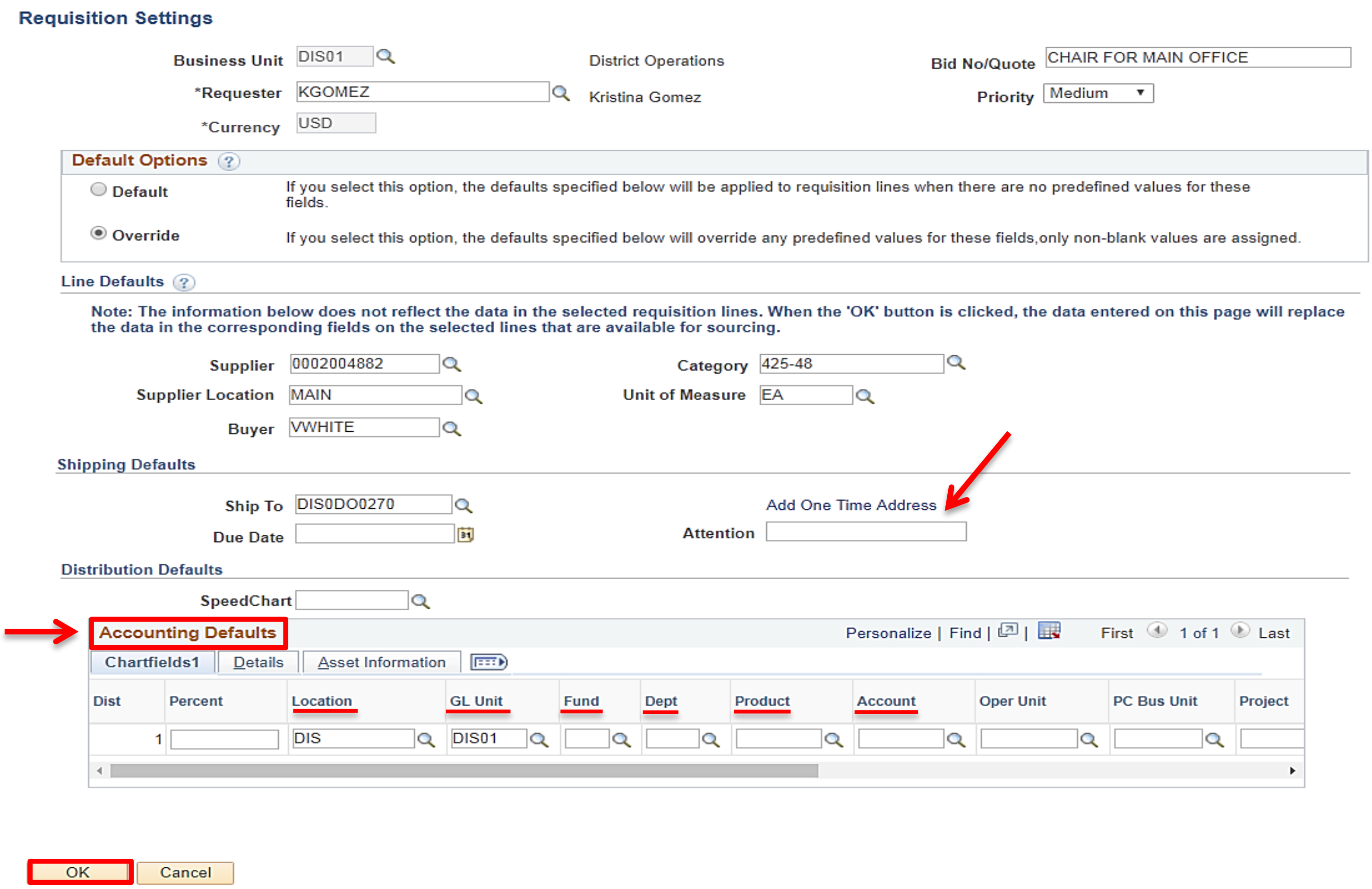
****NOTE**: Orders should be shipped to **Receiving** at the respective campus **Stockroom/Distribution Center. DO NOT** use **DIS** for orders. All computers, with the exception of Mesa, should be shipped to the Central Distribution Center using **Ship To Location DISCDC0100**.



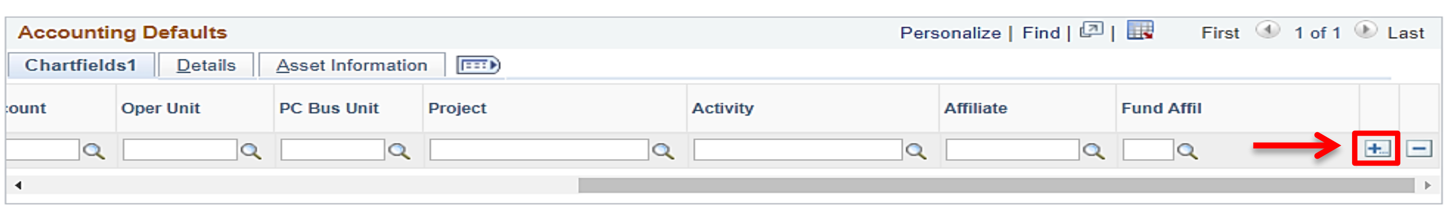
In the **Attention** field, indicate the name of the point of contact for the order and the building/room number.

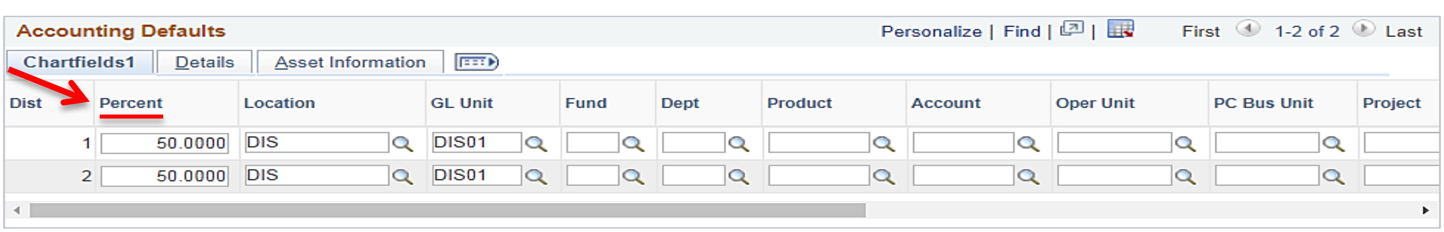
Next, enter the **Accounting Defaults** under the **Chartfields1 field**. On this tab, you will need to do the following:

- ❖ Select the end **Location** where the items will be located once received. This is needed both for inventory purposes and delivery by receiving.
- ❖ Define the **Chartfields** where items are to be expensed. Include the **GL Unit, Fund, Dept, Product and Account.** If CE, also include the **Operating Unit**.



To expense items over multiple chartfield strings, scroll to the far right of the **Chartfields1** tab and click on the plus sign (+) and enter the number of rows that need to be added. If applicable, indicate the percentage that applies to each Chartfield string.

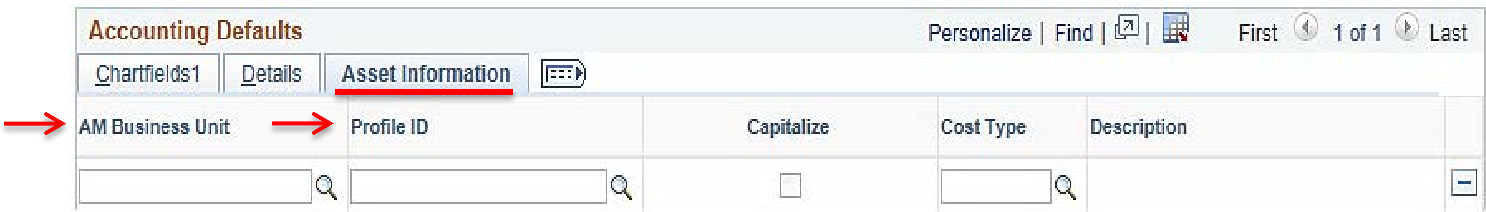




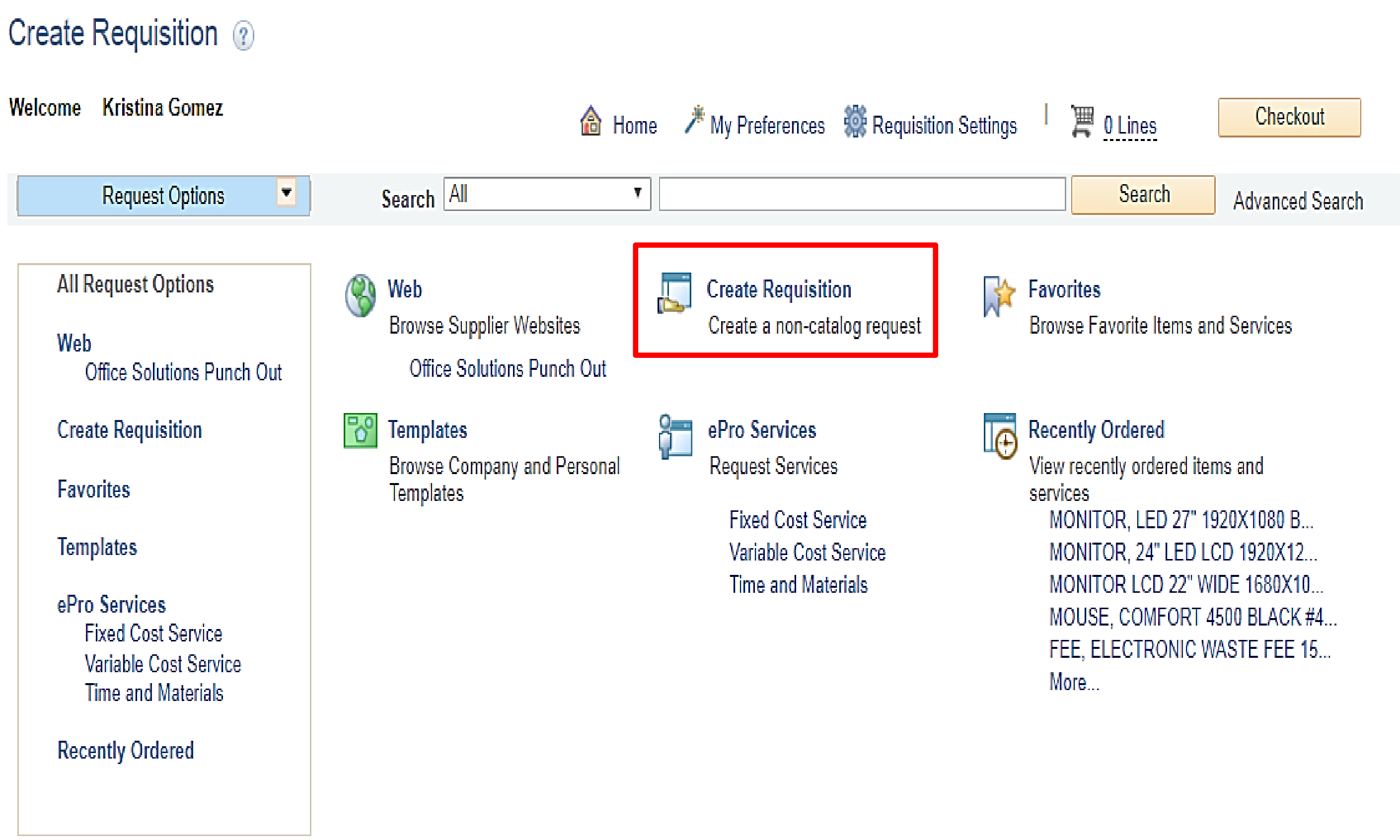
Select the **Asset Information** tab if:

- ❖ Any singular item is over $1000, including shipping & tax.
- ❖ Any line item contains Computer/AV/IT/Equipment with a value of $200 or greater
- ❖ Any line item contains Software (hard disk or download) with a value of $200 or greater
- ❖ Any line item contains a Firearm

Select the appropriate **AM Business Unit.** Then select the **Profile ID** that best describes the asset. When finished, click **OK** to be directed to the **Create requisition screen.**



Click on the **Create Requisition** link to enter all line items.

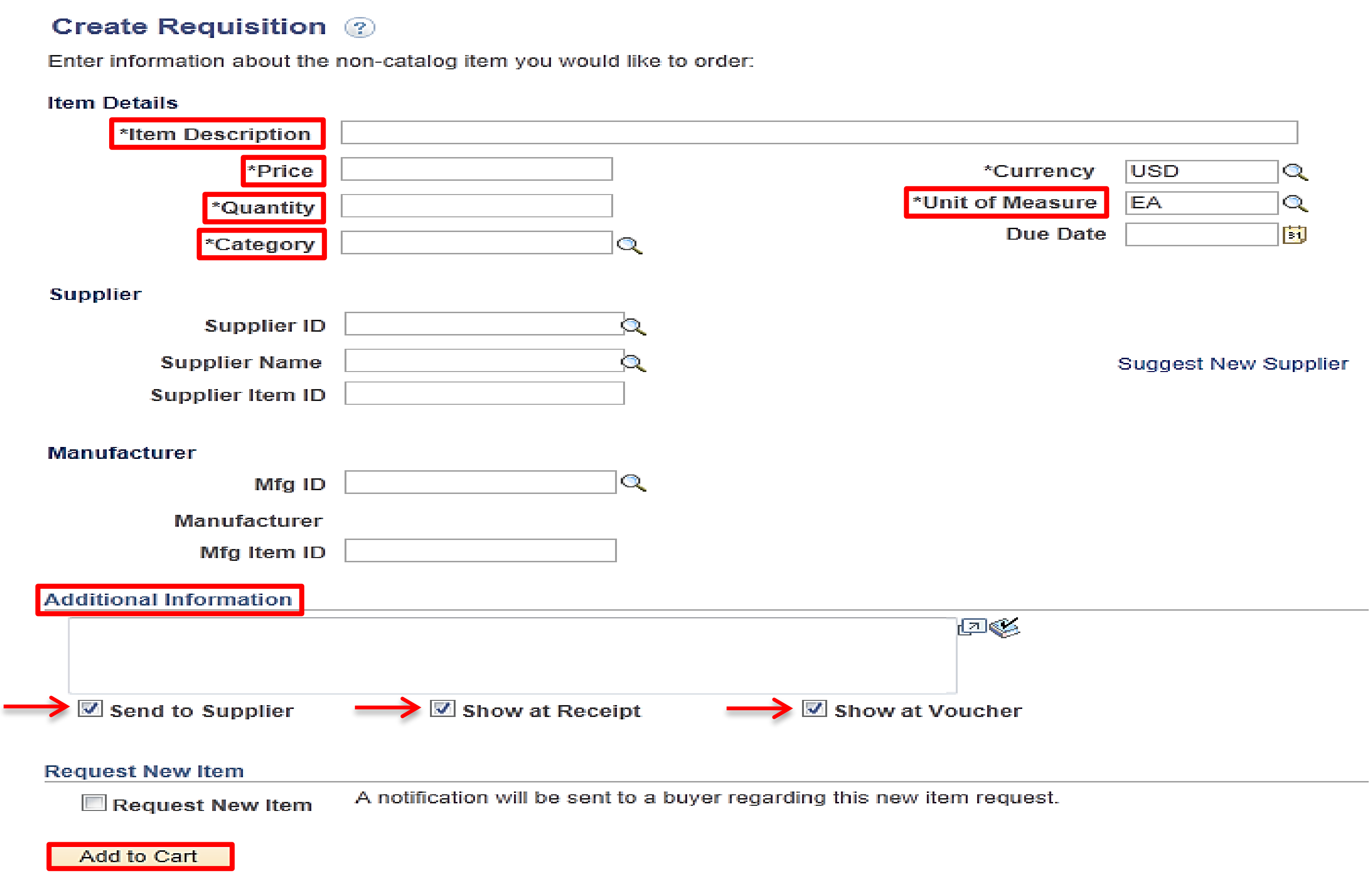


On the **Create Requisition** screen, appropriate information will need to be entered for each line of the requisition. All fields marked in **RED** below need to be completed.

- **Item Description** – Please follow the **ARMA Item Description rule** which is: **Noun, Description, Manufacturer (if applicable), and Model/Product Number.** The noun is always first, followed by the description, then the manufacturer if applicable, and finally the model or product number (i.e., CHAIR, STEEL CASE, “EASY,” CHAIR, COLOR BLUE, W/ CASTERS, PN: 1234ABC). See **page 53** for more information on **ARMA Rules**.
  ****NOTE:** The **Item Description** field will only fit 30 characters; include all remaining description details in the **Additional Information** box.
- Enter the **Price**, **Quantity**, and **Unit of Measure**
- Enter the correct **Category** code for each line item being entered.
- Check all three “**Send to**” and “**Show at**” boxes.

When each line is completed, click on **Add to Cart** at the bottom of the screen.

****NOTE: For AMOUNT ONLY requisitions, see pages 30 & 31, if not an AOPO, skip pages 30 & 31.**



To add additional line items, follow the process above. Once all lines have been entered, click on **Checkout** at the top of the page to be directed to the **Checkout - Review and Submit** screen.

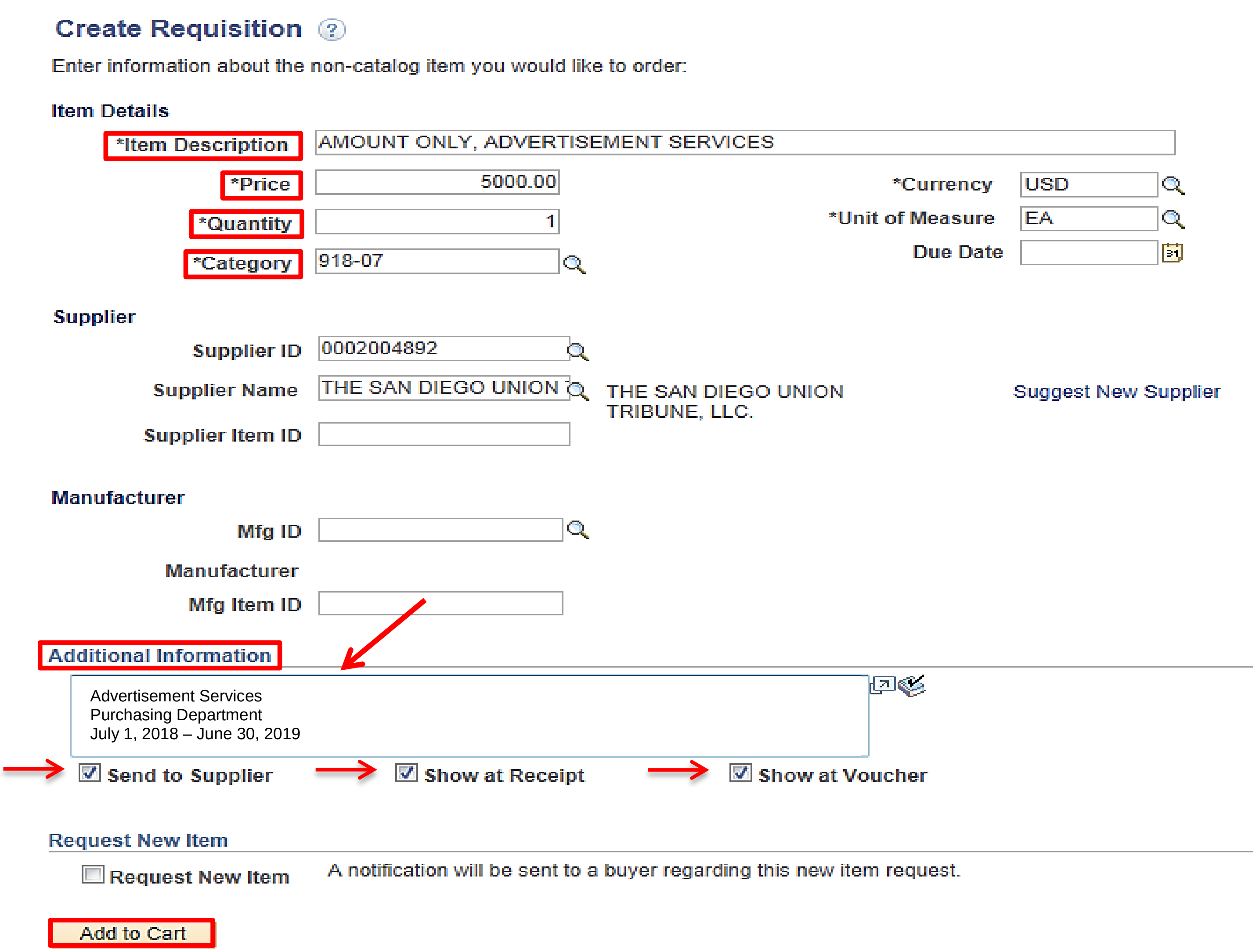
****NOTE: SKIP PAGES 30 & 31 UNLESS THIS IS AN AMOUNT ONLY REQUSITION**

Amount Only (AOPO) requisitions are intended for renewals, maintenance service agreements, professional services, rentals, and subscriptions/memberships. AOPO orders should not be used for the purpose of tangible product purchases. Use the appropriate templates.

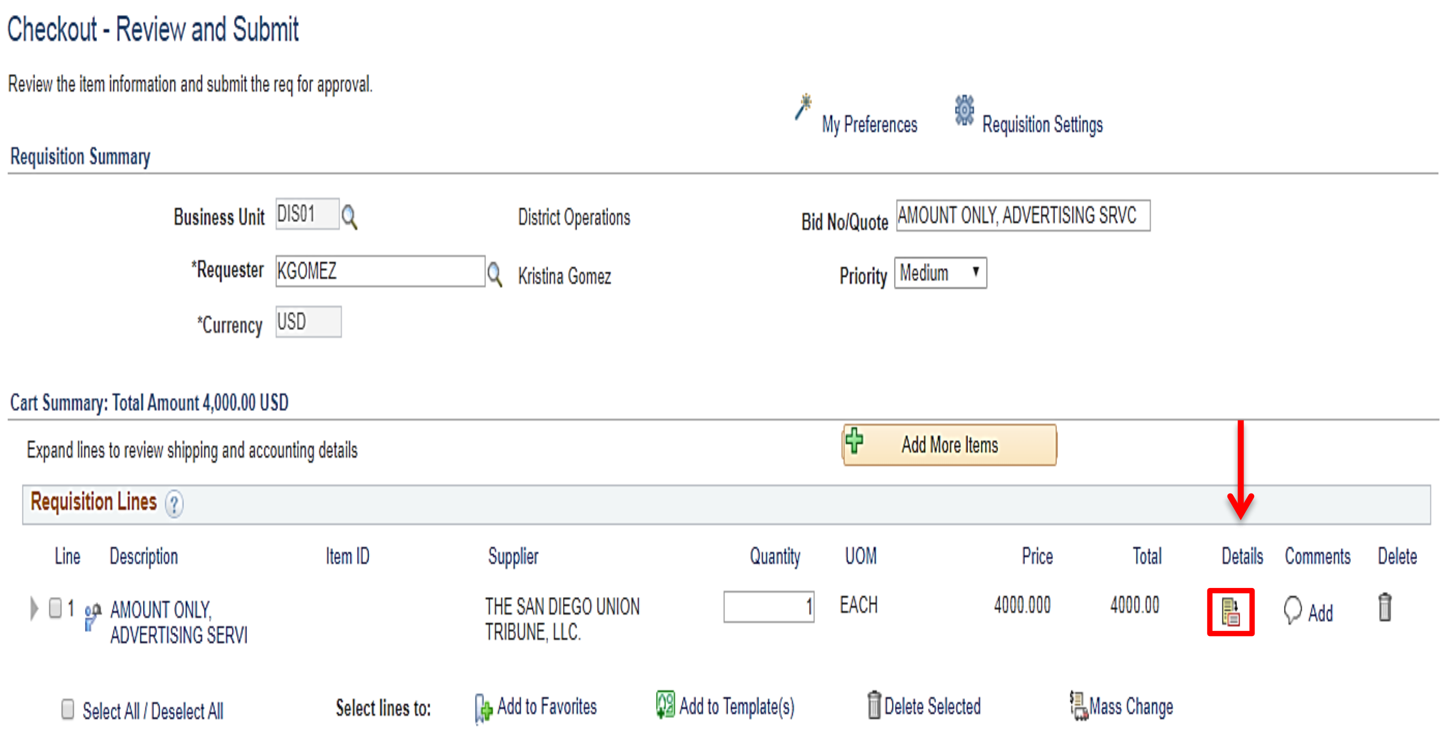
On the **Create Requisition** screen, appropriate information will need to be entered for the Amount Only PO. All fields marked in RED below need to be completed.

- **Item Description** – Enter **AMOUNT ONLY** followed by the type of services the requisition entails. This field will only fit 30 characters; include all remaining description details in the **Additional Information** box.
- **Price –**Enter the price.
- **Quantity** - Enter a Quantity of 1.
- **Category –** check if the category defaulted, if not, re-enter the Category Code**.**
- **Additional Information** – Use the appropriate template and include a description of the services, department, point of contact and the term of the agreement.
- Check all three "**Send to**" and "**Show at**" boxes.

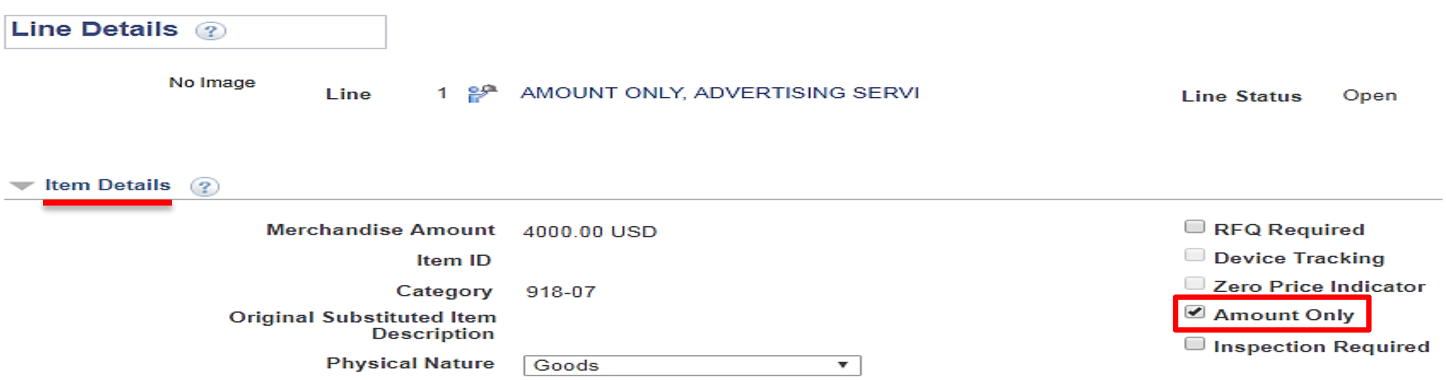
When complete, click on **Add to Cart** at the bottom of the screen. Then click on **Checkout** at the top of the screen to be directed to the **Checkout Review and Submit** screen.



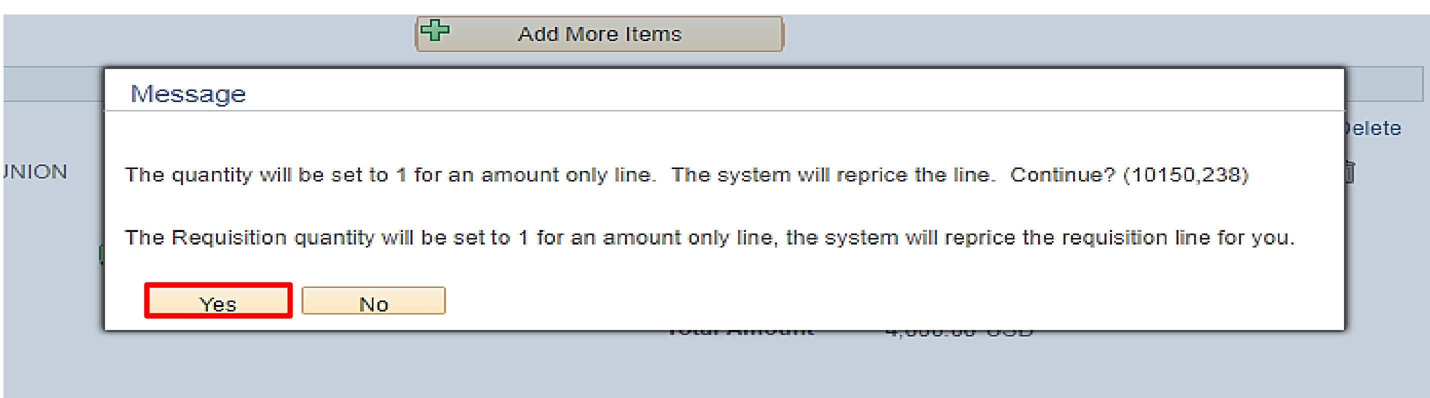
At the **Checkout - Review and Submit** screen, click on the **Line Details** icon below **Details**.



After clicking on the Details icon, the following pop-up box will appear. Check the **Amount Only** box under **Item Details** and then click **OK.**

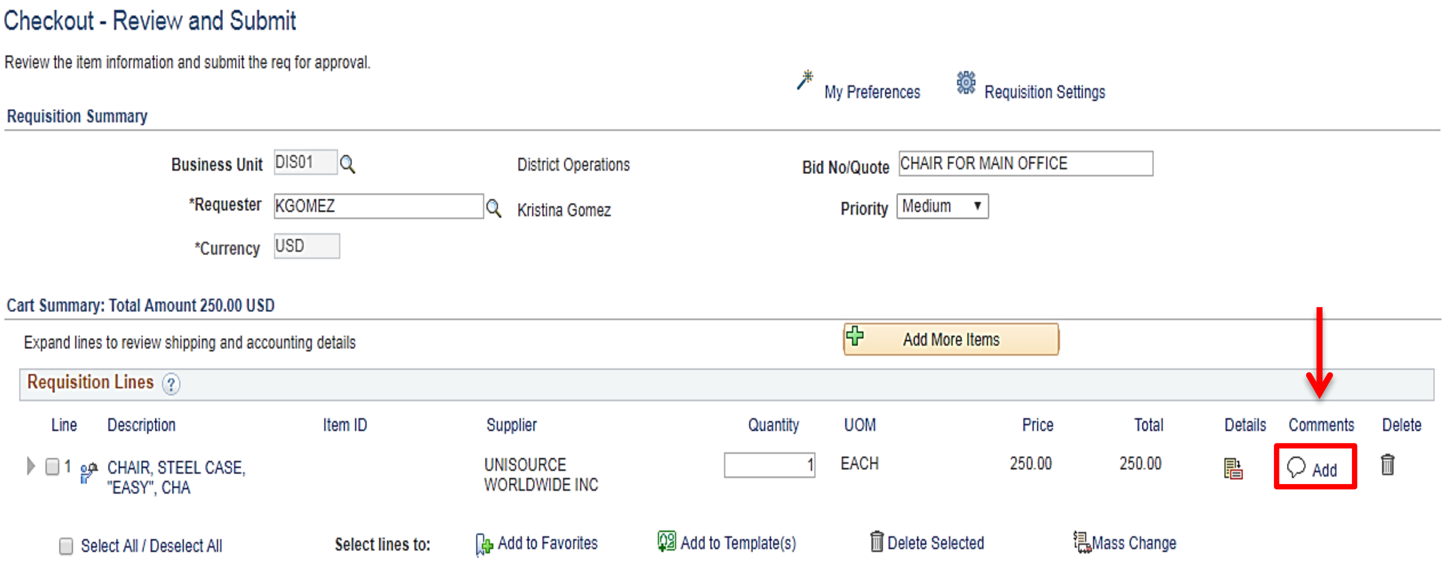


Click **Yes** on the next pop-up message that appears to be directed back to the **Checkout – Review and Submit** screen to continue the requisition.

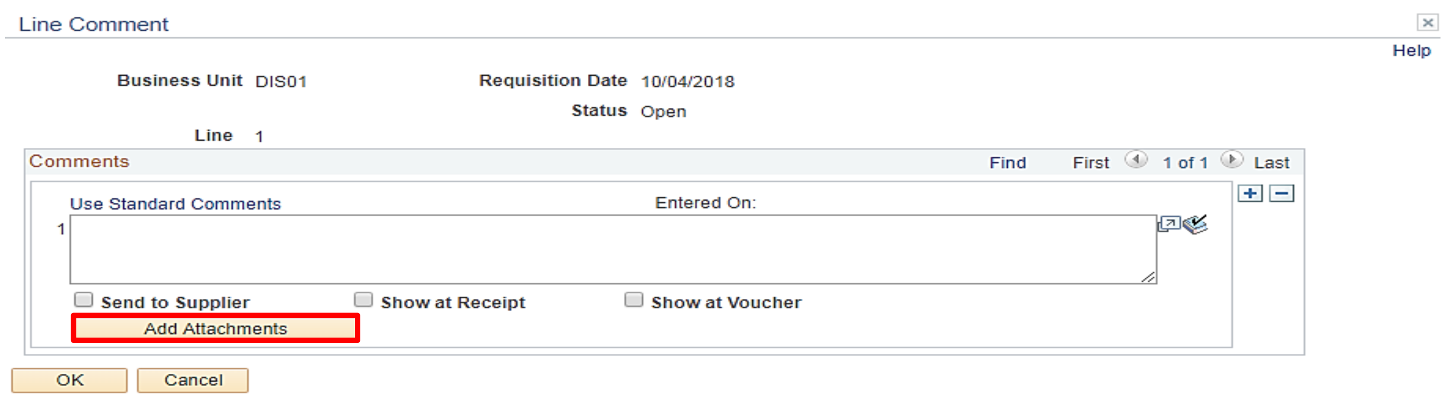


****NOTE: ALL DOCUMENTS MUST BE ATTACHED AS ONE SINGLE ATTACHMENT**

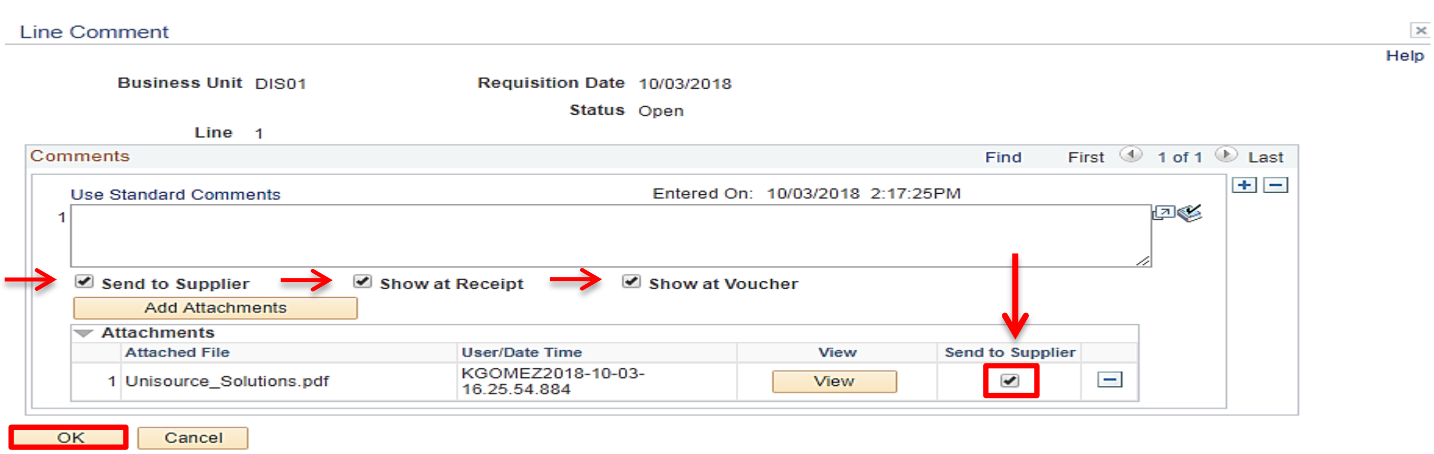
Next, add all supporting documents to the requisition. This should be done on **Line 1** of the requisition under the **Comments** field. Click on the **Add** icon to upload all attachments.



Next, click on **Add Attachments** and select the correct file from the appropriate folder, then click **Upload.**



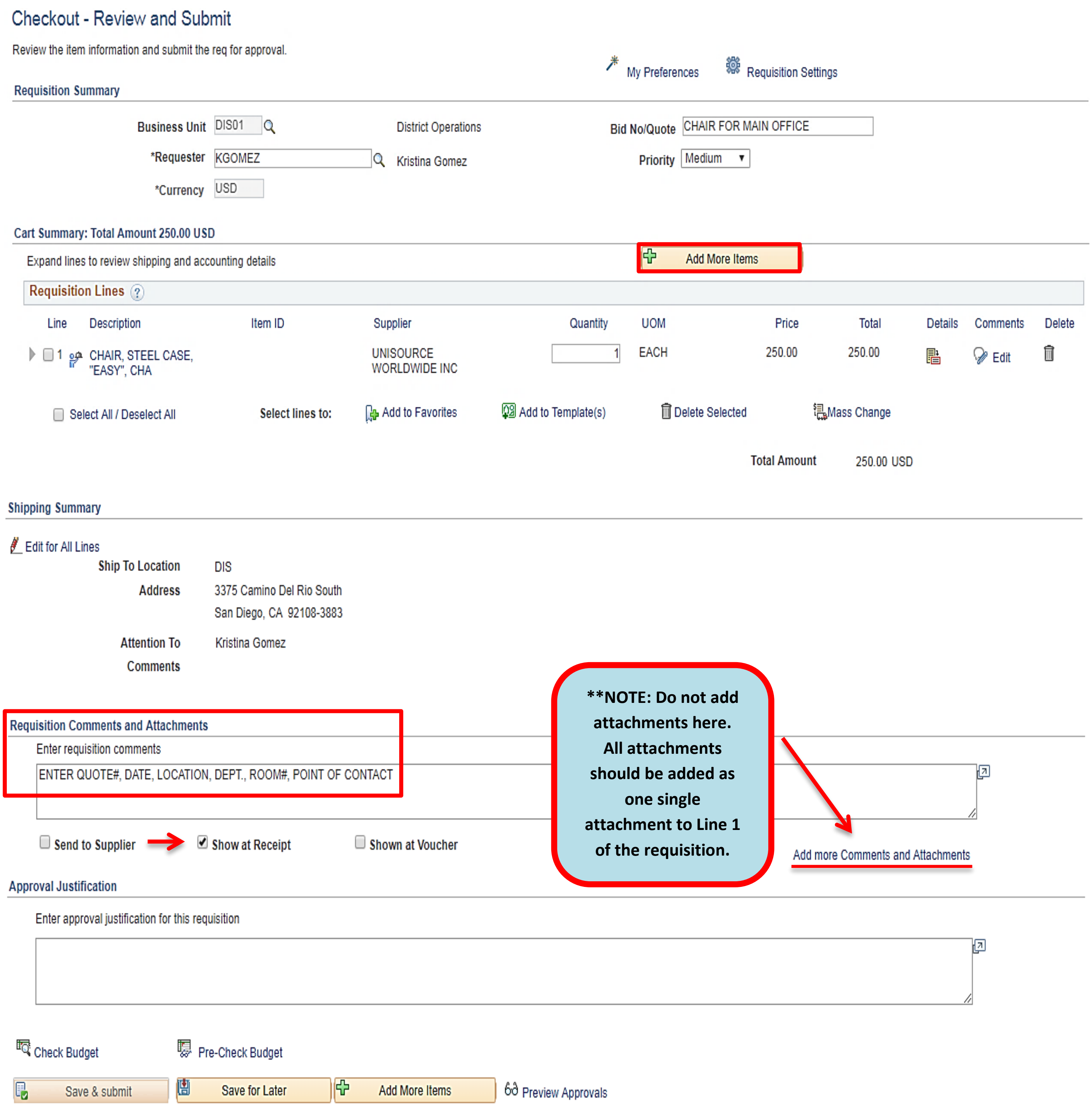
After verifying the attachments, check all three "**Send to**" and "**Show at**" boxes below. Click the **Send to Supplier** box and click **OK** to save and return to the checkout screen.



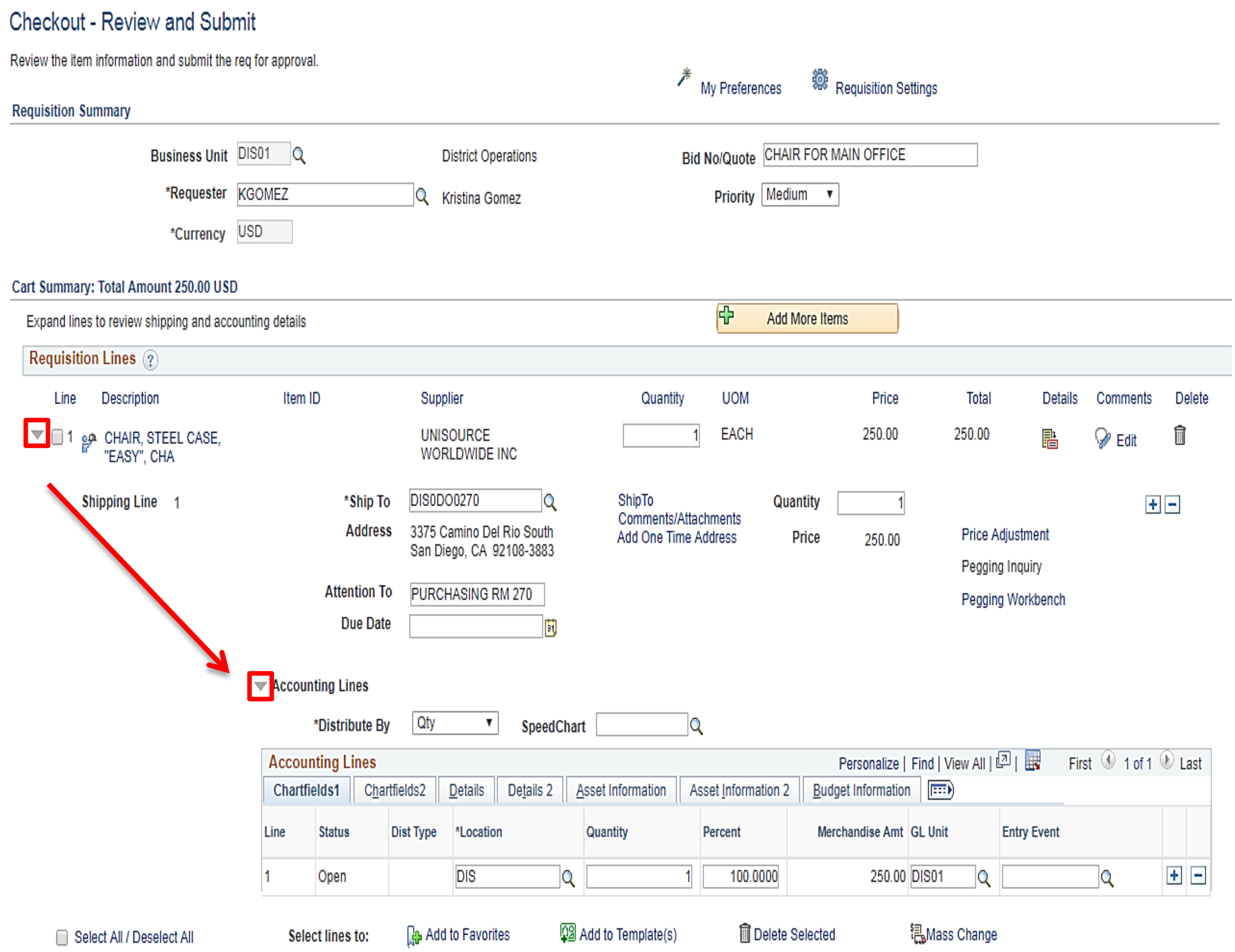
****NOTE: Freight must be added as a separate line item using Category Code 962-86 and this line must be marked as an AO by checking the Amount Only box in the Details field of that line.** **See page 31.**
****NOTE: Attachments should only be added to LINE 1 of the requisition.**
****NOTE: DO NOT add Sales Tax as a line item. Tax will be allocated to the PO automatically.**

If additional lines need to be added, click on **Add More Items**, then follow the same process as above.

In the **Requisition Comments and Attachments** box, enter the following information: **Quote Number, Date, Location, Department, Room Number, Point of Contact** and any special shipping instructions. Indicate if the end location is different than the shipping location. Then check the **Show at Receipt** box.

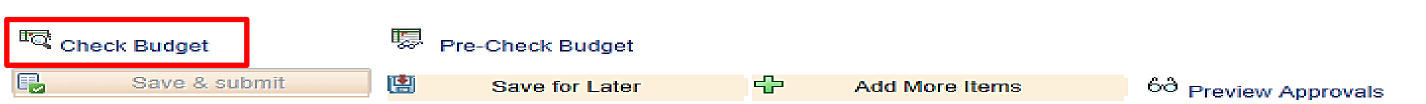


Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each **Line** item, and the corresponding **Accounting Lines** to expand and review the information within.

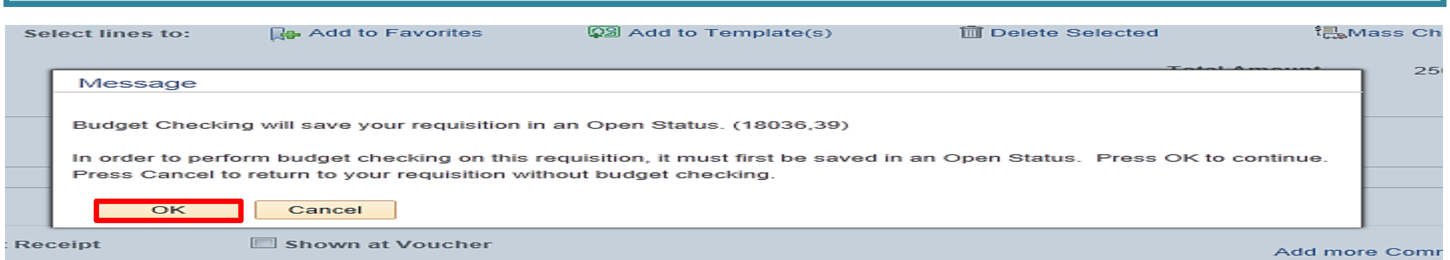


Once the requisition is complete, click on **Check Budget** at the bottom left of the page.

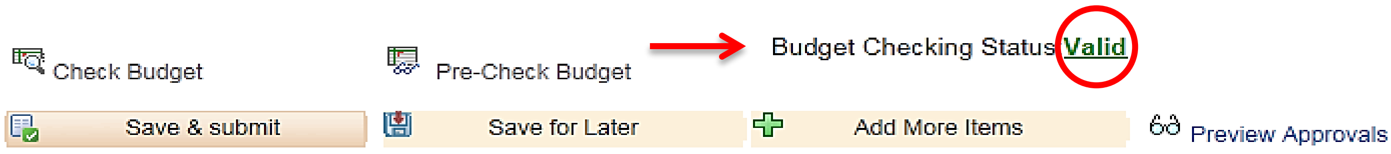
****NOTE: Requisitions that contain budget errors will not be saved or submitted. Budget errors will need to be resolved with the appropriate person within your department.**



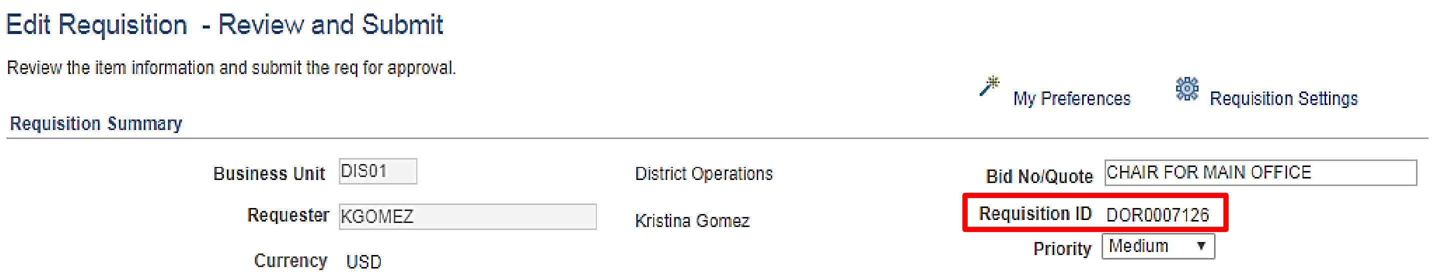
Click OK on the pop-up message that appears.



The **Budget Check Status** will show as VALID if the requisition has passed **Budget Check** and the system will automatically issue a **Requisiton ID** number.



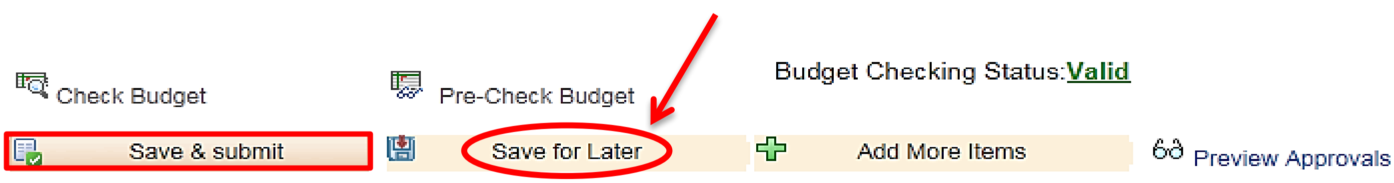
The **Requisition ID** is located at the top right of the **Edit Requisition – Review and Submit** page. Note the **Requisition ID** number for your records.



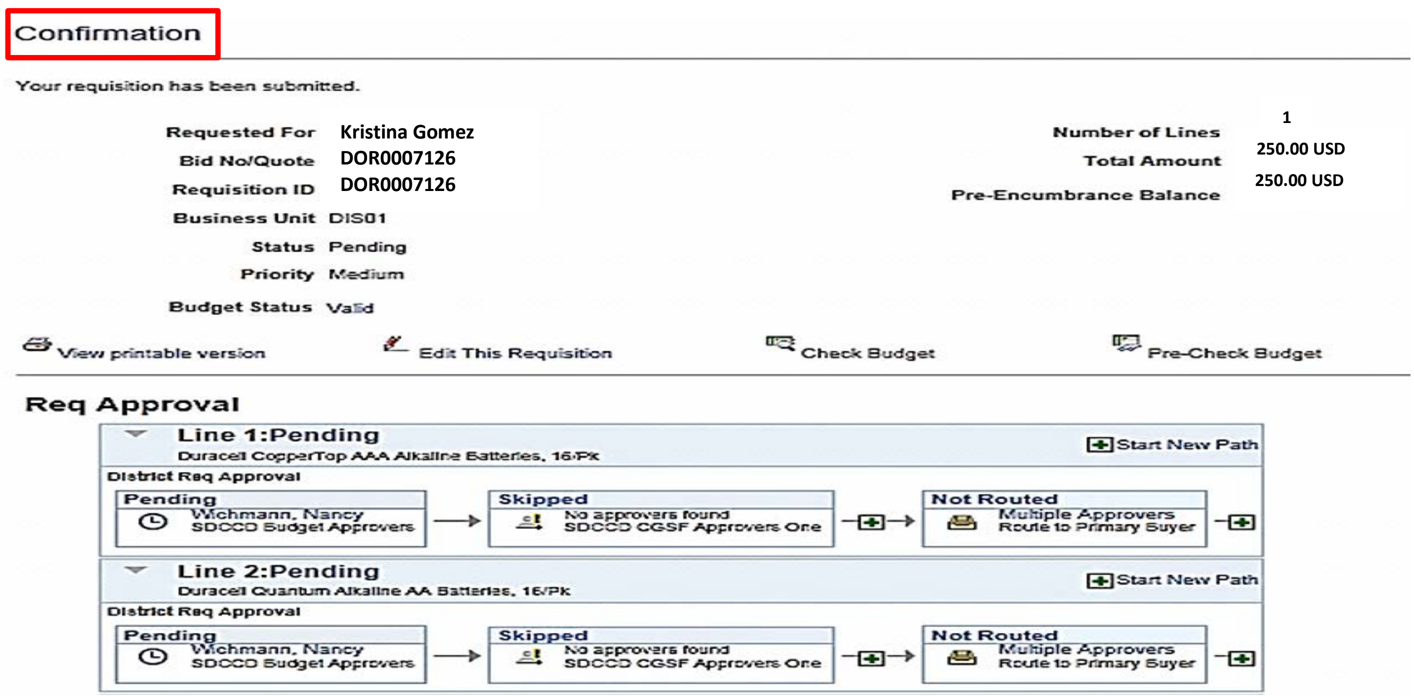
Once there is a valid **Budget Check** and a **Requisition ID** number is issued at the top of the page, scroll to the bottom of the page and click on **Save & Submit** to save the requisition and submit it for approval, sourcing, and dispatching to the supplier. The requisition remains editable while the status is open or pending.

To save the requisition to be completed at a later time, click on **Save for Later** and note the Requisition ID.

****NOTE:** In order to save for later, the budget must be checked first and that will generate a **Req ID** number.



The final page is the **Confirmation** page. This is a summary of the requisition and includes all of the approvals necessary to start the process of converting the requisition into a Purchase Order. Once the requisition is approved by the Buyer, a confirmation will be emailed to the requestor.

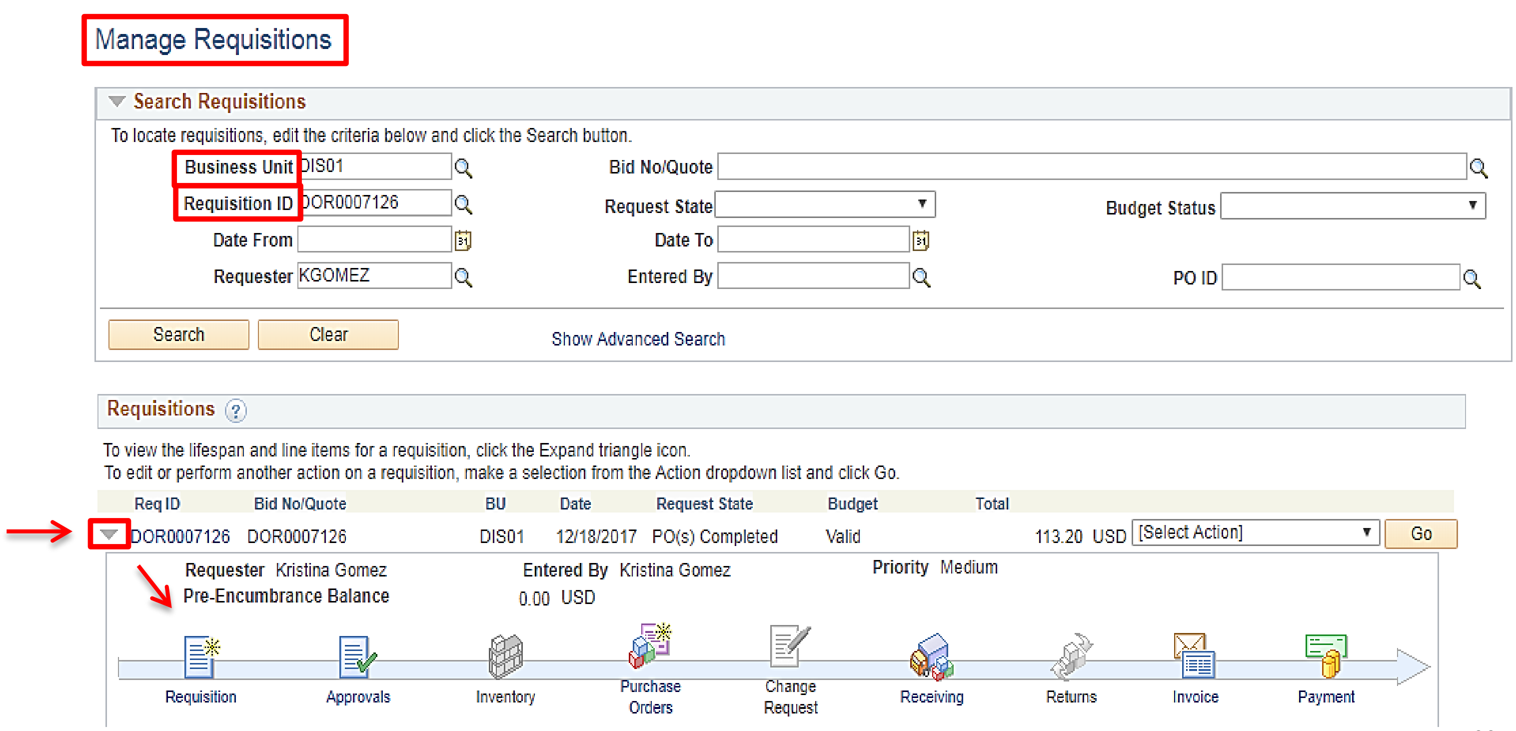


To check the status of the requisition or to view the workflow in PeopleSoft, use the following navigation to access **Manage Requisitions:**

- **Financials 9.2>eProcurement>Manage Requisitions**

Select the **Business Unit** and enter the **Requisition ID** number then click search. To expand the details of the workflow, click on the triangle to the far left under **Req ID**. Here, the status of the order can be reviewed by clicking on any of the highlighted icons below. An un-highlighted icon means that there has not been any activity in that field yet.

****NOTE:** Icons for **Inventory** & **Returns** fields are currently not in use.



Below are the next steps in the workflow process after a requisition has been submitted:

- **APPROVALS:** The requisition will move through the workflow approval process. If the requistion is denied it will be routed back to the end user for corrections and/or additional information. If the requisition is approved by all approvers, it will then be routed directly to the Buyer.

- **PURCHASE ORDERS:** The Buyer will review the requisiton for accuracy. If all is correct, the Buyer will process the requisiton and dispatch a Purchase Order. Purchase Orders are dispatched directly to the supplier via the email address in PeopleSoft. If the requisition is denied, it will be routed back to the end user for corrections and/or additionl information.

- **CHANGE ORDERS:** Changes that need to be made to a Purchase Order after it has been dispatched to the supplier, will require a change order. Change Orders must be initiated by the end-user at the requisition level. This allows for review and workflow approvals. Once approved, the Purchase Order will then be updated and sent back to the supplier via email. Please refer to the step by step tutorial for end users regarding the Change Orders process that starts on **page 38** of this manual.

- **RECEIVING:** End users should not accept deliveries; instead, re-route the suppliers to the Stockroom/Distribution Center so the ordered items can be received into PeopleSoft. District Office, DSC, and Continuing Education receiving needs to be processed through the Distribution Center as well.

  As a reminder, end users are **NOT** to receive items in PeopleSoft. If the item(s) were delivered directly to the end user, then the end user will need to contact the appropriate Stock Room/Central Distribution Center within **48 hours of receipt of goods** to notify them that the order has been received.

  All tangible items must be received in PeopleSoft. If goods are not received in PeopleSoft, this will cause a Match Exception at invoicing and could potentially delay payment to the supplier until the match exception is resolved.

  Receiving Contacts Per Location:

LOCATION	CONTACT	PHONE	EMAIL
District Office / Continuing Ed	Gary Waldrop / Ernie Ueckert	619-388-1180	distributioncenter@sdccd.edu
Miramar Collge	Joshua Beall	619-388-7445 619-388-7819	jbeall@sdccd.edu
Mesa College	Frank Fernandez	619-388-2761	ffernandez@sdccd.edu
City College	Francisco Navallez	619-388-3292	fnavallez@sdccd.edu

****NOTE: All assets must be shipped to the Distribution Center at Miramar College with the exception of Mesa College.**

- **RETURNS:** See Return & Exchanges Policy at: http://bussrv.sdccd.edu/purchasing/employees.cfm. If you need further assistance, contact the Stockroom/Distribution Center or contact the appropriate Buyer.

- **INVOICE:** All suppliers invoices should be submitted directly to the Accounts Payable Department. Once received, Accounts Payable will process the invoice.

- **PAYMENT** – All supplier payments are processed by Accounts Payable. For questions regarding supplier payments, please contact the **Accounts Payable Department** at **619-388-6554.**

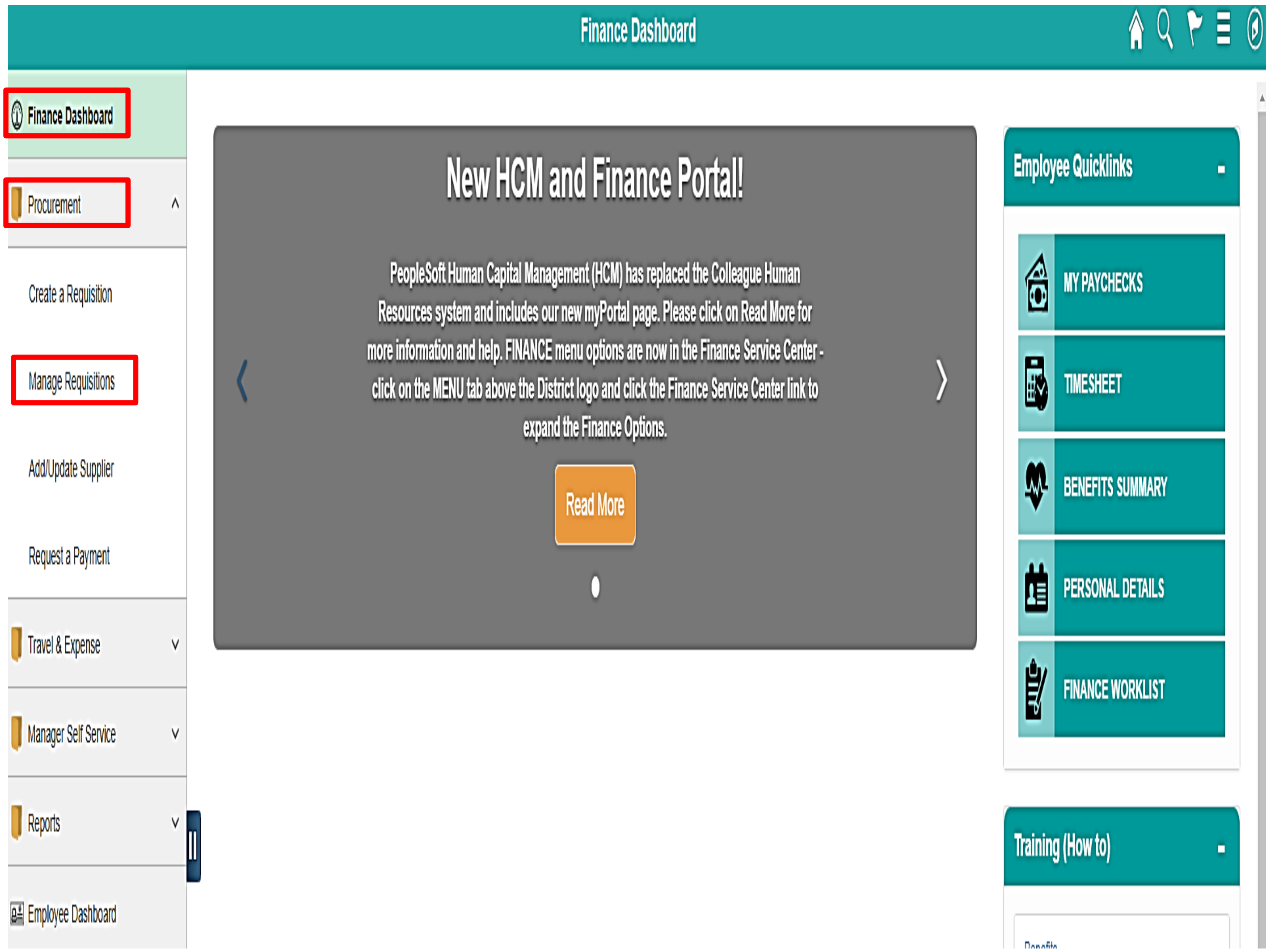
CHANGE ORDERS

The **Change Order** process is used when a Purchase Order has been created and something changes (price increase/decrease, qty., item(s) are no longer available, etc.). All changes to a purchase order must be initiated by the end-user at the requisition level. This allows for review and workflow approvals. Once approved and processed, the PO will then be updated and emailed back to the supplier.

Below are the steps to process a change order for any Purchase Order that has not been received. If the PO has been received, the end user will need to request from their respective **Receiving Department** to have the PO "un-received" until the change has been processed. Once the change is complete, it is the end users responsibility to notify receivers to re-receive the PO in PeopleSoft.

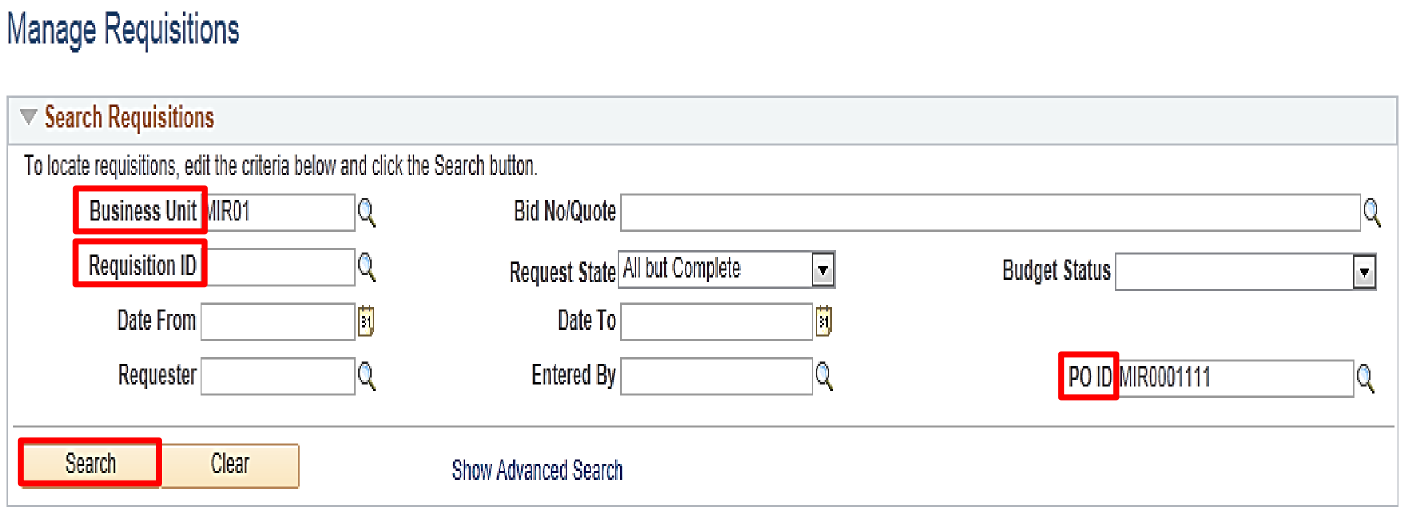
Use the following navigation to process **Change Orders:**

- **Finance Dashboard>Procurement>Manage Requisitions**



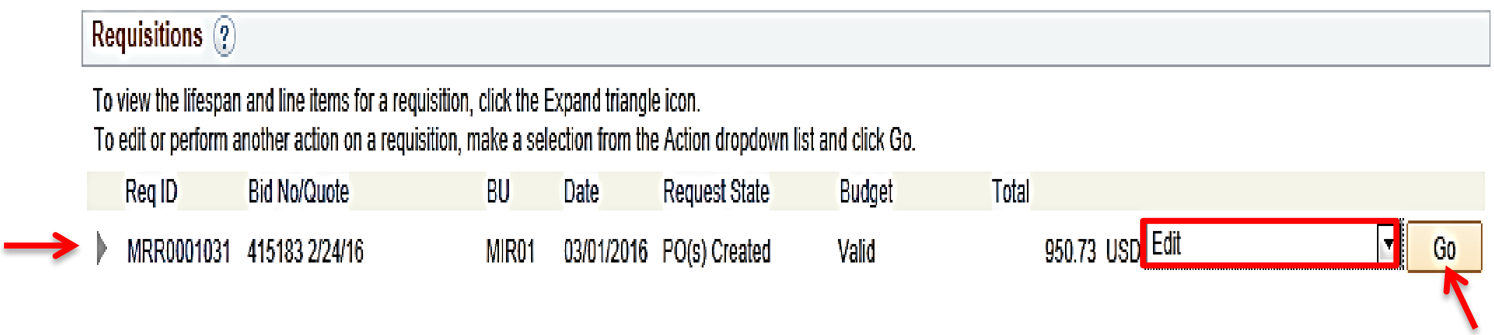
****NOTE: To search for a Purchase Order or Requisition that needs to be edited the Business Unit and either the Requisition ID or the PO ID fields MUST be populated.**

Enter the information in the fields marked in **RED** below and click **Search**.



Once the correct **Req ID** number is located, click on the dropdown on the far right, select **Edit** and click **GO**.

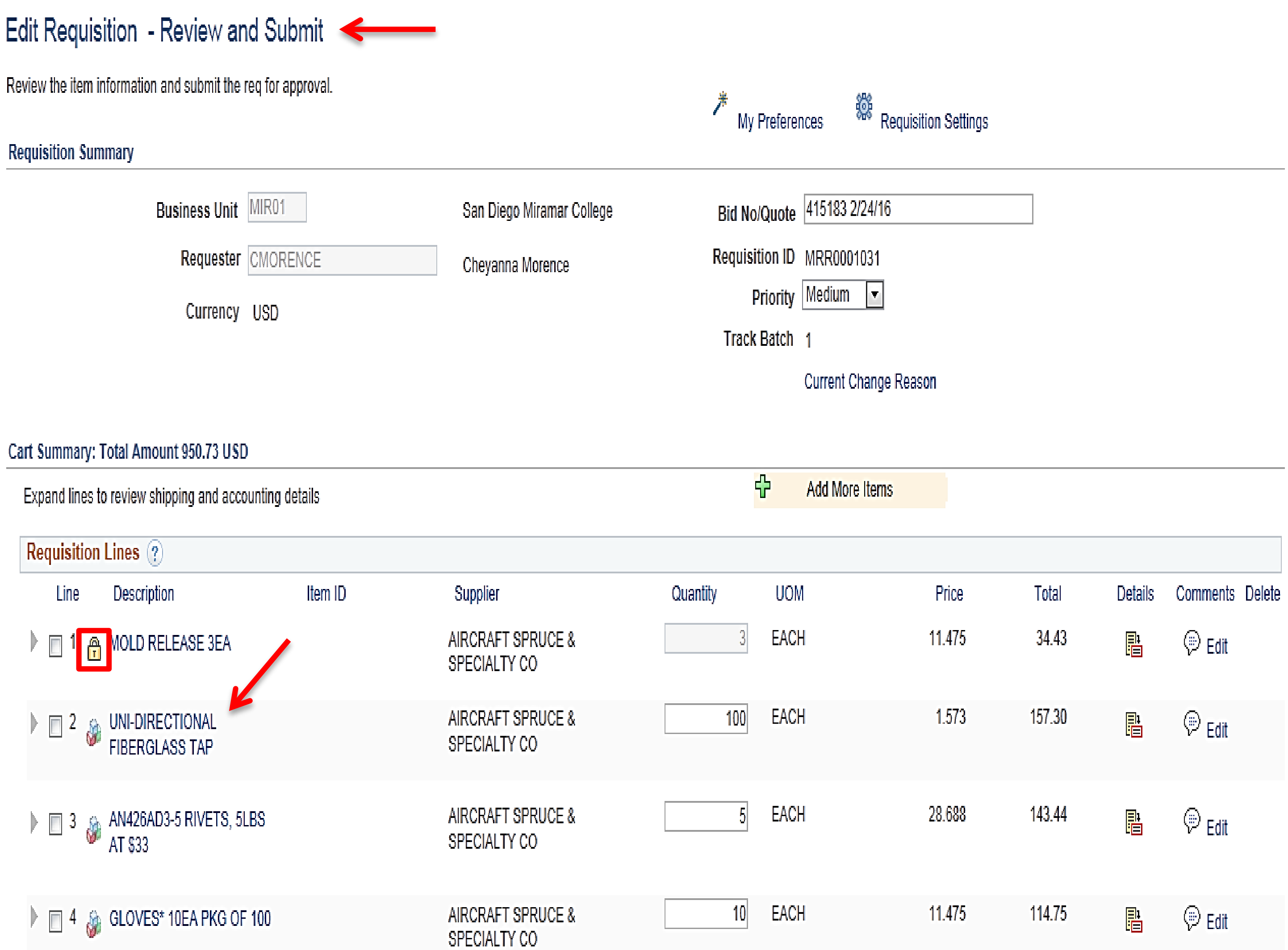
****NOTE: If you do not have the Edit option, notify your campus Business Services Office to obtain access. If you are at the District Office, contact IT to request access.**



This pop-up message should appear stating, “The Requisition is approved”. Click **OK** on that message to be directed to the **Edit Requisition – Review and Submit** screen below.

On the **Edit Requisition – Review and Submit** screen, click on the line item description to drill into any of the line(s) that need to be edited/adjusted.

****NOTE: If there is a lock next to the line item, it cannot be edited. Contact the Buyer for assistance.**



Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit MIR01   San Diego Miramar College

Requester CMORENCE   Cheyanna Morence

Currency USD

Bid No/Quote 415183 2/24/16

Requisition ID MRR0001031

Priority Medium

Track Batch 1

Current Change Reason

Cart Summary: Total Amount 950.73 USD

Expand lines to review shipping and accounting details

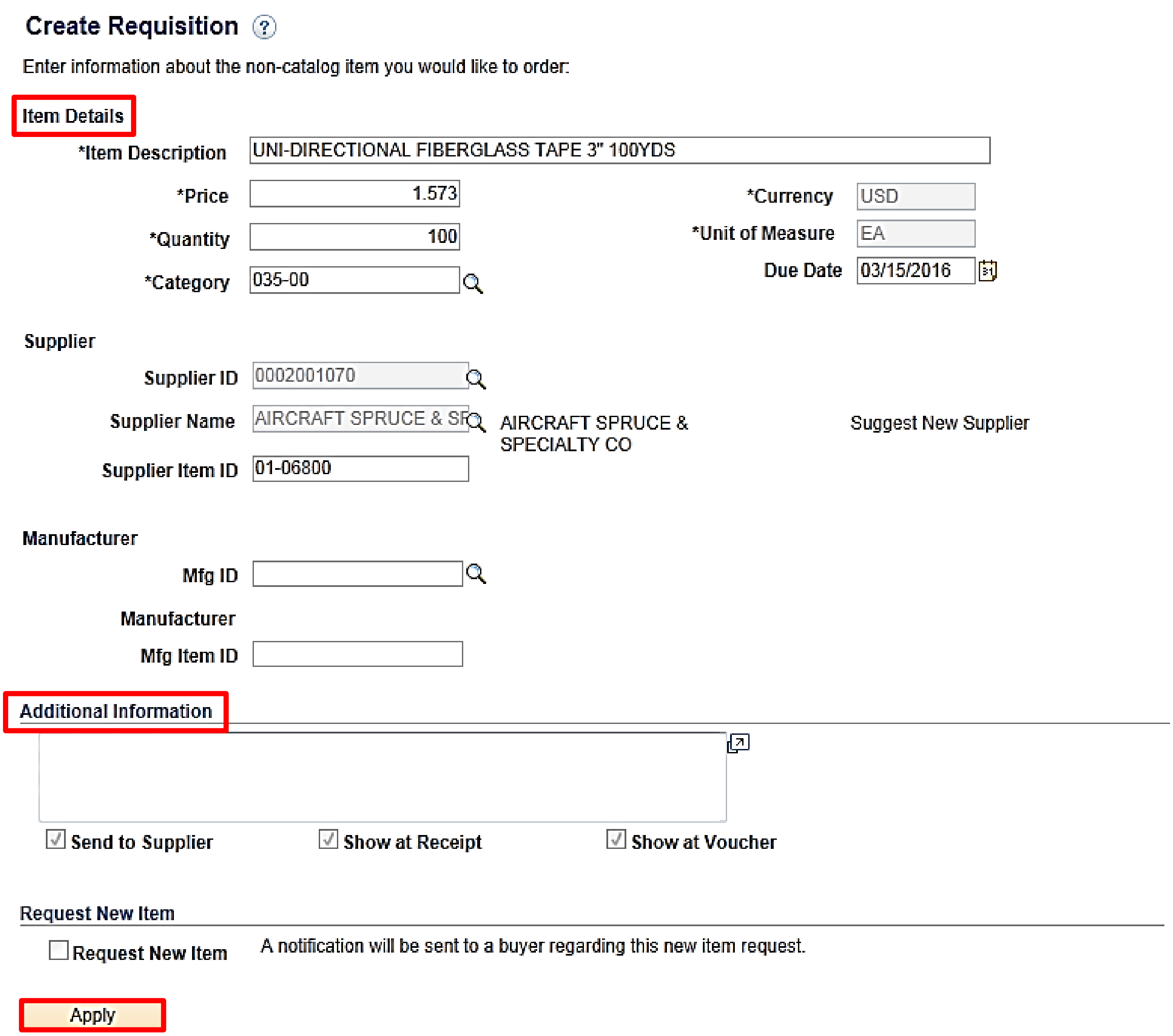
Add More Items

Requisition Lines

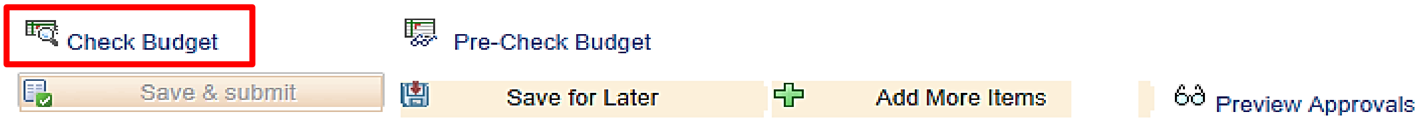
Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	MOLD RELEASE 3EA		AIRCRAFT SPRUCE & SPECIALTY CO	3	EACH	11.475	34.43		Edit	
2	UNI-DIRECTIONAL FIBERGLASS TAP		AIRCRAFT SPRUCE & SPECIALTY CO	100	EACH	1.573	157.30		Edit	
3	AN426AD3-5 RIVETS, 5LBS AT $33		AIRCRAFT SPRUCE & SPECIALTY CO	5	EACH	28.688	143.44		Edit	
4	GLOVES* 10EA PKG OF 100		AIRCRAFT SPRUCE & SPECIALTY CO	10	EACH	11.475	114.75		Edit	

On the **Edit Requisition** page under the **Create Requisition** field, adjustments can be made to the description/price, or quanties of the requistion. Edit as many lines as necessary by following the process above and click **Apply** to each. Add any additional comments in the **Additional Information** box below.

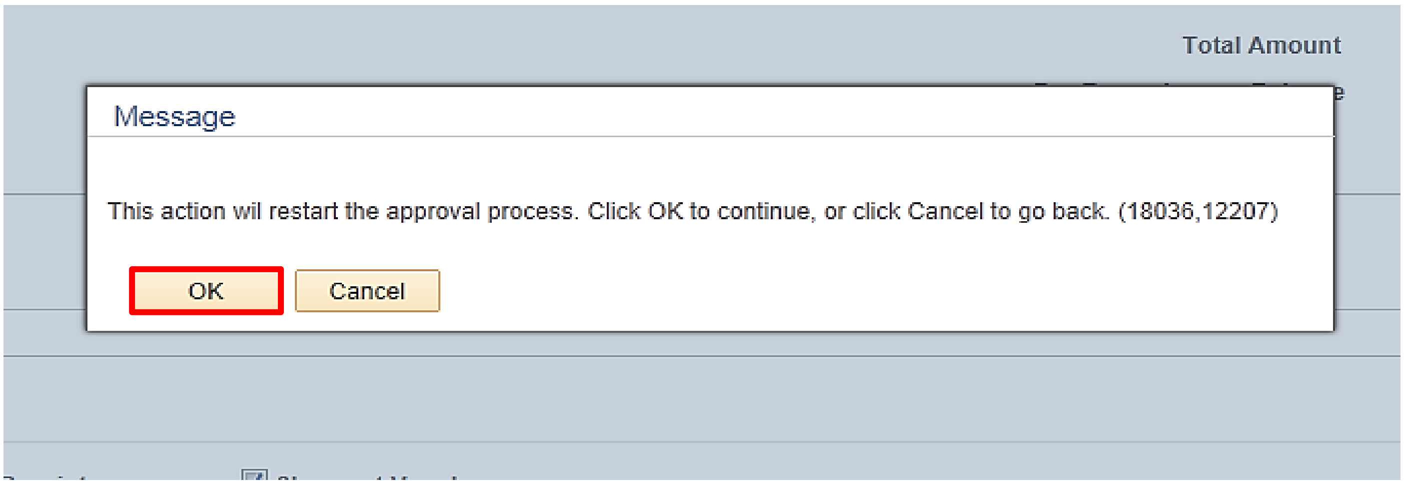
****NOTE: If you need to update the text within a PO, contact the assigned Buyer for assistance.**



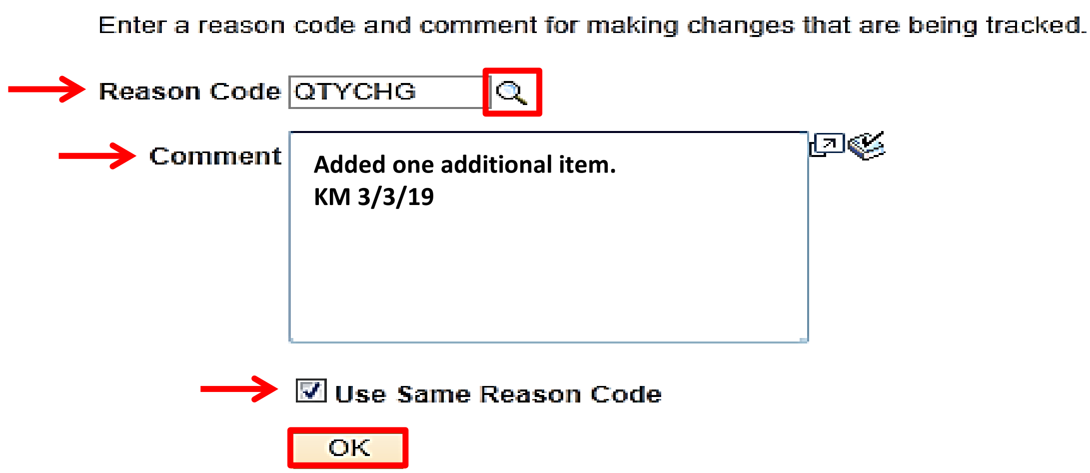
Once completed, you will be routed back to the **Review and Submit** page. Scroll to the bottom of the screen and click on **Check Budget.**



Click **OK** on the pop-up message that appears below.

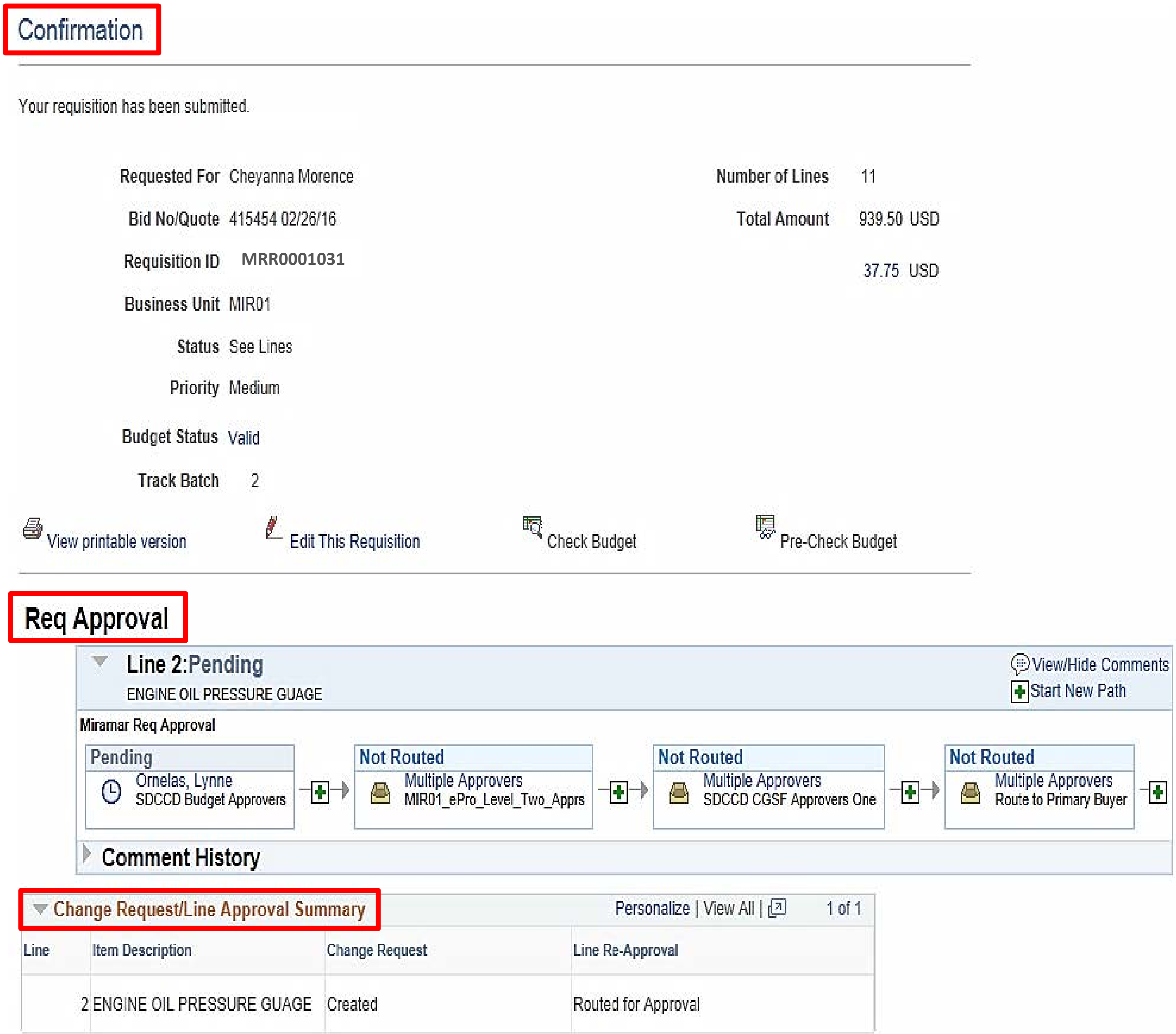


The **Change Order** box will appear. Please select a **Reason Code** (select the code that is most applicable). In the comment box, provide a description of the change(s). At the end, add the end user/initiator's initials and date of change (see example). Then Check the **Use Same Reason Code** box then click **OK.** If the reason is to increase/decrease an Amount Only, enter the new amount in the comments box.



The final page is the **Confirmation** page and here the **Change Request(s)** is listed at the bottom of the page. All Change Orders will go back through the workflow approval process, which is detailed below.

Once approvals are completed, the system will automatically notify the assigned Buyer that there is a change to the Purchase Order.



Confirmation

Your requisition has been submitted.

Requested For Cheyanna Morence
Bid No/Quote 415454 02/26/16
Requisition ID MRR0001031
Business Unit MIR01
Status See Lines
Priority Medium
Budget Status Valid
Track Batch 2

Number of Lines 11
Total Amount 939.50 USD
37.75 USD

View printable version
Edit This Requisition
Check Budget
Pre-Check Budget

Req Approval

Line 2:Pending
ENGINE OIL PRESSURE GUAGE
View/Hide Comments
Start New Path

Miramar Req Approval

Pending
Ornelas, Lynne
SDCCD Budget Approvers

Not Routed
Multiple Approvers
MIR01_ePro_Level_Two_Apprs

Not Routed
Multiple Approvers
SDCCD CGSF Approvers One

Not Routed
Multiple Approvers
Route to Primary Buyer

Comment History

Change Request/Line Approval Summary
Personalize | View All | 1 of 1

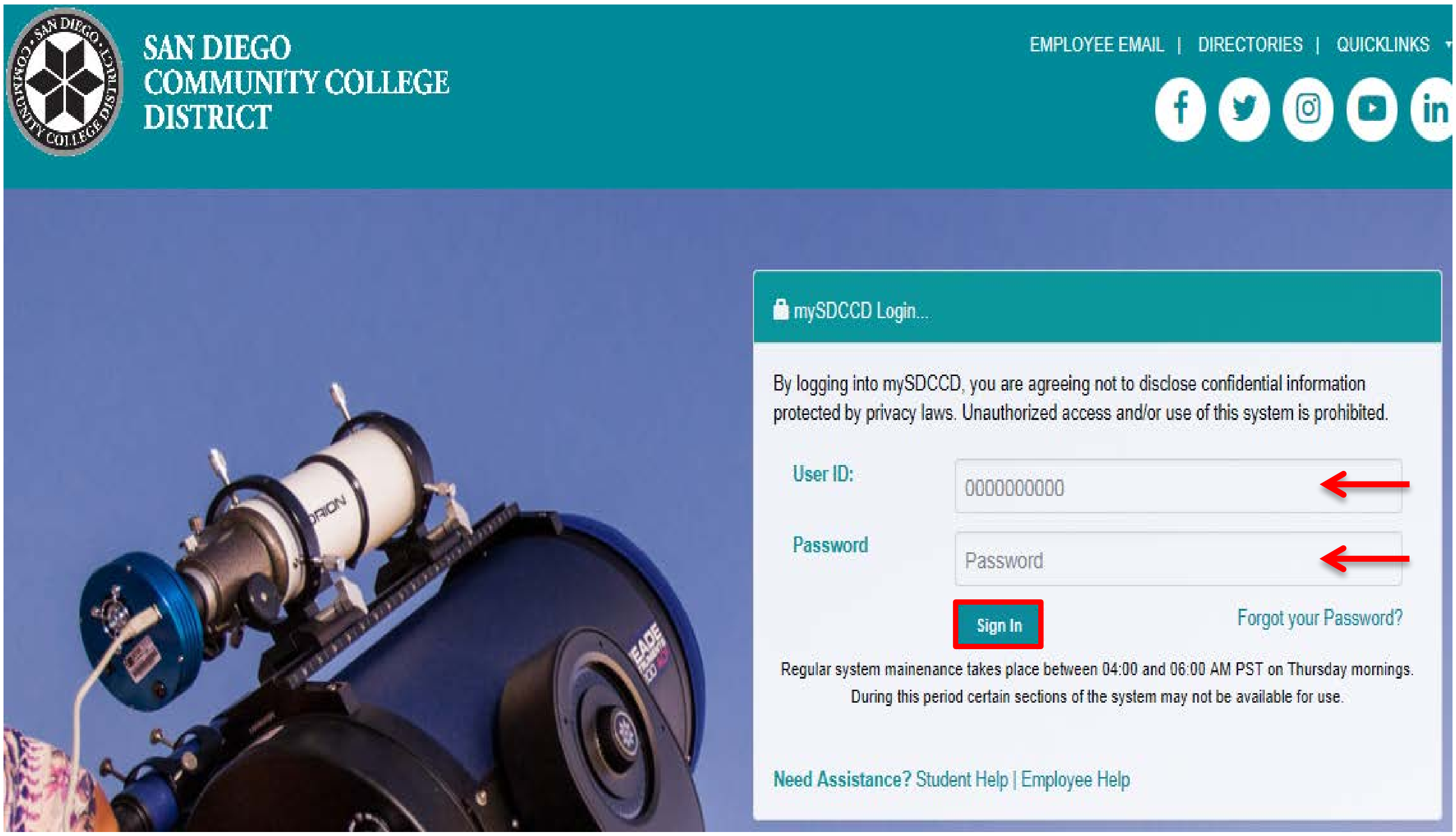
Line	Item Description	Change Request	Line Re-Approval
2	ENGINE OIL PRESSURE GUAGE	Created	Routed for Approval

DIRECT CONNECT (OFFICE SOLUTIONS) ORDERS

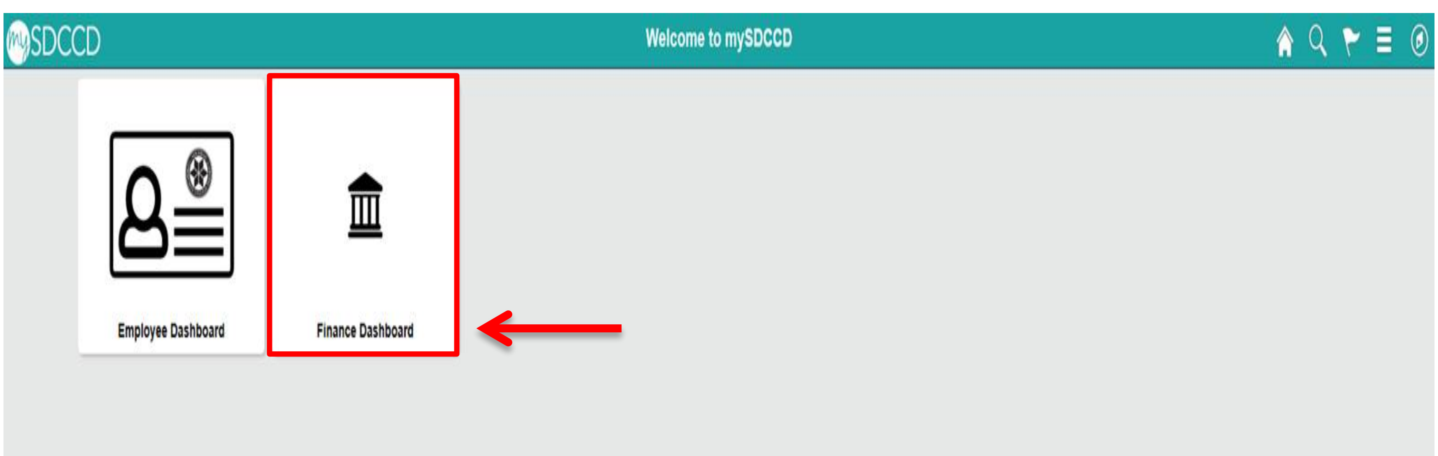
You can **access PeopleSoft** through the District website by selecting the **Employee** tab, and then navigating to the **PeopleSoft My Portal** link or go directly to the link below in Internet Explorer.

Use the following link: http://myportal.sdccd.edu/

****NOTE: Office Solutions orders CANNOT be processed using Chrome. All orders MUST be placed through PeopleSoft using either Internet Explorer (IE) or Firefox as your browser.**

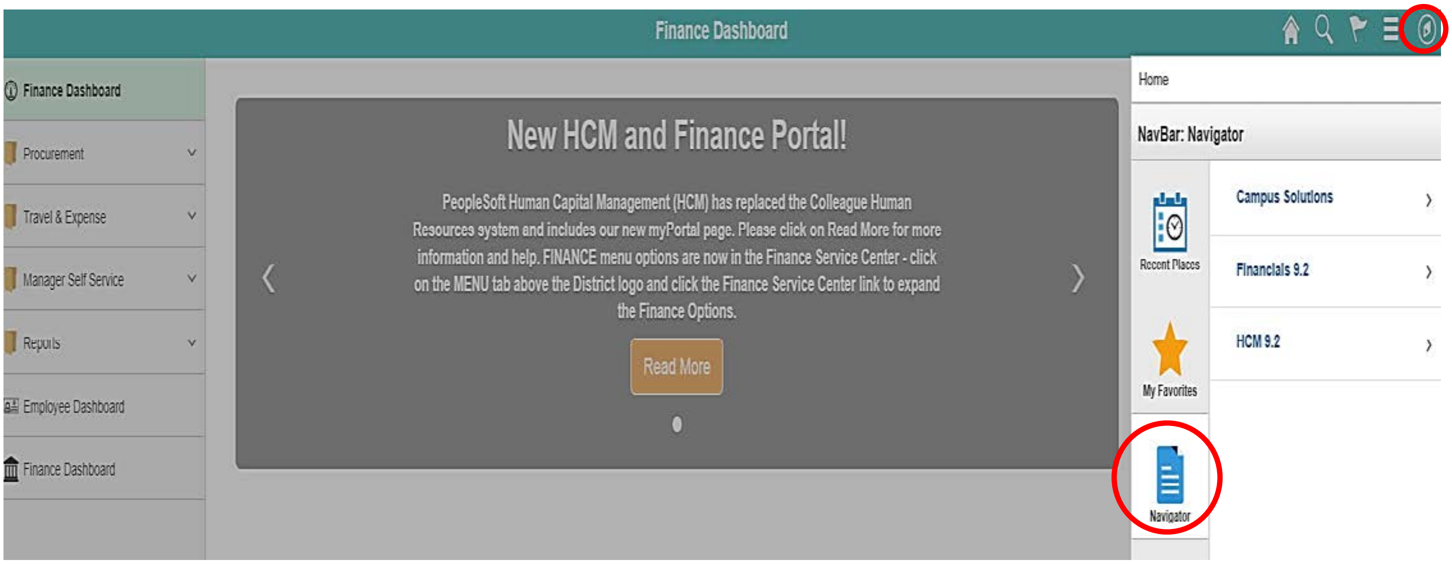


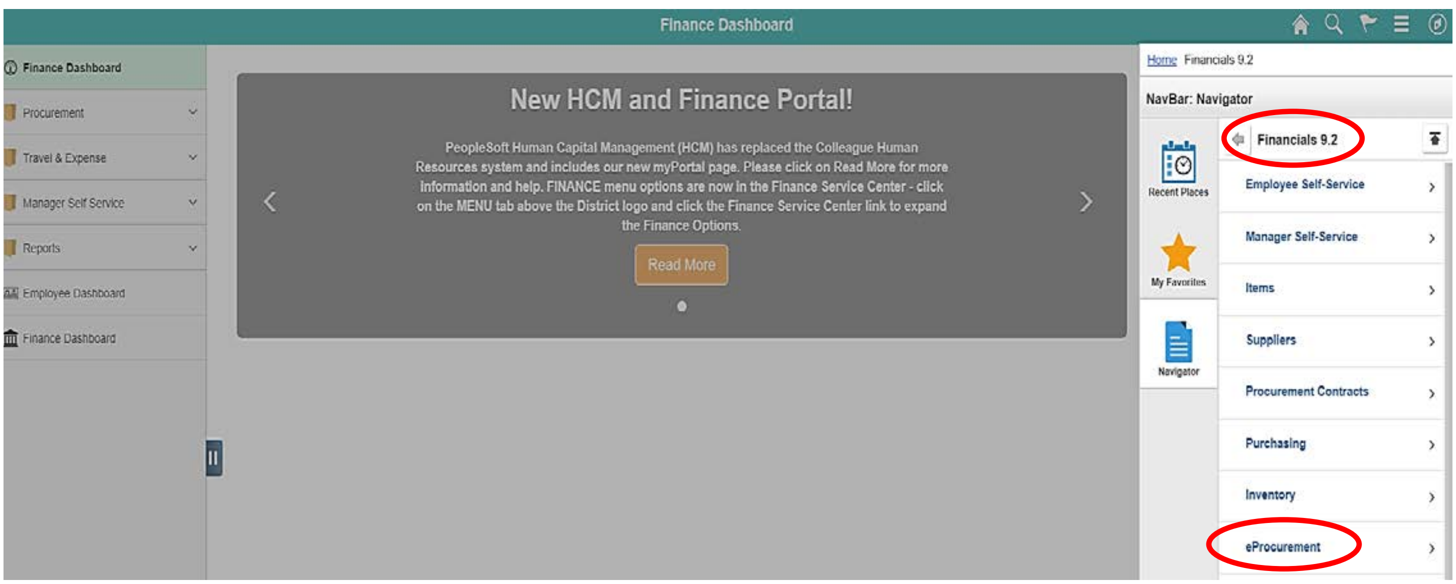
To access the **Create Requisition** screen, click on the **Finance Dashboard** icon.

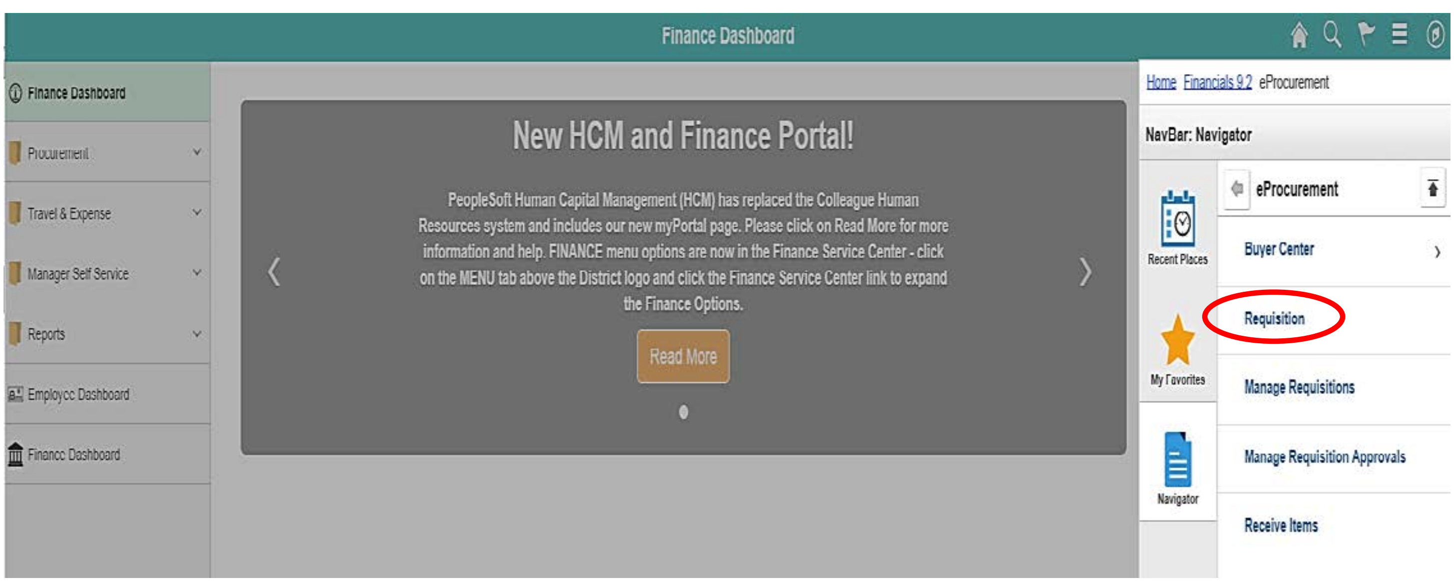


To access the Create Requisition screen, click on the **NavBar** icon in the top right of the screen. Then click the blue **Navigator** icon and use the following navigation:

- **Financials 9.2>eProcurement>Requisition**

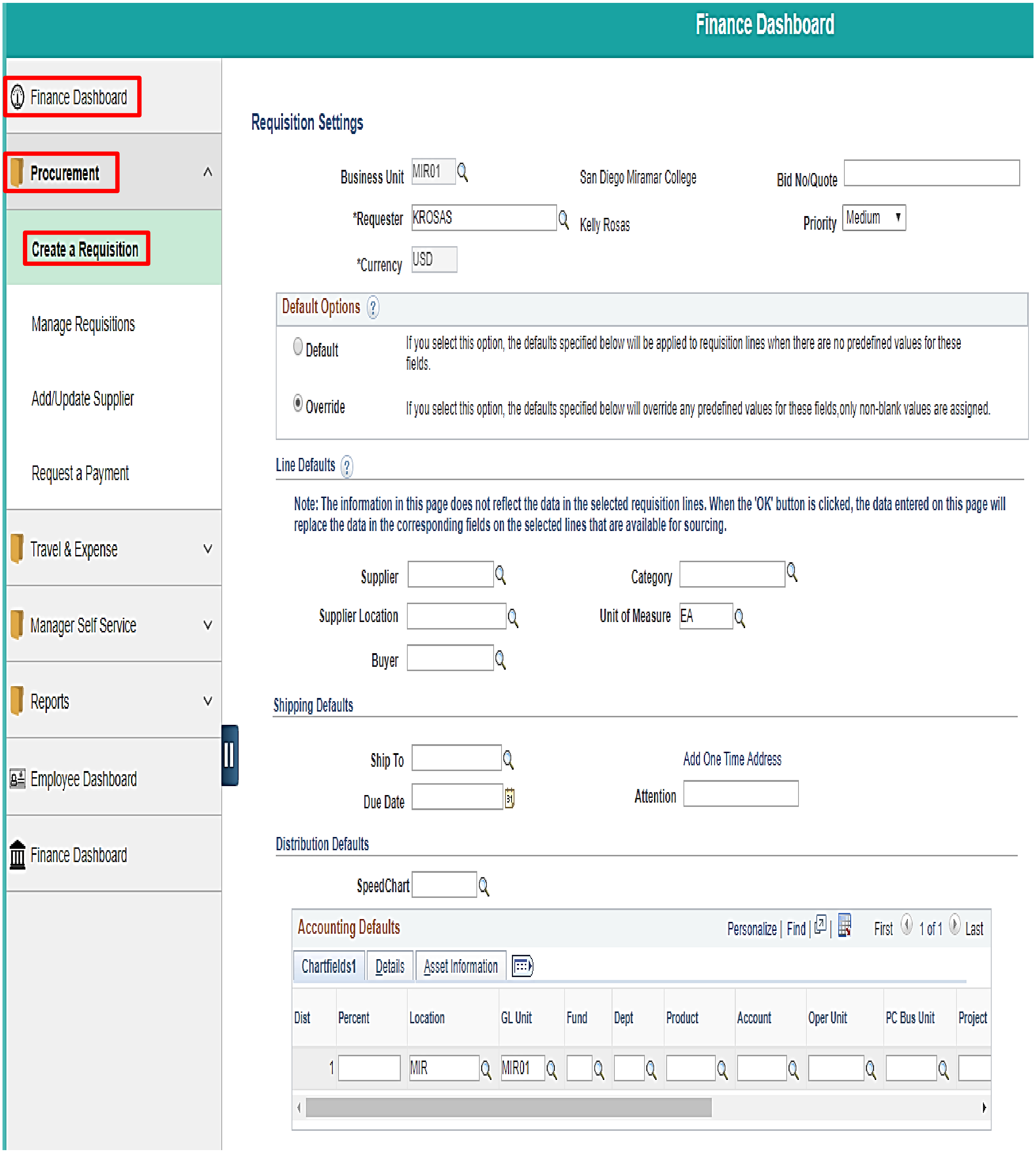




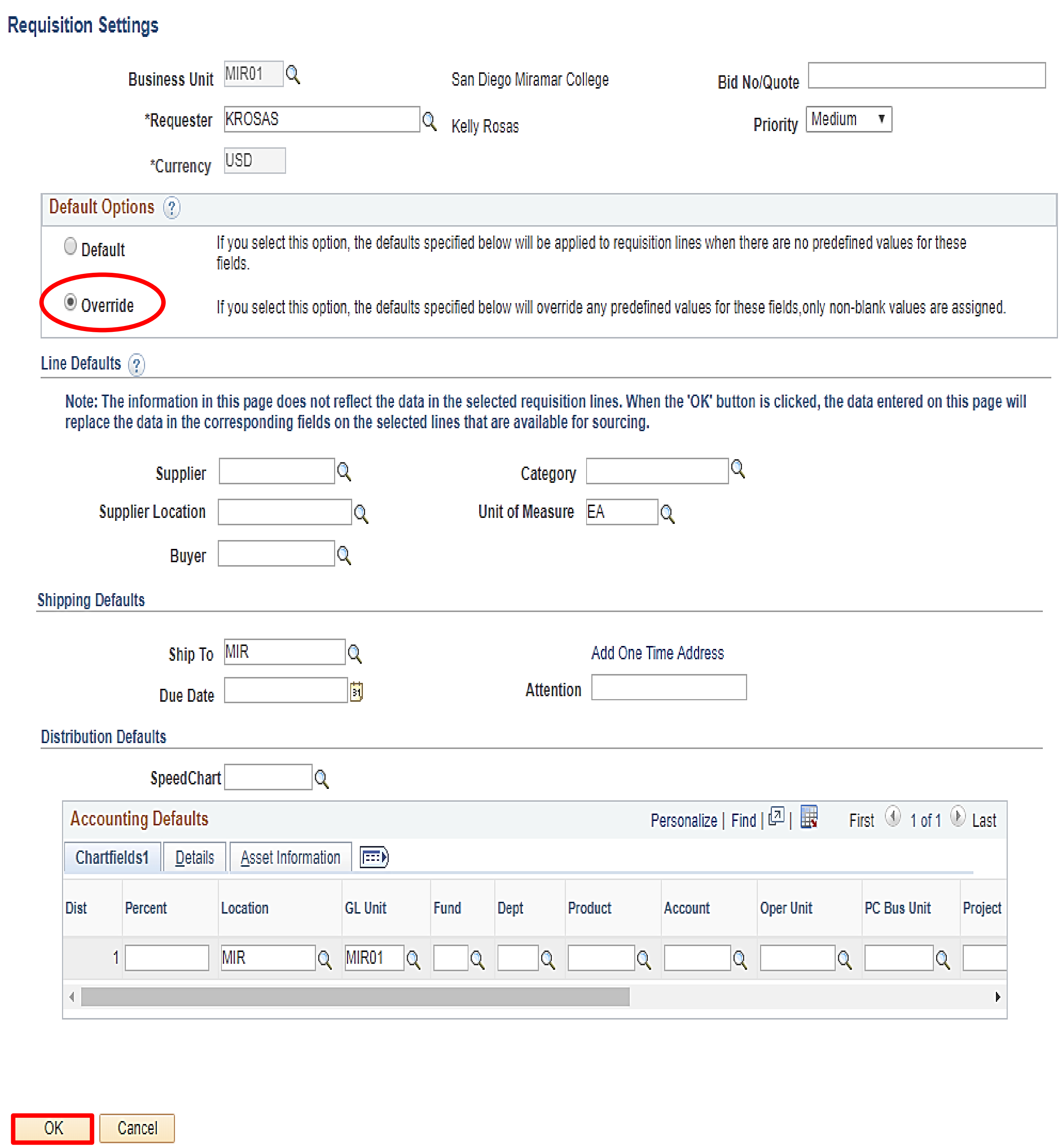


An alternative navigation to access the **Create a Requisition** screen is as follows:

- **Finance Dashboard>Procurement>Create a Requisition**



On the **Requisition Setting** page, click **Override**, skip all other fields and click **OK** at the bottom to advance to the **Office Solutions Create Requisition** page.

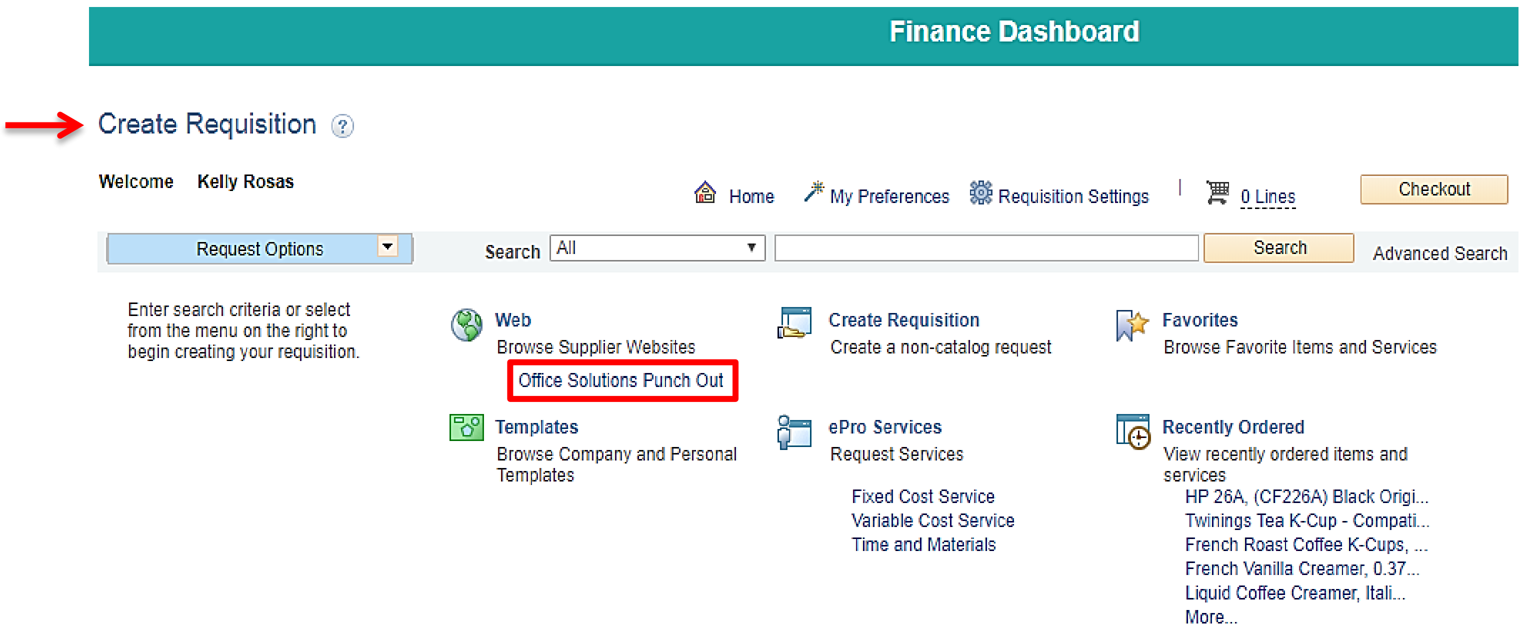


To access the Office Solutions unique website for SDCCD, go to www.officesol.com and enter the following login information:

- User: sdccdpc
- Pwd: sdccdpc@

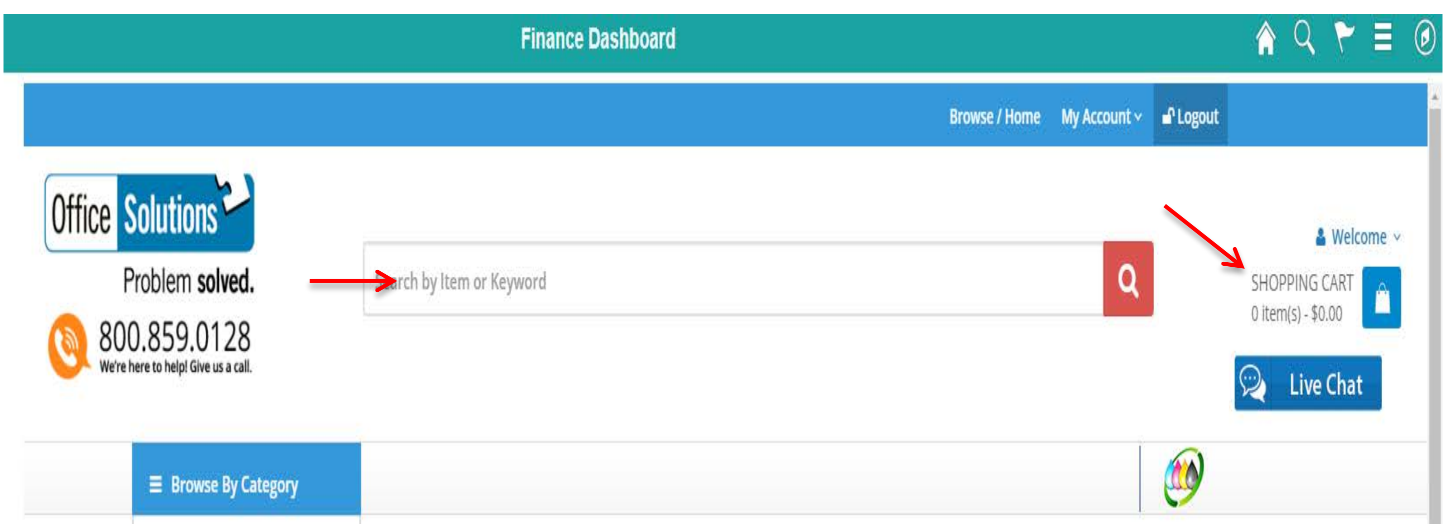
****NOTE:** This site can be utilized for product search and pricing only. The **Check-Out** feature is not active in this site. **Orders must be placed through PeopleSoft using either Internet Explorer (IE) or Firefox as your browser.**

To process the order through PeopleSoft, click on the **Office Solutions Punch Out** link to be directed to the ordering website. Refer to **page 65** to review the OS Quick Express Reference Guide.



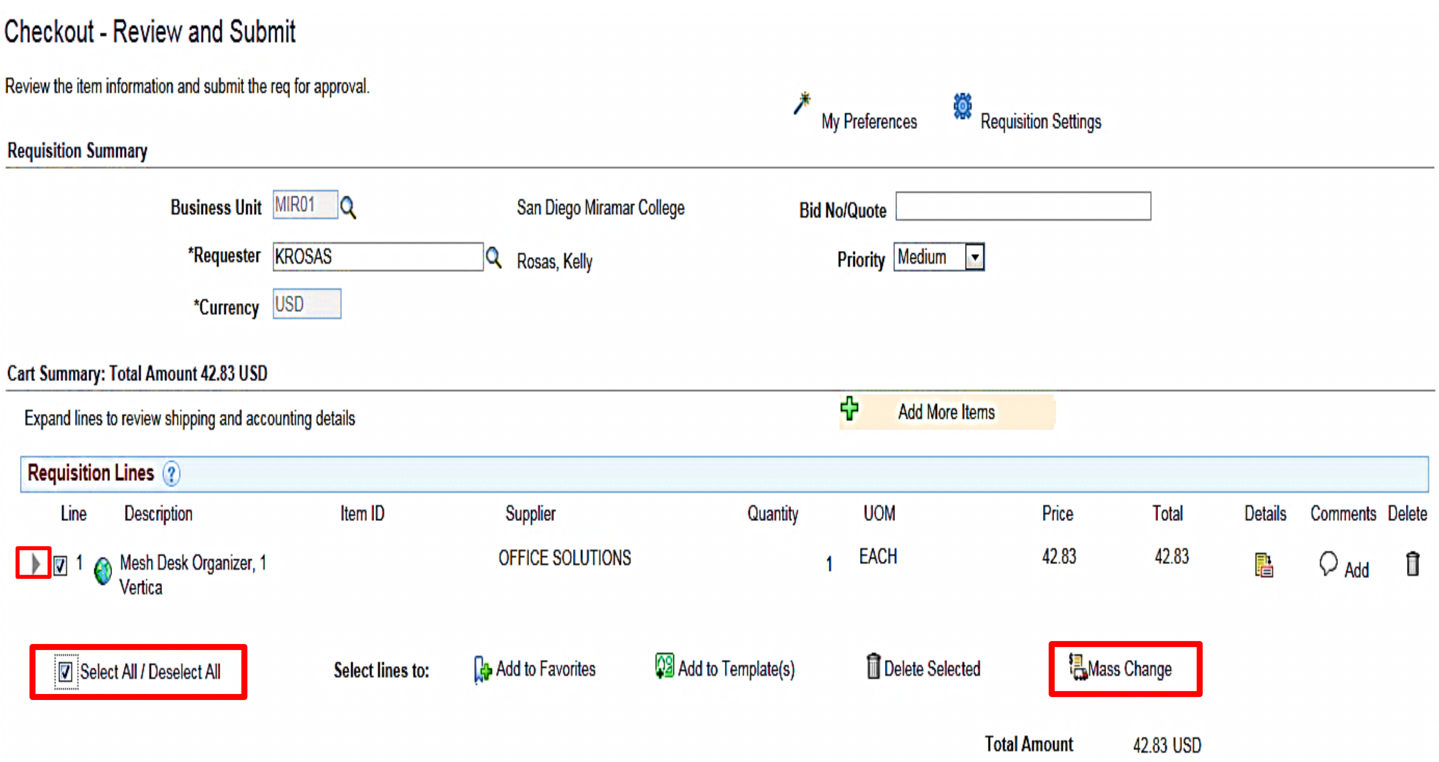
****NOTE: The minimum order amount is $35.00; before tax. The order will not be moved into PeopleSoft from this Office Solutions online system until your total order is $35.00 or more.**

Use the search field to find items to be purchased. Add selected items in the appropriate quantities to the shopping cart. When complete, click **View Cart** to review the order. Then **Checkout** to be transferred to **PeopleSoft's Checkout – Review and Submit** page.

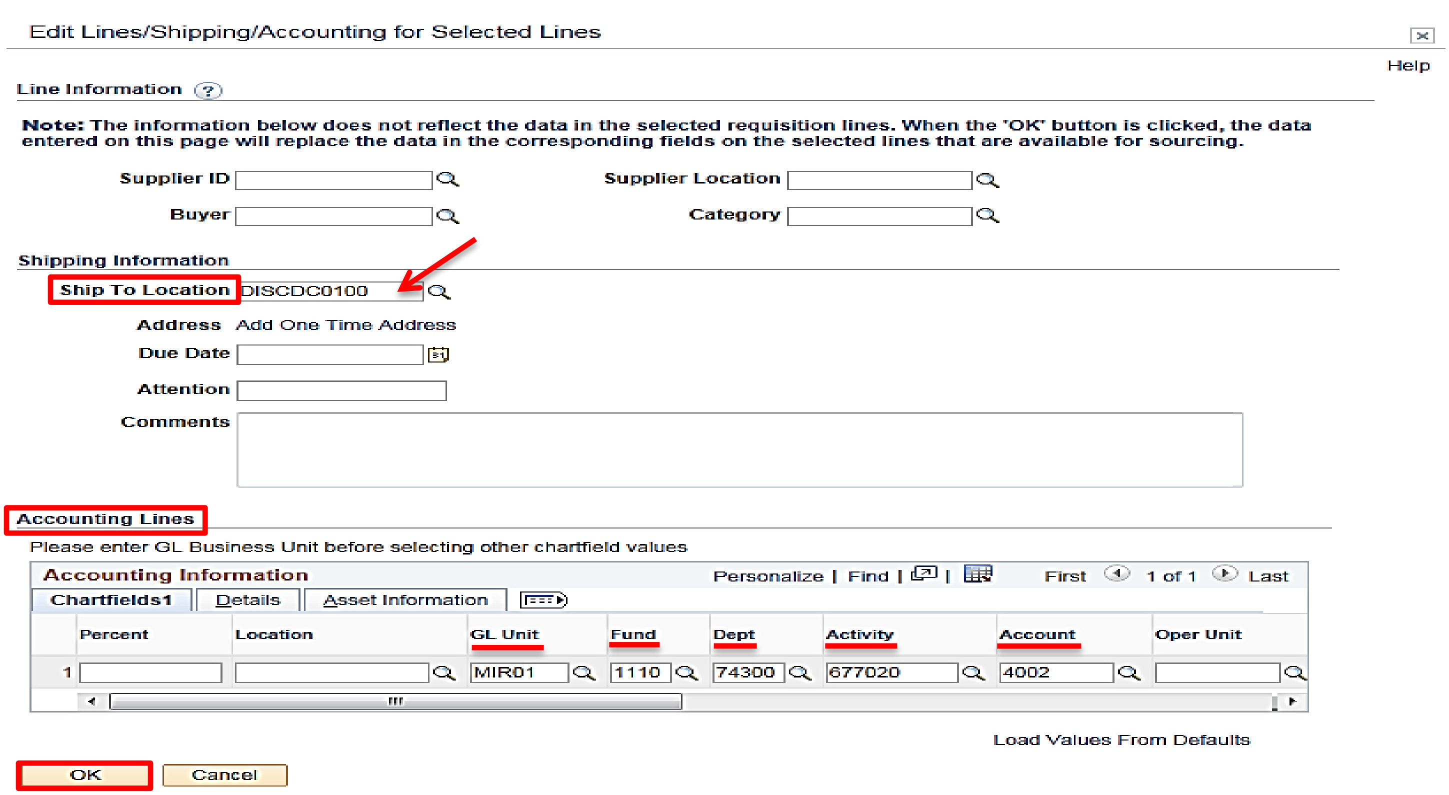


Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each line item to expand and review the information in the **Accounting Lines**.

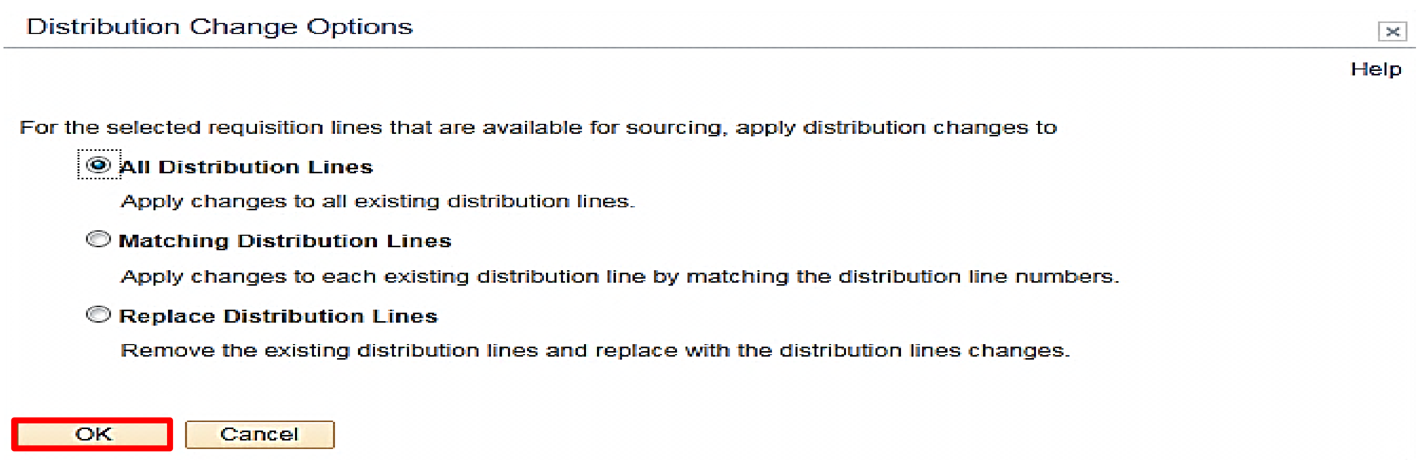
Click on **Select All/Deselect All** and then **Mass Change** to identify **Ship To** and **Accounting Information**.



In the pop-up, enter the **Ship To** location and the appropriate **Accounting Information** in fields below and click **OK**.



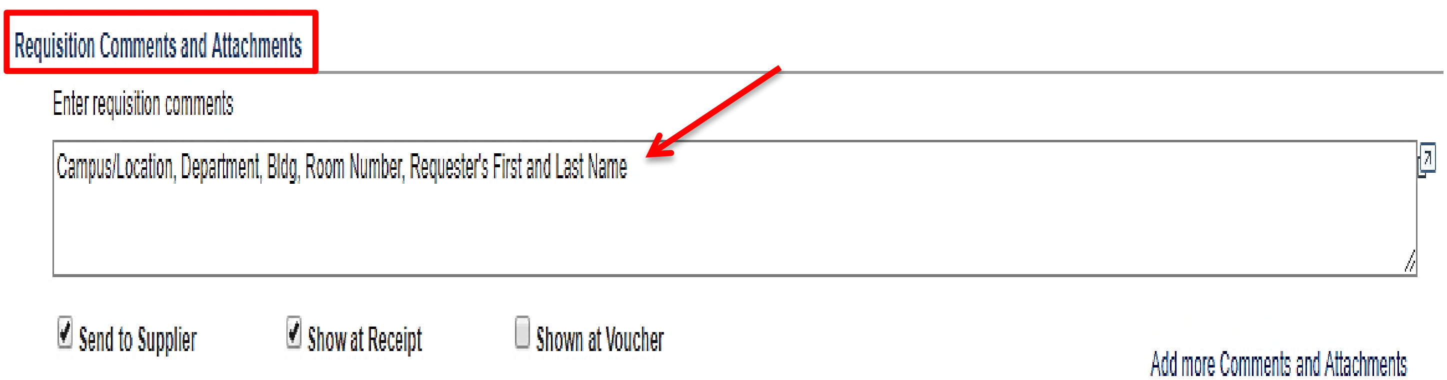
Click **OK** on the **Distribution Change Options** pop-up message that appears.



The **Requisition Comments and Attachements** field **MUST** include the following information:

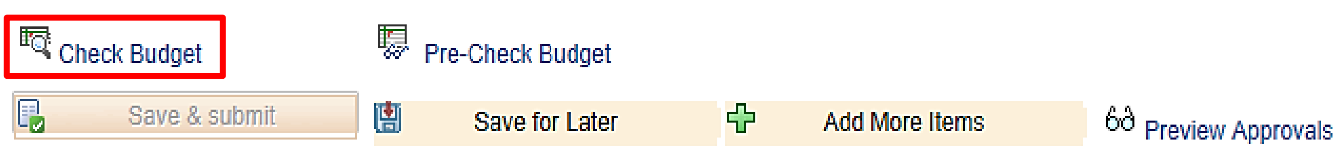
- **Campus/Location, Department, Building, Room Number, and Requester's First and Last name**.

After entering information above, check the **Send to Supplier** and **Show at Receipt** boxes.

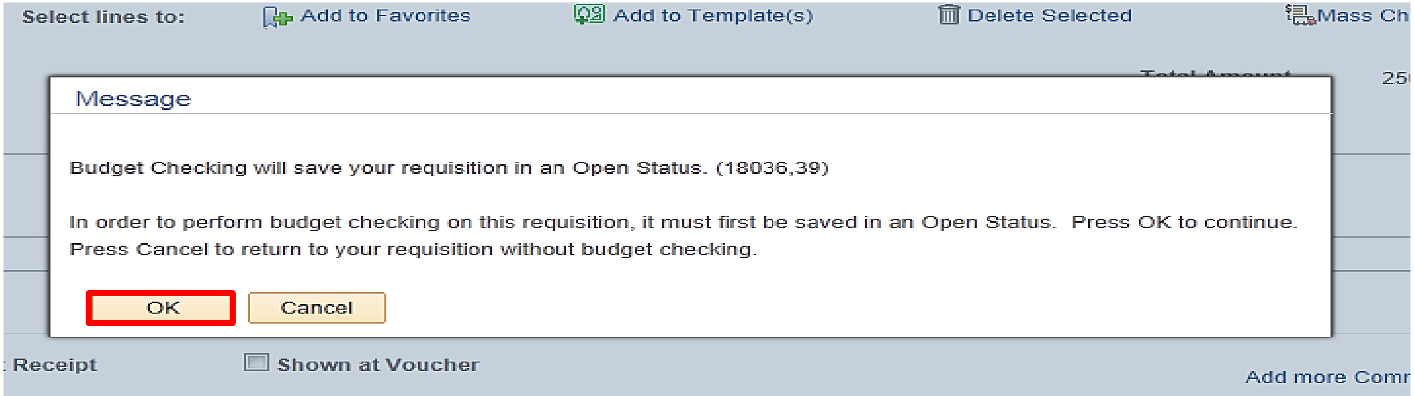


Once the requisition is complete, click on **Check Budget** at the bottom left of the screen.

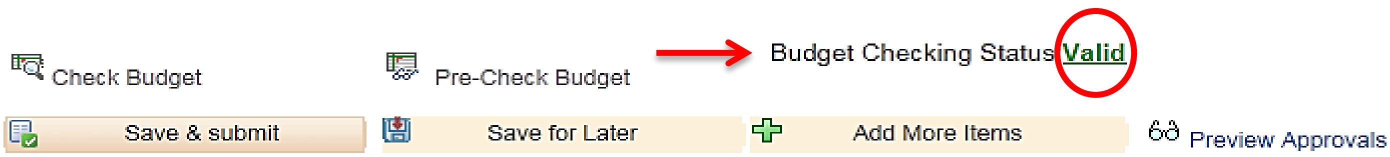
****NOTE: Requisitions that contain budget errors will not be saved or submitted. Issues with budget errors will need to be resolved with the appropriate person within your department.**



Click **OK** on the pop-up message that appears below.

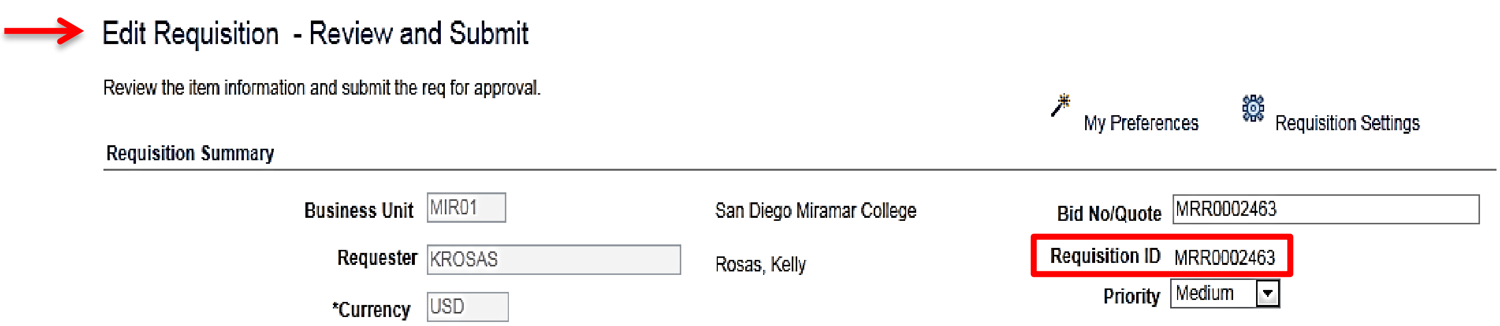


The **Budget Check Status** will show as VALID if the requisition has passed **Budget Check** and the system will automatically issue a **Requisiton ID** number.

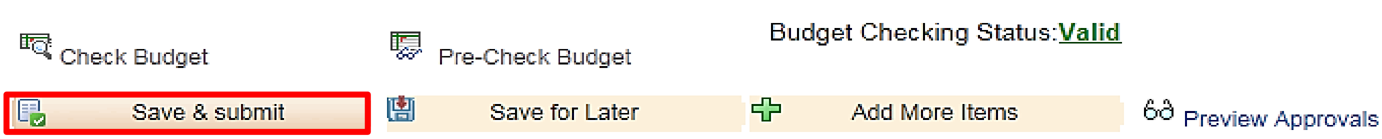


The **Requisition ID** is located at the top right of the **Edit Requisition – Review and Submit** page.

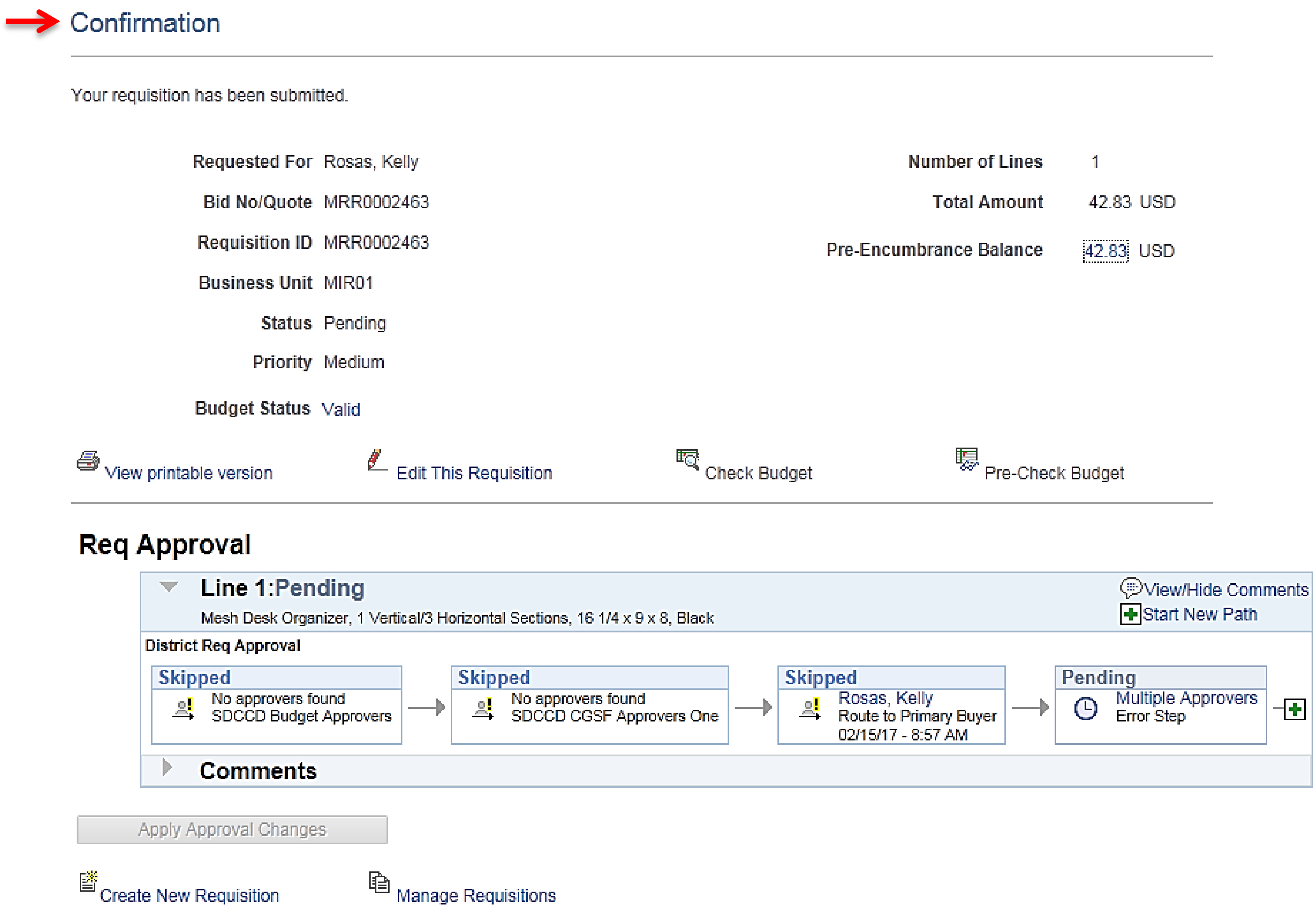
****Note the Requisition ID number for your records.**



Once there is a valid **Budget Check** and a **Requisition ID** number is issued, scroll to the bottom of the screen and click on **Save & Submit**.



The final page is the **Confirmation** page. This is a summary of the requisition and includes all of the approvals necessary to start the process of converting the requisition into a Purchase Order. Once the requisition is approved by the Buyer, a confirmation will be emailed to the requester.



To check the status of the requisition in PeopleSoft, access the **Manage Requisitions** screen and use the following navigation:

- **Navigation >Navigator>Financials 9.2>eProcurement>Manage Requisitions**

Enter the **Requisition ID** number and click search. Click on the grey arrow to the left under **Req ID** to expand the details of the requisition. Here the status of the requisition can be reviewed.

ARMA RULES

The **ARMA format will be required** to approve requisitions and dispatch purchase orders for consistency and clarity of receiving. To ensure that your orders are processed, please follow these formatting rules:

ARMA Item Description: Noun, Description, Manufacturer (if applicable), Model/Product Number

1. The NOUN is always FIRST, followed by the description, then the manufacturer if applicable, and finally the model or product number.

   Example A: TYPEWRITER, ELECTRIC, IBM, MODEL 8533

   Example B: BOOK, ENGLISH FOR EVERYONE, ISBN 0-123-456-78 – (Note: Publishers rarely look at the title when filling orders. So it's very important to have the ISBN number correct.)

   Example C: CONSULTANT SERVICES, FOR GRANT WRITING Equipment

2. When purchasing equipment, all options, components, and enhancements should be bundled with the equipment. However, separate operating pieces of equipment which may function independently of the equipment, should be separated (its own line item).

   EXAMPLES:

A. COMPUTER, SDCCD Q87M-E/CSM MT BASE SYSTEM MATX BLK
3EA $710.00 EA $2,130.00
031206 INWIN CASE Z589T.E350TBL USB 3.0 MATX 80+ 350W 3 $0.00 EA $0.00
RG1551 ASUS MB Q87M-E/CSM LGA1150 A/V/GBE VPRO MATX 3 $0.00 EA $0.00
UK1833 INTEL CPU I5-4690 3.5GHz/6M 4C 8T LGA1150 3 $0.00 EA $0.00
#BX80646I54690
TX1345 KINGSTON DDR3 2GB 1600MHZ CL11 #KVR16N11S6/2 6 $0.00 EA $0.00
PK0308 WESTERNDIGITAL HD 500GB SATA 7200 RPM 64MB #WD5003AZEX 3 $0.00 EA $0.00
031637 ASUS DVDRW +/- CDRW SATA BLK OEM# DRW-24F1STG 3 $0.00 EA $0.00
031730 MICROSOFT OS WIN 10 HOME OEM 64BIT 3 $0.00 EA $0.00
007208 LABOR - INSTALL SDCCD W7P 64BIT IMAGE 3.00 $0.00 HOUR $0.00
005004 STI BASIC SYSTEM CONFIGURATION 3 $0.00 EA $0.00
005008 STI 4 YEAR ONSITE WARRANTY 3 $0.00 EA $0.00
SERIAL STI SYSTEM SERIAL NUMBERS 3 $0.00 EA

B. KEYBOARD, KB 600 WIRED BLK USB ONLY #ANB-00001, P/N# V29332 MICROSOFT
3EA $10.00 EA $30.00

C. MOUSE COMFORT 4500 BLACK #4EH-00004, P/N# KL3561, MICROSOFT
3EA $15.00 EA $45.00

D. MONITOR LCD 22" WIDE 1680X1050 W/SPKR, P/N#PC1881,NEC
6EA $212.00 EA $1,272.00

E. ELECTRONIC WASTE FEE-15 TO 35 INCHES, P/N# EWRF15
6EA $4.00 EA $24.00

IF TABLETS ARE ORDERED IN LOTS, THEY MUST BE LISTED AS **EACH** AND NOT AS A **LOT**.

EXAMPLE: IPAD, APPLE 9.7" PRO, 128GB 15EA $729.00 (NOT 1LT @ $10,500)

ALL INDIVIDUAL INFORMATION TECHNOLOGY ELECTRONIC COMPONENTS OVER $200, NEED TO BE LISTED AS A SEPARATE LINE ITEM. THEY SHOULD NOT BE LISTED AS A LOT/KIT.

For Systems Furniture or Furniture orders EXAMPLES ARE:

WORKSTATION, 8.5x9L, (5) TACKBOARDS, (3) SHELVES, (2), TASKLIGHTS, (2) OVERHEADS, BBF PEDESTAL, LATERAL FILE, CHERRY LAMINATE, GREEN FABRIC, METALLIC PAINT 1 LT $2,122.36

CABINET, PEDESTAL, MOBILE, METAL 1EA $285.33

BOOKCASE, 5 SHELF ADJUSTABLE 1EA $325.00

CABINET, LOCKER 1EA $465.00

CABINET, LATERAL FILE, 2-DRAWERS, 36W METAL 1EA $378.49

CHAIR, HIGH BACK LEATHER, ADJUSTABLE 5EA $645.00

RULE IS THAT IF THE FURNITURE IS NOT BOLTED, GLUED, AND/OR WEILDED TO EACH OTHER, IT NEEDS TO BE LISTED AS A SEPARATE LINE ITEM. SYSTEMS FURNITURE ORDERED IN LOTS MUST BE LESS THAN $4,500. ANYTHING OVER THAT MUST BE LISTED AS SEPARATE OR AS ANOTHER LINE ITEM.

CATEGORY CODES

CODE	DESCRIPTION	SHORT DESCRIPTION
005-00	Abrasive Equipment and Tools	Abrasive
010-00	Acoustical Tile, All Types	Acoustical
015-00	Addressing, Copying, Mimeograph Machine Supplies	Addressing
025-00	Air Compressor and Accessories	Air Comp
031-00	Air Conditioning, Heating, and Ventilating: Equipment, Part	Air Con
035-00	Aircraft and Airport, Equipment, Parts, and Supplies	Aircraft
037-00	Amusement, Decorations, Entertainment, Toys, Etc.	Amusement
040-00	Animals, Birds, Marine Life-Live and Accessories	Animals
045-00	Appliances and Equipment, Household Type	Appliances
050-00	Art Equipment and Supplies	Art Equip
052-00	Art Objects	Art Object
060-00	Automotive Maintenance Items and Repair/Replacement Parts	Automotive
060-09	Batteries For Electric Vehicles -Including Recycled Types	Batteries
060-12	Batteries, Storage Including Electrolyte and Recycled Types	Batteries
060-35	Cooling System: Radiators, Complete and Cores; Thermostats	CoolingSys
060-38	Engines, Diesel -Automotive and Replacement Parts	Engines
060-39	Engines, Dual Fuel, Automotive and Replacement Parts	Engines
060-40	Engines, Gasoline: Complete, Short Block, and Parts	Engines
060-41	Exhaust System: Clamps, Exhaust Pipes, Mufflers, Tailpipes	ExhaustSys
060-47	Fuel System: Carburetors and Kits, Fuel Pumps, Tanks and Cap	Fuel Sys
060-57	Glass and Supplies: Door, Windshield, etc.	Glass
060-61	Hydraulic System Components and Parts	Hydraulic
060-63	Ignition System: Coils, Condensers, Points, Rotors, Spark Pl	Ignition
060-87	Tire and Tube Repair Items	Tire, Tubes
070-00	Automotive Vehicles and Related Transportation Equipment	Automotive
075-00	Automotive Shop Equipment and Supplies	Automotive
080-00	Badges, Emblems, Name Tags, and Plates, Jewelry, Etc.	Badges
090-00	Bakery Equipment, Commercial	Bakery Eq
095-00	Cosmetology Equipment and Supplies	Cosmetolog
100-00	Barrels, Drums, and Hazardous Waste Containers	Barrels
101-21	Freight and Cargo Containers, Shipping	FREIGHT AN
150-02	Adhesives, Bonding Agents and Cement Antifreeze	Adhesives
150-04	Aluminum Extrusions For Fabricating Window and Door Screens	Aluminum
150-06	Builders Paper, Kraft Types Not Felt and Tar Paper	Build Pap
150-07	Boxes, Shoring For Construction Worker Protection	Boxes
150-08	Cabinets, Counters, Shelves, etc., Ready-Made	Cabinets
150-09	Casement Window Hardware: Latches, Operators, and Handles	Casement
150-10	Construction Materials Not Otherwise Classified	Construct
150-11	Ceiling Coffers	Ceiling Co

150-12	Cement, Concrete, Lime and Plaster Mixes, Sacked LTL Quanti	Cement
150-14	Cement, Quick Setting, Sacked	Cement
150-15	Concrete, Polymer, All Types	Concrete
150-16	Curing Mixtures, All Types For Curing Concrete	Curing Mix
150-17	Chutes, Linen Laundry	Chutes
150-18	Door Bells, Chimes and Hardware	Door Bells
150-19	Door Operators Not Door Closers: Chain Hoist Type, Electric	Door Oper
150-20	Door Openers and Parts, Electric	Door Open
150-21	Doors, All Types	Doors
150-33	Grout, Drywall	Grout, Dry
150-34	Handrails, All Types	Handrails
150-49	Millwork: Counters, Custom-Made Cabinets, Shelves, Stairs	Millwork
150-51	Moldings, All Types	Moldings
150-83	Tile, All Types	Tile, All
150-92	Windows, All Types	Windows
155-00	Buildings and Structures: Fabricated and Prefabricated	Buildings
165-00	Cafeteria and Kitchen Equipment Commercial	Cafeteria
175-00	Chemical Laboratory Equipment and Supplies	Chemical
200-00	Uniforms, Clothing, Athletic, Apparel, and Accessories	Uniforms
204-13	Cables: Printer, Disk, Network, etc.	Cables
204-32	Drives, External Jump Drives, Flash Drives, etc.	Drives, Ex
204-33	Drives, Compact Disk CD ROM, DVR, etc.	Drives, Co
204-37	Drives, Tape	Drives, Ta
204-53	Microcomputers, Desktop or Tower based	Microcomp
204-54	Microcomputers, Handheld, Laptop, and Notebook	Microcomp
204-60	Monitors, All Types	MONITORS,
204-64	Network Components: Adapter Cards, Bridges, Connectors	Network Co
204-68	Peripherals, Miscellaneous: Keyboards, Graphic Digitizers, L	Peripheral
204-69	Computer Hardware Maintenance Fees	PC HW MNT
204-72	Power Supplies and Power Related Parts, Internal	Power Supp
204-76	Printers, Inkjet	Printers
204-77	Printers, Laser	Printers
204-80	Printers, Thermal	Printers
204-90	Scanners and Readers, Bar Code, Point of Sale Scanners, etc	Scanners
204-91	Servers, Microcomputer Application, Database, File, Mail	Servers
207-00	Computer Accessories And Supplies	Computer
207-72	Toner and Ink Cartridges	Toner
208-39	Desktop Publishing	DesktopPub
208-42	EDI- Electronic Data Interchange Translator Software, Micro	EDI
208-60	Medical Software, All Types	Medical SW
208-65	Point of Sale Software	Pos SW
208-69	Software Maintenance Fees	SW MAINT
208-80	Software, Microcomputer	Software

208-81	Software For Computer Software Training	Software
208-82	Scientific, Statistical, Engineering, Mathematical, and Mapp	Scientific
208-86	Sound or Music Editing Software, Microcomputer	Sound or M
208-90	Utilities: Back-up, Batch File, Firewall, Menus, Op Sys	Utilities
232-00	Crafts, General	Crafts
260-00	Dental Equipment and Supplies	Dental Equ
265-00	Window Coverings: Draperies, Curtains, and Blinds	Window Cov
269-00	Pharmaceuticals	Pharmaceut
287-00	Electronic Equipment and Supplies	Electronic
287-12	Batteries	Batteries
295-00	Elevators, Parts, Accessories and Maintenance	Elevators
305-00	Engineering and Architectural Equipment and Supplies	Engineerin
325-00	Feed, Bedding, Vitamins, Supplements for Animals	Feed, Bedd
330-00	Fencing and Related Supplies	Fencing
335-00	Fertilizers and Soil Conditioners	Fertilizer
340-00	Fire Protection and Equipment Supplies	Fire Prot
345-00	First Aid and Safety Equipment and Supplies	First Aid
350-00	Flags, Flag Poles, Banners, and Accessories	Flags
360-00	Floor Covering Materials and Supplies	Floor Cove
365-00	Floor Maintenance Machines, Parts, and Accessories	Floor Main
393-00	Food: Staple Grocery and Grocers Miscellaneous Items	Food Stap
395-00	Forms, Computer Paper, Form Labels, Preprinted	Forms, Com
405-00	Fuel, Oil, Grease, and Lubricants	Fuel, Oil
420-04	Auditorium, Stadium, Team Seating Furniture and Portable	Auditorium
420-08	Cafeteria Furniture, Chairs and Tables Incl. Stacking Types	Cafeteria
420-13	Childrens Furniture Incl. Stackable Types	Child Furn
420-25	Folding Chairs and Tables, Plastic or Resin	Fold Chair
420-56	Library Furniture	Library
420-59	Lounge Furniture	Lounge
420-93	Stools	Stools
425-03	Bookcases and Bookshelves, Metal and Wood	Bookcases
425-06	Seating, All Types	Seating, A
425-14	Credenza	Credenza
425-20	Furniture: Classroom	Furniture
425-40	Filing Cabinets: All Types	Filing Cab
425-47	Floors, Raised Access Type For Data Processing Equipment	Floors
425-48	Furniture, Office	Furniture
425-50	Key Storage Cabinets and Files	Key Store
430-00	Gases, Containers, Equipment: Laboratory, Medical, and Weldi	Gases
445-00	Hand Tools Powered and Non-Powered, Accessories and Suppli	Hand Tools
450-06	Batteries	Batteries
475-00	Medical Equipment and Supplies	Medical Eq

485-01	Ammonia and Other Chemicals, Household Plain or Sudsing	Ammonia
485-04	Applicators, Floor Finish, All Types Except Brushes	Applicator
485-06	Bottles, All Types	Bottles
485-10	Brooms, Brushes, and Handles	Brooms
485-11	Cleaner and Detergent	Cleaner
485-12	Polish, Metal For Brass, Stainless Steel, etc.	Polish
485-13	Cleaner, Hand and Skin, Synthetic Detergent Type	Cleaner
485-16	Cleaner, General Purpose, All Types	Cleaner
485-37	Detergent-Disinfectant, Liquid and Aerosol	Detergent
485-40	Disinfectants, All Types	Disinfecta
485-44	Dispensers, All Types	Dispensers
485-50	Door Mats, All Types	Door Mats
485-53	Dusters: Feather, Lambs wool, Split, etc.	Dusters
485-54	Floor Polishes and Waxes, Floor Sealer, and Dust Mop Treatin	Floor Poli
485-55	Floor Stripper and Cleaners	Floor Stri
485-64	Janitor Carts and Bags	Janitor
485-65	Janitorial Equipment and Supplies Not Otherwise Classified	Janitorial
493-00	Laboratory Equipment and Supplies	Laboratory
493-05	Laboratory Furniture	LAB FURN
493-42	Gases and Chemicals	Gases
493-62	Pipets	Pipets
500-00	Laundry and Dry Cleaning Equipment, Accessories, and Supp	Laundry
515-00	Landscaping Equipment and Supplies	Landscape
540-00	Lumber, Siding, and Related Products	Lumber
545-00	Machinery and Hardware, Industrial	Machinery
560-00	Material Handling and Storage Equipment and Supplies	Material
570-00	Metals, Raw	Metals
575-00	Microfiche and Microfilm Equipment and Supplies	Microfiche
580-00	Musical Instruments, Accessories, and Supplies	Musical
590-00	Sewing Equipment and Supplies	Sewing Eq
600-00	Office Machines, Equipment, and Accessories	Office Mac
600-15	Calculator, Electronic	Calculator
615-00	Office Supplies, General	Office Sup
615-05	Adhesives and Applicators: Glue, Mucilage, Paste, etc.	Adhesives
615-09	Binders: Chain, Post, Prong, Ring, etc.	Binders
615-14	Boards: Calendar, Schedule, Dispatch, Manning, etc.	Boards
615-15	Books, Office: Accounting, Address, Columnar, Composition	Books
615-19	Calendars, Calendar Pads and Stands	Calendars
615-23	Chair Mats Carpet Protectors, All Types	Chair Mats
615-41	File Folders, All Types	File Folde
615-62	Pads and Tablets, All Types	Pads
615-67	Paper Clips, All Types	Paper Clip
615-72	Planners, Organizers	Planners

615-73	Recycled Office Supplies	Recycled
615-75	Rubber Bands, All Sizes	Rubber Ban
615-77	Rubber Stamps, Stamp Pads, Stamp Pad Ink and Stamp Racks	Rubber Sta
615-81	Staples	Staples
615-88	Tape and Dispensers, Office Type	Tape
620-20	Erasers: All Types	Erasers
620-79	Pens, All Types	Pens, All
620-94	Recycled Pens and Pencils	Recycled
630-00	Paint and Protective Coatings	Paint
635-00	Paint Equipment and Accessories	Paint Equi
640-00	Paper and Plastic Products, Disposable	Paper
645-00	Paper for Office and Print Shop Use	Paper
650-00	Park, Playground, Recreational Area and Swimming Pool Equip	Park, Play
655-00	Photographic Equipment and Supplies	Photograph
670-00	Plumbing Equipment, Fixtures, and Supplies	Plumbing
680-00	Police Equipment, Supplies and Accessories	Police Equ
680-02	Access Control Systems and Security Systems	Access
680-04	Ammunition	Ammunition
680-32	Burglar Alarms	Burglar
680-34	Citation Issuance Devices and Supplies	Citation
680-50	Guns, Stun Nonlethal, Incl. Taser Weapons	Guns
680-52	Guns, Pistols, Rifles, and Shotguns	Guns
680-87	Surveillance Cameras Equipment and Supplies	Surveillan
700-00	Printing Plant Equipment and Supplies Except Paper	Print Eqpt
715-04	Audio Books, All Types	Audio Book
715-10	Books, Curriculum Guides, Directories, Magazines, Pamphlets	Books
715-12	Books, Reference Incl. CD versions: Dictionaries, Encyclop	Books
715-45	Laboratory Books, Research and Related Materials DNA, Genom	Laboratory
715-46	Legal Books and Publications	Legal Book
715-48	Medical Books and Publications	Med Books
715-83	Textbooks, Adult Education	Textbooks
715-88	Textbooks: College Level Includes Student and Teacher Edit	Textbooks
720-00	Pumping Equipment and Accessories	Pumping Eq
725-15	Communication Systems, Integrated	COMMUNICAT
725-74	Two-Way Radio, Portable, Including Vehicle Relay System	TWO-WAY RA
725-78	Two-Way Radio Receivers, Transmitters, Transceivers: Mobile	TWO-WAY RA
726-00	Radio Communication, Equipment, Accessories and Supplies	Radio Comm
735-00	Rags, Shop Towels, and Wiping Cloths	Rags, Shop
790-00	Seed, Sod, Soil, and Inoculants	Seed, Sod
801-00	Signs, Sign Material, Sign Making Equipment, and Related Sup	Signs
803-00	Sound Systems, Components, and Accessories: Group Intercom	Sound Sys
805-00	Athletic Equipment and Athletic Facility Equipment, Sporting	Athletic

838-00	Telecommunication Equipment, Accessories, and Supplies	Telecom
840-00	Television Equipment and Accessories	Television
855-00	Theatrical Equipment and Supplies	Theatrical
860-00	Tickets, Coupon Books, Sales Books, Strip Books, Etc.	Tickets
863-00	Tires and Tubes, Supplies and Accessories	Tires
875-00	Veterinary Equipment and Supplies	Veterinary
880-00	Audio Visual Equipment and Supplies	Audio Vis
880-43	Projection Screens	Projection
880-67	Projectors	Projectors
895-00	Welding Equipment and Supplies	Welding Eq
906-00	Architectural Services, Professional	Architectu
908-00	Bookbinding, Rebinding, and Repair Services	Bookbindin
909-00	Building Construction Services	Building C
915-00	Communications and Media Related Services	Communicat
915-75	Telephone Services, Cellular	TELEPHONE
918-02	Audio/Visual Consulting Services	Audio/Vis
918-06	Administrative Consulting	Admin
918-07	Advertising Consulting	Advertisin
918-14	Appraisals Consulting	Appraisals
918-15	Architectural Consulting	Architectu
918-19	Buildings, Structures and Components Consulting	Buildings
918-25	Compliance Consulting, American Disabilities Act ADA	Compliance
918-26	Communications: Public Relations Consulting	Communicat
918-28	Computer Hardware/Software Consulting	Computer
918-31	Construction Consulting	Construct
918-32	Consulting Services Not Otherwise Classified	Consulting
918-38	Education and Training Consulting	Education
918-41	Energy Conservation Consulting	Energy Con
918-42	Engineering Consulting	Engineerin
918-43	Environmental Consulting	Environmen
918-52	Food Service Consulting	Food Servi
918-66	Human Resources Consulting Services	Human Res
918-71	IT Consulting	IT Consult
918-74	Legal Consulting	Legal Cons
918-75	Management Consulting	Management
918-76	Marketing Consulting	Marketing
918-80	Moving/Relocation Consulting Service	Move/Relo
918-91	Roofing Consultant	Roof Csult
918-95	Telecommunications Consulting	Telecom
918-97	Utilities: Gas, Water, Electric Consulting	Utilities
925-00	Engineering Services, Professional	Engineerin
926-00	Environmental and Ecological Services	Environmnt
936-00	Equipment Maintenance and Repair Services for General Equip	Equipment

954-00	Laundry and Dry Cleaning Services	Laundry
961-00	Miscellaneous Services - Temp help, Catering, Chartering	Misc
962-16	Bus Transportation Services, School	Bus Transp
962-19	Cafeteria and Restaurant Services	Cafeteria
962-22	Chemical Laboratory Services	Chemical
962-23	Chemical Treatment of Boiler and Tower Water	Chemical
962-24	Courier/Delivery Services	Courier
962-27	Document Shredding Services	Doc Shred
962-33	Engraving Services; Awards, Trophies, Etc.	Engraving
962-46	Installation & Removel Svcs.	Install
962-48	Interior Design/Decorator Services	Int Design
962-56	Moving Services	Moving
962-58	Professional Services Not Otherwise Classified	Profession
962-63	Piano Tuning Services	Piano Tune
962-69	Personnel Services, Temporary	Personnel
962-79	Sign Making Services	Sign Makin
962-86	Freight, All Transportation of Goods	FREIGHT
962-87	Travel, Local Provided by Third Party	Travel
962-89	Vehicle Transporting Services	Vehicle
962-93	Vehicle Registration Services	Vehicle
962-94	Water Service, Bottled	WATER SERV
963-00	Non-Biddable Miscellaneous Items Associations, Fees, Dues	Non-Bid
966-00	Printing and Typesetting Services	Printing
968-00	Public Works and Related Services	Public Wks
971-00	Real Property Rental or Lease	Real Prop
975-00	Rental or Lease of Automotive	Rental
981-00	Rental or Lease of General Equipment	Rental
990-00	Security, Fire, Safety, and Emergency Services	Security

SAN DIEGO
COMMUNITY COLLEGE
DISTRICT

Please contact the Purchasing and Contract Services Department at 619-388-6562 to request a Confirmation Form.

STATUS DEFINITIONS

Purchase Orders	
Initial	A PO has a status of *Initial* when it is first added to the system. This status may change once a buyer is selected in the PO, depending upon how the buyer is set up.
Open	If the buyer is set up with this Default PO Status, an initial PO will become *Open*. A Template PO may always have an *Open* status. A PO with this status cannot be budget checked.
Pending Approval	A PO cannot be budget checked or entered into the approval process until it is in *Pending Approval* status. There is a checkmark that shows on *Open* POs that can be clicked to change the status to "*Pend Appr*."
Approved	When the workflow approval process is complete, the PO status changes from *Pending Approval* to *Approved*. After the PO is approved, any change in amount or ChartFields causes the system to return the PO status back to *Pending Approval*. *Approved* POs are available for the PO Dispatch/Print process.
Dispatched	If the PO has been approved and has a valid budget status, the PO status changes from *Approved* to *Dispatched*.
Canceled	Canceling an entire PO before it has been dispatched changes the status to *Canceled.* Canceling cannot be reversed.
Pending Cancel	Canceling a dispatched PO changes the status to *Pending Cancel.* The PO must be re-dispatched and budget-checked to move the status from *Pending Cancel* to *Canceled.*
Complete	Running the Close Purchase Orders process changes the status to *Complete*.
Approval Status	
Initial	The status of any PO or requisition when first brought into the "Approve Amounts" process.
In Process	If the requester or buyer cannot give full approval of a requisition or PO, the status of *In Process* shows after the initial approval is saved.
Complete	The requisition or PO receives a *Complete* approval status after the final approval has been done. These three approval statuses will only show in the Approve Amounts screen.

Requisitions	
Open	The *Open* status displays by default from the requester. This status may change once a requester is selected, depending upon how the requester is set up.
Pending Approval	The requisition is not eligible for the approval process until an authorized user changes this status to *Pending*. This may be done by pulling in the requester or clicking the “Open” checkmark to change the status to *Pending*.
Approved	The requisition has been fully approved.
Line Approved	This status means that one or more requisition lines have been approved.
Denied	The requisition has been denied by the Approver.
Canceled	The requisition was canceled on the header.
Complete	Running the Close Requisitions process changes the status to *Complete*.
Receipts	
Open	Not all edits have passed. If any receipt lines have a status of *Open*, the receipt header has a status of *Open*.
Received	When all lines are in *Received* or *Canceled* status, the receipt header will have a status of *Received*.
Hold	Receipt is on *Hold* until released by user. This status may be used when items are received damaged.
Moved	This status occurs when the receipt has been interfaced with Asset Management or Inventory in PeopleSoft.
Closed	All interface requirements have been fulfilled and no further processing is required. Running the Close Receipts process changes the status to *Closed*.
Canceled	The receipt has been *Canceled* on the header; the lines will go to a *Canceled* status as well. <u>Canceling cannot be reversed</u>.
Budget Status	
Not Chk‟d	(*Not Checked*) – Either the document has not been budget checked or the budget checking <u>process</u> failed. This can happen for reasons other than the accounting information being incorrect.
Valid	The PO or requisition has been successfully budget checked.
Error	The document has failed to budget check because of an error in the distribution information.

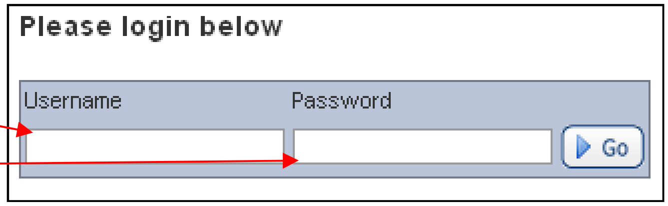
OS Express Quick Reference Guide

Office Solutions
Problem Solved.

User Login

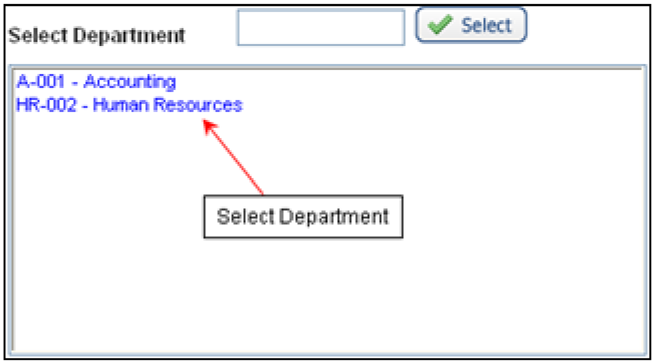
Enter Username

Enter Password



Hit enter Key or click GO

Choose a Department



Home Page

Search

Customer Information

Quick Order

Favorites Lists

Saved Carts

Order History/Returns

Add items to your

Search
Search for an item by all words, any word, exact phrase and sku # (item #).

Quick Order
Enter the item number you wish to order and **hit tab**, enter the quantity (defaults to 1), **hit tab**.
If desired, enter a line comment, **hit tab**. After all item numbers have been entered, click on add to cart.

Favorites Lists
From your Favorites List, select the list you wish to order from. Check the items you wish to order, change the quantity if desired and click on add checked items to cart. Or, click check all items and click add checked items to cart.

*Note: If you'd like to return to a previous screen, use the "breadcrumb" method.
By clicking on any of the words in the "trail or breadcrumb", you can go to the previous pages.

Product

Access a product page through a search or from your Favorites List

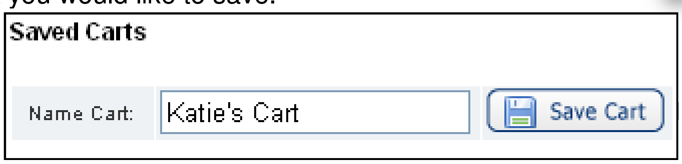
To add the item to your order, enter quantity in the Quantity Text Box and click **Add To Cart**

If you add an item to a list, click **Add To Favorites**

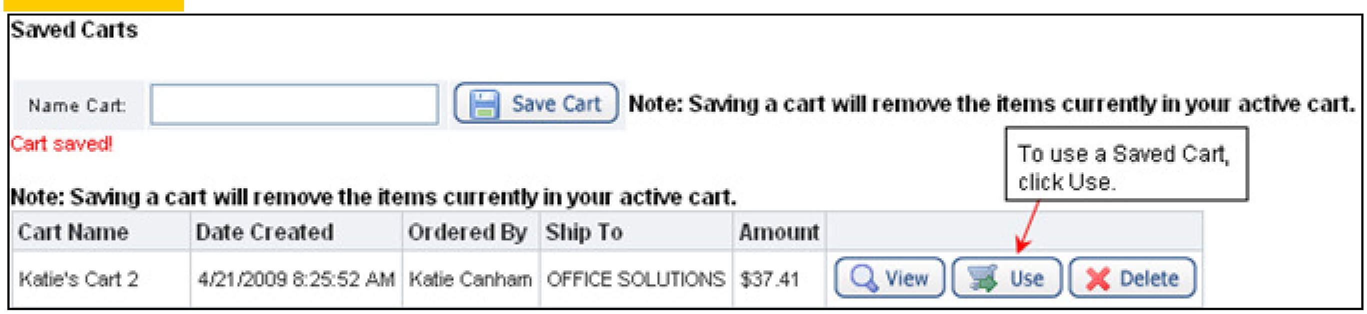
Save a Cart

If you would like to save your cart for later edits, after adding to cart, click 

Then name the cart you would like to save.



Use a Saved



When you click Use, the message below will appear. This message is explaining that your saved cart will become your active cart and the ship to address from the saved cart will be applied.

If you were previously working in an active cart, you must save it before using another cart or the items you are currently working on will be deleted.

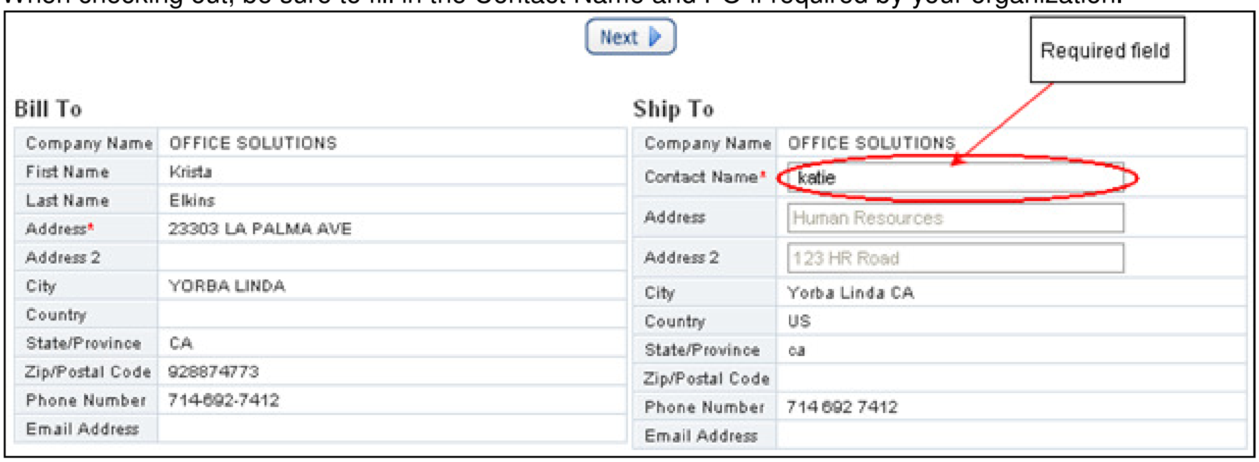
OS Express Quick Reference Guide

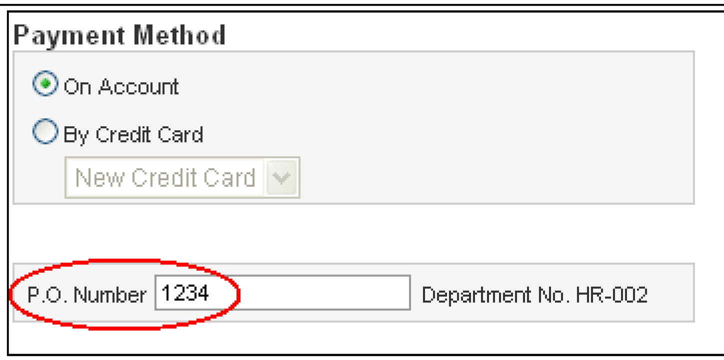
Your Order

Click **View Cart** to see items in your current order.
To continue shopping: Click the **Continue Shopping** button.
Continue to add items to your cart through **Search, Quick Order** or from **Favorites Lists**.
To modify: Change the quantities and click **Update Cart.**
To submit order: Click **Checkout.** Complete required fields, click **Next,** review information and click **Submit.**

Checkout

When checking out, be sure to fill in the Contact Name and PO if required by your organization.





When in Checkout, you still have the opportunity to edit your cart. Be sure the required fields are filled out which will allow you to edit your cart then click Update.

Thank You for Shopping OS Express!