

SAN DIEGO Community College District Be. Belong. Become.

PEOPLESOFT USER HANDBOOK PURCHASING & CONTRACT SERVICES

June 10, 2025

Revised

SAN DIEGO COMMUNITY COLLEGE DISTRICT PEOPLESOFT USER HANDBOOK PURCHASING & CONTRACT SERVICES

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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 (httPeopleSoft://www.sdccd.edu/about/departments-and-offices/business-technology-services-division/business-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.

Kelly Rosas Manager, Business 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 or any services not approved).

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

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 charges

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.

All CAL-Card statements must be submitted to District Accounts Payable by the 4th of each month via payment request.

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 10** 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?

If the intended supplier does not exist in PeopleSoft, a new Supplier ID number will need to be established. To establish a new supplier, the requestor must first send the blank SDCCD Supplier Application form to the supplier for their completion and request an IRS form W-9 from the supplier.

Use the following link to access the supplier intake form:

httPeopleSoft://www.sdccd.edu/about/departments-and-offices/business-technology-servicesdivision/business-services/purchasing-vendors/forms.aspx

Upon completion, the supplier shall return the two documents to the requestor. The requestor will review the documents for completeness, accuracy, and legibility. If incomplete, inaccurate or illegible, the requestor will return the document(s) to the supplier for revision. If complete, the requestor enters the supplier's information (from completed documents) into the PeopleSoft supplier database, and upload both forms as a combined .pdf document in the supplier's profile.

**NOTE: All foreign suppliers must first be TIN matched by Accounts Payable prior to approval and entry into PeopleSoft. Initiator/requestors must first submit the completed Supplier Application and W8 forms to purchasing. Purchasing will forward the forms to Accounts Payable for review and approval. Accounts Payable will perform a TIN match and notify Purchasing if the supplier is approved to move forward or if additional information is required. Once approved, Purchasing will notify the requestor to enter the supplier's information into the PeopleSoft supplier database.

After input by department, email notification is sent to Purchasing and Contract Services, at <u>supplierintake@sdccd.edu</u>, who will review the data and respond accordingly.

Once the supplier is approved, the supplier may be used when drafting a requisition. For instructions on how to set up a supplier in PeopleSoft, please refer to the step-by-step tutorial that starts on **page 10** of the PeopleSoft User Handbook.

Please note that if a supplier is set up for services, the supplier will need to be TIN matched through the IRS TIN matching process by District Accounts Payable. The TIN matching process is scheduled each week on Tuesday and Thursday afternoons. A supplier requiring TIN matching cannot be approved by Purchasing and Contract Services until District Accounts Payable has verified the suppliers IRS status.

Please allow ample time for supplier approval when TIN matching is required.

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 Procurement Specialist.

The following items, if \$5,000 or less, no longer need to be processed through requisitions but can be paid via the online payment request process in PeopleSoft:

- Subscriptions
- Non-Software licensing
- Membership fees
- Sponsorship PeopleSoft/Advertising
- Fees for Street Fairs/Outreach /Local promos
- Deposits for events which meet the above criteria

The purchase requisition for the requested services should be completed through the workflow approval process in PeopleSoft. A copy of the draft agreement must be uploaded with the purchase requisition. When the purchase order is completed, the Procurement Specialist will upload the completely executed agreement in PeopleSoft. See Board Policy AP 6330.

See pages 39 and 40 for the BPO 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.

****NOTE: Freight** must be added as a separate line item using **Category Code 962-86** and **DL** (**Dollar**) should be selected for the **Unit of Measure** on that line. (i.e., if the freight cost is \$25 that will be the **Quantity** and the **Price** will always be a \$1.00).

See page 38 for instructions on how to enter a freight line.

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? Procurement Specialists 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 Procurement Specialist will receive the requisition once routed to their worklist. All orders that exceed current bid threshold as provided by the Board of Governors of the California Community Colleges as required by Public Contracts Code Section 20651(d), may require competitive bidding. If a cooperative contract is being utilized for the goods and/or services, the Governing Board must approve the contract before the work begins, under District Board Policy 6340. The Procurement Specialist will review the requisition for the following: complete description; is the cost within current thresholds; was the correct category code used; are there any assets on the order and have they been correctly identified within the PeopleSoft system; is the correct supporting documentation attached; is the supplier suggested the best supplier for the procurement.

Following the review and other Purchasing and Contract Services actions, the Procurement Specialist 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 Procurement Specialist will move the purchase requisition back to the requestor. The Procurement Specialist 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 Procurement Specialist 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 Procurement Specialist 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 27** of the PeopleSoft User Handbook.

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 directly with each Business Office, 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 the Purchasing and Contract Services Department as needed.

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 one of the purchase requisition. If the purchase requisition exceeds \$20,000, three quotes are needed. Each quote must be uploaded as a separate attachment on line one of the purchase requisition. Please refer to **page 41** of the PeopleSoft User Handbook.

9. How do I create a Blanket Purchase Order?

Please refer to the step-by-step tutorial on how to enter a requisition as a "**Blanket**" requisition that starts on **page 39** of the PeopleSoft User Handbook.

10. Can I create a Blanket requisition for supplies?

Blanket Purchase Orders are intended for service renewals, maintenance service agreements, rental services, professional services, and subscriptions/memberships.

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 purchase 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. Click on any of the highlighted icons to obtain additional information.

This area will also show whether or not the purchase order has been dispatched to the supplier.

12. How do I check the balance on a Blanket Purchase Order?

To check the balance of a **Blanket Purchase Order** 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 purchase requisitions and purchase orders being processed. See the **ARMA Rules** on **pages 76 and 77** of the PeopleSoft User Handbook. 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. This information should be entered in the **Requisition Comments and Attachments** section of the requisition and all three boxes at the bottom of the box should be checked.

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

Submit a purchase requisition within PeopleSoft and attach a completed Request for Contract form with all supporting documentation. This information will route to the Purchasing and Contracts office for review and processing.

All agreements and contracts related must be signed by an authorized signatory for the annual District Signature Authority delegation listed under AP 6150.1.

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 Procurement Specialists use techniques that maximize cost savings, take into consideration availability, and ensure full and open competition where practicable. For some products, the District may utilize suppliers that have volume-based purchase agreements.

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

Yes. All purchase orders 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 Procurement Specialist prior to completing a purchase requisition to confirm that a requisition is needed. Once approved and processed, the purchase order will then be updated and the change order will be dispatched via email to the supplier, if needed. Please refer to the step-by-step tutorial for end users regarding change orders that start on **page 49** of the PeopleSoft User Handbook.

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

All goods must be delivered to the campus **Stockroom and or Central Distribution Center**. **DO NOT SHIP ITEMS TO YOUR HOME ADDRESS.**

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 purchase requisition as the Central Distribution Center (CDC). The CDC Ship To location code is **DISCDC0100**.

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 $\underline{48}$ <u>hours</u> 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 48** of the PeopleSoft User Handbook 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 Board Policy AP 6330.16.

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

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 Procurement Specialists 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 CAL-Card usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current form to be completed and have it 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. See Board Policy 6330, AP 6330.14.

23. What is SAM.gov registration?

Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

For Board Policy reference, click here: <u>https://www.sdccd.edu/about/leadership/board-of-trustees/</u>

board-policies/index.aspx

Thank you for your contributions to this FAQ section! Please e-mail us with questions at <u>purchase@sdccd.edu</u>.

PEOPLESOFT (PEOPLESOFT) SUPPLIER APPLICATION PROCESS

When a requestor decides to engage a 'new supplier' to purchase future products or services the requestor 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 Application form and IRS W-9 form is required as the initial step by the requestor (*It is recommended that these two blank forms be forwarded by the requestor to the supplier to complete (supplier has all the necessary information, first hand).

Use the following link to access the most current forms:

Forms - Purchasing | San Diego Community College District

Upon completion, the supplier shall return the two forms to the requestor. The requestor will review the forms for completeness, accuracy, and legibility.

If incomplete, inaccurate or illegible, the requestor will return the form(s) to the supplier for revision.

If complete, the requestor will perform the data entry into PEOPLESOFT from the completed forms.

The supplier's W-9 and Supplier Application forms are uploaded in the supplier's profile for filing purposes and access by both Accounts Payable (AP) and Purchasing.

Thereafter, a Supplier ID is issued within PEOPLESOFT. Enter that 10-digit Supplier ID number in the box (top right) of the Supplier Application form.

The data as entered will remain in an 'unapproved' status within PEOPLESOFT until purchasing is notified and reviews and approves the content.

The requestor then emails <u>supplierintake@sdccd.edu</u> requesting approval by Purchasing. Enter ONLY the supplier name and supplier ID number in the subject line of the email.

Purchasing will review and notify the requestor via email when the supplier is approved.

Thereafter, the requestor may obtain a quote and draft the requisition within PEOPLESOFT, including the now approved supplier (ID).

Purchasing is responsible for reviewing the data entry performed by the requestor and either approving in PEOPLESOFT or sending the data back to the requestor for revision.

The submitted W9 form is also (only) reviewed by Purchasing for completeness. No decision or recommendation is made by Purchasing as to the actual tax status of the named supplier.

A cursory review is then performed by Purchasing as to the W9 content. The purpose of this task is to identify the possibility of the named supplier, individual or named partnership as potentially qualifying for Federal 1099 tax status. Purchasing reviews 1099 supplier status for analysis and determination by A/P staff. Purchasing will notify A/P if a new supplier needs to be TIN matched prior to approval.

For assistance regarding the supplier process, 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 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 *i* in the top right of the screen. Then click the **Menu** icon and use the following navigation:

Suppliers > Supplier Information > Add/Update > Supplier





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

Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

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.

← Payables Operations	Supplier Infor	mation	<u> </u>	¢ Ĵ ; @
Supplier Information				New Window
Find an Existing Value		⊕Add a New Valu	e	
✓ Search Criteria Enter any information you have and click	Search. Leave fields blank for a list of all values.			
Recent Searches Choose fro	n recent searches 🗸 🖉 📮 Saved Se	earches Choose from saved searches	• //	
SetID	= v SHARE Q			
Supplier ID	contains 🗸			
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Short Supplier Name	begins with 🖌			
Our Customer Number	begins with 🖌			
Supplier Name	begins with 🖌			
∧ Show fee	ver options			
🗌 Case Se	nsitive 🗌 Include History 📄 Correct History			
s	Clear			

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 PeopleSoft 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 PEOPLESOFT with the exception of an employee or student. To add an Employee/Student, see page 15.

	← Payables Operations Supplier Information	$\hat{\Box}$	Q	Û	:	Ø
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	Find an Existing Value					
	✓ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.					
	Recent Searches Choose from recent searches Saved Searches Choose from saved searches	• 0	P			
	SetID = V SHARE Q					
	Supplier ID begins with •					
	Persistence = v					
	Short Supplier Name begins with Q Q					
	Our Customer Number begins with V Q					
	Supplier Name begins with Q					
	∧ Show fewer options					
	Case Sensitive Include History Correct History					
	Search					



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.

← Payables Operations	Supplier Information	۵	Q	Û	: Ø
Supplier Information					New Window-
Add a New Value		Q Find an Existing Value]		
*SetID SHARE Q *Supplier ID NEXT *Persistence Regular v					
Add					

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 (000xxxxxx) 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.

← Payables Operations	Supplier Information	۵	Q	Û	: (୭
Supplier Information					New Windo	-WC
Add a New Value		$\ensuremath{\mathbb{Q}}\xspace$ Find an Existing Value]			
*SetID SHARE Q *Supplier ID NEXT *Persistence Regular +						
Add						

Open the **IDENTIFYING INFORMATION** tab and complete all fields marked in **<u>Red</u>** below:

Supplier Name – Enter the Business Name (alpha only) from Line 1 of the W-9 form. If both line 1 & 2 are populated, enter line 1 for the Supplier Name and then enter line 2 under Payment/Withholding Alt Names in the Address tab.

If entering an individual's name, enter the first name, middle initial, and last name with no commas.

- Supplier Short Name Enter the first 10 characters of the supplier's name, alpha only, NO SPACES.
- Classification Select the appropriate classification for the Supplier. (Note: HCM stands for Human Capital Management and this is selected for Human Resources related suppliers)
- Check for Duplicate Click this to verify if the supplier is already active in PEOPLESOFT.
- Additional ID numbers Click on and expand the Additional ID Numbers tab to enter the Tax ID.

Address		
SetID	SHARE	*Supplier Name
Supplier ID	NEXT	Mithholding
*Supplier Short Name		✓ Watholding ✓ Open For Ordering
*Classification	Outside Party T	Check for Duplicate
HCM Class	T	*Supplier Audit Default •
*Persistence	Regular •	Supplier Audit Template ID SDCCD
*Supplier Status	Approved •	<u> </u>
	Expand All	**NOTE: If the supplier is a duplicate,
Supplier Relationships		use the previous Supplier ID and
	Corporate Supplier	cancel the current one. If you
Corporate SetID	SHARE	contact the Purchasing Department
Corporate Supplier ID	NEXT	to inactivate the duplicated ID.
Create Bill-To Customer		
	Create Bill To Customer	
Supplier Rating		
Supplier Logo		
Additional ID Numbers		
Duplicate Invoice Settings		
Pupiloate involce Settings		
Government Classifications		
Government Classifications Standard Industry Codes		
Government Classifications Standard Industry Codes Additional Reporting Elements		
Government Classifications Standard Industry Codes Additional Reporting Elements Comments		
Government Classifications Standard Industry Codes Additional Reporting Elements Comments Expand All Collapse All		
Government Classifications Standard Industry Codes Additional Reporting Elements Comments Expand All Collapse All Save Notify		Add Jupdate/Display Include History

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 (TIN)** 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.

Cu	istomer SetID	SHARE Q	Customer ID	Q	Our Customer Number
D Numbe	rs		Personalize Find View All 🗗 🔜	First ④ 1 of 1 🕑 Last	ISO and SEPA Information
pe	SetID	ID Number	DUNS Number		

Click on the **ADDRESS** tab and complete the fields marked in **<u>Red</u>** 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 the type of address for each sequence in the Description field (i.e., mailing address or remit address etc.).
 - C/O If an address has a C/O it will need to be entered twice. Once with the C/O and once without. More information on entering an address with a C/O can be found on page 18.
- Address 1 Re-enter the first line of the supplier address and then complete with City, State and Postal.
- ★ **NOTE: A Physical address is required for all new suppliers and the W9 form must include a physical address. We cannot accept a PO BOX on the W9 form.
- Email ID (REQUIRED) Enter the supplier's email address (not the web address) where the Purchase Order will be dispatched to. Ensure that the email address is a current and 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 20** for instructions on how to enter the additional **Remit** address.

lentifying Information Address	Contacts Location Cus	tom					
SetID SHARE	Short Supp	lier Name	Supplier				
upplier Address				I	Find View Al	l First 🕚	1 of 1 🕑 Las
Address ID 1 Description 3375 CAMIN	O DEL RIO S			+ -			
Details				Fin	d View All	First 🕙 1	of 1 🕑 Last
Effective Date 10/02/2018	E	Effective Status Activ	e v	+ -			
Country USA Q U	Inited States						
Address 2]					
Address 3]					
City SAN DIEGO)						
County		Postal 92108]				
State CA	California						
Email ID ENTER A VA	ALID EMAIL ADDRESS HERE						
Payment/Withholding Alt	Names						
Phone Information			Personalize	Find View All 🖾	0 🛃 F	irst 🛈 1 of 1	E Last
*Туре	Location	Prefix	Telephone		Extension	1	
Business Phone 🔻		619	388-6562				+ -

To add an address with C/O information, click on the **Plus Sign (+)** to the top right of the screen in the **Supplier Address** field to create an additional **Address field** and complete the following fields marked in **Red** below:

- **Description** Enter C/O and then the type of address (i.e., mailing address or remit, etc.).
- ✤ Address 1 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.

dentifying Information Address	Contacts Location Custo	m				
SetID SHARE Supplier ID NEXT	Short Supplie	er Name	Supplier			
Supplier Address				Find	d View All First	🖲 1 of 1 🕑 Las
Address ID Description C/O M	lailing					
Details				Find 1	View All 🛛 First 🕚	1 of 1 🕑 Last
Effective Date 10/02/2018	31	Effective Status Active	¥	+ -		
Country USA Q U Address 1 3375 CAMIN Address 2 Address 3 <u>City</u> SAN DIEGO	Inited States					
County <u>State</u> CA Email ID ENTER A VA	California	Postal 92108				
Payment/Withholding Alt	Names					
Phone Information			Personalize F	Find View All 💷	📕 First 🛈 1 o	f 1 🕑 Last
*Туре	Location	Prefix	Telephone		Extension	
Business Phone 🔻		619	388-6562			+ -

If both line 1 & 2 of the W9 are populated, use the Payment/Withholding Alt Names section of the Address tab to make note of the additional name.

Put the name from line 1 of the W9 as Name 1

Identifying Information	Address Contacts Lo	cation Custom		
SetID SHAF Supplier ID NEXT	RE .	Short Supplier Name	Supplier	
Supplier Address				Q I I II View All
Address ID Description	1			+ -
Details				Q I I III I I I I I View All
Effective Date	01/10/2024	Effective Status Active	•	+ -
Country	USA Q United States			
Address 1				
Address 2				
Address 3				
County		Postal		
State	Q			
Email ID				
▼ Payment/Withhold	ling Alt Names			
Payment Alternate	name			
	Name 1			
	Name 2			

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 <u>Red</u> below:

- ✤ Description Enter REMIT ADDRESS.
- ✤ Address 1 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.

entifying Information Address Contacts	Location Custom		
SetID SHARE Supplier ID NEXT	Short Supplier Name	Supplier	
upplier Address		Fin	l View All First 🛈 1 of 1 👀 La
Address ID 1			
Details		Find	√iew All First 🕚 1 of 1 🕑 Last
Effective Date 10/03/2018	Effective Status Active	,	
Country USA Q United States			
Address 2 Address 3			
City County	Postal		
State Q			
Payment/Withholding Alt Names			
Phone Information		Personalize Find View All 🔄	First 🕚 1 of 1 🕑 Last
*Type Location	Prefix	Telephone	Extension
Business Phone 🔻			•

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

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

tifying Information <u>A</u> ddress Contacts	Location Custom		
SetID SHARE	`		
Supplier ID NEXT	Short Supplier Name	Supplier	
pplier Contact		Find View A	ll 🛛 First 🕚 1 of 1 🕑
Contact ID 1 Description			
)etails		Find View All First	🕚 1 of 1 🕐 Last
Effective Date 10/03/2018			+ -
Effective Status Active			
Туре	Y		
Name			
Title			
Address			
Internet http://	View Internet Address		
Email ID			
Phone Information	Personalize Fin	d 💷 🔣 🛛 First 🕚 1 of	1 🕑 Last
*Type Prefix	Telephone	Extension	
Business Phone 🔻			± =

Click on the **LOCATION** tab and complete the fields marked in <u>**RED**</u> 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.

Identifying Information Address Contacts	ocation Custom	
SetID SHARE	N I I I I I I I I I I I I I I I I I I I	
Supplier ID NEXT	Short Supplier Name	Supplier
A supplier location is a default set of rules which define	how you conduct business with a supplier.	
Location		Find View All 🛛 First 🕚 1 of 1 🕑 Last
*Location MAIN	Default	RTV Fees Attachments (0)
Details		Find View All First 🕚 1 of 1 🕑 Last
*Effective Date 10/03/2018	Effective Status Active	• + -
		Expand All Collapse All
Options Payables	Procurement> Sales/Use Tax	1099
Additional ID Numbers		
▶ Comments		
Internet Address		
▶ VAT		
Expand All Collapse All		

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

Tax Options		×
		Help
SetID S	SHARE	Location MAIN
Supplier ID	NEXT	Description
Short Supplier Name		
Supplier Name		
Sales/Use Tax Appl *Sales/Use Ta *Sh	Alicability ax Applicability Sales Tax Non Taxable Sales Tax Use Tax	Ultimate Use Code
▼ Sales Tax and U	Jse Tax Options	
Sales Tax Tolerand	ce	
*Sales	s Tax Tolerance Default from Higher Level Currency Code Rate Type Q	Amount 0.000 Percent 0.00

×

Click on the IDENTIFY Attach the Sup Click Description: S Select OK to a Summary	VING INFORMATION tab and on plier Application Form AND on Attachments -> Add attach SUPPLIER INTAKE W9 save	complete the W9 as <u>ONE</u> p ment -> Sele	fields marked in <u>RED</u> b odf file. oct the file from your co	below: mputer	
SetID S Supplier ID 0 *Supplier Short Name V *Classification C HCM Class *Persistence F *Supplier Status A	HARE D03003909 Y AI INC IVY AI INC-001 Dutside Party • Regular • Approved • Expand All	*Sup Addit Check for Duplicate	oplier Name IVY AI INC ional Name Withholding Withholding VAT Registration *Supplier Audit Defau Supplier Audit .	It v Template ID SDCCD	TEMPLAT
Supplier Relationships	Supplier	Attachment			×
SetID SHARE	Supplier ID 0003003909 IVY AI INC		i¶ ¶ 1-1 c	f1 • 🕨 🕨	Help
File Name	Description	User	Name	Date/Time Stamp	
IVY_AI_INC_SI_W9.pdf Adding large attachments can take before adding large attachments.	SUPPLIER INTAKE W9	3330003848 save the transaction	Baylee McGuire	06/12/2024 2:33:40PM	
Add Attachment					

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.

Identifying Information	Address	<u>C</u> ontacts	Location	C <u>u</u> stom]				
*Supplie *	SetID Supplier ID r Short Name Classification HCM Class *Persistence	SHARE NEXT Outside Pa	rty		•	Check	*Supplier Name Additional Name for Duplicate	Withholding Withholding Vopen For Ordering VAT Registration *Supplier Audit Default Vsupplier Audit	Template ID SDCCD TEMPLAT
*51	ipplier Status	Unapprove	d		Ex	pand All	Collapse All	Attachments (0)	
Supplier Relationship	S								
Co	orporate SetID te Supplier ID	Corpor SHARE NEXT	ate Supplier				InterUnit Supplier I	InterUnit Supplier D Supplier Hierarchy	Q
Create Bill-To Custor	ier								
		Create	Bill To Custo	omer					
Supplier Rating									
Supplier Logo									
Additional ID Numb	pers								
Duplicate Invoice	Settings								
Government Clas	sifications								
Standard Industry	/ Codes								
Additional Report	ting Element	s							
▶ Comments									
Expand All	Collapse A	I							

🖫 Save 🖹 Notify

🛃 Add 🖉 Update/Display

After establishing the Supplier in People Soft, email <u>supplierintake@sdccd.edu</u> for approval.

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

To make changes to an existing supplier's profile, email a completed **Supplier Intake Form** indicating the changes to <u>supplierintake@sdccd.edu</u>. All edits to a supplier's profile must be completed by the **Purchasing and Contract Services Department**.

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; for 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 purchase order will be dispatched to.
- Appropriate chartfield and category code for the expenditure.
- Delivery location, end location and departmental contact information.
- All documents, such as quotes, pictures, agreements, etc. are in one file for attachment to the requisition
- Request for contract form and supporting documents for contract request

Things to Remember

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 Procurement Specialists 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 CAL-Card usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current form to be completed and have t h e f o r m 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 see Board Policy 6330, AP 6330.14.

- BLANKET ORDERS: Blanket orders are intended for renewals, maintenance service agreements, rentals, professional services, and subscriptions/memberships.
- 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**.
- SHIPPING/FREIGHT: Add as a separate line item on the purchase requisition. Use Category Code 962-86 and select DL (Dollar) for the Unit of Measure on that line. See page 38 for instructions on how to enter the freight line.
- SALES TAX: DO NOT add Sales Tax to the purchase requisition; tax will be allocated to the purchase order automatically. Please ensure that the chartfield used has sufficient funds to allocate tax.
- PAYMENT REQUESTS: Payments for items such as those below \$5,000 or less, no longer need to be processed through purchase requisitions but can be requested via online payment request through PeopleSoft with appropriate backup documentation. These payment requests will route through the usual non-travel workflow for the general ledger string being used to cover the cost of the items.
 - Subscriptions
 - Non-Software licensing
 - Membership fees
 - Fees for Street Fairs/Outreach/Local promos
 - Deposits for events which meet the above criteria

✤ AGREEMENTS: To request an agreement and/or contract, please download the Request for Contract form from the SDCCD website

(https://www.sdccd.edu/departments/business/purchasing/forms.aspx). Complete the form and obtain the necessary supporting documentation as identified on the Request for Contract form. Enter a purchase requisition into PeopleSoft and attach the complete Request for Contract Form with supporting documentation. The Procurement Contract Specialist will review the request, assure accuracy of required documents and generate the contract document for required signatures. The signature process will route through DocuSign. Once the contract has been fully executed, a final copy will be attached to the Purchase Order and dispatched via email to the supplier.

**No more payment requests for any type of agreement.

****NOTE:** If there is an agreement that is particularly complex, or if you have questions prior to requisition entry, please feel free to forward the questions to the Procurement Specialist at any time.

VEHICLES: When entering a requisition for a vehicle, including utility carts, trailers, and any vehicle that will be used on a public road, ensure the following language is included. Also note, all utility vehicles must be properly equipped to be street legal. The suppliers will know what equipment is required, but includes horn, seat belts, brakes, lights and license plates.

PLEASE CONTACT OUR DISTRICT'S CENTRAL RECEIVING DEPARTMENT AT LEAST 24-HOURS IN ADVANCE TO COORDINATE DELIVERY AND INSPECTION. THE VEHICLES MUST BE DELIVERED TO CENTRAL RECEIVING FOR INSPECTION AND ACCEPTANCE.

 CENTRAL RECEIVING: (619) 388-1180
 9315 HILLERY DRIVE SAN DIEGO, CA 92126

THE BILL OF SALE AND CERTIFICATE OF ORIGIN (MSO) MUST BE PROVIDED AT TIME OF DELIVERY.

THE SAN DIEGO COMMUNITY COLLEGE DISTRICT WILL REGISTER THE VEHICLES WITH DMV AS CALIFORNIA EXEMPT.

THE VEHICLES MUST BE DELIVERED WITH A FULL TANK OF GAS/FULL CHARGE AND ONE SPARE KEY.

A PURCHASE ORDER WILL BE ISSUED FOR THE VEHICLES REFLECTING NET-30 TERMS AND INVOICING INSTRUCTIONS. PAYMENT WILL NOT BE MADE UPON DELIVERY.

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, Procurement Specialist, 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.

PeopleSoft through can be accessed 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.



To access the Create Requisition screen, click on the Finance Dashboard icon.									
SDCCD		Welcome to mySDCCD	â	Q	2	Ø			
Employee Dashboard	Einance Dashboard	<							

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

- ✤ eProcurement
- ✤ Requisition





SDCCD	All	Search in All Category		Q	∴ : Ø
Payables Operati	ons ~	an sana sana ang ang ang ang ang ang ang ang ang		NavBar: Menu	0
	Supplier 360	Accounts Payable WorkCenter	Match Exceptions You are not authorized for this page.	Recently Visited Pro	Administer Procurement Buyer Center Manage Requisition Approvals
		Domie	tion		Manage Requisitions My Profile Procurement Card Center Reports Requisition
← Payables Operations		Requisi	uon	L	
Requisition Settings Business Unit	DIS01 Q	District Operations Bid No/Q	uote		New Window Personalize Page -
*Requester	AMURILLO001	Azucena Murillo Pri	ority Medium 🗸		
*Currency	USD		Custom Fields		
Default Options 👔					
Override	If you select this option, the defaults spe fields.	cified below will be applied to requisition lines when there	fields,only non-blank values are assigned.		
Line Defaults 👔					
Supplier Supplier Location Buyer	Q Q	CategoryQ Unit of Measure EAQ			
Shipping Defaults					
Ship To Due Date		Add One Time Address Attention			
Distribution Defaults					
SpeedCha	rt				
Accounting Defaults		Personalize Find r	🛛 📕 🛛 First 🕢 1 of 1 🕟 Last		
Chartfields1 Details	Asset Information		-		
Dist Percent	Location GL Unit	Fund Dept Product Account	nt Oper Unit PC Bus Un		
1	DIS Q DIS01	Q Q Q Q Q	Q Q		

OK Cancel

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

Below is the **Requisition Settings** page where all the information contained in the requisition header is entered. Complete all fields marked in <u>RED</u>, except for the Procurement Specialists as they no longer will be assigned by location, now they will be assigned by category code. See details for each field below.

			4			Distric	t Operatio	ons			Bid N	lo/Quote			
	*Requester	KGOMEZ			Q	Kristin	a Gomez					Priority	/ledium	1 ▼	
	*Currency	USD													
efault Opt	tions 🕐														
O Default	1	lf you select t fields.	his option	, the defau	Its spec	cified be	elow will k	be app	lied to re	quisiti	on lines when th	ere are no p	oredefin	ned values for the	se
Overric	le	lf you select t	his option	, the defau	lts spe	cified be	elow will o	overrid	e any pr	edefin	ed values for the	ese fields,on	ly non-	blank values are	assigne
ne Defaults	(?)														
Note: The	information be	low does not	t reflect t	he data in	the sel	lected i	requisitio	on line	s. When	the '(OK' button is cl	icked, the d	lata en	tered on this pa	ae will
the data i	n the correspor	iding fields o	n the sel	ected lines	s that a	are avai	ilable for	sourc	ing.						
	Supplier		C				Cat	tegory			Q				
Sup	plier Location			0		U	nit of Me	asure	EA		0				
											~				
	Buyer		0												
ipping Defa	ults														
	Ship To	DIS		Q					Add	One Tir	me Address				
	Ship To	DIS		Q til			At	tentio	Add (One Tir	me Address				
	Ship To Due Date	DIS		Q 11			At	tentio	Add (One Tir	me Address				
stribution D	Ship To Due Date Jefaults	DIS		Q İ			At	tentio	Add (One Tir	me Address				
stribution D	Ship To Due Date Defaults SpeedChar	DIS t	Q	Q			At	tentio	Add (One Tir	me Address				
stribution D	Ship To Due Date Defaults SpeedChar ting Defaults	DIS	Q	Q			At	tentio	Add (Dne Tir	me Address	d 🖓 属	F	First 🛈 1 of 1	East
stribution D Accoun Chartfie	Ship To Due Date Defaults SpeedChar ting Defaults Ids1 Details	DIS t	Q				At	tentio	Add (One Tir	me Address	d 🖓 🛄	F	First ① 1 of 1	🕑 Last
stribution D Accoun Chartfie Dist	Ship To Due Date Defaults SpeedChar ting Defaults Ids1 Details Percent	t	Q	Q B B GL Unit	Fu	Ind	At	tentio	Add (n	Dne Tir	me Address ersonalize Fin Account	d 🖓 🛄	F	First ④ 1 of 1	E Last
Stribution D Accoun Chartfie Dist	Ship To Due Date Defaults SpeedChar ting Defaults Ids1 Details Percent	t <u>Asset Infraction</u> DIS	ormation	Q B GL Unit DISO1	Fu	Ind	At Dept	etention P	Add C n	Dne Tir P	me Address ersonalize Fin	d 🖓 📑 Oper Unit	F	First ① 1 of 1 PC Bus Unit	Last Project
Stribution D Accoun Chartfie Dist 1	Ship To Due Date Defaults SpeedChar ting Defaults Ids1 Details Percent	DIS t <u>Asset Info</u> Location DIS	Q ormation	Q B CL Unit DISO1	<u>Fu</u>	Ind Q	At Dept	P Q Q	Add (P P	ne Address ersonalize Fin Account	d 🔄 🛄	F	First ① 1 of 1 PC Bus Unit	Last Project

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 the appropriate bid number or quote number.

Requisition Settings									
Business Unit DIS01 Q	District Operations	Bid No/Quote QUOTE# 1234							
*Requester KGOMEZ	Kristina Gomez	Priority Medium							
*Currency USD									
Click on Override in the Default Options field. By clicking Override , all of the information that is completed on the Requisition Settings page will transfer to the requisition.									

Requisition Settings

Business Unit	DIS01	District Operations	Bid No/Quote	QUOTE# 1234
*Requester	KGOMEZ	Kristina Gomez	Priority	Medium 🖌
*Currency	USD			
Default Options ?				
O Default	f you select this option, the defaults s ields.	pecified below will be applied to	o requisition lines when there are no	o predefined values for these
Override	f you select this option, the defaults s	pecified below will override any	predefined values for these fields,	only non-blank values are assigned.

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

Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

F	Requisition Settings								
	Business Unit	DIS01		District Operations	Bid No/Qu	QUOTE# 1234			
	*Requester	KGOMEZ	Q	Kristina Gomez	Prior	ity Medium 🗸			
	*Currency	USD	Supplie	er Search					
	Default Options (?)								н
		If you select this option, the		Supplier ID				Find	
	⊖ Default	fields.	1	Name	UNISOURCE			Reset	
				Name	ONICCONCE				
	Override	If you select this option, the	c	Short Supplier Name					
				Alternate Supp Name					
	Line Defaults (?)			City					
	Made The Information In	41-1		City					
	note: The information in replace the data in the c	this page does not reflect		Country	Q	State	\sim		
	replace the data in the e	streepending netue on the	1	Postal Code					
	Supplier		6 E	Enter search criteria to find	a supplier.				
	Puwor	~		Select Cancel					

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

Requisition Settings										
Business Unit	DIS01 Q		District Operations		Bid No/Quote	QUOTE# 1234				
*Requester	KGOMEZ	Q	Kristina Gomez		Priority	Medium 🗸				
*Currency	USD	Sup	plier Search							X
Default Options ?							Find			Help
O Default	If you select this option, the defau fields.		SU	Name UNISOURCE			Reset			
Override	If you select this option, the defau		Short Supplier Name							
Line Defaults 🕐			Anomato sup	City						
Note: The information in replace the data in the co	this page does not reflect the d orresponding fields on the seled		Post	Country	٩	State	~			
Supplier	Q	Sea	rch Results			Perso	nalize Find View All	2 🔣 🛛 Fi	rst 🕚 1-2 of	2 🕑 Last
Supplier Location	Q		Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
Shipping Defaults	Q	۲	0002004882	UNISOURCE WORLDWIDE INC	MAIN	PAPER PLUS	6815 FLANDERS DR	SAN DIEGO	CA	
Ship To	DIS	0	2 0002060188	UNISOURCE SOLUTIONS	MAIN	5010 SHOREHAM PL STE 110	5010 SHOREHAM PL STE 110	SAN DIEGO	CA	11 11
Due Date			Select Cano	cel						
Distribution Defaults										
SpeedChar	rtQ	_								

Next, indicate the **Category** which best defines the items that are being ordered. For a list of **Category Codes**, refer to **page 78**.

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.

Requisition Settings			
Business Unit	DIS01 Q District	Operations Bid No/Quote QUOTE# 1234	
*Requester *Currency	KGOMEZ Q Kristina	Gor Look Up Category	× Help
Default Options (?)		Note: You may either Search or Browse to look up the appropriate category for your special request.	
O Default O Override	If you select this option, the defaults specified bel fields. If you select this option, the defaults specified bel	Search Categories Search By Category FURNITURE Find	
Line Defaults (2)		Return	
Note: The information in replace the data in the co	this page does not reflect the data in the select presponding fields on the selected lines that a	ted re al and a second s	
Supplier	0002004882 Q	Category	
Supplier Location	MAIN Q. Un	t of Measure EA Q	
Buyer	Q	`	

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

equisition Settings							
Business Uni	DIS01 Q		District Operations	Look Up Category			
*Requester	KGOMEZ		Kristina Gomez				F
*Currency	USD			Note: You may either Searc	h or Browse to look up the appro	priate category for your special request.	
Default Options (?)				 Search Categories 			
O Default	If you select this option, the defaults specified below will be applied to req		eq Search By Description FURNITURE Find				
	neius.	las.		Categories	Personalize Find	View All 🖾 🔢 🛛 First 🕚 1-8 of 8 🕑 L	Last
Override	If you select this o	you select this option, the defaults specified below will override any pre-		Catalog	Category	Description	
Line Defaults ② Note: The information below does not reflect the data in the selected requisition lines. When		1 Non Catalog	420-04	Auditorium, Stadium, Team Seating Furniture and Portable			
the data in the correspo Supplier	nding fields on th	e selected lines th	at are available for sourcing.	2 Non Catalog	420-08	Cafeteria Furniture, Chairs and Tables Incl. Stacking Types	
Supplier Location	MAIN	Q Unit of Measure EA		3 Non Catalog	420-13	Childrens Furniture Incl. Stackable Types	
Chinping Defaulte		_~		4 Non Catalog	420-56	Library Furniture	
Shipping Delauits				5 Non Catalog	420-59	Lounge Furniture	
Ship To	DIS	Q	Add O	6 Non Catalog	425-20	Furniture: Classroom	
Due Date		31	Attention	7 Non Catalog	425-48	Furniture, Office	
Distribution Defaults	Jefaults		8 Non Catalog	493-05	LABORATORY FURNITURE		
SpeedCha	rt	Q					
Accounting Defaults				Browse Category T	Ггее		
Chartfields1 Details	Asset Informa	ation 💷		Return			
Dist Percent	Location	GL Unit	Fund Dept Product				

****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

Select DL (Dollar) for freight. See page 38 for instructions.

	DIS01 0			10.100	0110	TE# 1004		
Business Unit	DIGUT		District Operations	Bid N	lo/Quote	16# 1234		
*Requester	KGOMEZ	Q	Kristina Gomez		Priority Medi	um 🗸		
*Currency	USD							
					Look Up	Unit of Measure	3	
Default Options (2)								Н
ODefault	If you select this of fields.	ption, the defaults sp	ecified below will be applie	d to requisition lines when t	Unit of Meas	ure begins with 💉	•	
Override	If you select this o	ption, the defaults sp	ecified below will override	any predefined values for th	es Look Up	Clear	Cancel	Basic Lookup
ne Defaults 💮					Search Re	sults		
Noto: The information in	this page doos p	ot rofloct the data in	the colocted requisition	lines When the 'OK' butte	View 100	First 🕢	1-39 of 39	Last
replace the data in the co	orresponding field	is on the selected li	ines that are available for	sourcina.	Unit of Measu	re Description	Short Des	scription
					BA	BARREL	BARREL	
Supplier	0002004882	Q	Cotogony	105 10	1			
			Category	425-48	BF	BOARD FOOT	BOARD	FT
Access to a section	A RATE	6	Calegory	425-48	BF BG	BOARD FOOT BAG	BOARD I BAG	FT
Supplier Location	MAIN		Unit of Measure	425-48 C	BF BG BO	BOARD FOOT BAG BOTTLE	BOARD I BAG BOTTLE	FT
Supplier Location	MAIN		Unit of Measure	425-48 C	BF BG BO BX	BOARD FOOT BAG BOTTLE BOX	BOARD I BAG BOTTLE BOX	FT
Supplier Location Buyer	MAIN	© Q	Unit of Measure	EA Q	BF BG BO BX CD	BOARD FOOT BAG BOTTLE BOX CARD	BOARD I BAG BOTTLE BOX CARD	FT
Supplier Location Buyer pping Defaults	MAIN	@ q	Unit of Measure	EA Q	BF BG BO BX CD CS	BOARD FOOT BAG BOTTLE BOX CARD CASE	BOARD I BAG BOTTLE BOX CARD CASE	FT
Supplier Location Buyer pping Defaults	MAIN	@ Q	Unit of Measure	425-48 C	BF BG BO BX CD CS CT	BOARD FOOT BAG BOTTLE BOX CARD CASE CARTON	BOARD I BAG BOTTLE BOX CARD CASE CARTON	FT
Supplier Location Buyer pping Defaults Ship To	MAIN	Q Q	Unit of Measure	Add One Time Address	BF BG BO BX CD CS CT DL	BOARD FOOT BAG BOTTLE BOX CARD CASE CARTON DOLLARS	BOARD I BAG BOTTLE BOX CARD CARD CASE CARTON DOLLAR	FT I S
Supplier Location Buyer pping Defaults Ship To		Q Q Q	Unit of Measure	Add One Time Address	BF BG BO BX CD CS CT DL DR	BOARD FOOT BAG BOTTLE BOX CARD CARD CASE CARTON DOLLARS DRUM	BOARD I BAG BOTTLE BOX CARD CASE CARTON DOLLAR DRUM	FT I S
Supplier Location Buyer pping Defaults Ship To Due Date	MAIN DIS	Q Q B	Unit of Measure Attention	Add One Time Address	BF BG BO BX CD CS CT DL DR DZ	BOARD FOOT BAG BOTTLE BOX CARD CARD CASE CARTON DOLLARS DRUM DOZEN	BOARD I BAG BOTTLE BOX CARD CARD CASE CARTON DOLLAR DRUM DOZEN	I S
Supplier Location Buyer ipping Defaults Ship To Due Date	MAIN	Q Q B	Unit of Measure Attention	Add One Time Address	BF BG BO BX CD CS CT DL DR DZ EA	BOARD FOOT BAG BOTTLE BOX CARD CARD CARD DOLLARS DRUM DOZEN EACH	BOARD I BAG BOTTLE BOX CARD CASE CARTON DOLLAR DRUM DOZEN EACH	I S
Supplier Location Buyer pping Defaults Ship To Due Date stribution Defaults	MAIN DIS	Q Q III	Unit of Measure Attention	Add One Time Address	BF BG BO BX CD CS CT DL DR DZ EA FT	BOARD FOOT BAG BOTTLE BOX CARD CASE CARTON DOLLARS DRUM DOZEN EACH FOOT	BOARD I BAG BOTTLE BOX CARD CASE CARTON DOLLAR DRUM DOZEN EACH FOOT	I S
Supplier Location Buyer ipping Defaults Ship To Due Date stribution Defaults SpeedCha	MAIN DIS		Unit of Measure Attention	Add One Time Address	BF BG BO BX CD CS CT DL DR DZ EA FT GL	BOARD FOOT BAG BOTTLE BOX CARD CASE CARTON DOLLARS DRUM DOZEN EACH FOOT GALLON	BOARD I BAG BOTTLE BOX CARD CASE CARTON DOLLAR DRUM DOZEN EACH FOOT GALLON	I S
Supplier Location Buyer ipping Defaults Ship To Due Date stribution Defaults SpeedChar	MAIN DIS rt	Q Q IIII IIII	Unit of Measure Attention	Add One Time Address	BF BG BO BX CD CS CT DL DR DZ EA FT GL GR	BOARD FOOT BAG BOTTLE BOX CARD CASE CARTON DOLLARS DRUM DOZEN EACH FOOT GALLON GROSS	BOARD I BAG BOTTLE BOX CARD CARD CARD CARTON DOLLAR DRUM DOZEN EACH FOOT GALLON GROSS	I S

All Procurement Specialists are assigned by Category Code. End users will enter a category code and the system will route to the Procurement Specialist based on the code. The Procurement Specialist field should be left blank.

Please refer to **page 78** for the list of category codes.

Note: The information in replace the data in the o	n this page does n corresponding fiel	ot reflect t ds on the s
Supplier	0002004882	Q
Supplier Location	MAIN	Q

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 and Miramar, should be shipped to the Central Distribution Center using **Ship To Location DISCDC0100**. DO NOT SHIP TO YOUR HOME ADDRESS!

Business Unit DIS01 Q	District Operations E	Bid No/Quote
*Requester KGOMEZ	C Kristina Gomez	Priority Medium V
ISD		
~Currency 000	Lask La Obia Ta	
Default Options 🕐	LOOK UP Ship To	
Default If you select this option, the defau fields.	SetID SHARE	Help e no predefined valu
Override If you coloct this ention, the defau	Ship To Location begins with 🔻	Ide oply pop blopk w
in you select this option, the delad	Description begins with 🔻	ids,only non-blank va
Line Defaulte		
	Look Up Clear Cancel Basic Look	kup
Note: The information below does not reflect the data in the data in the corresponding fields on the selected lines	Search Results	, the data entered o
	Search Results	
Supplier 0002060188	View 100 First 1-42 of 42 CLast	
Supplier Location MAIN	Ship To Location Description	
Supplier Eocution mann	CCHAV Cesar Chavez Campus	
Buyer VWHITE Q	CEDCEMUUUU Cont. Ed Bldg CEM-RM UUUU	
	CIT City College Campus Receiving	
Shipping Defaults	CITODAU012 City College Bldg A - Rm 0012	
	CIT00B0202 City College Bldg B-RW 202	
Ship To DIS		
Due Date	DISODO0100 Dict Ofe Bide DO Rm 0100	
Due Date	DIS0D00105 Dist Ofc Bidg DO - Rm 0105	
Distribution Defaults	DIS0D00120 Dist Ofc Bidg DO - Rm 0120	
	DIS0D00125 Dist Ofc Bldg DO - Rm 0125	
SpeedChart	DIS0D00120 Dist Ofc Bldg DO - Rm 0120	
Accounting Defaults	DIS0D00210 Dist Ofc Bldg DO - Rm 0210	Eirst 4
	DIS0DO0260 Dist Ofc Bldg DO - Rm 0260	T LLA THOU O
Chartfields1 Details Asset Information	DIS0D00270 Dist Ofc Bldg DO - Rm 0270	
	DIS0D00275 Dist Ofc Bldg DO - Rm 0275	
Dist Percent Location GL Unit	DIS0DO300A Dist Ofc Bldg DO - Rm 300A	r Unit PC Bu
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.

Business Unit	DIS01 Q		District	Operations		Bid No	QUOTE	# 1234	
*Requester	KGOMEZ	0	Kristina	Gomez		F	Priority Medium	• •	
*Currency	USD								
Default Options 👔									
O Default	If you select this optic fields.	on, the defaults s	pecified bel	low will be app	lied to requisi	tion lines when the	ere are no predefi	ned values for the	se
Override	If you select this optic	on, the defaults s	pecified bel	low will overrid	e any predefi	ned values for thes	e fields,only non	-blank values are a	assigned
ne Defaults 😰									
Note: The information in replace the data in the co	this page does not r orresponding fields	eflect the data i on the selected	in the select lines that a	cted requisitio are available f	on lines. Whe	n the 'OK' button	is clicked, the c	lata entered on th	nis page
Supplier	0002004882	Q		Category	425-48	٩			
Supplier Logation	MAIN		Un	it of Monsuro	EA				
Supplier Education	MAIN	~	0.1	in or measure	LCA .	~			
Buyer	VWHITE	a	0.1	in or measure			,		
Buyer	VWHITE	a		int of measure			/		
ipping Defaults Ship To	VWHITE	 α 		int of measure	Add One 1	īme Address 🖌	/		
ipping Defaults Ship To Due Date		_ <		Attentio	Add One T	īme Address 🖌 GOMEZ/RM 27(/		
Suppler Locaton Buyer ipping Defaults Ship To Due Date stribution Defaults				Attentio	Add One T	īme Address 🖌	/		
Buyer Buyer Ship To Due Date Stribution Defaults SpeedCha		 α ₩		Attentio	Add One T	Time Address	/		
Buyer Buyer Ship To Due Date Stribution Defaults SpeedCha Accounting Defaults				Attentio	Add One T	Time Address		First 🕢 1 of 1 () Last
Buyer Buyer Ship To Due Date Stribution Defaults SpeedCha Accounting Defaults Chartfields1				Attentio	Add One T	Time Address		First 🕢 1 of 1 () Last
Buyer Buyer Ship To Due Date Stribution Defaults SpeedCha Accounting Defaults Chartfields1 Details Dist Percent		Q (Q () () () () () () () () () ()	Fund	Attentio	Add One T n [KRISTINA	Time Address) 🗿 🔜	First ④ 1 of 1 ④	E Last

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. ****Note: Ensure that Sales Tax is accounted for when splitting budgets.**

Accou	nting Defaults									Pers	sonalize Fir	nd 🖾		First 🕚 1 of 1	Last
Chartfi	elds1 Details	Asset Info	matio	n											
ount	Oper Unit	PC Bus Un	it	Project			Activ	vity			Affiliate		Fund Affil		
	2	٩ [Q				Q [Q		Q	Q	\rightarrow	+
4															Þ
Accour	ting Defaults								Pe	erson	nalize Find	🖾 📱	Fir	st 🕚 1-2 of 2	🕑 Last
Chartfie	elds1 Details	Asset Infor	matio	n 💷											
Dist	Percent	Location		GL Unit		Fund	Dept	Pr	roduct	Acc	count	Oper Ur	nit	PC Bus Unit	Project
1	50.0000	DIS	Q	DIS01				Q [Q		Q		Q	Q	
2	50.0000	DIS	Q	DIS01	Q	Q		۹ 🗆	Q		Q		Q	٩	

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 a monitor
- 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**.

Accounting	Defaults				Personalize Fir	nd 🖾 🔙	First 🛈 1 of 1 🕅	Last
Chartfields1	<u>D</u> etails	Asset Information						
AM Business Un	it	Profile ID		Capitalize	Cost Type	Description		
	-> (۹ 🗖	→ Q		Q			-

Click on the Special Requests link to enter all line items.

Request Options Search All Search Advance Enter search criteria or select from the menu on the right to begin creating your requisition. 	Checkout) 📜 O Lines	Settings	* My Preferences 🛛 🗱 Requisition	e /	💩 Hom	tina Gomez	ome
Enter search criteria or select from the menu on the right to begin creating your requisition. Image: Catalogs Browse Catalogs CATEGORY Image: Catalogs Browse Catalogs CATEGORY Image: Catalogs Browse Supplier Websites Office Solutions Punch Out Image: Catalogs Browse Supplier Websites Office Solutions Punch Out Image: Catalogs Create an Express Requisition Image: Special Requests Create a non-catalog request Image: Special Requests Create a non-catalog request Image: Special Requests Create and Submit Forms Image: Special Requests Special Requests Image: Special Requests Create and Submit Forms Image: Special Request Special	Advanced Searc	Search Ac				Search All T	Jest Options	
Special Requests Create a non-catalog request Forms Create and Submit Forms Favorites Browse Favorite Items and Servic Templates Forms Create and Submit Forms Request Services Fixed Cost Service Recently Ordered View recently ordered items and services Fixed Cost Service Variable Cost Service Time and Materials Desk Highlighters, Chisel Ti Liquid Coffee Creamer, Itali Plastic Cutlery. Heavyweight	'n	Express Item Entry Create an Express Requisition	Ę	Web Browse Supplier Websites Office Solutions Punch Out	(Catalog Browse Catalogs CATEGORY	criteria or select u on the right to y your requisition.	nter sea om the i egin cre
Templates ePro Services Recently Ordered Browse Company and Personal Templates Fixed Cost Services Desk Highlighters, Chisel Ti Fixed Cost Service Desk Highlighters, Chisel Ti Liquid Coffee Creamer, Frenc Time and Materials Liquid Coffee Creamer, Itali Plastic Cutlery, Heavyweight	ervices	Favorites Browse Favorite Items and Se		Forms Create and Submit Forms		Special Requests Create a non-catalog request		
Green Tea K-Cups, 24/Box More	and Ti enc li ht K	Recently Ordered View recently ordered items ar services Desk Highlighters, Chisel Ti Liquid Coffee Creamer, Free Liquid Coffee Creamer, Itali Plastic Cutlery, Heavyweigh Green Tea K-Cups, 24/Box More	I	ePro Services Request Services Fixed Cost Service Variable Cost Service Time and Materials	}	Templates Browse Company and Personal Templates	P	

On the **Special Requests** screen, appropriate information will need to be entered for each line of the requisition. All fields marked in <u>RED</u> below need to be completed:

- Item Description Please follow the ARMA Rule which is: Noun, Description, Manufacturer, and Model/Product Number. The noun is always first, followed by the description, manufacturer if applicable, and the model or product number as entered below. Only 35 characters will fit on this line. Include all remaining description details in the Additional Information box. See pages 76-77 for information on ARMA Rules.
- 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.

**NOTE: Freight - See page 38 for instruction on how to enter a separate line for freight.

When each line is completed, click on **Add to Cart** at the bottom of the screen. Note that there is a maximum of **50 line items** that can be entered per requisition.

**NOTE: For BLANKET requisitions, see pages 39 & 40, if not a BLANKET, skip pages 39 & 40.

Special Requests @

*Item Description	CHAIR, STEEL CASE, EASY	CHAIR, BLUE, W/CAST	ERS, PN 1234ABC	Ľ	
*Price	250.00		*Currency	USD	
*Quantity	1		*Unit of Measure	EA	Q
*Category	425-48		Due Date		31
Supplier					
Supplier ID	0002004882				
Supplier Name		UNISOURCE WORLD	WIDE INC	Suggest New	Supplier
Supplier Item ID					
Manufacturer					
Mfg ID	Q				
Manufacturer					
Mfg Item ID					
Additional Information					
					7
Send to Supplier	→ 🕑 Show at Receipt	→ Show a	at Voucher		
lequest New Item					
Request New Item	A notification will be sent to a	buyer regarding this nev	v item request.		

Freight must be added as a separate line item using **Category Code 962-86** and **DL (Dollar)** should be selected for the **Unit of Measure** on that line. (i.e., if the freight cost is \$25 that will be the **Quantity** and the **Price** will always be a \$1.00).

Special	Requests	?
---------	----------	---

Enter information about the non-catalog item you would like to order:

	FREIGHT		
*Price	1.00	*Currency	USD
*Quantity	25	*Unit of Measure	DL Q
*Category	962-86	Due Date	31
Supplier			
Supplier ID	0002002986 🔍		
Supplier Name	SOUTHLAND TECHNOL		Suggest New Supplier
Supplier Item ID			
Manufacturer			
Mfg ID	Q		
Manufacturer			
Mfg Item ID			
			Ľ
Send to Supplier	→ Show at Receipt	→ Show at Voucher	
Send to Supplier	→ Show at Receipt	→ Show at Voucher	/
Send to Supplier	A notification will be sent to a buy	→ Show at Voucher ver regarding this new item request.	
Send to Supplier Cequest New Item Request New Item Add to Cart	A notification will be sent to a buy	Show at Voucher	/
Send to Supplier Cequest New Item Request New Item Add to Cart o add additional line it	Show at Receipt A notification will be sent to a buy tems, follow the process above	Show at Voucher Yer regarding this new item request. Ye. Once all lines have been enter	red, click on Check
Send to Supplier Cequest New Item Request New Item Add to Cart To add additional line it at the top of the page t	A notification will be sent to a buy	Show at Voucher Yer regarding this new item request. Ye. Once all lines have been enter t – Review and Submit screen.	red, click on Check
Send to Supplier Request New Item Request New Item Add to Cart To add additional line it at the top of the page t	Show at Receipt A notification will be sent to a buy tems, follow the process abov o be directed to the Checkou	Show at Voucher Yer regarding this new item request. Ye. Once all lines have been enter t – Review and Submit screen.	red, click on Check
Send to Supplier Request New Item Request New Item Add to Cart To add additional line it at the top of the page t	A notification will be sent to a buy	Show at Voucher Ver regarding this new item request. re. Once all lines have been enter t – Review and Submit screen. Requisition Settings	red, click on Checko

**NOTE: SKIP PAGES 39 & 40 UNLESS THIS IS A BLANKET REQUSITION

Blanket requisitions are intended for renewals, maintenance service agreements, professional services, rentals, and subscriptions/memberships. Use the appropriate templates. See pages 72-74.

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

Item Description – Enter BLANKET ORDER only

Include appropriate template and 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, term of agreement, department and point of contact.
- 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.

Special Requests ②

Enter information about the non-catalog item you would like to order:

tem Details					
*Item Description	BLANKET				
*Price	4000.00		*Currency	USD	
*Quantity	1		*Unit of Measure	EA	Q
*Category	918-07	Q	Due Date		ET]
upplier					
Supplier ID	0002004892	Q			
Supplier Name	THE SAN DIEGO UNION			Suggest New	Supplier
Supplier Item ID]			
Nanufacturer					
Mfg ID		Q			
Manufacturer					
Mfg Item ID					
Additional Information					
ADVERTISING SERVICI PURCHASING DEPART JULY 1, 2020 - JUNE 30	ES MENT Use app , 2021 template i	propriate n this box.			Ę2
Send to Supplier		ipt> Show	at Voucher		
Request New Item					
Request New Item	A notification will be sent	to a buyer regarding this ne	w item request.		
Add to Cart					

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

Checkout - Review and Su Review the item information and submit th Requisition Summary	bmit ne req for approval.		* .	ly Preferences	🍀 Requisition Se	ttings			
Business Uni *Requester *Currency Cart Summary: Total Amount 4,000.00	t DISO1 Q r KGOMEZ r USD	District Operations	Bid I	lo/Quote QUOTE Priority Mediun	E# 1234				
Expand lines to review shipping and a	ccounting details			🕂 Add Me	ore Items				
Requisition Lines 👔									
Line Description	Item ID	Supplier The San Diego Union Tribune, LlC.	Quantity	UOM EACH	Price 4000.00	Total 4000.00	Details	Comments	Delete
Select All / Deselect All	Select lines to:	🗛 Add to Favorites	Add to Template(s)	🗍 Delete Se	elected	🖫 Mass Change			
After clicking on the Item Details and t	ne Details icon, hen click OK .	the following p	oop-up box will	appear.	Check the	e Amour	nt Only	box ur	nder
Line Details									
Line Details ②	, Line 1	P BLANKET					Line Sta	tus O	pen
Vitem Details (2)	Merchandise Amo Item Categ iginal Substituted I Descript Physical Nat	unt 4000.00 US ID ory 918-07 tem ion ure	D	~		۵	C RFQ I Devic Zero Amou Inspe	Required e Trackii Price Ind int Only ction Re	i ng licator quired
Click Yes on the Submit screen to	next pop-up me continue the rec	essage that ap quisition.	pears to be di	rected ba	ack to the	Checko	out – R	eview	and
JNION The quantity	will be set to 1 for a	Add More Ite	. The system will	reprice the	line. Contin	ue? (1015)	0,238))el	lete

Yes

No

40

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

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

****NOTE:** If the purchase requisition exceeds \$20,000, three quotes are required. Each quote must be uploaded as a separate attachment on line one of the purchase requisition; see below.

Checkout - Review and Sub	omit									
Review the item information and submit the	e req for approval.		*	/v Preferen	ces 🍀 Re	auisition Se	ettinas			
Requisition Summary					1200					
Business Unit	DIS01 Q	District Operations	Bid M	lo/Quote	QUOTE# 1234					
*Requester	KGOMEZ	C Kristina Gomez		Priority	Medium 🗸					
*Currency	USD									
Cart Summary: Total Amount 250.00 US	SD									
Expand lines to review shipping and ac	counting details			÷	Add More Items					
Requisition Lines 👔									•	
Line Description	Item ID	Supplier	Quantity	UOM		Price	Total	Details	Comments	Delete
▶ □ 1 क CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH		250.00	250.00	₽ŧ	🖗 Edit	Î
🗋 Select All / Deselect All	Select lines to:	🗛 Add to Favorites	🕼 Add to Template(s)	De De	elete Selected		🖫 Mass Change			
					То	tal Amour	nt 250.00 US	D		
Next, click on Add	Attachments	and select the	correct file from	n the	appropri	ate fo	older, then	click	Upload	I.
**NOTE: Click on t	he plus (+) sigi	n at the far righ	t to upload eac	h quơ	ote as a s	sepai	rate attach	iment.		

End Common				
Business Unit DIS01	Requisition Date Status	03/16/2021 Open		\backslash
Line 1				
Comments			Find	First 🕢 1 of 1 👋 Last
Use Standard Comments		Entered On:		+ -
1				<u>Ja</u> ¢£
Send to Supplier Add Attachments	Show at Receipt	Show at Voucher		

OK Cancel

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

Line Comment

	Status Open			
Line 1				
nments			Find Firs	t 🕢 1 of 1 🕑 L
Use Standard Comments	Entere	d On: 03/16/2021 2:54	4:24PM	+
[17 St
				5-6-
		wakelow inde		
Send to Supplier 🔶 St	how at Receipt 🛛 🔶 🗹 Show a	t Voucher		
Send to Supplier -> Solution	how at Receipt 🛛 🔶 🗹 Show a	t Voucher		
Send to Supplier SI Add Attachments	how at Receipt 🛛 🔿 🗹 Show a	t Voucher	V	
Send to Supplier SI Add Attachments Attachments Attached File	how at Receipt 🔶 🗹 Show a	t Voucher View	Send to Supplier	
Send to Supplier Add Attachments Attached File Unisource_Worldwide.pdf	how at Receipt Vser/Date Time KGOMEZ2021-03-16- 16.49.22.556	t Voucher View View	Send to Supplier	

**NOTE: DO NOT add Sales Tax as a line item. Sales Tax will be allocated to the purchase order automatically.

If additional lines need to be added, click on **Add More Items**, then follow the same process as above. There is a maximum of **50 line items** that can be entered per requisition.

In the **Requisition Comments and Attachments** box, enter the following information: **Quote Number, Date, Location, Department, Room Number, Point of Contact**, and **supplier email address**. Also enter any line(s) that are non-taxable in this box and any special shipping instructions. Indicate if the end location is different than the shipping location.

Then check all three "Send to" and "Show at" boxes.

Review the item information and submit the	e req for approval.		*		856				
Requisition Summary			,	My Prefere	ences es Requisitio	n Settings			
,	B 1004								
Business Unit	DIS01 Q	District Operations	Bid	No/Quote	QUOTE# 1234				
*Requester	KGOMEZ	🔍 Kristina Gomez		Priority	Medium 🗸				
*Currency	USD								
Cart Summary: Total Amount 250.00 US	D								
Expand lines to review shipping and ac	counting details			÷	Add More Items				
Requisition Lines ?									
Line Description	Item ID	Supplier	Quantity	UOM	Pric	e Total	Details	Comments	Delete
CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH	250.0	0 250.00		🦻 Edit	Î
Select All / Deselect All	Select lines to:	🗛 Add to Favorites	요. Add to Template(s)	1	Delete Selected	📇 Mass Change			
Edit for All Lines Ship To Location Address Attention To Comments Requisition Comments and Attachm Enter requisition comments ENTER QUOTE#, DATE, LOCA' SUPPLIER'S EMAIL ADDRESS ALL NON-TAXABLE LINE ITEN:	DIS0DO0270 3375 Camino Del Rio : San Diego, CA 92108 KRISTINA GOMEZ/RM ents TION, DEPT, ROOM #, POIN	South -3883 // 270 T OF CONTACT,			NOTE: Do not add attachment here. All attachment should be uploaded as c	s s			
Send to Supplier Approval Justification Enter approval justification for this	Show at Receipt	→ Shown at Vouch	er		single attachment line one of tl requisition	Add mor	e Commer	ts and Attachn	nents
									/

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.

Checkout - Review and Su	bmit													
Review the item information and submit t	he req for	approval.						*	2	8				
Requisition Summary								My Prefere	nces 🧖	Requisi	tion Setting	gs		
Business Uni	t DIS01	Q		District Operati	ions			Bid No/Quote	QUOTE#	1234				
*Requeste	r KGON	IEZ	Q	Kristina Gomez	z			Priority	Medium	×				
*Currency	USD													
Cart Summary: Total Amount 250.00 U	SD													
Expand lines to review shipping and account	ling details						¢	Add More Iten	ns					
Requisition Lines (?)														
Line Description	Item	ı ID	Supplier			Quantity	UOM		Price		Total	Details	Comments	Delete
CHAIR, STEEL CASE, "EASY", CHA			UNISOURCI WORLDWID	e De INC		1	EACH		250.00	25	50.00	ŀ	🖗 Edit	Î
Shipping Line 1		*Ship To	DIS	Q	Ad	d Shipto Com	ments	Quantity	1]			+	-
		Address	3375 Camino San Diego, CA	Del Rio South A 92108-3883	Add	l One Time Ac	idress	Price	250.00	F	Price Adjust	ment		
		Attention To	Kristina Gome	87						F	egging Inq	uiry debanah		
		Due Date		ij						r	regging wo	IKDENCH		
7	_	1000000												
	Accou	inting Lines	Oty N	2	-									
	Accou	*Distribute By		SpeedChar	t	Q	1		Demonstine	Find View	AILAL	Fire	() 1 of 1	A Last
	Chartf	ields1 Chartfie	elds2 <u>D</u> etails	Details 2	Asset Inform	nation Ass	set <u>I</u> nform	nation 2 <u>B</u> udg	pet Information			1 113	I W I UII	C Last
	Line	Status Di	st Type *Locat	ion	Quantity	P	ercent	Merc	handise Amt	GL Unit	Entry	Event		
	1	Open	DIS	Q		1	100.	.0000	250.00	DIS01	Q		Q	+ -
Select All / Deselect All	Sel	ect lines to:	🔒 Add to Favo	orites 🖓 /	Add to Temp	plate(s)		Delete Selected		Mass Ch	ange			
Once the requisition	is co	mplete, c	lick on (Check B	udge	t at the	e bot	tom left	of the	page.				
**NOTE: Purchase	reau	isitions	that co	ntain bu	ıdaet	error	s wi	ll not b	e save	ed or	subr	nitted	Bude	tet
issues will need to	be re	esolved	with the	approp	riate	perso	n wit	thin you	ir depa	artme	nt.	muou	. Duuş	J OC
Check Budget		P P	re-Check	Budget										
Save & submit	L.		Save f	or Later		52	Ac	d More It	ems		60 P	review	Approva	als

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

Currency USD

Se	lect lines to:	Add to Favorites	ବ୍ଲଥି Add to Template(s)	Delete Selected	រ្មែ Mass Ch
	Message			Total	25
	Budget Checki	ing will save your requisition in	n an Open Status. (18036,39) requisition, it must first be saved i	in an Open Status Press OK to	continue
	Press Cancel t	to return to your requisition wi	thout budget checking.		
Re	ceipt	Shown at Voucher			Add more Comr

The Budget Check Status will show as <u>VALID</u> if the purchase requisition has passed Budget Check and the system will automatically issue a Requisiton ID number.									
Check Budget	Pre-Check Budge	et Bud	lget Checking Status Valid Add More Items	රිථ Preview Approvals					
The Requisition ID is loca Requisition ID number for	ated at the top of th your records.	e Edit Requisi	tion – Review and Sub	mit page. Note the					
Edit Requisition - Review and Review the item information and submit the req Requisition Summary	Submit for approval.		* My Preferences	Requisition Settings					
Business Unit DIS Requester KG	S01 SOMEZ	District Operations Kristina Gomez	Bid No/Quote CHA Requisition ID DOR	R FOR MAIN OFFICE					

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 purchase requisition and submit it for approval, sourcing, and dispatching to the supplier. The purchase requisition remains editable while the status is open or pending.

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

**NOTE: To Save for Later, check the budget first in order to generate a Req ID number.



Priority Medium

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To check the status of the purchase 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.

Manage Requisitions							
Search Requisitions							
To locate requisitions, edit the criteria below a	nd click the Sea	rch button.					
Business Unit DIS01	Q	Bid No/Quote					Q
Requisition ID DOR0007126	Q	Request State	۲]	Budget Statu	IS	٣
Date From	B	Date To	1				
Requester KGOMEZ	Q	Entered By	Q		PO	ID	Q
Requisitions ? To view the lifespan and line items for a requis To edit or perform another action on a requisiti	tion, click the Ex on, make a selec	pand triangle icon. tion from the Action dropdo	wn list and click Go.				
Req ID Bid No/Quote	BU	Date Request State	Budget	Total			
DOR0007126 DOR0007126	DIS01	12/18/2017 PO(s) Comple	ted Valid		113.20 USD [Select A	ction] 🔹	Go
Requester Kristina Gomez Pre-Encumbrance Balance	Ente 0.00	red By Kristina Gomez USD	Priority	Medium			
		Burchase	Change		<u> </u>		
Requisition Approvals	Inventory	Orders	Request Rece	eiving	Returns Invoi	ce Payment	

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

- APPROVALS: The purchase requisition will move through the workflow approval process. If the purchase requisition is denied it will be routed back to the end user for corrections and/or additional information. If the purchase requisition is approved by all approvers, it will then be routed directly to the Procurement Specialist.
- PURCHASE ORDERS: The Procurement Specialist will review the requisition for accuracy. If all is correct, the Procurement Specialist will process the purchase requisition and dispatch a purchase order. Purchase orders are dispatched directly to the supplier via the email address in PeopleSoft. If the purchase requisition is denied, it will be routed back to the end user for corrections and/or additional 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 purchase 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 49 of this handbook.
- 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. DO NOT SHIP ANYTING TO YOUR HOME ADDRESS.

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 <u>48 hours of receipt of goods</u> 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 College	Stanley Herivaux	619-388-7445 619-388-7819	sherivaux@sdccd.edu
Mesa College	Frank Fernandez	619-388-2761	ffernandez@sdccd.edu
City College	Eddie Michael Jr.	619-388-3258	emichel001@sdccd.edu

- RETURNS: See Return & Exchanges Board Policy AP 6330.16. If you need further assistance, contact the Stockroom/Distribution Center or contact the appropriate Procurement Specialist.
- INVOICE: All 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 purchase requisition level. This allows for review and workflow approvals. Once approved and processed, the purchase order will then be updated and emailed back to the supplier.

****NOTE:** A change order cannot be completed if an active voucher is linked to the purchase order, or if the budget status is not valid.

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

Use the following navigation to process Change Orders:

Finance Dashboard > NavBar > Menu > eProcurement > Manage Requisitions

SDCCD		All ~	Search in All Category		Q		
Pavables C	perations ~				NavBar: Mer	าน	0
	Supplier 360		Accounts Payable WorkCenter	Match Exceptions You are not authorized for this page.	Recently Visited	A Accounts Payable B B B B B B B B B B B B B B B B B B B	>
					Menu	C Commitment Control	>
						Employee Self-Service	>
						eProcurement eSettlements	> >

**NOTE: To search for a purchase order or purchase 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 <u>**RED</u>** below and click **Search**.</u>

Manage Requisitions

 Search Requisitions 				
To locate requisitions, edit the criteri	a below and click the	Search button.		
Business Unit MIR01	Q	Bid No/Quote		Q
Requisition ID	Q	Request State All but	Complete 💌	Budget Status
Date From	31	Date To	31	
Requester	Q	Entered By	٩	PO ID MIR0001111
Search Clear		Show Advanced 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 the IT Help Desk to request access.

F	Requisitions 🕐								
	To view the lifespar To edit or perform a	n and line items for a requi another action on a requisi	sition, click the E ition, make a sele	xpand triangle	e icon. e Action dropdown	list and click Go.			
	Req ID	Bid No/Quote	BU	Date	Request State	Budget	Total		
>	MRR0001031	415183 2/24/16	MIR01	03/01/2016	PO(s) Created	Valid		950.73 USD Edit	Go
									1
_					<i>"</i> — , —				

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.

		Request	state num	ui compi	ere				Duuge	ri ətatus				
	_	Da	te To 06/0	7/2016		31					200		_	
		Message	•											Q
S	ho	This requisi	tion is app	roved. Ec	diting this r	requisition	may resta	rt the ap	pproval p	process.	(18036,624	49)		
ck the E	xpa ctic	Click OK to	continue,	or click Ca	ancel to go) back.								
U	Da	ОК		Cancel]									
IIR01	0370	01/2016 PC	D(s) Create	d	Valid		g	50.73 l	JSD Fa	n			G	D

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 Procurement Specialist for assistance.

Please note that if the change order is for an increase that exceeds \$20,000.00 or current bid threshold, additional quotes or bid process may be required.

Edit Requisition - Review and	Submit <	-						
Review the item information and submit the req	for approval.		≯ My	Preferences	Requisition Settings			
Requisition Summary								
Business Unit	R01	San Diego Miramar College	Bid No	/Quote 415183 2	/24/16			
Requester CN	IORENCE	Cheyanna Morence	Requisi	tion ID MRR0001	031			
Currency US	3D		F	Priority Medium	T			
			Track	Batch 1				
				Current C	hange Reason			
Cart Summary: Total Amount 950.73 USD								
Expand lines to review shipping and account	ing details		l	🕂 🖌 Add More	e 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
EXAMPLE 2 INI-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		Dedit
) 🔲 4 🍦 GLOVES* 10EA PKG OF 10	0	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 quantities of the requisition. 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.

Special Requests (2)

Enter information about the non-catalog item you would like to order:

Item Details			
*Item Description	UNI-DIRECTIONAL FIBERGI	LASS TAPE 3" 100YDS	
*Price	1.573	*Currency	USD
*Quantity	100	*Unit of Measure	EA
*Category	035-00 Q	Due Date	03/15/2016
Supplier			
Supplier ID	0002001070 Q		
Supplier Name	AIRCRAFT SPRUCE & SFQ	AIRCRAFT SPRUCE &	Suggest New Supplier
Supplier Item ID	01-06800	SPECIALTY CO	
Manufacturer			
Mfg ID	Q		
Manufacturer			
Mfg Item ID			
Additional Information			
		ه <u>ا</u>	
Send to Supplier	Show at Receipt	Show at Voucher	
Request New Item			
Request New Item	A notification will be sent to a	a buyer regarding this new item request.	

Apply

Once completed, you will b and click on Check Budge	e routed back to the Review and Submit page. Scroll to the bottom of the screen
Check Budget	Pro-Check Budget

L				
	Save & submit	Save for Later	Add More Items	60 Preview Approvals

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

		Total Amount
Mes	ssage	е
This a	action wil restart the approval process. Click OK to continue, or click Cancel to	o go back. (18036,12207)
	OK Cancel	

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 a Blanket Order, enter the new amount in the comments box.

Enter a reason code and comment for making changes that are being tracked.

> Reason Code	QTYCHG Q	
> Comment	Added one additional item. KM 7/1/2020	7¢
\rightarrow	Use Same Reason Code	
	ОК	

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 Procurement Specialist that there is a change to the purchase order.

Confi	irmation								
Your re	quisition has been submi	umosi 1							
	Requested For	Cheyanna Mo	rence			Number of Lines	11		
	Bid No/Quote	415454 02/26	16)31			Total Amount	939.50 USD		
	Requisition ID	MIN10001033					37.75 USD		
	Business Unit	MIR01							
	Status	See Lines							
	Priority	Medium							
	Budget Status	Valid							
	Track Batch	2							
🖨 Vie	ew printable version	🖉 Edit	This Requisitior	n Che	ck Budget	👼 Pre-Checl	Budget	;)	
Req	Approval								
	Line 2:Pen ENGINE OIL PR	ding Essure guage						♥ View/Hide Commen Start New Path	ts
	Miramar Req Approval				78 7				
	Pending		Not Rou	Ited		Not Routed		Not Routed	
	SDCCD Budget	t Approvers	⊡→ 🙆 🕅	IR01_ePro_Level_Two_App	rs 🕂	SDCCD CGSF Approver	s One	Route to Primary Buyer	3
	Comment His	tory						۵۰۰ 2۵۰ ۱	
▼ C	hange Request/Line	Approval Sur	nmary		Perso	nalize View All [쾨 1 c	f 1		
Line	Item Description		Change Reque	st	Line Re-App	roval			
	2 ENGINE OIL PRESS	SURE GUAGE	Created		Routed for A	pproval			

DIRECT CONNECT 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.

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

All orders MUST be placed through PeopleSoft using either Chrome or Firefox.





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

✤ eProcurement > Requisition

		All ~	Search in All Category		Q	ſ	≏ : Ø
Payables C	perations ~				NavBar: Me	nu	0
•					9	A	
	Supplier 360		Accounts Payable WorkCenter	Match Exceptions	Recently Visited	Accounts Payable	>
						в	
					Favorites	🗅 Billing	>
					_	с	
					Menu	Commitment Contro	< Ic
						E	
						Employee Self-Serv	vice >
						Enterprise Compon	ents >
						eProcurement	>

Then click the Requisition icon

 Catalog Browse 	Requisition	U C Ĉ : ©
quisition Settings		New Window Personalize Pag
Business U	nit DIS01 Q District Operations Bid No/Quote	
*Reques	ter AMURILLO001 Q Azucena Murillo Priority Medium V	
*Currer	cy USD	
Default Options	Custom Helas	
	If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these	
Obelault	fields.	
Override	If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.	
Line Defaults 🥐		
Suppl	er Q Category Q	
Supplier Locati	on Q Unit of Measure EA Q	
Buy	er Q	
Shipping Defaults	· · · · · · · · · · · · · · · · · · ·	
Ship	To DIS Q Add One Time Address	
Due I	Attention	
Distribution Defaults		
Speed	thart	
Accounting Defau	ts Personalize Find 🖉 🧱 First 🕢 1 of 1 🛞 Last	
Chartfields1 De	ails Asset Information	
Dist Percent	Location GL Unit Fund Dept Product Account Oper Unit PC Bus Un	
1		
4		

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.

Business Unit	MIR01 Q		San Diego N	Miramar C	ollege	Bid No	Quote			
*Requester	KROSAS		un e		, energe	Did N		dium 🔻		
Requester		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Kelly Rosas	8			Priority	uum -		
*Currency	030									
efault Options 🕐										
O Default	If you select this optio fields.	n, the defaults sp	ecified below w	will be app	olied to requisiti	ion lines when the	ere are no pre	edefined values	for these	9
Override	If you select this optio	n, the defaults sp	ecified below w	will overrid	le any predefin	ed values for thes	se fields,only	non-blank value	es are as	signe
ie Defaults 🥐										
replace the data in the co	prresponding fields o	on the selected l	ines that are a	available f	for sourcing.					
Supplier		2		Category	1	Q				
Supplier Supplier Location		a Ta	Unit of	Category f Measure	/	Q Q				
Supplier Supplier Location Buyer		২]৹ ১	Unit of	Category f Measure	EA	م م				
Supplier Supplier Location Buyer		২ _] Q ২	Unit of	Category f Measure	EA	<u></u> व				
Supplier Supplier Location Buyer pping Defaults		2]Q 2	Unit of	Category f Measure	EA	<u></u> द				
Supplier Supplier Location Buyer pping Defaults Ship To		2]a 2	Unit of	Category f Measure	Add One Ti	Q me Address				
Supplier Supplier Location Buyer pping Defaults Ship To Due Date		2]Q 2]Q]B	Unit of	Category f Measure Attentio	Add One Tir	Q me Address				
Supplier Supplier Location Buyer pping Defaults Ship To Due Date stribution Defaults		2]Q]Q]II	Unit of	Category f Measure Attentio	Add One Ti	Q me Address				
Supplier Supplier Location Buyer pping Defaults Ship To Due Date stribution Defaults SpeedChar	(2]Q 2]Q	Unit of	Category f Measure Attentio	Add One Ti	C Address				
Supplier Supplier Location Buyer pping Defaults Ship To Due Date stribution Defaults SpeedChar Accounting Defaults	Image: marked state Image: marked	2]Q]Q]B	Unit of	Category f Measure Attentio	Add One Til	ersonalize Find	1 2 1	First (1)	of 1 🕑) Last
Supplier Supplier Location Buyer pping Defaults Ship To Due Date stribution Defaults SpeedChar Accounting Defaults Chartfields1	Image: Second	2 2 2]Q]II	Unit of	Category f Measure Attentio	Add One Til	ersonalize Find	1 🔊 🔣	First () 1	of 1 🕑) Last
Supplier Supplier Location Buyer pping Defaults Ship To Due Date stribution Defaults SpeedChar Accounting Defaults Chartfields1 Details Dist Percent		2 2 2 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Unit of	Category f Measure Attentio	Add One Til Add One Til Product	Q Q me Address Personalize Find Account	oper Unit	First (1)	of 1 🕑) Last

To access the Office Solutions unique website for pricing and item numbers, go to https://officesolutions.com/log-in/ 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 Chrome or Firefox as your browser.**

To process an order through PeopleSoft, click on the **Office Solutions Punch Out** link to be directed to the ordering website.



On the next screen, the following message will appear. It should automatically take you to the Office Solutions ordering page within 5 seconds; if not, click on **Enter Catalog**.

If you have not been navigated to the catalog within 5 seconds, please click Enter Catalog. Enter Catalog

**NOTE: The minimum order amount is \$35.00; before tax. A purchase order will not be dispatched to Office Solutions unless the total is \$35.00.

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.

Checkout - Rev	view and Sub								
Review the item inform	nation and submit the	req for approval.)	 My Preferences 	Requisition Settings			
Requisition Summary	Ŋ								
	Business Unit	MIR01 Q	San Diego Mirama	ar College E	Bid No/Quote				
	*Requester	KROSAS	Q Rosas Kelly		Priority Medium	-			
	*Currency	USD	(',,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			_			
Cart Summary: Total	I Amount 42.83 USD								
Expand lines to revi	view shipping and acc	ounting details			Add More It	tems			
Requisition Line	es 🕐								
Line De	escription	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments Dele
▶ 🛛 1 🚳 Mes Vert	sh Desk Organizer, 1 rtica		OFFICE SOLUTIONS	3	1 EACH	42.83	42.83		₽ Add f
V Select All	/ Deselect All	Select lines to:	🕞 Add to Favorites	Add to Template(s)	Delete Selecte	ed 🔚 Ma	ss Change		
In the pop	o-up, enter	the Ship To lo	ocation and th	e appropriate	Accounting	Total Amount	42.83 USD	lds belc	w and
In the pop click OK .	o-up, enter	the Ship To lo	ocation and th	e appropriate	Accounting	Total Amount	42.83 USD on in fie	lds belo	w and
In the pop click OK . Edit Lines/)-up, enter /Shipping/A	the Ship To lo	ocation and th	e appropriate	Accounting	Total Amount	42.83 USD on in fie	lds belc	w and
In the pop click OK . Edit Lines/ Line Informat)-up, enter /Shipping/A	the Ship To k	ocation and th	e appropriate	Accounting	Total Amount	42.83 USD on in fie	lds belc	ow and
In the pop click OK . Edit Lines/ Line Informat notes: The in)-up, enter /Shipping/A tion ?	the Ship To lo	elected Lines	e appropriate	Accounting	Total Amount	42.83 USD	lds belc	w and
In the pop click OK . Edit Lines/ Line Informat Note: The in entered on th	Shipping/A /Shipping/A tion ?	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se	Accounting	Total Amount	42.83 USD on in fie	lds belc	ow and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup	Shipping/A /Shipping/A tion ? nformation be his page will pplier ID	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se oplier Location	Accounting	Total Amount Information	42.83 USD on in fie	lds belc	w and
In the pop click OK . Edit Lines/ Line Informat Note: The in entered on the Sur)-up, enter /Shipping/A tion ? nformation be his page will pplier ID Buyer	the Ship To k	elected Lines	e appropriate selected requisiti ng fields on the se oplier Location Category	Accounting	Total Amount	42.83 USD on in fie	lds belc	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup	/Shipping/A tion ? nformation be his page will pplier ID Buyer	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se oplier Location Category	on lines. When the	Total Amount	42.83 USD On in fie	lds belo	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info)-up, enter /Shipping/A tion ? nformation be his page will pplier ID Buyer ormation Location DIS	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se oplier Location Category	Accounting	Total Amount	42.83 USD on in fie	lds belc	w and
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In the pop click OK. Edit Lines/ Line Informat Note: The in entered on th Sup Shipping Info Ship To L A Co	-up, enter /Shipping/A tion ? nformation be his page will pplier ID Buyer ormation Location DIS Address Add Due Date Attention	the Ship To k	elected Lines	e appropriate selected requisiting fields on the selected requisiting fields on the selected requisiting and the selected requisition and the selected requisitio	Accounting	Total Amount	42.83 USD on in fie	lds belc	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info Ship To L A Co Accounting L	O-UP, enter	the Ship To k	elected Lines	e appropriate selected requisiti- ng fields on the se oplier Location Category	Accounting	Total Amount	42.83 USD on in fie	lds belc	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info Ship To L A Col Accounting L Please enter	O-UP, enter	the Ship To k	Decation and the elected Lines	e appropriate selected requisiting fields on the selected requisiting fields on the selected requisiting fields on the selected requisition Category Categor	Accounting	Total Amount	42.83 USD	lds belc	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info Ship To L A Con Accounting L Please enter Accounting L	O-UP, enter /Shipping/A tion ? Information be his page will pplier ID Buyer ormation Location DIS Address Add Due Date Attention omments innes r GL Business ng Informat	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se	on lines. When the et al of the state of the	Total Amount	42.83 USD on in fie	Ids belo	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info Ship To L A Co A Co A Co A Counting L Please enter Accounting	D-up, enter /Shipping/A tion ? Information be his page will pplier ID Buyer ormation Location DIS Address Add Due Date Attention omments Innes GL Business ng Informat Is1	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se oplier Location Category alues Personaliz	e Find [7]	Total Amount	42.83 USD on in fie is clicked for sourci	Ids belo	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info Ship To L A Co A A Co A A Co A Co A Counting L	O-UP, enter	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se poplier Location Category	Accounting	Total Amount	42.83 USD on in fie is clickee for sourci 1 of 1 Oper U	Ids belc	w and
In the pop click OK. Edit Lines/ Line Informat Note: The in entered on the Sup Shipping Info Ship To L A Co A Co A A Co A Co A Co A Co	O-UP, enter	the Ship To k	elected Lines	e appropriate selected requisiting fields on the se oplier Location Category alues Personaliz nd Dept 10 Q 74300 Q	Accounting	Total Amount Informatio he 'OK' buttor are available Q Q First	42.83 USD on in fie for sourci	Ids belo	w and

OK Cancel

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

Distribution Change Optio	ns			×
				Help
For the selected requisition lines	that are available for sourcing	ı, app <mark>ly dis</mark> tril	bution changes to	
Anniv changes to all ex	isting distribution lines			
Matching Distribution	l ines			
Apply changes to each	existing distribution line by ma	tching the di	stribution line numbers	
C Replace Distribution L	ines			
Remove the existing dis	stribution lines and replace wit	h the distribu	tion lines changes.	
OK Cancel				
The Requisition Comments	and Attachments field M	UST include	e the following inform	nation:
Campus/Location. D	epartment. Building. Roc	m Number	. and Requester's I	First and Last name.
, , , , , , , , , , , , , , , , , , ,	5 , 11 5 , 11		,	
Requisition Comments and Attachments				
Enter requisition comments				
Campus/Location, Department, Building, Room Nun	iber, and Requester's First and Last name.			Z
🗹 Send to Supplier 🛛 🗹 Show at Rece	ipt 🛛 🗹 Shown at Voucher			
				Add more Comments and Attachments
Once the purchase requisition	n is complete, click on Ch a	ok Budgot	at the bettem left of	the earcon
Once the purchase requisition		ck buugei	at the bottom left of	the screen.
**NOTE: Purchase requisiti	ons that contain budget	errors will	not be saved or su	bmitted. Issues with
budget errors will need to b	be resolved with the appr	opriate per	rson within your de	epartment.
Chaok Budget	Pro Chook Budget			
	··· Fie-Check Budget			
Save & submit	Save for Later		dd More Items	60 Preview Approvals

Click OK on the	pop-up message th	nat appears below	<i>I</i> .		
	_				
Select lines to:	Add to Favorites	s 😡 Add to	Template(s)	Delete Selected	記 記 Mass Ch
Message					Total Amount 25
Budget Checkir	ig will save your requis	ition in an Open Stat	us. (18036,39)		
Press Cancel to	orm budget checking or o return to your requisit	n this requisition, it m ion without budget ch	ust first be save lecking.	d in an Open Status. Press	OK to continue.
ок	Cancel				
Receipt	Shown at Vouche	er			Add more Comr
The Budget Che	eck Status will sho	w as <u>VALID</u> if the	e requisition h	as passed Budget Ch	eck and the system
will automatically	issue a Requisito	n ID number.			
-		_	> Buda	et Checking Status Valid	
Check Budget	P P	re-Check Budget	 Dudg 		
Save & s	submit 📳	Save for Later	÷	Add More Items	රිථ Preview Approvals
The Requisition	ID is located at the	e top right of the I	Edit Requisit	tion – Review and Sul	omit page.
**Note the Requ	isition ID number	for your record	S.		
Edit Requisition - R	leview and Submit				
Review the item information ar	id submit the req for approval.			My Preferences	Requisition Settings
Requisition Summary					
Bu	Isiness Unit MIR01	San Die	ego Miramar College	Bid No/Quote MRR	0002463
	Requester KROSAS	Rosas,	Kelly	Requisition ID MRR(0002463 um 🔽
	*Currency USD				
Once there is a v and click on Sav	alid Budget Check e & Submit.	c and a Requisit ion	on ID numbe	r is issued, scroll to the	bottom of the screen
-	-		Buda	et Checking Status Valid	
Check Budget	P B P	Pre-Check Budget	Dudge	on one on a constraint of a co	
Save &	submit	Save for Later	÷	Add More Items	60 Preview Approvals

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 purchase requisition into a purchase order.

Once the purchase requisition is approved by the Procurement Specialist, a confirmation will be emailed to

ir requisition has been submi	tted.						
Requested For	Rosas, Kelly				Number of Lines	1	
Bid No/Quote	MRR0002463				Total Amount	42.83 USD	
Requisition ID	MRR0002463				Pre-Encumbrance Balance	42.83 USD	
Business Unit	MIR01					I	
Status	Pending						
Priority	Medium						
Budget Status	Valid						
View printable version eq Approval	🖉 Edit Ti	nis Requisition	Check I	Budget	Pre-Che	ck Budget	
Line 1:Pen Mesh Desk Organ	ding nizer, 1 Vertical/3 F	lorizontal Sections, 16 1/4	x 9 x 8, Black			♥View/Hide ●Start New	e Comm Path
District Req Approval							
No approvers for SDCCD Budget	Approvers	Skipped No approvers fou	nd pprovers One	Skip	Rosas, Kelly Route to Primary Buyer 02/15/17 - 8:57 AM	Multiple Appr Error Step	overs
Comments							
Apply Approval Change	S						

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

♦ Nav Bar Menu > 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 purchase requisition. Here the status of the purchase requisition can be reviewed.

DIRECT CONNECT (GRAINGER) 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.

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

All orders MUST be placed through PeopleSoft using either Chrome or Firefox.





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

✤ eProcurement>Requisition

SDCCD ා NavBar: Menu Payables Operations ~ Α (\mathbf{r}) Accounts Payable > Match Exceptions You are not authorized for this page. Supplier 360 unts Payable WorkCenter Recently Visited в \heartsuit D Billing > Favorites с = Commitment Control > Menu Е Employee Self-Service > Enterprise Components > eProcurement >

Then click in the requisition icon

← Catalo	og Browse	-				Re	quisition						Q	Û	: @
equisition	Settings												New Wir	ndow Pe	rsonalize Page
	- Ducinosa Unit	DIS01		liatriat Operatio		-				_					
	Business Unit		U	istrict Operatio	ons	В	id No/Quote	adium ++							
	^Requester	AMORILLOUUT	A A	zucena Murillo			Priority 1	edium V							
	*Currency	050					C	ustom Fields							
Defaul	It Options 🕐														
OD	efault	If you select this option, the fields.	he defaults specifi	ed below will b	e applied to re	quisition lines wh	en there are no pi	redefined values for t	iese						
• o	verride	If you select this option, th	he defaults specifi	ed below will o	verride any pre	defined values fo	or these fields,only	y non-blank values ar	e assigned.						
Line Def	faults 🕐														
	Supplier	Q		Cat	egory		Q								
	Supplier Location		۹	Unit of Mea	asure EA	Q									
	Buyer	Q													
Shipping	Defaults														
	Shin To	DIS)		O bbA	ne Time Address									
	Due Date		n N	Att	tention		, 								
Distribut	tion Defaults														
Distribut	SpeedCha	rt													
Ace	counting Defaults					Personalize	Find 🔄 🗮	First 🕢 1 of 1	Last						
Ch	artfields1 Details	Asset Information)												
Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Un						
	1	DIS	DIS01	Q	74300 Q		Q	Q							
									Þ						

OK Cancel

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

Rusiness Unit	DIS01 Q		District Operations	Did M.	Ousta	
Dusiness onic			District Operations	Bid N		
*Requester	KGOMEZ	Q	Kristina Gomez		Priority Mealum V	
*Currency	USD					
Default Options 🕐						
O Default	If you select this optic fields.	on, the defaults spe	cified below will be app	lied to requisition lines when th	ere are no predefined val	ues for these
Override	If you select this optic	on, the defaults spe	cified below will overrid	e any predefined values for the	se fields,only non-blank v	values are assigned
ne Defaults 🕐						
Supplier		a	Category	Q		
Supplier Location		Q	Unit of Measure	EA Q		
Buyer		Q				
pping Defaults						
Ship To	DIS	Q		Add One Time Address		
winds to			Attentic	n		
Due Dete					1	
Due Date						
Due Date						
Due Date stribution Defaults SpeedCha	rtQ					
Due Date stribution Defaults SpeedCha Accounting Defaults	rtQ			Personalize Fin	d 🛛 🔀 First 🧃	🕽 1 of 1 💽 Last
Due Date stribution Defaults SpeedCha Accounting Defaults Chartfields1 Details	rtQ	n 💷		Personalize Fin	d 💭 📑 🛛 First 🧃) 1 of 1 🕡 Last
Due Date stribution Defaults SpeedCha Accounting Defaults Chartfields1 Details Dist Percent	rt Q	n 💷	ind Dept P	Personalize Fin roduct Account	d 💭 📑 First 🧃 Oper Unit PC Bu) 1 of 1 () Last us Unit Project
Due Date stribution Defaults SpeedCha Accounting Defaults Chartfields1 Details Dist Percent	rt Q	n 💷 GL Unit Fu DISO1 Q	ind Dept P	Personalize Fine roduct Account	d 💭 📑 First 🧃 Oper Unit PC Bu) 1 of 1 () Last us Unit Project

To process an order through PeopleSoft, click on the **Grainger Punch Out** link to be directed to the Grainger ordering website.

Create Requisition @



**NOTE: The minimum order amount is \$35.00; before tax. A purchase order will not be dispatched to Grainger unless the total is \$35.00.

Use the search field to find items to be purchased. Add selected items in the appropriate quantities to the shopping cart then click on **View Cart** to review the order. When complete, click on **Submit Cart**.

GRAINGER.	Catalog Find A Branch Help 1-800-GRAINGER		San Diego Communicty College Dist 🔻
All Products 🔻	Enter keyword, item, model or part #	Q	Bulk Order 🔻 Account 🔻 🃜
Custom Catalog			View >
All Products	O Market Basket		

Click Yes on the pop-up message to be transferred to People Soft's Checkout Review and Submit page.

Submit Cart ?

Thank you for visiting Grainger!

You are about to transfer products to your internal procurement system.

These products will not be shipped until an order is received from your company.

For customer service, please contact ePro Customer Care at 1-877-202-2592, voice prompt 3.

							10	Y	es
Use the Checkout corrections. Click of Accounting Lines Click on Select All	t – Review and on the arrows of a. I/Deselect All a	Submit scree n the far left o nd then Mass	en to review tl f each line ite Change to id	ne order and m to expand entify Ship T	I make an I and revie o and Ac	y necess ew the in counting	sary (forma g Info	change ation in ormatic	s or the)n.
Checkout - Review and Su	bmit								
Review the item information and submit the Requisition Summary	ne req for approval.		*	My Preferences	Requisition Settings				
Business Unit *Requester *Currency	t DIS01 Q KGOMEZ	District Operations	Bi	d No/Quote	2				
Cart Summary: Total Amount 42.12 US	D			🖨 Add Mara H	-				
Expand lines to review shipping and ad	ccounting details			Add More II	ems				
Line Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
TK52416673T Fire-Resis Was	tant	GRAINGER	1	EACH	42.12	42.12		\bigcirc Add	Û
Select All / Deselect All	Select lines to:	🖟 Add to Favorites	🕅 Add to Template(s)	Delete Selecter	d 🔚 M	ass Change 42.12 USD			
Shipping Summary									
Edit for All Lines Ship To Location Address Attention To Comments	DIS 3375 Camino Del Rio South San Diego, CA 92108-3883 Kristina Gomez								

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

e Information								
te: The information the second s	ion below je will rep	v does not reflect the d blace the data in the co	lata in the sele prresponding f	cted requis	ition lines. e selected li	When the 'OK' bunches that are avail	itton is clicked, t able for sourcing	he data g.
Supplier		Q	Suppl	er Locatior	ı	Q		
Buy	er	a		Category	/	Q		
nipping Informati	on							
Ship To Locatio	n DISCD	C0100 Q			Add One Ti	me Address		
Due De	te	31		Attentio	n			
Due Da				, the strate				
Comment	ts							
Comment counting Lines								
Comment Comment Counting Lines SpeedCha	ts	Init before selecting othe	er chartfield valu	les			,	
Comment Comment SpeedCha Please enter GL B Accounting Inf	ts	Init before selecting othe	er chartfield valu	ies Perso	nalize Find	1 🛛 I 🔜 F	irst 🕢 1 of 1 (Last
Comment Comment SpeedCha Please enter GL B Accounting Int Chartfields1	ts	Init before selecting other	er chartfield valu	ies Perso	nalize Find	[2] <mark> </mark> F	ïrst ⊛ 1 of 1 (E Last
Comment Comment SpeedCha Please enter GL B Accounting Inf Chartfields1	ts	Init before selecting other	er chartfield valu	Perso Fund	nalize Find	Product	irst ④ 1 of 1 ④	Last Oper Uni
Comment Comment SpeedCha Please enter GL B Accounting Inf Chartfields1 Dist Percent	ts	Init before selecting other	er chartfield valu	Perso	nalize Find	Product 677020	irst () 1 of 1 () Account () 4002 Q	Der Uni
Comment Comment SpeedCha Please enter GL B Accounting Inf Chartfields1	ts	Init before selecting other Asset Information Location	er chartfield valu	Perso	nalize Find	Product 677020	First ④ 1 of 1 ④	Der Uni

Distribution Change Options

For the selected requisition lines that are available for sourcing, apply distribution changes to

All Distribution Lines

Apply changes to all existing distribution lines.

O Matching Distribution Lines

Apply changes to each existing distribution line by matching the distribution line numbers.

O Replace Distribution Lines

Remove the existing distribution lines and replace with the distribution lines changes.

OK Cancel

Help

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

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

Requisition Comments and Atta	achments				
Enter requisition comments					
Campus/Location, Departm	ent, Building, Room Number, and Rec	quester's First and Last name.			2
Send to Supplier	Show at Receipt	Shown at Voucher			Add more Comments and Attachments
Once the purcha **NOTE: Purcha budget errors w	ase requisition is con ase requisitions th vill need to be reso	mplete, click on Ch at contain budget plved with the app	eck Bud t errors v propriate	get at the bottom left of vill not be saved or su person within your de	the screen. bmitted. Issues with epartment.
Check Budget	ubmit 関	-Check Budget Save for Later	÷	Add More Items	ර්ථ Preview Approvals
Click OK on the	pop-up message th	at appears below.			
Select lines to:	🕞 Add to Favorites	ହିଛି Add to Te	emplate(s)	<u> </u> Delete Selecte	d 稳Mass Ch
Message					25
Budget Checkin In order to perfor Press Cancel to OK	g will save your requisit orm budget checking on o return to your requisition Cancel	tion in an Open Status. this requisition, it must on without budget chec	(18036,39) first be sav king.) ved in an Open Status. Pres	s OK to continue.
Receipt	Shown at Voucher	r			Add more Comr

The Budget Check Status will show as <u>VALID</u> if the requisition has passed Budget Check and the system will automatically issue a Requisiton ID number.						
Check Budget	Pre-Check Bud	get Budç	get Checking Status			
Save & submit	Save for L	ater 🛟	Add More Items	6එ Preview Approvals		
The Requisition ID is locate	ed at the top right o number for your r	of the Edit Requis	ition – Review and Sul	bmit page.		
Edit Requisition - Review and S	Submit					
Review the item information and submit the req for	or approval.		My Preferences	Requisition Settings		
Requisition Summary			ing i foto inte			
Business Unit DIS	01	District Operations	Bid No/Quote DOR	0012754		
Requester KG	OMEZ	Kristina Gomez	Requisition ID DOR	0012754		
*Currency USI	D		Priority Medi	um ¥		
Once there is a valid Budg e and click on Save & Subm	et Check and a Re iit.	quisition ID numb	per is issued, scroll to the	bottom of the screen		
		-				
Check Budget	Pre-Check Bu	ldget	Add More Items	<u>d</u>		
Cave & Submit	Cave Ior		And more items	Preview Approvals		
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 purchase requisition into a purchase order.

Once the purchase requisition is approved by the Procurement Specialist, a confirmation will be emailed to the requester.

Confirmation						
Your requisition has been submi	tted.					
Requested For	Kristina Gomez		Number of Lines	1		
Bid No/Quote	DOR0012754		Total Amount	42.12 USD		
Requisition ID	DOR0012754		Pre-Encumbrance Balance	42.12 USD		
Business Unit	DIS01					
Status	Pending					
Priority	Medium					
Budget Status	Valid					
View printable version	L Edit This Requisi	tion Check Budg	et Pre-Chec	k Budget		
Line 1:Pend TK52417044T Fire District Req Approval Pending Nancy Wichman SDCCD Budget A	ing Resistant Wastebasket Rectan In oprovers ● → Not Ro S	gular Open 7 gal Black Height 15 14 in V uted iancy Wichmann DCCD CGSF Approvers One	MdthDiameter 10 12 in Depth 10 12 in Not Routed Kellie Marie Silva Route to Primary Buyer	Plastic Fiberglass Texture	I Indoor Stationary No Lid Non	e None Free-Standing How Path
Apply Approval Change Create New Requisition To check the s use the followin Nav Ba	s Manage Requisit tatus of the pur ng navigation: ar O Menu>	^{ions} [.] chase requisition in eProcurement>M	n PeopleSoft, acco anage Requisitio	ess the Man	age Requisitio	ons screen and
Enter the Rea	uisition ID num	ber and click sear	ch. Click on the gre	ey arrow to th	e left under R	eq ID to expand

the details of the purchase requisition. Here the status of the purchase requisition can be reviewed.

TEMPLATE LANGUAGE – BLANKET ORDER

Copy and paste the template language needed into the **Additional Items** *on the create requisition page. This language* **MUST** be included on all purchase requisitions that are blanket order requisitions. In addition, the Amount Only box needs to be checked on Checkout – Review and Submit page. *Please note: Amount Only is the PeopleSoft language, however the industry standard is BLANKET ORDER.*

CONSULTANT SERVICES TEMPLATE

This is the format for all professional services. The important information is the description of service, the time period, the campus/dept and the District point of contact. A District approved consultant agreement and "Evaluation of Employer/Employee Relationship" form must be completed for each consultant, signed by the Department or Program Chair and District Purchasing **BEFORE** entering the requisition. <u>Please note</u>: Completion of a W-9 is required by the consultant in advance of any other documentation, if they are a new supplier.

PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM

EFFECTIVE XX/XX/XX TO XX/XX/XX

CONTACT PERSON: NAME/PHONE AND/OR E-MAIL

SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO

COPIER MAINTENANCE TEMPLATE

FOR THE MAINTENANCE OF MAKE: ___, MODEL: ______, S/N: ______

FROM: 7/1/XX TO 6/30/XX

COST PER COPY:

LOCATION: CAMPUS: DEPT/ROOM STREET ADDRESS SAN DIEGTO CA 921XX

PERSON(S) AUTHORIZED TO PLACE SERVICE CALLS: NAME/PHONE

PURCHASE OF EQUIPMENT IS NOT AUTHORIZED UNDER THIS PURCHASE ORDER. SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT <u>APINVOICE@SDCCD.EDU</u>.

SUPERCEDES PO

MEMBERSHIP TEMPLATE

NEW/RENEW INSTITUTIONAL MEMBERSHIP TO_____FOR CAMPUS/DEPT

EFFECTIVE XX/XX/XX TO XX/XX/XX

MEMBER: NAME

CONTACT PERSON: NAME/PHONE OR E-MAIL

SUPERCEDES PO

PEST CONTROL TEMPLATE

SUPPLY ALL MATERIALS NECESSARY TO PROVIDE MONTHLY PEST CONTROL SPRAYING.

LOCATION: WHERE & WHEN NEEDED

STREET ADDRESS SAN DIEGO, CA 921XX

EFFECTIVE 7/1/XX TO

6/30/XX

CONTACT PERSON: NAME/PHONE

SPRAYING SHALL BE COORDINATED WITH MONTHLY SPRAYING OF CAMPUS.

DELIVERY SLIP TO BE PROVIDED AT TIME OF SERVICE. SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT <u>APINVOICE@SDCCD.EDU</u>.

SUPERCEDES PO

RENTAL SPACE TEMPLATE

RENTAL OF FACILITY/SPACE FOR CAMPUS/DEPT

LOCATION: OF RENTAL SPACE

TIME PERIOD: 7/1/XX TO 6/30/XX

CONTACT PERSON: NAME/PHONE OR EMAIL

INTERNAL USE ONLY: BOARD APPROVE <u>DATE</u> AGENDA ITEM: XXXX

SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO

SERVICE TEMPLATE

ALL LABOR AND MATERIALS TO MAINTAIN AND/OR REPAIR NAME OF EQUIPMENT/CAMPUS/DEPT

FROM 7/1/XX TO 6/30/XX

VENDOR TO RESPOND TO SERVICE REQUESTS WITHIN A REASONABLE TIME, BUT NOT MORE THAN 24 HOURS AFTER RECEIPT OF CALL. IF DISTRICT EQUIPMENT MUST BE REMOVED TO VENDOR'S PLACE OF BUSINESS, VENDOR AGREES TO COMPLETE REPAIRS WITHIN A REASONABLE TIME, SUBJECT TO DISTRICT NEEDS, BUT GENERALLY WITHIN FIVE WORKING DAYS.

PERSON(S) AUTHORIZED TO PLACE SERVICE CALLS: NAME/PHONE

PRICED SERVICE REPORT TO BE PROVIDED AT TIME-OF-SERVICE CALL. SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT <u>APINVOICE@SDCCD.EDU</u>.

SUPERSEDES PO

SUBSCRIPTION TEMPLATE

NEW/RENEW SUBSCRIPTION TO _____FOR CAMPUS/DEPT

ACCOUNT NO:

EFFECTIVE XX/XX/XX TO

XX/XX/XX LABEL TO: CAMPUS DEPT/ROOM DISTRICT TITLE OF PERSON RECEIVING SUBSCRIPTION STREET ADDRESS SAN DIEGO CA 921XX

CONTACT PERSON: NAME/PHONE OR E-MAIL SUPERCEDES PO

SUPPLIES TEMPLATE

FOR THE PURCHASE OF NAME/TYPE OF SUPPLY FOR CAMPUS/DEPT

EFFECTIVE 7/1/XX TO 6/30/XX AUTHORIZED PERSON(S): NAME/PHONE PURCHASE OF EQUIPMENT IS NOT AUTHORIZED UNDER THIS PURCHASE ORDER. SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT <u>APINVOICE@SDCCD.EDU</u>.

SUPERCEDES PO

CATERING

CATERING SERVICES FOR SAN DIEGO [CAMPUS OR DISTIRCT DEPARTMENT]: [EVENT]

DATE:

DELIVERY LOCATION:

CAMPUS DEPT/ROOM STREET ADDRESS SAN DIEGO CA 921XX

DELIVERY TIME: PICKUP TIME (IF APPLICABLE):

CONTACT PERSON: [NAME] [TELEPHONE NUMBER]

PRICED SUMMARY TO BE PROVIDED AT TIME OF DELIVERY. SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

SUPPLIERS PROVIDING FOODSERVICE TYPE SERVICES TO THE SAN DIEGO COMMUNITY COLLEGE DISTRICT ARE REQUIRED TO MAINTAIN A VALID HEALTH PERMIT FROM THE COUNTY OF SAN DIEGO AND INSURANCE COVERAGE AS STIPULATED IN SECTION 18 OF THE DISTRICT'S GENERAL TERMS AND CONDITIONS, WHICH APPLY TO ALL PURCHASE ORDERS ISSUED BY THE DISTRICT. A COPY OF THE HEALTH PERMIT AND CERTIFICATE OF INSURANCE MUST BE PROVIDED PRIOR TO DELIVERY OF ANY FOOD RELATED SERVICES. EMAIL THE DOCUMENTS TO <u>NWICHMAN@SDCCD.EDU.</u> A LINK TO OUR GENERAL TERMS AND CONDITIONS, WHICH ARE INCORPORATED HEREIN, IS PROVIDED AT THE BOTTOM OF THIS PURCHASE ORDER.

PAYMENT TERMS FOR GOODS AND SERVICES PROVIDED TO THE SAN DIEGO COMMUNITY COLLEGE DISTRICT ARE NET
 30. PAYMENT IS MADE FOLLOWING DELIVERY OF GOODS OR COMPLETION OF SERVICE AND RECEIPT OF AN
 ACCURATE AND COMPLETE INVOICE SUBMITTED IN ACCORDANCE WITH THE PURCHASE ORDER.

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

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 ADJUSTABL 5EA \$645.00

THE 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 A SEPARATE OR AS ANOTHER LINE ITEM.

CATEGORY CODES

Use the following link to access the most recent Purchasing Specialist Category Code Assignment

https://www.sdccd.edu/departments/business/purchasing/forms.aspx

STATUS DEFINITIONS

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

Purchase Requisitions					
Open	The <i>Open</i> 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 purchase requisition is not eligible for the approval process until an authorized user changes this status to <i>Pending</i> . This may be done by pulling in the requester or clicking the "Open" checkmark to change the status to <i>Pending</i> .				
Approved	The purchase requisition has been fully approved.				
Line Approved	This status means that one or more purchase requisition lines have been approved.				
Denied	The purchase requisition has been denied by the Approver.				
Canceled	The purchase requisition was canceled on the header.				
Complete	Running the Close Requisitions process changes the status to <i>Complete</i> .				
Receipts					
Open	Not all edits have passed. If any receipt lines have a status of <i>Open</i> , the receipt header has a status of <i>Open</i> .				
Received	When all lines are in <i>Received</i> or <i>Canceled</i> status, the receipt header will have a status of <i>Received</i> .				
Hold	Receipt is on <i>Hold</i> 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 <i>Closed</i> .				
Canceled	The receipt has been <i>Canceled</i> on the header; the lines will go to a <i>Canceled</i> status as well. <u>Canceling cannot be reversed</u> .				
Budget Status					
Not Chk [«] d	(<i>Not Checked</i>) – 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 purchase order or purchase requisition has been successfully budget checked.				
Error	The document has failed to budget check because of an error in the distribution information.				