SAN DIEGO COMMUNITY COLLEGE DISTRICT

PEOPLESOFT USER MANUAL FOR PURCHASING

June 22, 2021

Revised

SAN DIEGO COMMUNITY COLLEGE DISTRICT

PEOPLESOFT USER MANUAL FOR PURCHASING

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October 12, 2020

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

Subject: Reminder – Notice on Gifts and Gratuities

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

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

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

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

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

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

Peter Hester
Purchasing Supervisor, Purchasing and Contract Services

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

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

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

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

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

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

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

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

Prohibited Uses (not an all inclusive list)

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

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

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

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

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

AGREEMENT

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

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

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

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

If you have any questions, contact Peter Hester.

Purchasing and Contract Services Department
Frequently Asked Questions (FAQs)

1. **How is a supplier searched for in PeopleSoft?**

   Please refer to the Suppliers tutorial that starts on **page 9** 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 requester/initiator must first send the blank SDCCD Supplier Intake 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: http://bussrv.sdccd.edu/purchasing/forms.cfm.

   Upon completion, the supplier shall return the two documents to the requester/initiator. The requester/initiator will review the documents for completeness, accuracy, and legibility. If incomplete, inaccurate or illegible, the requester/initiator will return the document(s) to the supplier for revision. If complete, the requester/initiator enters the supplier's information (from completed documents) into the PeopleSoft supplier database.

   **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 Intake 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 requester/initiator to enter the supplier's information into PeopleSoft supplier database.

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

   Once 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 9** of the PeopleSoft User Manual for Purchasing.

3. **What if the supplier is a consultant?**

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

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

   The 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
   - ❖ Sponsorships/Advertising
   - ❖ Honorarium- one time lectures
   - ❖ 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 Buyer will upload the completely executed agreement in PeopleSoft. **See Board Policy AP 6330.**

See pages 33 and 34 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 32** 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?**

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

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

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

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

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

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

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

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

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

   Please refer to the step by step tutorial regarding requisitions that starts on **page 20** of the PeopleSoft User Manual for Purchasing.

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

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

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

   All supporting documents are to be attached as one single attachment to Line one of the purchase requisition. If the purchase requisition exceeds $10,000, three quotes are needed. Each quote must be uploaded as a separate attachment on line one of the purchase requisition. Please refer to **page 35** of the PeopleSoft User Manual for Purchasing.

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 33** of the PeopleSoft User Manual for Purchasing.

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 70 and 61** of the PeopleSoft User Manual for Purchasing. If you have further questions, please contact the **Central Distribution Center at 619-388-1180**.

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

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

If the agreement document is one provided by the supplier, the supplier may request we sign it first. This is common for documents that originate with the supplier. In this circumstance, a few additional steps may be required. Still attach the agreement to line one of the purchase requisition. The Buyer will review the agreement and forward it to the Purchasing Supervisor who will then either sign the agreement and forward it to the suppler for their signature, or will request revisions from the supplier, if needed. Purchasing will continue to communicate with the supplier until the revisions are completed and the agreement is fully executed. Please note, agreements provided by the supplier almost always require revisions. The process can take time, particularly if the supplier has to forward the revisions to their legal department for review.

After the revisions are complete, and all signatures are obtained, the Buyer will upload the fully executed agreement to the purchase order and it will be dispatched to the supplier. Please note that all agreements and contracts related to Purchasing and Contract Services must be signed by an authorized signatory.

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

The supplier entered on the purchase request is often a suggested source of supply, particularly when the request is for goods or supplies. The San Diego Community College District Buyers use techniques that maximize cost savings, take into consideration availability, and ensure full and open competition where practicable. For some products, the 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 Buyer 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 41** of the PeopleSoft User Manual for Purchasing.

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

All goods must be delivered to the campus **Stockrooms/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 **48 hours** of receipt of goods.

As a reminder, end users are **NOT** to receive items in PeopleSoft. If the item(s) were delivered directly to the end user, then the end user will need to contact the appropriate Stock Room/Central Distribution Center to notify them that the order has been received. For a list of receiving contacts per location, please refer to **page 40** of the PeopleSoft User Manual for Purchasing or your campus Business Service Office.

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

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

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

21. **What is the process for returns and Exchanges?**

See Returns & Exchanges 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 Buyers are unauthorized purchases and may result in the individual being financially responsible for that unauthorized purchase or result in the supplier not receiving payment from SDCCD. The District requires regular purchase orders be issued pursuant to the California Education Code prior to the procurement of materials, supplies or services.

This does not apply to purchases made via approved processes related to CAL-Card usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current form to complete and have signed by your Campus VPA. This form details the unauthorized purchase and what steps will be taken to ensure only authorized purchases are made going forward. Please refer to **page 79** of the PeopleSoft user Manual for Purchasing. See Board Policy 6330, AP 6330.14.

For Board Policy reference, click here: https://www.sdccd.edu/about/leadership/board-of-trustees/board-policies/index.aspx.

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

PEOPLESOFT (PS) SUPPLIER INTAKE PROCESS

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

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

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 requester/initiator must first send the blank SDCCD Supplier Intake 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: http://bussrv.sdccd.edu/purchasing/forms.cfm.

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

All requests for supplier approval must be reviewed for completeness by the campus Business Office prior to submittal to purchasing for approval.

**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 Intake 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 requester/initiator to enter the supplier into PeopleSoft's supplier database.

The requester/initiator will then email the IRS W9 / W8 and Supplier Intake documents to supplierintake@sdccd.edu requesting approval by Purchasing. Enter ONLY the supplier name as entered into PeopleSoft and ID number in the subject line of the email.

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

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

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

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

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

To make changes to an existing supplier's profile, email a completed Supplier Intake Form indicating the changes to supplierintake@sdccd.edu. **All edits to a supplier's profile must be completed by the purchasing department.**

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

SUPPLIERS

PeopleSoft can be accessed through the District website by selecting the **Employees** tab, and 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.

SAN DIEGO
COMMUNITY COLLEGE
DISTRICT

EMPLOYEE EMAIL | DIRECTORIES | QUICKLINKS ▾

mySDCCD Login....

By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID: 0000000000

Password: Password

Sign In   Forgot your Password?

Regular system mainenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

Need Assistance? Student Help | Employee Help

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

  ❖ **Financials9.2>Suppliers>Supplier Information>Add/Update>Supplier**
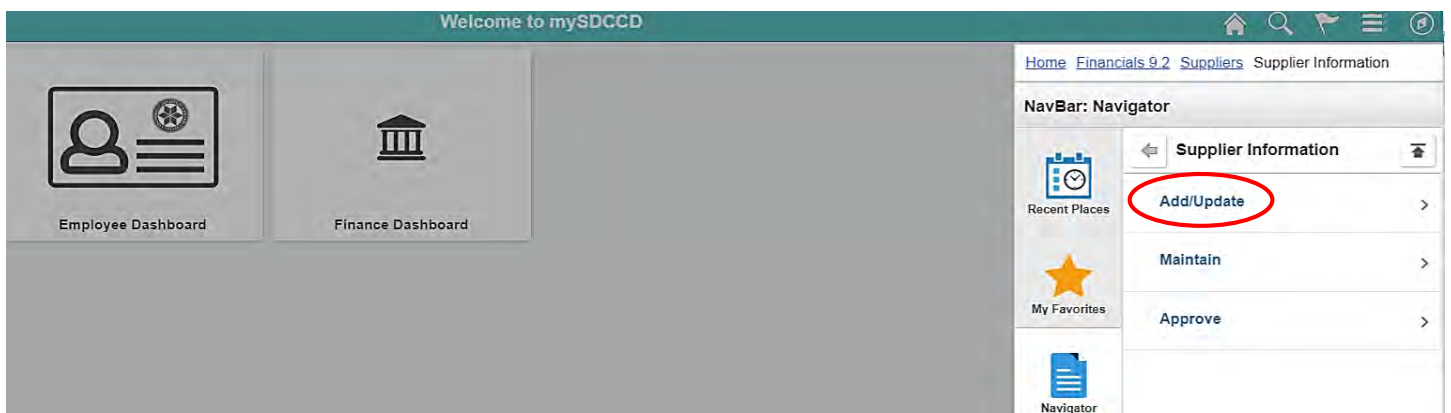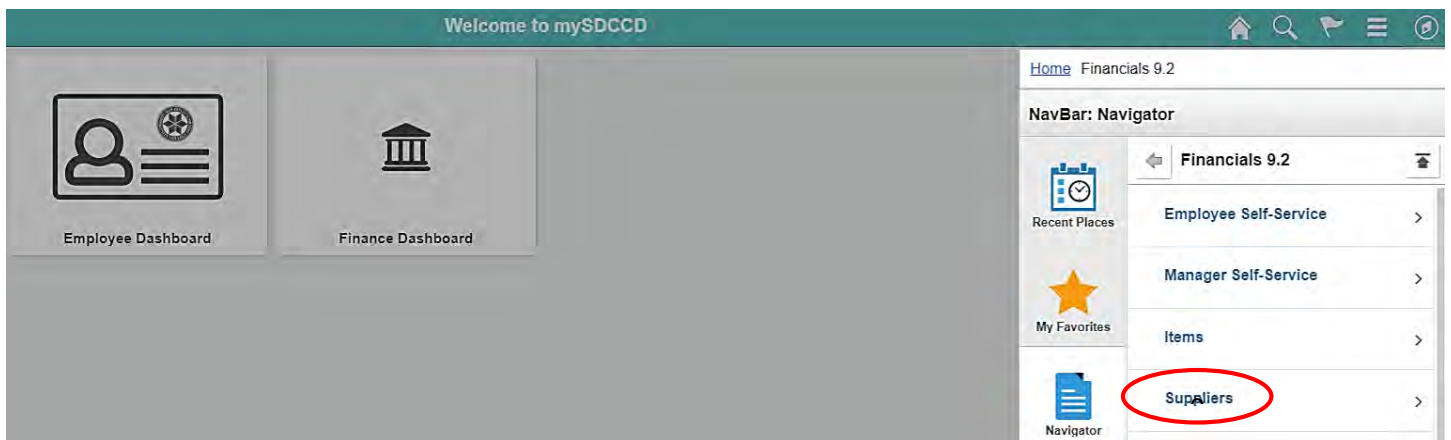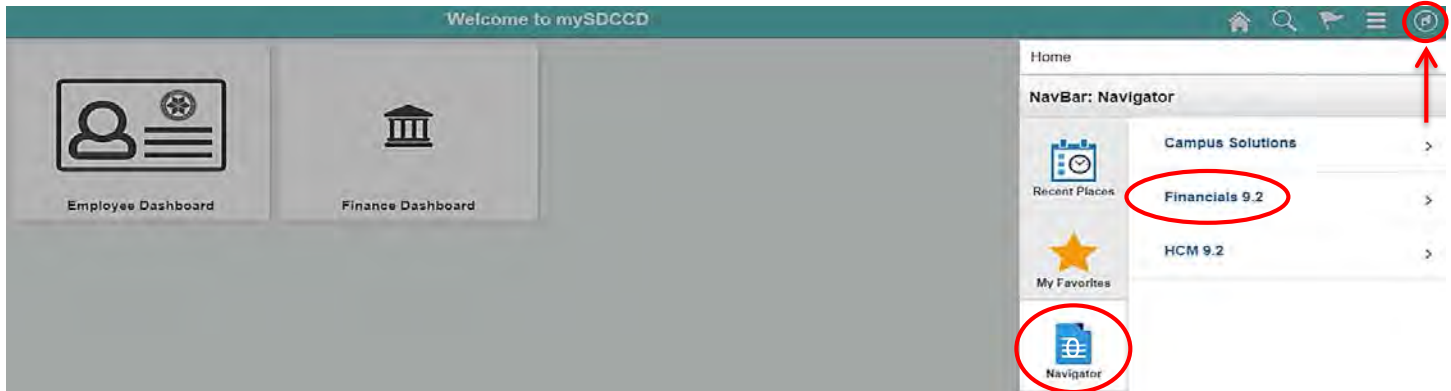
To search for an existing supplier, enter the **Supplier ID** number or **Supplier Name** in the search field below and click **Search**. If searching with a Supplier ID number, click on the dropdown arrow in that field and click **contains** prior to searching.

Supplier Information

Supplier Information

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

Find an Existing Value	Add a New Value

▼ Search Criteria

SetID	= ▼	SHARE 🔍
Supplier ID	contains ▼	
Persistence	= ▼	▼
Short Supplier Name	begins with ▼	🔍
Our Customer Number	begins with ▼	🔍
Supplier Name	begins with ▼	🔍

☐ Include History ☐ Correct History ☐ Case Sensitive

| Search | Clear | Basic Search 🔲 Save Search Criteria |

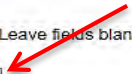Find an Existing Value | Add a New Value

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

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

Supplier Information

Supplier Information

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

Find an Existing Value	Add a New Value

▼ Search Criteria

SetID	= ▼	SHARE 🔍
Supplier ID	contains ▼	
Persistence	= ▼	▼
Short Supplier Name	begins with ▼	🔍
Our Customer Number	begins with ▼	🔍
Supplier Name	begins with ▼	🔍

☐ Include History ☐ Correct History ☐ Case Sensitive

| Search | Clear | Basic Search 🔲 Save Search Criteria |

Find an Existing Value | Add a New Value

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.

Supplier Information

Supplier Information

| Find an Existing Value | Add a New Value |

SetID SHARE 🔍
Supplier ID NEXT
Persistence Regular ▼

Add

Find an Existing Value | Add a New Value

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

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

Supplier Information

Supplier Information

| Find an Existing Value | Add a New Value |

SetID SHARE 🔍
Supplier ID NEXT
Persistence Regular ▼

Add

Find an Existing Value | Add a New Value

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

- ❖ **Supplier Name** – Enter the **Business Name** (**alpha only)** from Line 2 of the W-9 form. If Line 2 is blank, enter the Name from Line 1. If both line 1 & 2 are populated, enter line 2 for the Supplier Name and then enter line 1 on the first line of the supplier address.
  If entering an individual's name, enter the first name first, middle initial and last name with no comma
- ❖ **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 Recourses related suppliers)
- ❖ **Check for Duplicate** – Click this to verify if the supplier is already active in PS.
- ❖ **Additional ID numbers** – Click on and expand the **Additional ID Numbers** tab to enter the Tax ID**.**

| Identifying Information | Address | Contacts | Location | Custom |

SetID SHARE

Supplier ID NEXT

*Supplier Short Name [ ]

*Classification [Outside Party ▼]   [Check for Duplicate]

HCM Class [▼]

*Persistence [Regular ▼]

*Supplier Status [Approved ▼]

*Supplier Name [ ]

Additional Name [ ]

☐ Withholding
☑ Open For Ordering
☐ VAT Registration
*Supplier Audit [Default ▼]
☑ Supplier Audit   Template ID [SDCCD TEMPLAT]

[Expand All]

**NOTE: If the supplier is a duplicate, use the previous Supplier ID and cancel the current one. If you already saved the new supplier, contact the Purchasing Department to inactivate the duplicated ID.

Supplier Relationships

☐ Corporate Supplier
Corporate SetID [SHARE]
Corporate Supplier ID [NEXT]

Create Bill-To Customer

☐ Create Bill To Customer

▶ **Supplier Rating**
▶ **Supplier Logo**
▶ **Additional ID Numbers**
▶ **Duplicate Invoice Settings**
▶ **Government Classifications**
▶ **Standard Industry Codes**
▶ **Additional Reporting Elements**
▶ **Comments**

[Expand All]   [Collapse All]

[Save] [Notify]   [Add] [Update/Display] [Include History] [Correct History]

Identifying Information | Address | Contacts | Location | Custom

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.

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

▼Additional ID Numbers

Customer SetID [SHARE] 🔍   Customer ID [ ] 🔍   **Our Customer Number** [ ]

ID Numbers   Personalize | Find | View All | 🔲 | 🔳   First ◀ 1 of 1 ▶ Last   ISO and SEPA Information

Type	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.).
- ❖ **Address 1** – Re-enter the first line of the supplier address or if applicable, enter the C/O information or the legal name from line 1 of the W9 form. Enter the address on **Address 2** and then complete with City, State and Postal.
- ❖ ****NOTE: A Physical address is required for all new suppliers and the W9 form must be included 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 16** for instructions on how to enter the additional **Remit** address.

Identifying Information	Address	Contacts	Location	Custom

SetID SHARE

Supplier ID NEXT   Short Supplier Name   Supplier

Supplier Address   Find | View All   First 1 of 1 Last

Address ID 1

Description 3375 CAMINO DEL RIO S

Details   Find | View All   First 1 of 1 Last

Effective Date 10/02/2018   Effective Status Active ▾

Country USA   United States

Address 1 3375 CAMINO DEL RIO S

Address 2

Address 3

City SAN DIEGO

County   Postal 92108

State CA   California

Email ID ENTER A VALID EMAIL ADDRESS HERE

▶ Payment/Withholding Alt Names

Phone Information   Personalize | Find | View All | 🖾 | 📊   First 1 of 1 Last

*Type	Location	Prefix	Telephone	Extension
Business Phone ▾		619	388-6562	

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

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

Identifying Information	Address	Contacts	Location	Custom

SetID SHARE

Supplier ID NEXT   Short Supplier Name   Supplier

Supplier Address   Find | View All   First ◀ 1 of 1 ▶ Last

Address ID 1   ⊞ ⊟

Description REMIT ADDRESS

Details   Find | View All   First ◀ 1 of 1 ▶ Last

Effective Date 10/03/2018 📅   Effective Status Active ▼

Country USA 🔍 United States

Address 1

Address 2

Address 3

City

County   Postal

State 🔍

Email ID

▶ 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.

| Identifying Information | Address | Contacts | Location | Custom |

SetID SHARE

Supplier ID NEXT   Short Supplier Name   Supplier

Supplier Contact   Find | View All   First ◁ 1 of 1 ▷ Last

Contact ID 1

Description [   ]

Details   Find | View All   First ◁ 1 of 1 ▷ Last

Effective Date 10/03/2018 📅

Effective Status Active ▼

Type [   ] ▼

Name [   ]

Title [   ]

Address [ ] 🔍

Internet http:// [   ]   View Internet Address

Email ID [   ]

Phone Information   Personalize | Find | 🗔 | 📊   First ◁ 1 of 1 ▷ Last

*Type	Prefix	Telephone	Extension
Business Phone ▼	[ ]	[ ]	[ ]

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

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

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

Identifying Information	Address	Contacts	Location	Custom

SetID SHARE

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)

Description

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 SHARE   Location MAIN

Supplier ID NEXT   Description

Short Supplier Name

Supplier Name

Sales/Use Tax Applicability

*Sales/Use Tax Applicability Sales Tax ▼   Ultimate Use Code 🔍

*Ship To Location | Non Taxable | Tax Destination 🔍
                    | Sales Tax |
                    | Use Tax |

▼ Sales Tax and Use Tax Options

Sales Tax Tolerance

*Sales Tax Tolerance Default from Higher Level ▼

Currency Code 🔍   Amount   0.000

Rate Type 🔍   Percent   0.00

OK   Cancel

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 | Contacts | Location | Custom

SetID SHARE

Supplier ID NEXT

*Supplier Short Name _____

*Classification Outside Party ▾   [Check for Duplicate]

HCM Class _____ ▾

*Persistence Regular ▾

*Supplier Status Unapproved ▾

*Supplier Name _____

Additional Name _____

☐ Withholding
☑ Open For Ordering
☐ VAT Registration
*Supplier Audit Default ▾
☑ Supplier Audit   Template ID SDCCD TEMPLAT

[Expand All] [Collapse All]
Attachments (0)

Supplier Relationships

☐ Corporate Supplier

Corporate SetID SHARE

Corporate Supplier ID NEXT

☐ InterUnit Supplier

InterUnit Supplier ID _____ 🔍

Supplier Hierarchy

Create Bill-To Customer

☐ Create Bill To Customer

▶ **Supplier Rating**

▶ **Supplier Logo**

▶ Additional ID Numbers

▶ **Duplicate Invoice Settings**

▶ **Government Classifications**

▶ **Standard Industry Codes**

▶ **Additional Reporting Elements**

▶ **Comments**

[Expand All] [Collapse All]

[💾 Save] [✉ Notify]   [➕ Add] [📝 Update/Display] [📋 Include History] [📄 Correct History]

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

**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 supplierintake@sdccd.edu. **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
❖ Consultant, Lecture or Performance agreement, if applicable.

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 Buyers are unauthorized purchases and may result in the individual being financially responsible for that unauthorized purchase or result in the supplier not receiving payment from SDCCD. The District requires regular purchase orders be issued pursuant to the California Education Code prior to the procurement of materials, supplies or services.

This does not apply to purchases made via approved processes related to CAL-Card usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current form to complete and have signed by your Campus VPA. This form details the unauthorized purchase and what steps will be taken to ensure only authorized purchases are made going forward. Please refer to **page 79** of the PeopleSoft user Manual for Purchasing and 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**.

❖ **SHIPPIN/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 32** 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 of $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
  • Sponsorships/Small Advertising
  • Honorarium- one time lectures
  • Fees for Street Fairs/Outreach /Local promos
  • Deposits for events which meet the above criteria

❖ **AGREEMENTS**: For our District agreements, please complete all blank fields, and have the campus representative and supplier sign, then attach the agreement to line one of the purchase requisition. When the Buyer receives the purchase requisition in their queue, they will review the attached agreement. The Buyer will then forward the agreement to the Purchasing Supervisor for signature. Or, if revisions are needed, the Buyer will return the agreement to the requester to complete the revisions.

If the agreement document is one provided by the supplier, the supplier may request we sign it first. This is common for documents that originate with the supplier. In this circumstance, a few additional steps may be required. Still attach the agreement to line 1 of the requisition. The Buyer will review the agreement and forward it to the Purchasing Supervisor who will then either sign the agreement and forward it to the suppler for their signature, or will request revisions from the supplier, if needed. Purchasing will continue to communicate with the supplier until the revisions are completed and the agreement is fully executed. Please note, agreements provided by the supplier almost always require revisions. The process can take time, particularly if the supplier has to forward the revisions to their legal department for review.

In either of the above scenarios, after the revisions are complete, and all signatures are obtained, the Purchasing Supervisor will return the fully executed agreement to the Buyer so that the purchase order can be processed. The fully executed agreement will be attached to the purchase order when it is dispatched to the supplier.

**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 Buyer 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 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.

A PURCHASE ORDER WILL BE ISSUED FOR THE VEHICLES REFLECTING NET-30 TERMS AND INVOICING INSTRUCTIONS.

REQUISITIONS

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

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

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.

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

**NOTE: Add this website to your internet favorites for easy access.
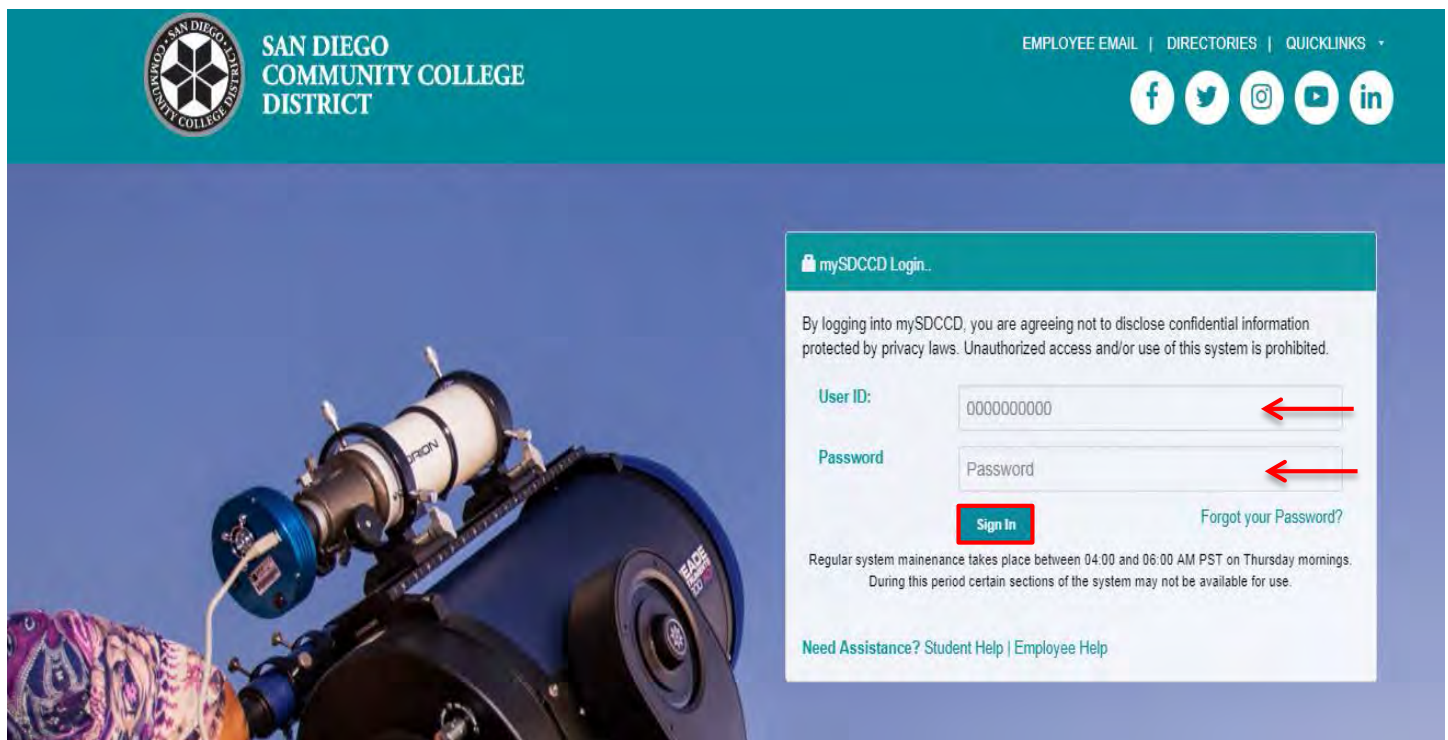
To access the **Create Requisition** screen, click on the Finance Dashboard icon.

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

- ❖ **Financials 9.2>eProcurement>Requisition**

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

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

Requisition Settings

Business Unit DIS01 District Operations   Bid No/Quote

*Requester KGOMEZ Kristina Gomez   Priority Medium ▼

*Currency USD

Default Options ⑦

○ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these 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 ⑦

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier   Category

Supplier Location   Unit of Measure EA

Buyer

Shipping Defaults

Ship To DIS   Add One Time Address

Due Date   Attention

Distribution Defaults

SpeedChart

Accounting Defaults   Personalize | Find | 🗗 | 🔜   First ◀ 1 of 1 ▶ Last

Chartfields1 | Details | Asset Information | 📇▶

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project
1		DIS	DIS01							

OK   Cancel

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 🔍 ←	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 ?

○ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these 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.

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 name and click **Find**.

Requisition Settings

Business Unit	DIS01 🔍	District Operations	Bid No/Quote QUOTE# 1234
*Requester	KGOMEZ 🔍	Kristina Gomez	Priority Medium ▾
*Currency	USD		

Default Options ?

○ Default   If you select this option, the defaults spe...   fields.

◉ Override   If you select this option, the defaults spe...

Line Defaults ?

Note: The information in this page does not reflect the data in ... replace the data in the corresponding fields of the selected lin...

Supplier	🔍
Supplier Location	🔍
Buyer	🔍

Shipping Defaults

Ship To	DIS 🔍
Due Date	📅

Supplier Search   Help

Supplier ID		Find
Name	UNISOURCE ←	Reset
Short Supplier Name		
Alternate Supp Name		
City		
Country	🔍	State ▾
Postal Code		

ⓘ Enter search criteria to find a supplier.

Select   Cancel

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

Next, indicate the **Category** which best defines the items that are being ordered. For a list of **Category Codes,** refer to **pages 72-78**.

- ❖ **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.

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

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

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

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

Buyer Assignment:

- ❖ **Peter Hester –** CE Mesa, CE Miramar and North City
- ❖ **Kelly Rosas –** Miramar College, CE Mid-City and CE West City
- ❖ **Kellie Silva –** District Office and City College
- ❖ **Vanessa White –** Mesa College, Cesar Chavez and ECC

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!

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

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

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

Requisition Settings

Business Unit	DIS01 🔍	District Operations	Bid No/Quote	QUOTE# 1234
*Requester	KGOMEZ 🔍	Kristina Gomez	Priority	Medium ▾
*Currency	USD			

Default Options ⑦

○ Default — If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these 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 ⑦

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier	0002004882 🔍	Category	425-48 🔍
Supplier Location	MAIN 🔍	Unit of Measure	EA 🔍
Buyer	VWHITE 🔍		

Shipping Defaults

| Ship To | DIS0DO0270 🔍 | Add One Time Address | |
| Due Date | 🗓 | Attention | KRISTINA GOMEZ/RM 27† |

Distribution Defaults

SpeedChart [   ] 🔍

Accounting Defaults   Personalize | Find | 🔳 | 🔣   First ◀ 1 of 1 ▶ Last

| Chartfields1 | Details | Asset Information | 🔲 |

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project
1		DIS 🔍	DIS01 🔍	🔍	74300 🔍	🔍	🔍	🔍	🔍	

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.**

Accounting Defaults   Personalize | Find | 🔳 | 🔣   First ◀ 1 of 1 ▶ Last

| Chartfields1 | Details | Asset Information | 🔲 |

ount	Oper Unit	PC Bus Unit	Project	Activity	Affiliate	Fund Affil		
🔍	🔍	🔍	🔍	🔍	🔍	🔍	⊞	⊟

Accounting Defaults   Personalize | Find | 🔳 | 🔣   First ◀ 1-2 of 2 ▶ Last

| Chartfields1 | Details | Asset Information | 🔲 |

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project
1	50.0000	DIS 🔍	DIS01 🔍	🔍	🔍	🔍	🔍	🔍	🔍	
2	50.0000	DIS 🔍	DIS01 🔍	🔍	🔍	🔍	🔍	🔍	🔍	

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 | Find | ☐ | ☐ First ◄ 1 of 1 ► Last
Chartfields1	Details	**Asset Information**	☐►		
AM Business Unit		Profile ID	Capitalize	Cost Type	Description
⟶ 🔍		⟶ 🔍	☐	🔍	⊟

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

Create Requisition ⓘ

Welcome   Kristina Gomez

🏠 Home   ✳ My Preferences   ⚙ Requisition Settings | 🛒 0 Lines   [Checkout]

| Request Options ▼ | Search | All ▼ | | [Search] | Advanced Search |

Enter search criteria or select from the menu on the right to begin creating your requisition.

📗 **Catalog**
Browse Catalogs
CATEGORY

🌐 **Web**
Browse Supplier Websites
Office Solutions Punch Out

📋 **Express Item Entry**
Create an Express Requisition

📂 **Special Requests**
Create a non-catalog request

📄 **Forms**
Create and Submit Forms

⭐ **Favorites**
Browse Favorite Items and Services

🗂 **Templates**
Browse Company and Personal Templates

👥 **ePro Services**
Request Services

Fixed Cost Service
Variable Cost Service
Time and Materials

🕑 **Recently Ordered**
View recently ordered items and services
Desk Highlighters, Chisel Ti...
Liquid Coffee Creamer, Frenc...
Liquid Coffee Creamer, Itali...
Plastic Cutlery, Heavyweight...
Green Tea K-Cups, 24/Box
More...

🔍 **External Catalogs**
Browse Supplier Website Items

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

- ❖ **Item Description** – Please follow the **ARMA 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 70-71** 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 32 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 33 & 34, if not an BLANKET, skip pages 33 & 34.

Special Requests ⑦

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

Item Details

*Item Description	CHAIR, STEEL CASE, EASY CHAIR, BLUE, W/CASTERS, PN 1234ABC		
*Price	250.00	*Currency	USD
*Quantity	1	*Unit of Measure	EA
*Category	425-48	Due Date	

Supplier

Supplier ID 0002004882
Supplier Name UNISOURCE WORLDWIDE UNISOURCE WORLDWIDE INC Suggest New Supplier
Supplier Item ID

Manufacturer

Mfg ID
Manufacturer
Mfg Item ID

Additional Information

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher

Request New Item

☐ Request New Item   A notification will be sent to a buyer regarding this new item request.

Add to Cart

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 ⑦

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

Item Details

*Item Description	FREIGHT			
*Price	1.00	*Currency	USD	
*Quantity	25	*Unit of Measure	DL 🔍	
*Category	962-86 🔍	Due Date	📅	

Supplier

Supplier ID 0002002986 🔍

Supplier Name SOUTHLAND TECHNOLO 🔍   Suggest New Supplier

Supplier Item ID

Manufacturer

Mfg ID 🔍

Manufacturer

Mfg Item ID

Additional Information

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher

Request New Item

☐ Request New Item   A notification will be sent to a buyer regarding this new item request.

Add to Cart

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

🏠 Home   ⁕ My Preferences   ⚙ Requisition Settings | 🛒 1 Line   Checkout

Search All ▼   Search   Advanced Search

NOTE: SKIP PAGES 33 & 34 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 66-69.

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 ⑦

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

Item Details

*Item Description	BLANKET
*Price	4000.00
*Quantity	1
*Category	918-07

*Currency USD
*Unit of Measure EA
Due Date

Supplier

Supplier ID	0002004892
Supplier Name	THE SAN DIEGO UNION
Supplier Item ID	

Suggest New Supplier

Manufacturer

Mfg ID	
Manufacturer	
Mfg Item ID	

Additional Information

ADVERTISING SERVICES
PURCHASING DEPARTMENT
JULY 1, 2020 - JUNE 30, 2021

> Use appropriate template in this box.

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher

Request New Item

☐ Request New Item   A notification will be sent to a buyer regarding this new item request.

Add to Cart

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

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit	DIS01	District Operations	Bid No/Quote	QUOTE# 1234
*Requester	KGOMEZ	Kristina Gomez	Priority	Medium ▾
*Currency	USD			

Cart Summary: Total Amount 4,000.00 USD

Expand lines to review shipping and accounting details   Add More Items

Requisition Lines ⑦

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ ☐ 1	BLANKET		THE SAN DIEGO UNION TRIBUNE, LLC.	1	EACH	4000.00	4000.00	🗎	Edit	🗑

☐ Select All / Deselect All   Select lines to: Add to Favorites   Add to Template(s)   Delete Selected   Mass Change

---

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

Line Details

Line Details ⑦

No Image   Line   1   BLANKET   Line Status   Open

▼ **Item Details** ⑦

Merchandise Amount	4000.00 USD	☐ RFQ Required
Item ID		☐ Device Tracking
Category	918-07	☐ Zero Price Indicator
Original Substituted Item Description		☑ Amount Only
Physical Nature	▾	☐ Inspection Required

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

Add More Items

Message

Delete

UNION

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)

The Requisition quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

[Yes]   [No]

*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 $10,000, three quote are required. Each quote must be uploaded as a separate attachment on line one of the purchase requisition; see below.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit DIS01 🔍	District Operations	Bid No/Quote QUOTE# 1234
*Requester KGOMEZ 🔍 Kristina Gomez		Priority Medium ▾
*Currency USD		

Cart Summary: Total Amount 250.00 USD

Expand lines to review shipping and accounting details   ✚ Add More Items

Requisition Lines ⓘ

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ ☐ 1	CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH	250.00	250.00	🗐	💬 Edit	🗑

☐ Select All / Deselect All   Select lines to: 📥 Add to Favorites   📋 Add to Template(s)   🗑 Delete Selected   📊 Mass Change

Total Amount   250.00 USD

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

**NOTE: Click on the plus (+) sign at the far right to upload each quote as a separate attachment.

Line Comment

Business Unit DIS01	Requisition Date 03/16/2021
	Status Open
Line 1	

Comments   Find   First ◀ 1 of 1 ▶ Last   ➕ ➖

Use Standard Comments   Entered On:

1 [   ]

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher
Add Attachments

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

Business Unit DIS01	Requisition Date 03/16/2021
	Status Open
Line 1	

Comments   Find   First ◀ 1 of 1 ▶ Last   ➕ ➖

Use Standard Comments   Entered On: 03/16/2021 2:54:24PM

1 [   ]

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher
Add Attachments

▼ Attachments

Attached File	User/Date Time	View	Send to Supplier
1 Unisource_Worldwide.pdf	KGOMEZ2021-03-16-16.49.22.556	View	☑ ➖

OK   Cancel

**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.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit DIS01 🔍	District Operations	Bid No/Quote QUOTE# 1234
*Requester KGOMEZ 🔍	Kristina Gomez	Priority Medium ▾
*Currency USD		

Cart Summary: Total Amount 250.00 USD

Expand lines to review shipping and accounting details   ➕ Add More Items

Requisition Lines ❓

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▸ ☐ 1	CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH	250.00	250.00	🗒	📝 Edit	🗑

☐ Select All / Deselect All   Select lines to: ➕ Add to Favorites   📲 Add to Template(s)   🗑 Delete Selected   Mass Change

Total Amount   250.00 USD

Shipping Summary

✏ Edit for All Lines

Ship To Location	DIS0DO0270
Address	3375 Camino Del Rio South
	San Diego, CA 92108-3883
Attention To	KRISTINA GOMEZ/RM 270
Comments	

Requisition Comments and Attachments

Enter requisition comments

ENTER QUOTE#, DATE, LOCATION, DEPT, ROOM #, POINT OF CONTACT, SUPPLIER'S EMAIL ADDRESS
ALL NON-TAXABLE LINE ITENS

☑ Send to Supplier   ☑ Show at Receipt   ☑ Shown at Voucher   Add more Comments and Attachments

NOTE: Do not add attachments here. All attachments should be uploaded as one single attachment to line one of the requisition.

Approval Justification

Enter approval justification for this requisition

Check Budget   Pre-Check Budget

| Save & submit | Save for Later | ➕ Add More Items | 👓 Preview Approvals |

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 Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit DIS01 🔍	District Operations	Bid No/Quote QUOTE# 1234
*Requester KGOMEZ 🔍	Kristina Gomez	Priority Medium ▾
*Currency USD		

Cart Summary: Total Amount 250.00 USD

Expand lines to review shipping and accounting details   ➕ Add More Items

Requisition Lines ⑦

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▾ 1	CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH	250.00	250.00	📋	💡 Edit	🗑

Shipping Line 1

*Ship To DIS 🔍   Add Shipto Comments   Quantity 1   ➕ ➖
Address 3375 Camino Del Rio South   Add One Time Address   Price 250.00
         San Diego, CA 92108-3883

Price Adjustment
Pegging Inquiry
Pegging Workbench

Attention To Kristina Gomez
Due Date ___ 📅

▾ Accounting Lines

*Distribute By Qty ▾   SpeedChart ___ 🔍

Accounting Lines

Personalize | Find | View All | 🗖 | 🔍   First ◀ 1 of 1 ▶ Last

Chartfields1 | Chartfields2 | Details | Details 2 | Asset Information | Asset Information 2 | Budget Information | 📧▸

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event	
1	Open		DIS 🔍	1	100.0000	250.00	DIS01 🔍	🔍	➕ ➖

☐ Select All / Deselect All   Select lines to: 🔖 Add to Favorites   📋 Add to Template(s)   🗑 Delete Selected   📝 Mass Change

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

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

🔍 Check Budget   📋 Pre-Check Budget

📋 Save & submit   💾 Save for Later   ➕ Add More Items   👓 Preview Approvals

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

Select lines to: Add to Favorites   Add to Template(s)   Delete Selected   Mass Ch

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.

[OK]   [Cancel]

Receipt   ☐ Shown at Voucher   Add more Comm

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

Check Budget   Pre-Check Budget   → Budget Checking Status:**Valid**

Save & submit   Save for Later   ✚ Add More Items   Preview Approvals

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

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

✳ My Preferences   ⚙ Requisition Settings

Requisition Summary

Business Unit	DIS01	District Operations	Bid No/Quote	CHAIR FOR MAIN OFFICE
Requester	KGOMEZ	Kristina Gomez	Requisition ID	DOR0007126
Currency	USD		Priority	Medium ▾

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.

Check Budget   Pre-Check Budget   Budget Checking Status:**Valid**

Save & submit   Save for Later   ✚ Add More Items   Preview Approvals

The final page is the **Confirmation** page. This is a summary of the purchase 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 Buyer, a confirmation will be emailed to the requestor.

Confirmation

Your requisition has been submitted.

Requested For	Kristina Gomez	Number of Lines	1
Bid No/Quote	DOR0007126	Total Amount	250.00 USD
Requisition ID	DOR0007126	Pre-Encumbrance Balance	250.00 USD
Business Unit			
Status	Pending		
Priority	Medium		
Budget Status	Valid		

📄 View printable version   ✏️ Edit This Requisition   📝 Check Budget   📝 Pre-Check Budget

Req Approval

Line 1:Pending
Duracel CopperTop AAA Alkaline Batteries, 16/Pk   ➕ Start New Path

District Req Approval

Pending		Skipped		Not Routed	
🕐 Wichmann, Nancy SDCCD Budget Approvers	→	⚠️ No approvers found SDCCD CGSF Approvers One	➕→	🖨️ Multiple Approvers Route to Primary Buyer	➕

Line 2:Pending
Duracel Quantum Alkaline AA Batteries, 16/Pk   ➕ Start New Path

District Req Approval

Pending		Skipped		Not Routed	
🕐 Wichmann, Nancy SDCCD Budget Approvers	→	⚠️ No approvers found SDCCD CGSF Approvers One	➕→	🖨️ Multiple Approvers Route to Primary Buyer	➕

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 and click the Search button.

Business Unit	DIS01 🔍	Bid No/Quote			🔍
Requisition ID	DOR0007126 🔍	Request State	▼	Budget Status	▼
Date From	📅	Date To	📅		
Requester	KGOMEZ 🔍	Entered By	🔍	PO ID	🔍

Search   Clear   Show Advanced Search

Requisitions ❓

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Bid No/Quote	BU	Date	Request State	Budget	Total		
▼ DOR0007126	DOR0007126	DIS01	12/18/2017	PO(s) Completed	Valid	113.20 USD	[Select Action] ▼	Go

Requester Kristina Gomez   Entered By Kristina Gomez   Priority Medium
Pre-Encumbrance Balance   0.00 USD

Requisition	Approvals	Inventory	Purchase Orders	Change Request	Receiving	Returns	Invoice	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 requistion 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 Buyer.

❖ **PURCHASE ORDERS:** The Buyer will review the requisiton for accuracy. If all is correct, the Buyer will process the purchase requisiton 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 additionl information.

❖ **CHANGE ORDERS:** Changes that need to be made to a purchase order after it has been dispatched to the supplier, will require a change order. Change orders must be initiated by the end-user at the 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 41** of this manual.

❖ **RECEIVING:** End users should not accept deliveries; instead, re-route the suppliers to the Stockroom/Distribution Center so the ordered items can be received into PeopleSoft. District Office, DSC, and Continuing Education receiving needs to be processed through the Distribution Center as well. 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 **48 hours of receipt of goods** to notify them that the order has been received.

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

Receiving Contacts Per Location:

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

❖ **RETURNS:** See Return & Exchanges Board Policy AP 6330.16. If you need further assistance, contact the Stockroom/Distribution Center or contact the appropriate Buyer.

❖ **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 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>Procurement>Manage Requisitions**
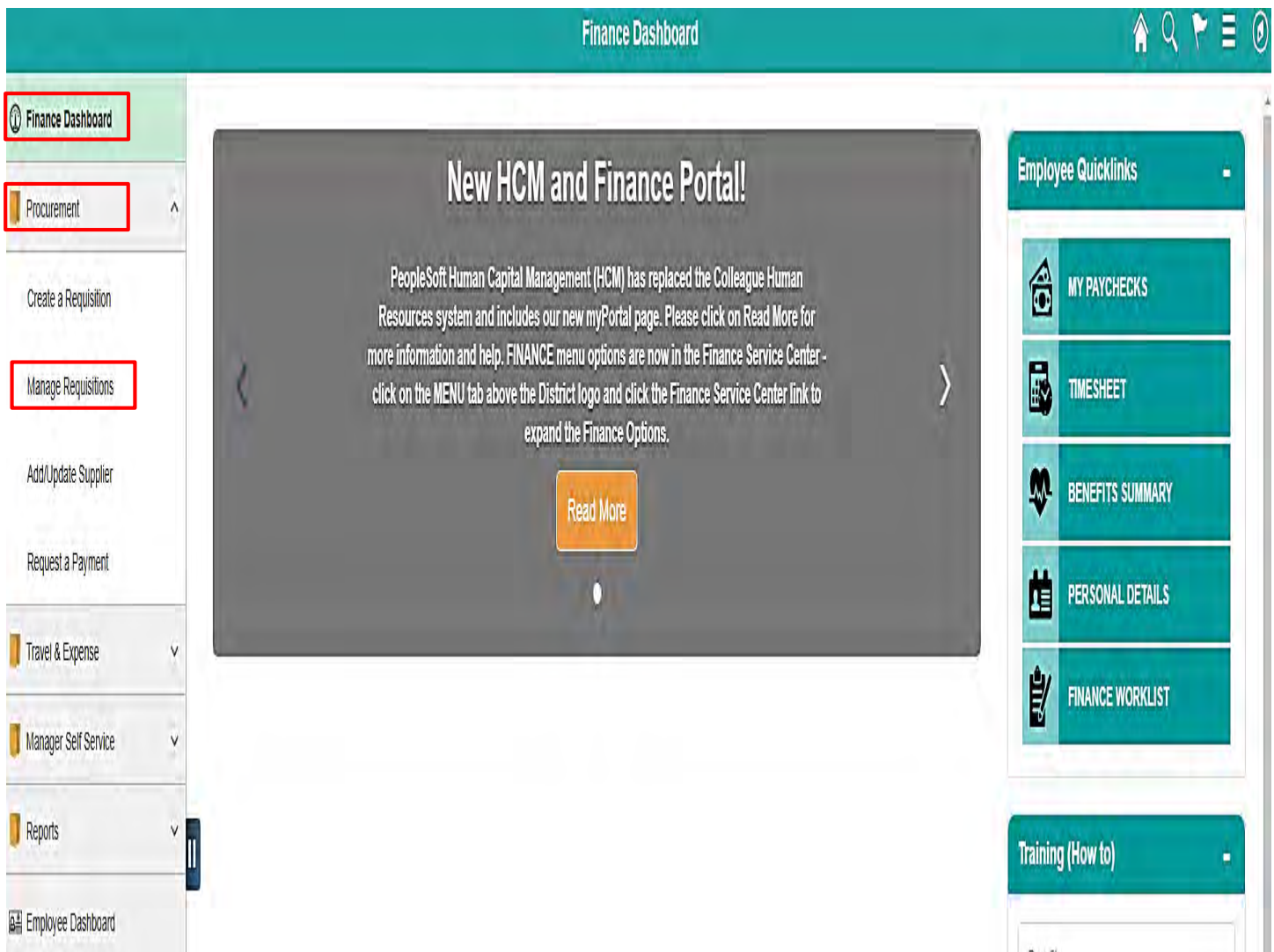
NOTE: To search for a purchase order or purchase requisition that needs to be edited, the Business Unit and either the Requisition ID or the PO ID fields MUST be populated.

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

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit MIR01	Bid No/Quote		
Requisition ID	Request State All but Complete	Budget Status	
Date From	Date To		
Requester	Entered By	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.

Requisitions (?)

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the 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

---

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 All but Complete	Budget Status
Date To 06/07/2016	

Message

This requisition is approved. Editing this requisition may restart the approval process. (18036,6249)

Click OK to continue, or click Cancel to go back.

OK   Cancel

IR01   03/01/2016 PO(s) Created   Valid   950.73 USD Edit   Go

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

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

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit MIR01	San Diego Miramar College
Requester CMORENCE	Cheyanna Morence
Currency USD	

Bid No/Quote 415183 2/24/16

Requisition ID MRR0001031

Priority Medium

Track Batch 1

Current Change Reason

Cart Summary: Total Amount 950.73 USD

Expand lines to review shipping and accounting details   Add More Items

Requisition Lines ?

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

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

Special Requests ⑦

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

Item Details

*Item Description   UNI-DIRECTIONAL FIBERGLASS TAPE 3" 100YDS

*Price   1.573   *Currency   USD

*Quantity   100   *Unit of Measure   EA

*Category   035-00   Due Date   03/15/2016

Supplier

Supplier ID   0002001070

Supplier Name   AIRCRAFT SPRUCE & SP   AIRCRAFT SPRUCE & SPECIALTY CO   Suggest New Supplier

Supplier Item ID   01-06800

Manufacturer

Mfg ID

Manufacturer

Mfg Item ID

Additional Information

☑ Send to Supplier   ☑ Show at Receipt   ☑ Show at Voucher

Request New Item

☐ Request New Item   A notification will be sent to a buyer regarding this new item request.

Apply

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

Check Budget   Pre-Check Budget

Save & submit   Save for Later   Add More Items   Preview Approvals

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

Total Amount

Message

This action wil restart the approval process. Click OK to continue, or click Cancel to 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

Comment Added one additional item.
KM 7/1/2020

☑ Use Same Reason Code

OK

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

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

Confirmation

Your requisition has been submit

Requested For	Cheyanna Morence		Number of Lines	11
Bid No/Quote	415454 02/26/16		Total Amount	939.50 USD
Requisition ID	MRR0001031			37.75 USD
Business Unit	MIR01			
Status	See Lines			
Priority	Medium			
Budget Status	Valid			
Track Batch	2			

🖨 View printable version   ✏ Edit This Requisition   🔍 Check Budget   📋 Pre-Check Budget

Req Approval

▼ **Line 2:Pending**   ⓘ View/Hide Comments
   ENGINE OIL PRESSURE GUAGE   ➕ Start New Path

Miramar Req Approval

Pending	Not Routed	Not Routed	Not Routed
⊙ Ornelas, Lynne SDCCD Budget Approvers	📬 Multiple Approvers MIR01_ePro_Level_Two_Apprs	📬 Multiple Approvers SDCCD CGSF Approvers One	📬 Multiple Approvers Route to Primary Buyer

▶ **Comment History**

▼ **Change Request/Line Approval Summary**   Personalize | View All | 🔗   1 of 1
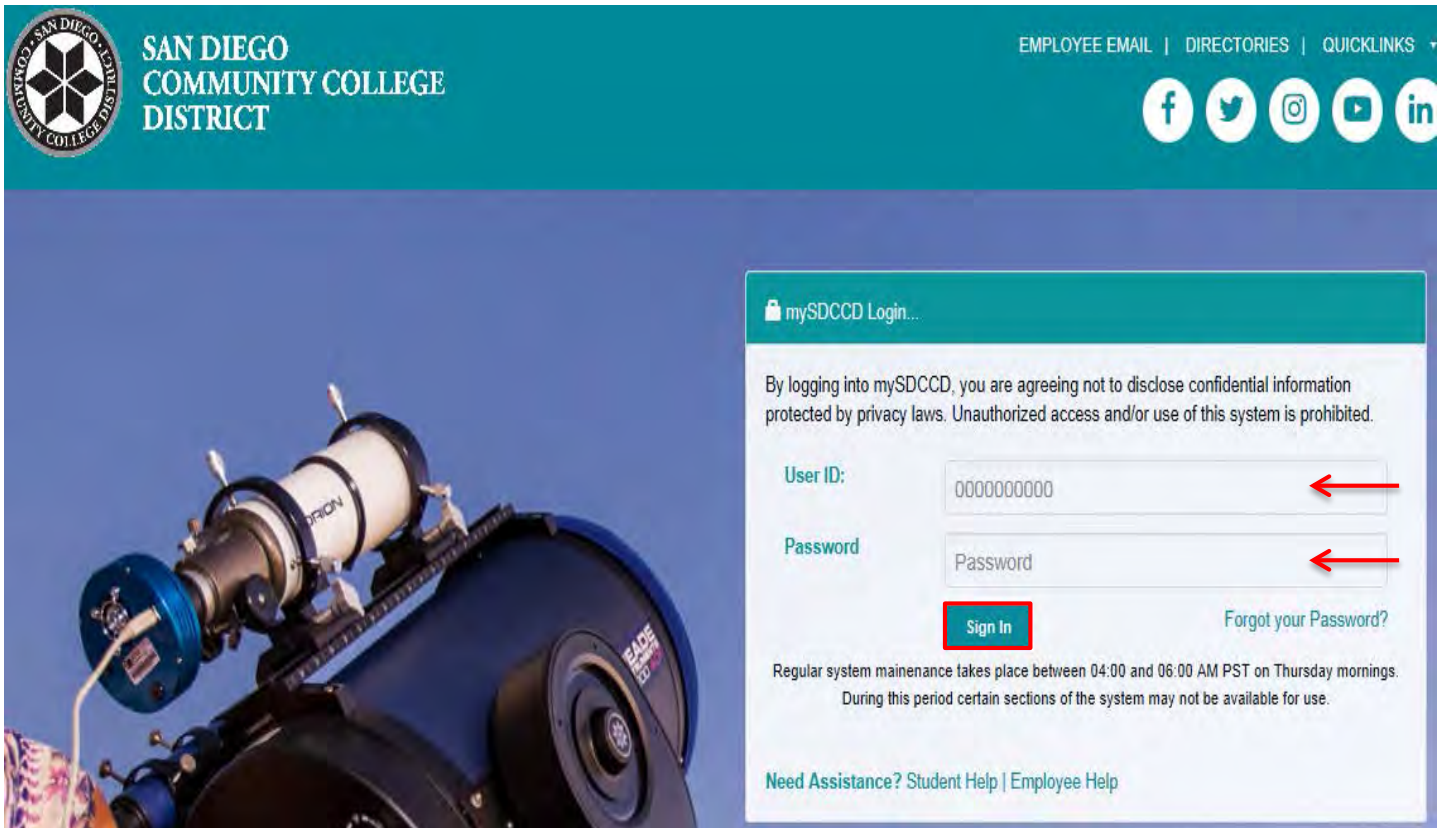
Line	Item Description	Change Request	Line Re-Approval
2	ENGINE OIL PRESSURE GUAGE	Created	Routed for Approval

DIRECT CONNECT (OFFICE SOLUTIONS) ORDERS

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

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 **Finance Dashboard** icon.

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

❖ **Financials 9.2>eProcurement>Requisition**

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

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

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

Requisition Settings

Business Unit MIR01 🔍   San Diego Miramar College   Bid No/Quote [ ]

*Requester KROSAS 🔍   Kelly Rosas   Priority Medium ▾

*Currency USD

Default Options ?

○ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these 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 ?

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier [ ] 🔍   Category [ ] 🔍

Supplier Location [ ] 🔍   Unit of Measure EA 🔍

Buyer [ ] 🔍

Shipping Defaults

Ship To MIR 🔍   Add One Time Address

Due Date [ ] 📅   Attention [ ]

Distribution Defaults

SpeedChart [ ] 🔍

Accounting Defaults										Personalize | Find | 🔳 | 🔳	First ◀ 1 of 1 ▶ Last

| Chartfields1 | Details | Asset Information | 🔳 |

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project
1	[ ]	MIR 🔍	MIR01 🔍	[ ] 🔍	[ ] 🔍	[ ] 🔍	[ ] 🔍	[ ] 🔍	[ ] 🔍	[ ]

[OK]   [Cancel]

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

❖ User: sdccdpc
❖ Pwd: sdccdpc@

NOTE: This site can be utilized for product search and pricing only. The **Check-Out feature is not active in this site. **Orders must be placed through PeopleSoft using either 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 - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit	MIR01	San Diego Miramar College	Bid No/Quote
*Requester	KROSAS	Rosas, Kelly	Priority Medium
*Currency	USD		

Cart Summary: Total Amount 42.83 USD

Expand lines to review shipping and accounting details

Add More Items

Requisition Lines ?

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ ☑ 1	Mesh Desk Organizer, 1 Vertica		OFFICE SOLUTIONS	1	EACH	42.83	42.83		Add	

☑ Select All / Deselect All   Select lines to: Add to Favorites   Add to Template(s)   Delete Selected   Mass Change

Total Amount   42.83 USD

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

Edit Lines/Shipping/Accounting for Selected Lines

Help

Line Information ?

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier ID		Supplier Location	
Buyer		Category	

Shipping Information

Ship To Location DISCDC0100

Address Add One Time Address

Due Date

Attention

Comments

Accounting Lines

Please enter GL Business Unit before selecting other chartfield values

Accounting Information   Personalize | Find | 🔲 | 🏢   First ◀ 1 of 1 ▶ Last

Chartfields1	Details	Asset Information							
Percent	Location	GL Unit	Fund	Dept	Activity	Account	Oper Unit		
1		MIR01	1110	74300	677020	4002			

Load Values From Defaults

OK   Cancel

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

Distribution Change Options   ☒

                                                                                 Help

For the selected requisition lines that are available for sourcing, apply distribution changes to
    ◉ **All Distribution Lines**
        Apply changes to all existing distribution lines.
    ○ **Matching Distribution Lines**
        Apply changes to each existing distribution line by matching the distribution line numbers.
    ○ **Replace Distribution Lines**
        Remove the existing distribution lines and replace with the distribution lines changes.

   OK   Cancel

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 Attachments

Enter requisition comments

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

☑ Send to Supplier   ☑ Show at Receipt   ☑ Shown at Voucher   Add more Comments and Attachments

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

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

🔍 Check Budget   📝 Pre-Check Budget

📋   Save & submit   💾   Save for Later   ➕   Add More Items   6ȣ Preview Approvals

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

Select lines to: 🔖 Add to Favorites   📇 Add to Template(s)   🗑 Delete Selected   📇Mass Ch

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.

[OK]   [Cancel]

: Receipt   ☐ Shown at Voucher   Add more Comr

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

🔍 Check Budget   📝 Pre-Check Budget   → Budget Checking Status: Valid

📋 Save & submit   💾 Save for Later   ➕ Add More Items   👓 Preview Approvals

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

**Note the Requisition ID number for your records.

→ Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

✴ My Preferences   ⚙ Requisition Settings

Requisition Summary

Business Unit	MIR01	San Diego Miramar College	Bid No/Quote MRR0002463
Requester	KROSAS	Rosas, Kelly	Requisition ID MRR0002463
*Currency	USD		Priority Medium ▼

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

🔍 Check Budget   📝 Pre-Check Budget   Budget Checking Status: Valid

📋 Save & submit   💾 Save for Later   ➕ Add 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 Buyer, a confirmation will be emailed to the requester.

Confirmation

Your requisition has been submitted.

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		
Status	Pending		
Priority	Medium		
Budget Status	Valid		

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

Req Approval

Line 1:Pending   View/Hide Comments
Mesh Desk Organizer, 1 Vertical/3 Horizontal Sections, 16 1/4 x 9 x 8, Black   Start New Path

District Req Approval

Skipped	Skipped	Skipped	Pending
No approvers found SDCCD Budget Approvers	No approvers found SDCCD CGSF Approvers One	Rosas, Kelly Route to Primary Buyer 02/15/17 - 8:57 AM	Multiple Approvers Error Step

► Comments

Apply Approval Changes

Create New Requisition   Manage Requisitions

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

❖ **Nav Bar** ⊙ **>Navigator>Financials 9.2>eProcurement>Manage Requisitions**

Enter the **Requisition ID** number and click search. Click on the grey arrow to the left under **Req ID** to expand the details of the 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 **Finance Dashboard** icon.

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

❖ **Financials 9.2>eProcurement>Requisition**

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

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

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

Requisition Settings

Business Unit DIS01 🔍   District Operations   Bid No/Quote [_____]

*Requester KGOMEZ 🔍   Kristina Gomez   Priority Medium ⌄

*Currency USD

Default Options ⑦

○ Default   If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these 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 ⑦

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier [_____]🔍   Category [_____]🔍

Supplier Location [_____]🔍   Unit of Measure EA 🔍

Buyer [_____]🔍

Shipping Defaults

Ship To DIS 🔍   Add One Time Address

Due Date [_____]📅   Attention [_____]

Distribution Defaults

SpeedChart [_____]🔍

Accounting Defaults   Personalize | Find | 🗗 | 🖩   First ◁ 1 of 1 ▷ Last

Chartfields1 | Details | Asset Information ▦▶

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project
1	[____]	DIS 🔍	DIS01 🔍	[_]🔍	[_]🔍	[_]🔍	[_]🔍	[_]🔍	[_]🔍	[_]

◁   ▶

OK   Cancel

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

Create Requisition ?

Welcome   Kristina Gomez

🏠 Home   🪄 My Preferences   ⚙ Requisition Settings | 🛒 0 Lines | Checkout

[Request Options ▼]   Search [All ▼] [_____]   [Search]   Advanced Search

Enter search criteria or select from the menu on the right to begin creating your requisition.

📖 **Catalog**
Browse Catalogs
CATEGORY

🌐 **Web**
Browse Supplier Websites
Grainger Punch Out
Office Solutions Punch Out

📑 **Express Item Entry**
Create an Express Requisition

🗒 **Special Requests**
Create a non-catalog request

📄 **Forms**
Create and Submit Forms

⭐ **Favorites**
Browse Favorite Items and Services

▦ **Templates**
Browse Company and Personal Templates

👤 **ePro Services**
Request Services
Fixed Cost Service
Variable Cost Service
Time and Materials

⊕ **Recently Ordered**
View recently ordered items and services
FEE, REGULATORY FEE
LAPTOP, HP PROBOOK 450, G8 V...

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 #]   🔍   Bulk Order ▼   Account ▼   🛒

Custom Catalog   View ›

⦿ All Products   ○ 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.

[NO]   [Yes]

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 - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit DIS01	District Operations	Bid No/Quote
*Requester KGOMEZ	Kristina Gomez	Priority Medium ⌄
*Currency USD		

Cart Summary: Total Amount 42.12 USD

Expand lines to review shipping and accounting details   ✚ Add More Items

Requisition Lines ❓

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
▶ ☑ 1	TK52416673T Fire-Resistant Was		GRAINGER	1	EACH	42.12	42.12	🖥	○ Add	🗑

☑ Select All / Deselect All   Select lines to: Add to Favorites   Add to Template(s)   Delete Selected   Mass Change

Total Amount   42.12 USD

Shipping Summary

✏ Edit for All Lines

Ship To Location	DIS
Address	3375 Camino Del Rio South
	San Diego, CA 92108-3883
Attention To	Kristina Gomez
Comments	

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

Edit Lines/Shipping/Accounting for Selected Lines

Help

Line Information ⑦

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

| Supplier ID | [   ] 🔍 | Supplier Location | [   ] 🔍 |
| Buyer | [   ] 🔍 | Category | [   ] 🔍 |

Shipping Information

Ship To Location DISCDC0100 🔍   Add One Time Address

Due Date [   ] 📅   Attention [   ]

Comments [   ]

Accounting Lines

SpeedChart [   ] 🔍

Please enter GL Business Unit before selecting other chartfield values

Accounting Information

Personalize | Find | 🗐 | 🔢   First ◀ 1 of 1 ▶ Last

| Chartfields1 | Details | Asset Information | 🔢 |

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Uni
1	[ ]	[ ] 🔍	DIS01 🔍	1110 🔍	74300 🔍	677020 🔍	4002 🔍	[ ]

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

Distribution Change Options

Help

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

🔘 **All Distribution Lines**

Apply changes to all existing distribution lines.

⚪ **Matching Distribution Lines**

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

⚪ **Replace Distribution Lines**

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

[OK]   [Cancel]

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 Attachments

Enter requisition comments

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

☑ Send to Supplier   ☑ Show at Receipt   ☑ Shown at Voucher

Add more Comments and Attachments

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

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

Check Budget   Pre-Check Budget

Save & submit   Save for Later   ➕ Add More Items   👓 Preview Approvals

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

Select lines to: Add to Favorites   Add to Template(s)   🗑 Delete Selected   Mass Ch

Total Amount   25

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.

OK   Cancel

Receipt   ☐ Shown at Voucher

Add more Comr

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

Check Budget   Pre-Check Budget   → Budget Checking Status Valid

Save & submit   Save for Later   ✚ Add More Items   👓 Preview Approvals

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

**Note the Requisition ID number for your records.

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

My Preferences   Requisition Settings

Requisition Summary

Business Unit   DIS01   District Operations   Bid No/Quote   DOR0012754

Requester   KGOMEZ   Kristina Gomez   Requisition ID   DOR0012754

*Currency   USD   Priority   Medium ▾

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

Check Budget   Pre-Check Budget   Budget Checking Status:Valid

Save & submit   Save for Later   ✚ Add 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 Buyer, a confirmation will be emailed to the requester.

Confirmation

Your requisition has been submitted.

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   Edit This Requisition   Check Budget   Pre-Check Budget

Req Approval

▼ **Line 1:Pending**   Start
                                                                                                                         ⊞ New
    TK52417044T Fire-Resistant Wastebasket Rectangular Open 7 gal Black Height 15 14 in WidthDiameter 10 12 in Depth 10 12 in Plastic Fiberglass Textured Indoor Stationary No Lid None None Free-Standing   Path

District Req Approval

Pending		Not Routed		Not Routed	
Nancy Wichmann SDCCD Budget Approvers 🕐	⊞→	Nancy Wichmann SDCCD CGSF Approvers One	⊞→	Kellie Marie Silva Route to Primary Buyer	⊞

Apply Approval Changes

Create New Requisition   Manage Requisitions

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

❖ **Nav Bar** 🔵 **>Navigator>Financials 9.2>eProcurement>Manage Requisitions**

Enter the **Requisition ID** number and click search. Click on the grey arrow to the left under **Req ID** to expand the details of the 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. **Please note**: 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 <u>DESCRIPTION OF SERVICE</u> FOR <u>CAMPUS/DEPT/PROGRAM</u>

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 APINVOICE@SDCCD.EDU.

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 APINVOICE@SDCCD.EDU.

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 DATE
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 <u>NAME OF EQUIPMENT/CAMPUS/DEPT</u>

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 <u>CAMPUS/DEPT</u>

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 <u>NAME/TYPE OF SUPPLY</u> FOR <u>CAMPUS/DEPT</u>

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 PURCHPO@SDCCD.EDU. 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 @ $10,500)

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

For Systems Furniture or Furniture orders EXAMPLES ARE:

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

CABINET, PEDESTAL, MOBILE, METAL   1EA $285.33

BOOKCASE, 5 SHELF ADJUSTABLE   1EA $325.00

CABINET, LOCKER   1EA $465.00

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

CHAIR, HIGH BACK LEATHER, ADJUSTABLE   5EA $645.00

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

CATEGORY CODES

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

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

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

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

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

838-00	Telecommunication Equipment, Accessories, and Supplies	Telecom
840-00	Television Equipment and Accessories	Television
855-00	Theatrical Equipment and Supplies	Theatrical
860-00	Tickets, Coupon Books, Sales Books, Strip Books, Etc.	Tickets
863-00	Tires and Tubes, Supplies and Accessories	Tires
875-00	Veterinary Equipment and Supplies	Veterinary
880-00	Audio Visual Equipment and Supplies	Audio Vis
880-43	Projection Screens	Projection
880-67	Projectors	Projectors
895-00	Welding Equipment and Supplies	Welding Eq
901-00	CATERING	Catering
906-00	Architectural Services, Professional	Architectu
908-00	Bookbinding, Rebinding, and Repair Services	Bookbindin
909-00	Building Construction Services	Building C
915-00	Communications and Media Related Services	Communicat
915-75	Telephone Services, Cellular	TELEPHONE
918-02	Audio/Visual Consulting Services	Audio/Vis
918-06	Administrative Consulting	Admin
918-07	Advertising Consulting	Advertisin
918-14	Appraisals Consulting	Appraisals
918-15	Architectural Consulting	Architectu
918-19	Buildings, Structures and Components Consulting	Buildings
918-25	Compliance Consulting, American Disabilities Act ADA	Compliance
918-26	Communications: Public Relations Consulting	Communicat
918-28	Computer Hardware/Software Consulting	Computer
918-31	Construction Consulting	Construct
918-32	Consulting Services Not Otherwise Classified	Consulting
918-38	Education and Training Consulting	Education
918-41	Energy Conservation Consulting	Energy Con
918-42	Engineering Consulting	Engineerin
918-43	Environmental Consulting	Environmen
918-52	Food Service Consulting	Food Servi
918-66	Human Resources Consulting Services	Human Res
918-71	IT Consulting	IT Consult
918-74	Legal Consulting	Legal Cons
918-75	Management Consulting	Management
918-76	Marketing Consulting	Marketing
918-80	Moving/Relocation Consulting Service	Move/Relo
918-91	Roofing Consultant	Roof Csult
918-95	Telecommunications Consulting	Telecom
918-97	Utilities: Gas, Water, Electric Consulting	Utilities
925-00	Engineering Services, Professional	Engineerin
926-00	Environmental and Ecological Services	Environmnt
936-00	Equipment Maintenance and Repair Services for General Equip	Equipment

954-00	Laundry and Dry Cleaning Services	Laundry
961-00	Miscellaneous Services - Temp help, Catering, Chartering	Misc
962-16	Bus Transportation Services, School	Bus Transp
962-19	Cafeteria and Restaurant Services	Cafeteria
962-22	Chemical Laboratory Services	Chemical
962-23	Chemical Treatment of Boiler and Tower Water	Chemical
962-24	Courier/Delivery Services	Courier
962-27	Document Shredding Services	Doc Shred
962-33	Engraving Services; Awards, Trophies, Etc.	Engraving
962-46	Installation & Removel Svcs.	Install
962-48	Interior Design/Decorator Services	Int Design
962-56	Moving Services	Moving
962-58	Professional Services Not Otherwise Classified	Profession
962-63	Piano Tuning Services	Piano Tune
962-69	Personnel Services, Temporary	Personnel
962-79	Sign Making Services	Sign Makin
962-86	Freight, All Transportation of Goods	FREIGHT
962-87	Travel, Local Provided by Third Party	Travel
962-89	Vehicle Transporting Services	Vehicle
962-93	Vehicle Registration Services	Vehicle
962-94	Water Service, Bottled	WATER SERV
963-00	Non-Biddable Miscellaneous Items Associations, Fees, Dues	Non-Bid
966-00	Printing and Typesetting Services	Printing
968-00	Public Works and Related Services	Public Wks
971-00	Real Property Rental or Lease	Real Prop
975-00	Rental or Lease of Automotive	Rental
981-00	Rental or Lease of General Equipment	Rental
990-00	Security, Fire, Safety, and Emergency Services	Security
999-99	Staples Default Item Category	Staples

SAN DIEGO COMMUNITY COLLEGE DISTRICT

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

STATUS DEFINITIONS

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

Purchase Requisitions	
Open	The *Open* status displays by default from the requester. This status may change once a requester is selected, depending upon how the requester is set up.
Pending Approval	The purchase requisition is not eligible for the approval process until an authorized user changes this status to *Pending*. This may be done by pulling in the requester or clicking the "Open" checkmark to change the status to *Pending*.
Approved	The 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 *Complete*.

Receipts	
Open	Not all edits have passed. If any receipt lines have a status of *Open*, the receipt header has a status of *Open*.
Received	When all lines are in *Received* or *Canceled* status, the receipt header will have a status of *Received*.
Hold	Receipt is on *Hold* until released by user. This status may be used when items are received damaged.
Moved	This status occurs when the receipt has been interfaced with Asset Management or Inventory in PeopleSoft.
Closed	All interface requirements have been fulfilled and no further processing is required. Running the Close Receipts process changes the status to *Closed*.
Canceled	The receipt has been *Canceled* on the header; the lines will go to a *Canceled* status as well. Canceling cannot be reversed.

Budget Status	
Not Chk"d	(*Not Checked*) – Either the document has not been budget checked or the budget checking process 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.