

BLANKET ORDER REQUISITIONS

PURPOSE: BLANKET ORDERS (formerly known as Amount Only POs) ARE INTENDED FOR SERVICES, RENEWALS, PROFESSIONAL SERVICES, RENTALS, AND SUBSCRIPTIONS/MEMBERSHIPS. *THESE SHOULD NOT BE USED ON A CONTINUOUS BASIS FOR TANGIBLE GOODS.*

(AMOUNT ONLY IS THE PEOPLESOFT TERM; BLANKET ORDER IS THE INDUSTRY STANDARD WE WILL BE USING.)

BLANKET ORDERS ARE TYPICALLY ONE LINE FOR THE SERVICE WITH A FIXED DOLLAR AMOUNT. WHEN ENTERING THESE ORDERS, BE SURE TO ACCOUNT FOR TAX, FREIGHT, AND OTHER FEES THAT MAY BE INCLUDED WITHIN THE ORDER, IF NECESSARY. PROPER PLANNING WILL PREVENT THE NEED FOR CHANGE ORDERS.

BLANKET ORDERS NEED A PROPER DESCRIPTION THAT NEEDS TO BE INSERTED ON THE CREATE REQUISITION PAGE UNDER “ADDITIONAL INFORMATION.” YOU DO NOT NEED TO ADD AN ATTACHMENT TO THE REQUISITION UNLESS IT IS A CONSULTANT/LECTURE AGREEMENT.

REQUIRED ITEMS NEEDED PRIOR TO PROCESSING:

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. BUDGET NUMBER AND AVAILABLE FUNDING
3. REQUEST FOR CONTRACT FORM IF AN AGREEMENT IS REQUIRED FOR SERVICES

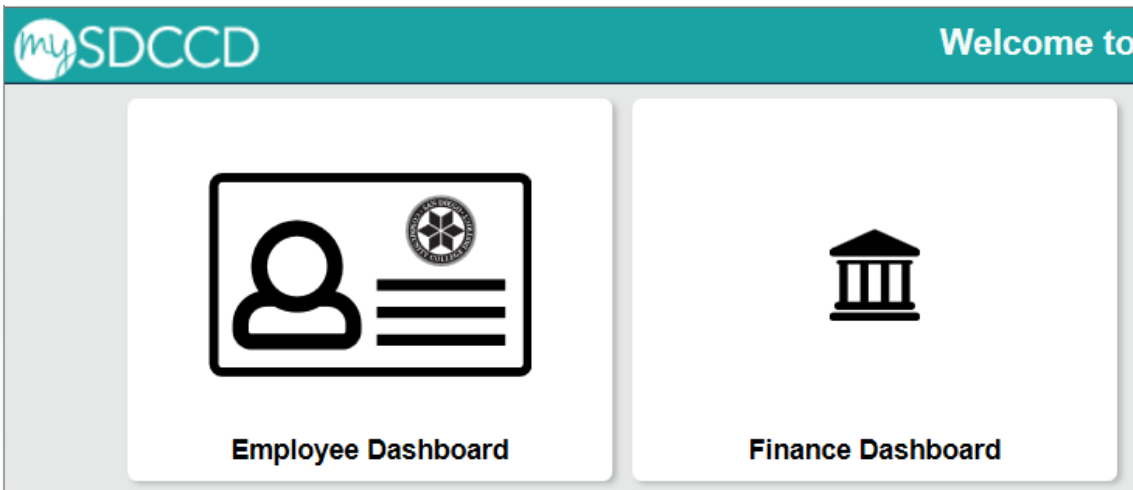
REQUIRED ATTACHMENT: NONE

CHECK “AMOUNT ONLY” BOX: YES

PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. THE INVOICE IS PROVIDED TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT. REQUESTERS SHOULD TRACK PROCESS VIA MANAGE REQUISITIONS SCREEN.

Log into your SDCCD account and open PeopleSoft.

Navigate to Create a Requisition from the home page by selecting: Finance Dashboard/Procurement/Create a Requisition.



To create a requisition, enter information on this page and it will auto populate into each line item of the requisition.

The “Bid No/Quote” field – a notation field for your personal reference. (i.e., Supplier Name, Quote Number, etc.)

Requisition Settings

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.

Click the magnifying glass icon  to the right of “Supplier”. Enter Supplier’s Name, click Find.

*Requester  Carrie De Moll Priority

*Currency

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 

Supplier Location 

Buyer 

Shipping Defaults

Ship To 

Due Date 

Distribution Defaults

SpeedChart 

Accounting Defaults Personalize | Find

Chartfields1 

Dist	Percent	Location	GL Unit	Fund	Dept	Proj
1		MIR	MIR01			

Supplier Search 

Supplier ID

Name  

Short Supplier Name

Alternate Supp Name

City

Country  State

Postal Code

 Enter search criteria to

Supplier Search

Supplier ID

Name  

Short Supplier Name

Alternate Supp Name

City

Country  State

Postal Code

Search Results Personalize | Find | View All |   First 1-4 of 4 Last

Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
1 0002003973	HOME DEPOT INC	52	10604 WESTVIEW PARKWAY	5620 FAIRMOUNT AVE	SAN DIEGO	CA	
2 0002003973	HOME DEPOT INC	MAIN	CREDIT SERVICES	5620 FAIRMOUNT AVE	SAN DIEGO	CA	
3 0002003973	HOME DEPOT INC	ORDER 1	FAIRMONT AVE	5620 FAIRMOUNT AVE	SAN DIEGO	CA	
4 0002003973	HOME DEPOT INC	ORDER 2	GENESEE	MAINTENANCE WAREHOUSE	SAN DIEGO	CA	

If your search yields multiple locations, click the Supplier ID number at the correct address to select vendor. Click “Select”.

Next, click the  icon to search for the Category Code.

Requisition Settings

Business Unit  San Diego Miramar College

*Requester  Carrie De Moll

*Currency

Bid No/Quote

Priority

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 

Supplier Location 

Buyer 

Category 

Unit of Measure 

Using the “Search By” drop down menu, you can search by *Category*, which is the actual category code number; or by *Description*, typing in a key word for the item you are ordering. For example enter “Chair” and click “Find”.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By Category 420 Find

Categories			Personalize	Find	View All	First	1-7 of 7	Last
Catalog	Category	Description						
1 Non Catalog	420-04	Auditorium, Stadium, Team Seating Furniture and Portable						
2 Non Catalog	420-08	Cafeteria Furniture, Chairs and Tables Incl. Stacking Types						
3 Non Catalog	420-13	Childrens Furniture Incl. Stackable Types						
4 Non Catalog	420-25							
5 Non Catalog	420-56							
6 Non Catalog	420-59							
7 Non Catalog	420-93							

Look Up Category

Search By Description Find

Browse Category Tree

Return

Once the options populate, select the appropriate category/description. You can click any link within applicable row.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By Description TOOLS Find

Categories			Personalize	Find	View All	First	1-3 of 3	Last
Catalog	Category	Description						
1 Non Catalog	005-00	Abrasive Equipment and Tools						
2 Non Catalog	420-93	Stools						
3 Non Catalog	445-00	Hand Tools Powered and Non-Powered, Accessories and Suppli						

Browse Category Tree

Return

Leave the *Buyer* field blank; it will automatically default to the Buyer assigned for the type of commodity or service to be purchased.

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 ⓘ

Supplier ⓘ Category ⓘ

Supplier Location ⓘ Unit of Measure ⓘ

Buyer ⓘ

SHIPPING DEFAULTS – Ship to should be “MIR”. Add the name to whose attention it should go.

Shipping Defaults

Ship To ⓘ

Due Date ⓘ Attention

DISTRIBUTION DEFAULTS – Location should be “MIR” and GL Unit is ‘MIR01’. Enter budget number (Fund, Dept, Product, Account). You should obtain this from your dean or manager. Click “OK”.

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

The Requisition Settings page is complete. To begin creating the requisition, click the [Special Requests](#) link.

Create Requisition ⓘ

Welcome Elizabeth Ann Whitsett

Home My Preferences Requisition Settings ⓘ 0 Lines Checkout

Request Options Search Search Advanced Search

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

Catalog
Browse Catalogs
CATEGORY

Special Requests
Create a non-catalog request

Templates
Browse Company and Personal Templates

Web
Browse Supplier Websites
Grainger Punch Out
Office Solutions Punch Out

Forms
Create and Submit Forms

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

Express Item Entry
Create an Express Requisition

Favorites
Browse Favorite Items and Services

Recently Ordered
View recently ordered items and services
INSTALLATION MATERIALS
LABOR, PROJECT MANAGEMENT
LABOR, CABLE INSTALLATION, I...
PRINTER, LJ HP M610dn Printe...
BPO

The “Item Description” field should simply state “Blanket Order”.

Enter the appropriate “Blanket Order Template Language” into the Additional Information field.

The screenshot shows the 'Create Requisition' form with the following fields and values:

- Item Details:**
 - *Item Description: BLANKET ORDER
 - *Price: 3000.00
 - *Quantity: 1
 - *Category: 560-00
 - *Currency: USD
 - *Unit of Measure: LT
 - Due Date: [calendar icon]
- Supplier:**
 - Supplier ID: 0002003973
 - Supplier Name: HOME DEPOT INC
 - Supplier Item ID: [empty]
- Manufacturer:**
 - Mfg ID: [empty]
 - Manufacturer: [empty]
 - Mfg Item ID: [empty]
- Additional Information:**
 - PROFESSIONAL SERVICES TO PROVIDE DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM
 - ☒ 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.
- Buttons:**
 - Add to Cart

Annotations:

- A red box highlights the 'Additional Information' field with the text: "To locate the appropriate **BLANKET ORDER COMMENT**, use the District Blank Order Template as your guide. The templates are shown on pages 10 -12."
- A blue arrow points from the 'Unit of Measure' dropdown to a 'Look Up Unit of Measure' pop-up window.
- The 'Look Up Unit of Measure' window shows a list of units with 'LT' and 'LOT' highlighted in red.
- A blue arrow points from the 'Add to Cart' button to the text: "Check “Send to Supplier”, “Show at Receipt”, and “Show at Voucher” boxes. Click “Add to Cart”."

Check “Send to Supplier”, “Show at Receipt”, and “Show at Voucher” boxes. Click “Add to Cart”.

Click the “Checkout” button. This will direct you to the *Checkout – Review and Submit* screen.

The screenshot shows the 'Create Requisition' form with the 'Checkout' button highlighted in yellow. The button is located in the top right corner of the form, next to the '1 Line' indicator.

To identify the requisition as an “Blanket Order”, click the yellow “Details” icon on the “Checkout – Review and Submit” screen.

Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit San Diego Miramar College
 *Requester Carrie De Moll
 *Currency

[My Preferences](#) [Requisition Settings](#)

Bid No/Quote
 Priority

Cart Summary: Total Amount 3,000.00 USD

Expand lines to review shipping and accounting details

[Add More Items](#)

Requisition Lines

Line	BLANKET ORDER	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	BLANK ORDER		HOME DEPOT INC	1	EACH	3000.00	3000.00			
☐ Select All / Deselect All								Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change		
Total Amount							3,000.00 USD			

Shipping Summary

[Edit for All Lines](#)

Ship To Location
 Address

 Attention To
 Comments

If you have an agreement, attach it here. Nothing else should be attached.

Check the Box for “Amount Only” and scroll down on the same page and click “OK”

Line Details

Line Details

Line 1 MOU-MIRACOSTA COLLEGE FOUNDATI

Line Status Approved

Item Details

Merchandise Amount 5500.00 USD

Item ID

Category 962-58

Original Substituted Item Description

Physical Nature Services

Buyer XROSAS

Buyer Information

Configuration Info

Contract Information

Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information

Supplier ID 0003000369

MIRACOSTA COLLEGE FOUNDATION

Supplier Location MAIN

Supplier Item ID

Supplier's Catalog

RFQ Required

Price Tracking

Zero Price Indicator

Amount Only

Inspection Required

Line Details

Buyer XROSAS

Buyer Information

Configuration Info

Contract Information

Use Contract if Available

Contract ID

Contract Details

Version

Contract Line

Category Line

Supplier Information

Supplier ID 0003000369

MIRACOSTA COLLEGE FOUNDATION

Supplier Location MAIN

Supplier Item ID

Supplier's Catalog

Manufacturer Information

Manufacturer ID

Manufacturer

Manufacturer's Item ID

GTIN

Sourcing Controls

Consolidate with other Reqs

Calculate Price

Override Suggested Supplier

OK Cancel

Review all your information carefully. Click “Save for Later”, which will create a Requisition ID number.

Checkout - Review and Submit

Review the item information and submit the req for approval.

Requisition Summary

Business Unit

San Diego Miramar College

*Requester

Carrie De Moll

*Currency

[My Preferences](#)

[Requisition Settings](#)

Bid No/Quote

Requisition ID

Priority

Cart Summary: Total Amount 3,000.00 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	BLANK ORDER		HOME DEPOT INC	1	EACH	3000.00	3000.00			

☐ Select All / ☐ Deselect All

Select lines to:

[Add to Favorites](#)

[Add to Template\(s\)](#)

[Delete Selected](#)

[Mass Change](#)

[Check Budget](#)

[Pre-Check Budget](#)

Budget Checking Status: **Not Checked**

Total Amount 3,000.00 USD

[Save & submit](#)

[Save for Later](#)

[Add More Items](#)

[Preview Approvals](#)

Enter Requisition Comments: Using this format: CAMPUS/DEPT/ROOM #/POINT OF CONTACT NAME/EXTENSION. Include the Supplier’s Email Address (IMPORTANT: PeopleSoft may not have the current email address on file, so please ask the supplier what email should be used when dispatching the PO.)

If everything appears correct, click “Check Budget”.

Shipping Summary

[Edit for All Lines](#)

Ship To Location MIR
Address 10440 Black Mountain Road
San Diego, CA 92128-2999
Attention To Carrie De Moll
Comments

Requisition Comments and Attachments

Enter requisition comments

QUOTE (If applicable)
MIR/BUSINESS OFFICE/N-101/CAARRIE DE MOLL X 7401
SUPPLIER EMAIL: douglas_m_jopson@homedepot.com

☒ Send to Supplier

☒ Show at Receipt

☒ Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

LEAVE THIS FIELD BLANK - This box is used for Denied Requisitions – if your requisition is denied, in order to get the requisition to re-launch for approvals, you MUST enter a comment in the Approval Justification box.

[Check Budget](#)

[Pre-Check Budget](#)

Budget Checking Status: **Not Checked**

[Save & submit](#)

[Save for Later](#)

[Add More Items](#)

[Preview Approvals](#)

When the following message appears, click “OK”.

Message

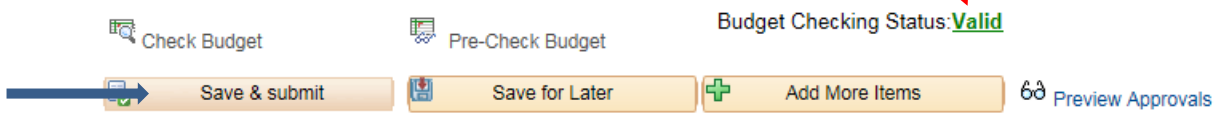
Budget Checking will save your requisition in an Open Status. (18036,39)

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.

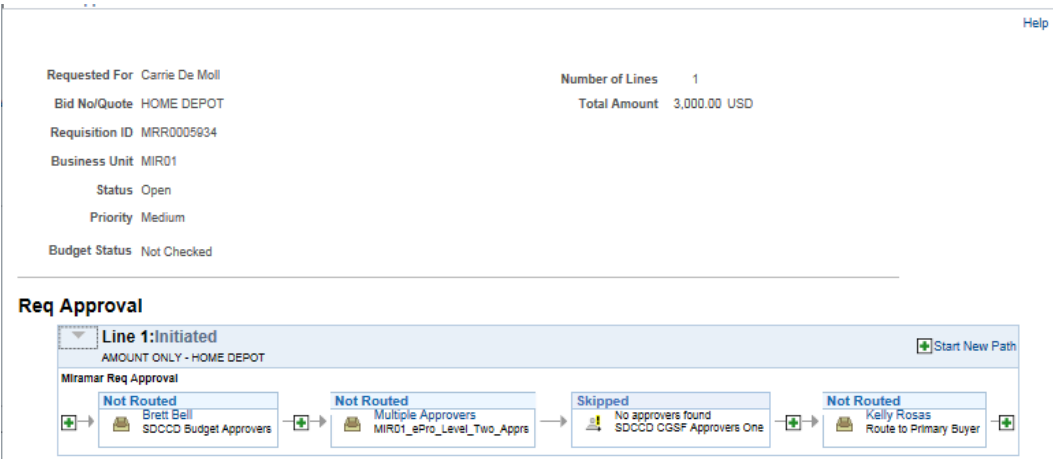
[OK](#)

[Cancel](#)

When the Budget Checking Status” changes from “Not Checked” to “Valid”, click the “Save & Submit” button. This will launch the requisition into the approval workflow.



The Confirmation Page will list the order of the designated approvers based on the budget entered.



It usually takes about 5-7 business days for the full approval process. Once it reaches Purchasing, there are 3 steps to releasing the PO: 1) Approval, 2) PO is created, and lastly, 3) PO is dispatched via email to the supplier.

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 requisitions that are Amount Only 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 DESCRIPTION OF SERVICE FOR CAMPUS/DEPT/PROGRAM

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

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

SEND INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)

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 DIEGO CA 921XX

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

PURCHASE OF EQUIPMENT IS NOT AUTHORIZED UNDER THIS PURCHASE ORDER. SEND INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)

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 (ENTER PO NUMBER FROM PRIOR YEAR)

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 INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)

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 INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)

SERVICE TEMPLATE

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

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

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

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

PRICED SERVICE REPORT TO BE PROVIDED AT TIME OF SERVICE CALL. SEND INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)

SUBSCRIPTION TEMPLATE

NEW/RENEW SUBSCRIPTION TO _____ FOR CAMPUS/DEPT

ACCOUNT NO:

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

LABEL TO:

CAMPUS

DEPT/ROOM

DISTRICT TITLE OF PERSON RECEIVING SUBSCRIPTION

STREET ADDRESS

SAN DIEGO CA 921XX

CONTACT PERSON: NAME/PHONE OR E-MAIL

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)

SUPPLIES TEMPLATE

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

EFFECTIVE 7/1/XX TO 6/30/XX

AUTHORIZED PERSON(S): NAME/PHONE

PURCHASE OF EQUIPMENT IS NOT AUTHORIZED UNDER THIS PURCHASE ORDER. SEND INVOICE TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU.

SUPERCEDES PO (ENTER PO NUMBER FROM PRIOR YEAR)