

AMOUNT ONLY PURCHASE REQUISITION

PURPOSE: TO CREATE A BLANKET PURCHASE ORDER FOR MAINTENANCE SERVICE AGREEMENTS, RENTALS, PROFESSIONAL SERVICES, AND SUBSCRIPTIONS. AMOUNT ONLY POS SHOULD NOT BE USED FOR THE PURPOSE OF TANGIBLE PRODUCT PURCHASES.

REQUIRED ITEMS NEEDED PRIOR TO PROCESSING:

1. ACTIVE PEOPLESOFT SUPPLIER ID #
2. BUDGET NUMBER AND AVAILABLE FUNDING

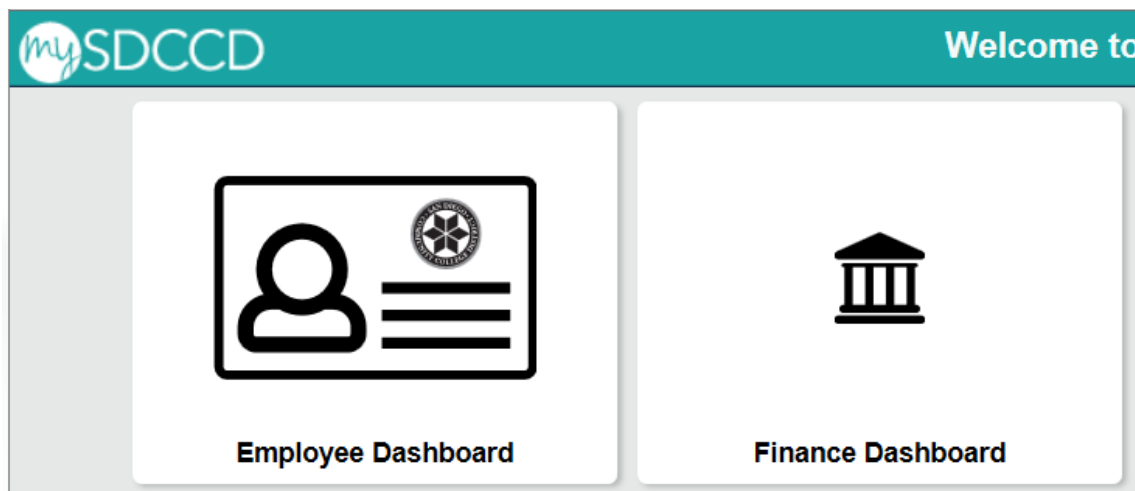
REQUIRED ATTACHMENT: NONE

CHECK “AMOUNT ONLY” BOX: YES

PAYMENT PROCESS TO SUPPLIER: SUPPLIER PROVIDES ACCOUNTS PAYABLE OR CAMPUS WITH INVOICE. INVOICE IS ELECTRONICALLY ROUTED WITHIN PEOPLESOFT FOR APPROVAL. BUSINESS OFFICE VALIDATES APPROVAL TO PAY WITH END USER’S CONSENT.

Log into PeopleSoft at myportal.sdccd.edu using your User ID and Password.

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.

This screenshot shows the "Requisition Settings" page in the PeopleSoft system. On the left is a vertical navigation menu with the following items: "Finance Dashboard", "Procurement", "Create a Requisition", "Manage Requisitions", "Add/Update Supplier", and "Request a Payment". Red arrows point to "Procurement" and "Create a Requisition". The main content area is titled "Requisition Settings" and includes fields for "Business Unit" (MIR01), "San Diego Miramar College", "Bid No/Quote" (empty), "*Requester" (CDEMOLL), "Carrie De Moll", "*Currency" (USD), and "Priority" (Medium). Below these fields is a "Default Options" section with two radio buttons: "Default" (selected) and "Override". A "Line Defaults" link is at the bottom.

The "Bid No/Quote" field should follow the naming convention "Amount Only – Vendor Name"
In the default options box, change the status from *Default* to *Override*

This screenshot shows the "Requisition Settings" page with modifications. The "Bid No/Quote" field is now populated with the text "AMOUNT ONLY - HOME DEPOT" and is highlighted with a yellow background. A blue arrow points from the text above to this field. The "Default Options" section is expanded, showing the "Override" radio button selected with a red circle around it. The "Line Defaults" link is visible at the bottom.

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.

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote
*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
Chartfields1 Details Asset Information

Dist	Percent	Location	GL Unit	Fun
1		MIR	MIR01	

Supplier Search

Supplier ID Name Short Supplier Name Alternate Supp Name City





Find Reset

Supplier Search

Supplier ID Name Short Supplier Name Alternate Supp Name City Country State Postal Code

Find Reset

Search Results

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input checked="" type="radio"/>	1 0002003973	HOME DEPOT INC	52	10804 WESTVIEW PARKWAY	5920 FAIRMOUNT AVE SAN DIEGO	CA		
<input type="radio"/>	2 0002003973	HOME DEPOT INC	MAIN	CREDIT SERVICES	5920 FAIRMOUNT AVE SAN DIEGO	CA		
<input type="radio"/>	3 0002003973	HOME DEPOT INC	ORDER 1	FAIRMONT AVE	5920 FAIRMOUNT AVE SAN DIEGO	CA		
<input type="radio"/>	4 0002003973	HOME DEPOT INC	ORDER 2	GENESEE	MAINTENANCE WAREHOUSE SAN DIEGO	CA		

Select Cancel

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

Click the  icon to search for the Category Code.

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote
*Requester Carrie De Moll Priority
*Currency

Default Options ?
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☒ 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 Buyer

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

Find

Catalog	Category
1 Non Catalog	420-56
2 Non Catalog	420-59
3 Non Catalog	420-93
4 Non Catalog	420-08
5 Non Catalog	420-04
6 Non Catalog	420-25
7 Non Catalog	420-13

Browse Category Tree

Return

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

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: Category


425

Find

Catalog	Category	Description
1 Non Catalog	425-03	Bookcases and Bookshelves, Metal and Wood
2 Non Catalog	425-06	Seating, All Types
3 Non Catalog	425-40	Filing Cabinets: All Types
4 Non Catalog	425-48	Furniture, Office
5 Non Catalog	425-50	Key Storage Cabinets and Files
6 Non Catalog		Credenza
7 Non Catalog		Floors, Raised Access Type For Data Processing Equipment
8 Non Catalog		Furniture: Classroom

Browse Category Tree

Return

In the Buyer field, click on the  icon and select the appropriate Buyer, or leave blank to default to Miramar's Buyer.

Default Options ?

☐ Default If you select this option, the defaults sp...
☒ Override If you select this option, the defaults sp...

Line Defaults ?

Note: The information in this page does not reflect the data it replace the data in the corresponding fields on the selected li

Supplier 0002003973
 Supplier Location 52
 Buyer

Look Up Buyer X

Buyer begins with
 Name begins with

Look Up Clear Cancel Basic

Lookup

Search Results

View 100 First 1-3 of 3 Last

Buyer	Name
KROSAS	Kelly Rosas
PHESTER	Peter Hester
VWHITE	Vanessa White

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

Shipping Defaults

Ship To MIR
 Due Date
 Attention CARRIE DE MOLL

DISTRIBUTION DEFAULTS – Location should be “MIR”. 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 | 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 **Create Requisition** link.

Create Requisition ?

Welcome Carrie De Moll

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.

Web
 Browse Supplier Websites
 Office Solutions Punch Out

Templates
 Browse Company and Personal Templates

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

Create Requisition
 Create a non-catalog request.

Favorites
 Browse Favorite Items and Services

Recently Ordered
 View recently ordered items and services
 AMOUNT ONLY - ENTERPRISE CAR...
 UNIT, CYAN PHOTCONDUCTOR
 SHIPPING & HANDLING
 LABOR
 FEE, SERVICE
 More...

The “Item Description” field should follow the naming convention “Amount Only – Vendor Name”.

Enter the appropriate Purchasing Template Amount Only Language into the Additional Information field and update with the necessary information for the type of requisition being created.

Create Requisition ?

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

Item Details

*Item Description

*Price

*Quantity

*Category

*Currency

*Unit of Measure

Due Date

Supplier

Supplier ID

Supplier Name

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.

Look Up Unit of Measure

Unit of Measure begins with

Search Results

Unit of Measure	Description	Short Description
BA	BARREL	BARREL
BF	BOARD FOOT	BOARD FT
BG	BAG	BAG
BO	BOTTLE	BOTTLE
BX	BOX	BOX
CD	CARD	CARD
CS	CASE	CASE
CT	CARTON	CARTON
DL	DOLLARS	DOLLARS
DR	DRUM	DRUM
DZ	DOZEN	DOZEN
EA	EACH	EACH
FT	FOOT	FOOT
GL	GALLON	GALLON
GR	GROSS	GROSS
HR	HOURLY RATE	HOURLY RTE
HU	HUNDREDS	HUNDREDS
JB	JOB	JOB
K	THOUSAND	THOUSAND
KT	KIT	KIT
LB	POUND	POUND
LT	LOT	LOT
PD	PAD	PAD
PK	PACK	PACK
PL	PALETTE	PALETTE
PR	PAIR	PAIR
PT	PINT	PINT
QT	QUART	QUART
RL	ROLL	ROLL

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.

Create Requisition ?

Welcome Carrie De Moll

[Home](#) [My Preferences](#) [Requisition Settings](#) | [1 Line](#)

Request Options

To identify the requisition as an “Amount Only”, 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 Bid No/Quote
*Requester Carrie De Moll Priority
*Currency

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	AMOUNT ONLY - HOME DEPOT		HOME DEPOT INC	1	EACH	3000.00	3000.00			
								Edit		

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

Total Amount 3,000.00 USD

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

Shipping Summary

[Edit for All Lines](#)

Ship To Location MIR
Address 10440 Black Mountain Road
San Diego, CA 92126-2999
Attention To CARRIE DE MOLL
Comments

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

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
Buyer
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.

Business Unit San Diego Miramar College Bid No/Quote
*Requester Carrie De Moll Requisition ID
*Currency 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	AMOUNT ONLY - HOME DEPOT		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

Click the “Edit more Comments and Attachments” link. Enter in the appropriate AMOUNT ONLY LANGUAGE

Shipping Summary

[Edit for All Lines](#)

Ship To Location MIR
Address 10440 Black Mountain Road
San Diego, CA 92126-2999
Attention To CARRIE DE MOLL
Comments

Requisition Comments and Attachments

Enter requisition comments

☒ Send to Supplier ☒ Show at Receipt ☒ Shown at Voucher [Edit more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition [Header Comments](#)

[Check Budget](#) [Pre-Check](#) [Save & submit](#) [Save](#)

Business Unit MIR01 Requisition Date 03/25/2019
Requisition ID MRR0006230 Status Open

Comments Find First 1 of 1 Last

Use Standard Comments Entered On: 03/25/2019 11:40:35AM

1 FOR THE PURCHASE OF HARDWARE SUPPLIES FOR MIRAAMAR/PUBLIC SAFETY
EFFECTIVE 7/1/18 TO 6/30/19
☒ Send to Supplier ☒ Show at Receipt
[Add Attachments](#)

[OK](#) [Cancel](#)

To locate the appropriate AMOUNT ONLY COMMENT, use the District APO Template as your guide. The template is shown on pages 10 -12.

Click “OK”.

If everything appears correct, click “Check Budget”.

Approval Justification

Enter approval justification for this requisition

[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.

Shipping Summary

Edit for All Lines

Requisition Comments and Attachments

Enter requisition comments

IF END LOCATION IS DIFFERENT FROM WHAT IS LISTED IN CHARTFIELD 2; LIST THAT INFORMATION HERE.
EX: DO/PURCH/RM 270

☐ Send to Supplier

☒ Show at Receipt

☐ Shown at Voucher

Edit more Comm

Approval Justification

Enter approval justification for this requisition

Check Budget

Budget Checking Status: Valid

Save & submit

Save for Later

Add More Items

63 Preview Approvals

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

Confirmation

Requested For Carrie De Moll

Bid No/Quote HOME DEPOT

Requisition ID MRR0005934

Business Unit MIR01

Status Open

Priority Medium

Budget Status Not Checked

Number of Lines 1

Total Amount 3,000.00 USD

Req Approval

Line 1:Initiated

AMOUNT ONLY - HOME DEPOT

Miramar Req Approval

Not Routed

Brett Bell
SDCCD Budget Approvers

Not Routed

Multiple Approvers
MIR01_ePro_Level_Two_Apprs

Skipped

No approvers found
SDCCD CGSF Approvers One

Not Routed

Kelly Rosas
Route to Primary Buyer

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 – AMOUNT ONLY PO's

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.

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

SUPERCEDES & CANCELS 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 DIEGO 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 & CANCELS 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 & CANCELS 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 & CANCELS 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 & CANCELS PO

SERVICE TEMPLATE

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

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

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

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

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

SUPERSEDES AND CANCELS PO

SUBSCRIPTION TEMPLATE

NEW/RENEW SUBSCRIPTION TO _____ FOR CAMPUS/DEPT

ACCOUNT NO:

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

LABEL TO:

CAMPUS

DEPT/ROOM

DISTRICT TITLE OF PERSON RECEIVING SUBSCRIPTION

STREET ADDRESS

SAN DIEGO CA 921XX

CONTACT PERSON: NAME/PHONE OR E-MAIL

SUPERCEDES & CANCELS PO

SUPPLIES TEMPLATE

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

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

AUTHORIZED PERSON(S): NAME/PHONE

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

SUPERCEDES AND CANCELS PO