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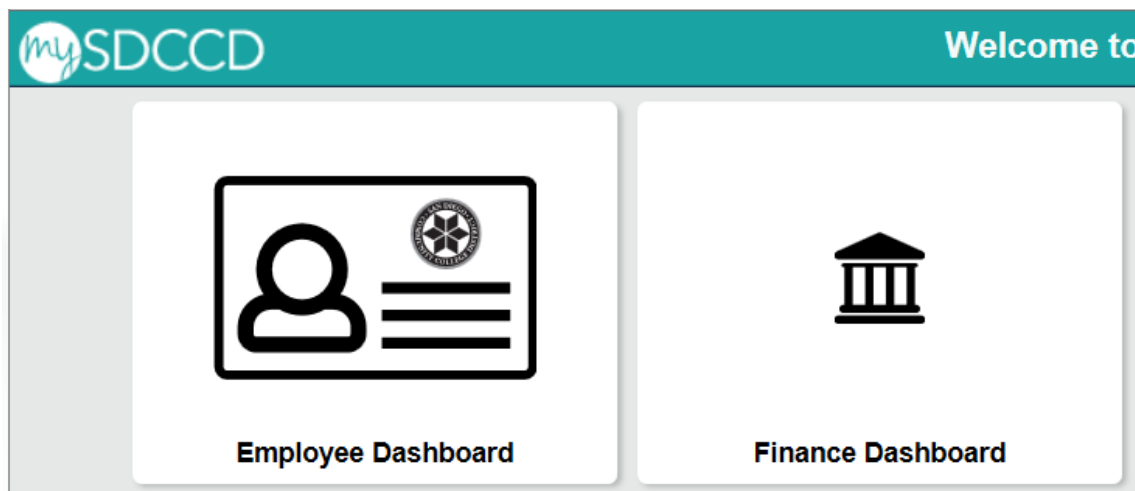
To create a requisition, enter information on this page and it will auto populate into each line item of the requisition.

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*

Click the magnifying glass icon 🔍 **to the right of "Supplier". Enter Supplier's Name, click Find.**

Requisition Settings

Business Unit	MIR01 🔍	San Diego Miramar College	Bid No/Quote	AMOUNT ONLY - HOME DEPOT
*Requester	CDEMOLL 🔍	Carrie De Moll	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 [   ] 🔍
Supplier Location [   ] 🔍
Buyer [   ] 🔍

Shipping Defaults

Ship To [MIR] 🔍
Due Date [   ] 📅

Distribution Defaults

SpeedChart [   ] 🔍

Accounting Defaults

Chartfields1	Details	Asset Information	
Dist	Percent	Location	GL Unit	Fun...
1		MIR 🔍	MIR01 🔍	

Supplier Search ✕

Help

Supplier ID [   ]   [Find]
Name [HOME DEPOT]   [Reset]
Short Supplier Name [   ]
Alternate Supp Name [   ]
City [   ]

ⓘ Enter search cr...   [Select]

Supplier Search

Supplier ID [   ]   [Find]
Name [HOME DEPOT]   [Reset]
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	5920 FAIRMOUNT AVE	SAN DIEGO	CA	🗐
○	2 0002003973	HOME DEPOT INC	MAIN	CREDIT SERVICES	5920 FAIRMOUNT AVE	SAN DIEGO	CA	🗐
○	3 0002003973	HOME DEPOT INC	ORDER 1	FAIRMONT AVE	5920 FAIRMOUNT AVE	SAN DIEGO	CA	🗐
○	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	MIR01 🔍	San Diego Miramar College	Bid No/Quote	AMOUNT ONLY - HOME DEPOT
*Requester	CDEMOLL 🔍	Carrie De Moll	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 [0002003973] 🔍   Category [   ] 🔍
Supplier Location [52] 🔍   Unit of Measure [EA] 🔍
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".

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

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... ...ned values for these fields.
- ● Override — If you select this option, the defaults sp... ...blank values are assigned.

Line Defaults ⓘ

Note: The information in this page does not reflect the data i... ...data entered on this page will replace the data in the corresponding fields on the selected li...

Supplier	0002003973	🔍
Supplier Location	52	🔍
Buyer		🔍

Look Up Buyer ✕

Help

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 | 🔳 | 🔢   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 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

📋 **Create Requisition**
Create a non-catalog request

⭐ **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
AMOUNT ONLY - ENTERPRISE CAR...
UNIT, CYAN PHOTOCONDUCTOR
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.

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*.

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.

My Preferences   Requisition Settings

Requisition Summary

Business Unit MIR01   San Diego Miramar College   Bid No/Quote HOME DEPOT

*Requester CDEMOLL   Carrie De Moll   Priority Medium

*Currency USD

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

Help

Line Details

No Image   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 KROSAS
Buyer Information
Configuration Info

☐ RFQ Required
☐ Device Tracking
☐ Zero Price Indicator
☑ Amount Only
☐ Inspection Required

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

Line Details

Buyer KROSAS
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 MIR01   San Diego Miramar College   Bid No/Quote HOME DEPOT
*Requester CDEMOLL   Carrie De Moll   Requisition ID MRR0005934
*Currency USD   Priority Medium

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

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

Help

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

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

Check Budget   Pre-Check
Save & submit   Save

OK   Cancel

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".

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 – 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 <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 APINVOICE@SDCCD.EDU.

SUPERSEDES AND CANCELS 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 & CANCELS 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 APINVOICE@SDCCD.EDU.

SUPERCEDES AND CANCELS PO