Find Categories for Special Request Items

When you order Special Request goods or services, it’s very important to select the correct Category each time. When you do, the correct budget (account) is automatically chosen to pay for that Special Request item. If you don’t select the correct Category when creating the eProcurement requisition, then the wrong funds will be used to pay for the order. This typically results in your site losing money by spending incorrect funds on things, and can have a negative effect on your funding for the following year. In addition to that, if you select the wrong Category, it could delay or even cancel your order.

This Job Aid shows you methods to locate and choose the correct Category for a Special Request item.

1. Once you have a new, blank requisition form on your screen, click the **Special Request** hyperlink to bring it forward.
2. Click the **Category Lookup** icon, next to the Category field.

![Category Lookup](image)

3. Verify that Category is selected in the Search by dropdown.

![Look Up Category](image)

From here, there are several different methods of finding the right Category for your Special Request item. The following pages of this Job Aid show you these methods.
I. Find Category by Account Number

Considered by many to be the easiest way, you can use the account number from the budget (Chartfield) string to locate the correct Category for all items (except for Asset items... they work a bit differently, as shown further on).

1. Always make sure that the Search By is set to “Category”. In the textbox between “Category” and the Find button, type a percent sign, and the account number that will be used to pay for the item. Then, click the Find button.

2. The Category that belongs to the account number is displayed below. It shows the Catalog (on the left), the Category (in the middle), and the Description (on the right) that are connected with that account number. Click anywhere on the linked line.
3. The correct Category is now in place, and you can continue to complete the order.

II. Find Category by Group Text Criteria

This method works well if you want to view a list of related Categories to choose from. There are three basic groups of related Categories: Goods, Services, and Assets. You can type one of these Category group names into the look-up field, and display all Categories within that group.

1. Always make sure that the Search By is set to “Category”. In the text field, type the initials for the Category group you want:
   - **GDS** (to look up Goods Categories)
   - **SVC** (to look up Services Categories)
   - **A** (to look up Asset Categories)

   Then, click the Find button.
2. The list of individual Categories appears. You can scroll through the list and click to choose the Category you want. To make it easier, you can alphabetize the list by clicking Description at the top.

To see an example of a clicked (chosen) Category in the Category field of a Special Request ordering screen, please turn to Step 3 on page 4.
III. Find Category by Browsing Category Tree

This method is similar to the one shown on the previous page (using Group Text Criteria). It works well if you don't have the account number handy, and you just want to preliminarily browse through the Category lists.

1. Always make sure that the Search By is set to “Category”. Click the Expand Section icon button (shaped like a tiny arrow) to display the Browse Category Tree feature.

2. In the Select a catalog drop-down menu, click to choose one of the five root Catalogs.
3. Ignore the **Select Category** link, and click the yellow folder with the plus sign on it.

4. The Category list is displayed for that root Catalog. Scroll down the list to find the Category you want. *(Unfortunately, you can’t alphabetize this list).* Click to choose the desired Category.

   To see an example of a clicked (chosen) Category in the Category field of a Special Request ordering screen, please turn to Step 3 on page 4.
IV. Find an Asset Category

Asset Categories are the only Categories that cannot be located by account number. Their budgets are set up a little differently than other budgets. Probably the best way to find an Asset Category is the way shown below.

1. Always make sure that the Search By is set to “Category”. In the Find field, type the letter A, and then click the Find button.

2. Scroll to locate and click the Asset Category you want. Some have two that look the same, with G4640 and L4640 on the ends. G4640 means a single unit of that item is worth Greater Than $4,640 before tax. L4640 means a single unit is worth Less Than $4,640 before tax.
For more information about how to use the PeopleSoft software system in our school district, as well as to find training opportunities and support, go online to www.sandi.net and follow this clicking navigation:

Staff —> Technical Support & Resources —> PeopleSoft