Order SDUSD Catalog Items
How to Order Our Stock/Inventory Items

This Job Aid shows how to use SDUSD’s eProcurement software to order stock/inventory items typical for our school district. Please be sure your computer’s browser meets the minimum requirements to use eProcurement (Internet Explorer 8 or higher is the usual browser).

1. After logging in to the PeopleSoft Financials website, navigate to a new blank requisition by following these steps:

   1. Click Main Menu.
   2. Click eProcurement.
   3. Click Requisition.
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2. The eProcurement home page looks like this:

![eProcurement Home Page]

**IMPORTANT NOTE:** Be sure to order items from the same vendor on a single ePro requisition. Do not mix vendors. Also, be sure to use the same budget string (account information) for all the items on a single requisition. Do not enter multiple budgets on one requisition, unless you need to split payment for one or more items between multiple budgets.

On the eProcurement home page, you can start placing items on your requisition. There are two methods available to locate SDUSD Catalog stock/inventory items:

I. **Keyword Search**
   - Enter a single word from the **actual name** of the item.

II. **Express Item Entry**
   - Search by specific filters.
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I. Keyword Search

Follow the illustrated steps below to use keywords to locate any/all of the following items: Cheese, Tardy Slips, Paper (for use in printers or copiers):

Type a single word taken from the name of the item, and then click Search.

To narrow your search, choose Catalog from the menu of search choices.

Enter the quantity you want to order, and then click the Add (shopping cart) button next to the Quantity field.
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In the upper right area of the screen, hover your mouse over the shopping cart where it tells you how many line items you currently have. Wait a moment until you see your requisition summary appear, displaying details about your order, so far.

You can add more Catalog items, or continue to the next step, illustrated below.

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### II. Express Item Entry

Follow the illustrated steps below to quickly locate a known item, and place it on your requisition. This is a fast way to place an item on your requisition when you already know its ID number.

**Please Note:** If you don’t already know or cannot locate the item’s complete ID number, the Express Item Entry method will only work if you can enter all the other details about the item (Description, UOM, Category, etc.)
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From the eProcurement homepage, click Express Item Entry.

If you already know the Item ID number, type it in here. If you don't know it, leave this field blank and click the Search icon.
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Use this Look Up Item ID feature to locate the Item ID number for the Stock/Inventory item you want to order. Keep in mind you can alphabetize the list by clicking the word "Description". When you find the Item ID number you want, click it once.

The Item ID number populates the field. You can then type in the Quantity you want, and click the Add to Cart button to place this item on your requisition. If you want to see more details about this item, click the "Show all columns" icon.

Express Item Entry

Add to Cart
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In the upper right area of the screen, hover your mouse over the shopping cart where it tells you how many line items you currently have. Wait a moment until you see your requisition summary appear, displaying details about your order, so far.

You can add more Catalog items, or continue to the next step, illustrated below.

What To Do After You Click “Checkout”

Type a name for the Requisition.

Click a checkmark into the checkbox for “Select All/Deselect All”.
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Click Mass Change (in the lower right of the screen).

Type in the Budget (Chartfield) String for the one budget that will pay for the entire order. Then, click the OK button in the lower left corner.
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Distribution Change Options

For the selected requisition lines, 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.
- **Replace Distribution Lines**
  - Remove the existing distribution lines and replace with the.

Make sure “All Distribution Lines” is selected, and click OK. This applies that budget string to all the items on this requisition.

At the bottom of the screen, you can use the OPTIONAL “Pre-Check Budget” feature to see whether there’s enough money to cover this order. Or, you can go straight to “Check Budget” to pre-encumber the funds immediately.

If you ran the Pre-Check Budget and it passed, it’ll show “Provisionally Valid”. Then you can run the “Check Budget”.

After running “Check Budget”, if it now says “Budget Checking Status Valid”, you can click “Save & submit” to process the order.
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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.sandiegounified.org and follow this clicking navigation:

Staff Login —> Technical Support —> PeopleSoft

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