eProcurement Training Job Aids

San Diego Unified School District

August 2016
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How to Login to PeopleSoft Financials
Access to eProcurement, Travel Expenses, Budget Reports, & More

This Job Aid shows how to login to the San Diego Unified School District’s PeopleSoft Financials online system. You must be a current, active employee of the district, with an Employee ID number and password to login.

1. Launch your browser and go to the www.sandiegounified.org website. On the home page, click the Staff Portal link at the top to navigate to the Employee Portal (you might have to login).

2. Hover over Resources, and on the right side under Technology & Support, click Applications:

3. Find & click PeopleSoft - Financial on the list of applications:
4. Login with your SDUSD Employee ID number and password.

5. Single-click the menu choices at the top left corner to navigate where you want to go.

6. To logout, click the Sign Out link in the top right corner of the screen.
PeopleSoft Training & Support

To support the work you do using our PeopleSoft software applications (such as Time & Labor, PARs, eProcurement, Expenses, Budget Reports, etc.), we provide many training materials, classes, and support resources. You have access to manuals, job aids (illustrated instruction sheets), online narrated tutorial demonstration videos, contact information for SDUSD experts to help you, and more.

To view the online training and support web pages, you will need to sign into the SDUSD website with your SDUSD Employee ID number and password.

1. Go online to the SDUSD Employee Portal web page.

2. Underneath Staff Shortcuts on the lower left side, click the Technical Support link.

3. Under the Software Applications subheading, click the PeopleSoft link.
4. Click any of the links on this page to access printable or video training materials, and helpful resources.

PeopleSoft Support & Resources

- Overview
- Training Opportunities
- Training Materials & Resources
- News & Announcements
- IT Back-to-School

PeopleSoft is a web-based system we use to run the financial and HR systems. There are two areas of PeopleSoft: PeopleSoft HR and PeopleSoft Financial.

5. On the Financial or HCM Printed Training Materials pages, you can access all versions of PeopleSoft Financials and HCM printable Job Aids, Manuals, and other training related documents.

Financial Printed Training Materials

Below are links to illustrated step-by-step manuals, booklets, and instruction booklets for each area of PeopleSoft. Please click any link to open them.

**eProcurement**

- eProcurement Training Manual [Updated as of 8/19/15](#)
- eProcurement Training Exercises
- eProcurement Training Job Aid Packet

**How to Run a Budget Inquiry**

*(Find out if you have enough funds to pay for your orders)*

- How to Order SDUSD Catalog (Stock/Inventory) Items

September 2015
How to Clear Cache Files in Internet Explorer
Important to Do This if You Use PeopleSoft

This Job Aid shows how to clear or delete the cache files in your Internet Explorer browser. This is important to do on a regular basis, if you use PeopleSoft applications (eProcurement, Time & Labor, Expenses, Budget Reports, PARs, etc.). When using PeopleSoft apps, they tend to load up your computer with a lot of temporary Internet files and cookies. If you don’t get rid of those regularly, they can collect in your hard drive and start to gum up the works, so to speak. Your computer would become sluggish, and you might start to see weird errors popping up.

It is especially important to clear your cache files right before you start to use any or our PeopleSoft Training Videos, too.

You should clear out your cache files at least once a week.

1. Launch your Internet Explorer browser. The illustrations here were taken using Windows 7 and Internet Explorer 9, but any version of IE is fine. In the upper right corner, click the Tools icon, that looks like a wheel-gear:

2. Choose Internet Options
How to Clear Cache Files in Internet Explorer
Important to Do This if You Use PeopleSoft

3. Click Delete.

4. Make sure the Preserve Favorites website data is UNCHECKED. Then make sure there ARE checkmarks for Temporary Internet files, Cookies, and History.

Then, click the Delete button at the bottom.

It might take a few seconds or several minutes to complete deleting the cache. When done, just close the window.
Run a Budget Inquiry
See How Much You Have in Available Funds

To view the balance in your budget accounts, you run a “Budget Inquiry”. This means you ask the PeopleSoft system to show you how much available money is in one or more of your site’s budget accounts.

This Job Aid shows you how to run a budget inquiry in those of your budget accounts that deal with purchasing goods, services, or paying for travel expenses. This budget inquiry does NOT show balances in accounts that have to do with HCM or Human Resources, such as payroll. To run this Budget Inquiry you must login to the PeopleSoft Financial environment; not the HCM environment.

1. In this example, we begin from the main menu area after logging into the PeopleSoft Financial environment.

   To access Budget Details, click:
   A. Main Menu
   B. Commitment Control
   C. Review Budget Activities
   D. Budget Details

2. Enter your budget code numbers into the Chartfields.

   Keep in mind that the fewer fields you use, the broader and longer your inquiry results will be (you’ll see more budgets).

   The more fields you use, the fewer and more precise your inquiry results will be (you’ll see fewer budgets).

3. Click the yellow Search button in the lower left corner.
Run a Budget Inquiry

See How Much You Have in Available Funds

4. A list of budget accounts might appear at the bottom of the screen based upon the Chart-Fields selected. If your search criteria was very specific to one budget, the details of that one budget will display instead of a list of budgets.

Each line represents a single budget. Click on any area along one horizontal line to display that budget’s details.

5. Click on any one of the horizontal, linked account lines at the bottom of the screen to view available funds.

6. Look towards the bottom-left of the next screen to view the Available Budget dollar amount.

Disregard “With Tolerance”

7. You can click the Return to Search button in the bottom left corner of this screen to get back to the previous page;
Alternatively, you can logout or navigate to another page in PeopleSoft.
Order Catalog Items
How to Order 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).

To access eProcurement, you need to login to PeopleSoft Financials from the SDUSD website. First, login to the Staff Portal from www.sandiegounified.org. After that, click Resources and then click Applications.

Click PeopleSoft —Financial.

- PeopleSoft - Financial
- PeopleSoft - HCM

Sign in with your Employee ID number and your password.
Order Catalog Items
How to Order Stock/Inventory Items

2. The PeopleSoft Financials home page appears:

3. Navigate to a new blank requisition by following these steps:
   - Click Main Menu.
   - Click eProcurement.
   - Click Requisition.
4. The eProcurement home page looks like this:

5. **IMPORTANT NOTES:** Be sure to order Special Request or Web items, from the same vendor on a single ePro requisition. *Do not mix vendors, and do not mix Special Requests or Web orders with Catalog orders on the same requisition.* It is okay to use different vendors if all the items are Catalog (stock or inventory) items. Also, try to use the same budget string (account information) for all the items on a single requisition. Doing this can help to prevent potential delays in processing.

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

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

II. **Express Item Entry (this one is a new feature)**
   - Enter the already-known exact details about the item and locate it immediately

**NOTE:** The Browse Catalogs search method does not work.
Order Catalog Items
How to Order Stock/Inventory Items

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):

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

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

Enter the quantity you want to order, and then click the Add (shopping cart) button next to the Quantity field.
II. Browse Catalogs

This feature is not currently available in eProcurement. Please use the "Express Item Entry" tool instead.
Order Catalog Items
How to Order Stock/Inventory Items

III. 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 name or 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.)

![Express Item Entry Screen](image)

**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.

**Good Tip!...** You can "fake in" the zeroes of an ID number. Let's say the Item ID you want is 000000012345, but you can’t recall how many zeroes it has. If you don’t type the **EXACT** number with the zeroes, it won’t find it. So, do this: Type the 12345 part of the number, and then click your mouse arrow immediately to the left of the 12345 to place your insertion point there. Then, press and hold down the 0 (zero) button on your keyboard until it stops typing 0's. Then you can click the Search icon, and it will find the item.
Order Catalog Items
How to Order Stock/Inventory Items

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.
Order Catalog Items
How to Order Stock/Inventory Items

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.

Click Checkout.

What To Do After You Click “Checkout”

Type a name for the Requisition.

Click a checkmark for “Select All/Deselect All”.

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.

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

Click Checkout.
Order Catalog Items
How to Order Stock/Inventory Items

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.
Order Catalog Items
How to Order Stock/Inventory Items

Make sure “All Distribution Lines” is selected, and click OK. This applies that budget 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.
Order Catalog Items
How to Order Stock/Inventory Items

The Confirmation screen displays, indicating your requisition has been submitted for approval and processing.

You can use the Breadcrumbs at the top left of the screen to navigate elsewhere.
This Job Aid shows how to use the new feature, “Express Item Entry”, in eProcurement 9.2. Use this feature to quickly locate and add single Catalog (stock/inventory) items you’re familiar with.

1. From the eProcurement Home Page, click Express Item Entry.

2. On the Express Item Entry page, you can expand out all the information by clicking the “Show all columns” button. If you already know the Item ID number, type it in. If you don’t know it, search for it.

   - Type the Item ID number, or search for it by clicking the Search icon (magnifying glass).
If you clicked the Search icon for the Item ID field, you will use this feature to look up the Item ID you want. Using the filters will help narrow and speed up your search.

When you find the Item you want, single-click on it to place it into the Express Item Entry Item ID field.

1) The Item ID field is populated with the one you clicked.

2) Enter the quantity you want of this one item.

3) Click the Add to Cart button, to place this item on your requisition. Then, you can go on to add more items, or click the Checkout button to finish the order.
Enter Budget Codes Once for Entire Order

If you are ordering more than one line item on an ePro requisition, and all the items will be paid for from the same budget, then you can use this handy shortcut that will save a lot of time. Instead of entering the 32-digit Chartfield string of budget numbers individually for each line item, you can enter the Chartfield string just once for the entire requisition. You can indicate on the requisition that you want that same budget to be applied to all line items.

**NOTE:** Once you enter the budget and apply it to all line items, any additional line items you place on the requisition will not be included. You will have to enter the budget numbers again for additional items you add on.

**NOTE:** This Job Aid begins at the point at which an ePro requisition has already been created with multiple line items added to it. If you don’t know how to arrive at this point, then you are not ready to attempt this Job Aid. Please refer to the Job Aid entitled: *How to Order Catalog Items.*

1. After you have added all the items you want to order, navigate to the Review and Submit page. Once there, click the **Select All** link or checkbox, to select all the items. You’ll know all items are selected when you can see a checkmark in each of their little boxes on the far left side.

2. Select the Requisition Setting Hyperlink in the upper right hand corner of the requisition.

3. On this screen, enter the budget code numbers into the **Chartfields** for the budget you want to use for the entire requisition.

Then click the **OK** button.
How to Order Copy/Printer Paper

Please follow the steps in this Job Aid when you want to order paper for your copier or printer. Do not order paper from Office Depot, or from anywhere else. Order paper from the eProcurement preset Catalogs as a regular inventory/stock item.

1. When you order paper, please be sure you create a single, eProcurement requisition just for ordering paper. Do not add any other items to the requisition. First, login to PeopleSoft-Financials and navigate to the eProcurement home page: **Main Menu —> eProcurement —> Requisition**

2. Select Catalog from the Search dropdown. Select the Advance Search hyperlink.

   **First, choose “Catalog” from the Search drop-down menu.**

   **Then, click the Advanced Search link.**
3. Go to the **Item ID field**. Select “Contains” from the drop-down menu. Enter the **4-digit Item ID number** there, for the type of paper you want. Click the **Search** Button. The list to choose from is displayed below. All four types of paper are standard white bond.

*(If you want to order colored or other specialty paper, use a Web supplier such as Independent Stationers or Office Depot)*

**Item ID**
- 7640 — 8 ½ inch x 11 inch
- 7641 — 8 ½ inch x 14 inch
- 7642 — 8 ½ inch x 11 inch, 3-hole punched
- 7643 — 11 inch x 17 inch

4. The item information will appear. Enter the **Quantity** of cases you want, and then click the **Add** button. This places the item on your ePro requisition form.

**Enter the number of cases you want in the Quantity field.**

**Then click the Add button to add this item to your order.**
5. Once you add the paper to your requisition, the system provides you with a message that the item has been added and your shopping cart updates with the number of line items you have so far.

6. To view information about the added items, hover your mouse over the **Line Field** next to the shopping cart.

7. Click on the **Checkout** Button to Submit the requisition.

8. On the Checkout-Review and Submit page, type a **Requisition Name** for the order.
9. Complete the rest of the requisition normally: Enter the **Budget String** to indicate which funds will pay for the order; run a successful **Check Budget**; and then **Save & submit** the requisition. Remember that the “Pre-Check Budget” feature is optional, and only tells you whether there are enough funds to cover this order by saying “Provisionally Valid”. If you don’t know where to enter the Budget String, please refer to the Job Aid entitled ”How to Order Keyword Catalog Items” or “Where to Enter Budget Strings”.

**Important Things to Remember When Ordering**

- Never mix Web items *(such as Office Depot or Waxie)* with Catalog stock/inventory items *(ePro Catalog items)* on the same requisition. Always create separate requisitions.
- Order from only one supplier per requisition.
Release Funds from a Canceled Order
So You Won’t Lose Funding!

If you cancel a requisition it is **VERY** important to also release the funds from it, so they can be returned to the budget. This is especially true when an Approver denies an eProcurement requisition. It is very important for the Requester *(originator)* to also cancel and budget-check the order immediately. Otherwise, the funds that had been pre-encumbered remain locked up, unusable, and you will lose funding.

If the denied requisition is not canceled and re-budget-checked, then the money that was pre-encumbered when the order was originally budget-checked will remain encumbered...which means those funds remain locked up and unusable for anything else. It is important to release the money from that requisition by canceling **and budget-checking it again**, so that it will be returned to the budget account it came from.

1. On the **Manage Requisitions** page, locate the requisition you wish to cancel. In the **Select Action** drop down menu, choose **Cancel Requisition**.

   Then, click the yellow **Go** button next to that line.

2. Verify that this is the requisition you want to cancel. Click the **Cancel Requisition** button.
3. You are returned to the Manage Requisitions page. Verify that the requisition’s Status shows it is now **Canceled**, and its Budget shows **Not Chk’d**. But the funds are still pre-encumbered... and will remain stuck there until you run a Budget Check on that requisition one more time.

4. From the **Select Action** drop-down menu on the far right side, click **Budget Check**, and click **Go**.

5. You’ll know the money has been released back into the Budget when you see that the Budget Status for the canceled requisition has changed from **Not Chk’d** to **Valid**.
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.

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

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.
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.
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 **G5000** and **L5000** on the end of the descriptions. **G5000** means a single unit of that item is worth **Greater Than $5,000** before tax. **L5000** is for a single unit that is worth **Less Than $5,000** before tax.
Requisition Settings for Special Request Items
Shortcut for Ordering Multiple Similar Special Request Items

This Job Aid shows how to use the Requisition Settings feature in eProcurement to set up defaults for your Special Request items on a single order. You can enter information into a few of the fields, and have that same information populate those fields automatically for each Special Request item in that requisition. This works well when you order multiple items from the same supplier, or use the same budget for all items, or generally plan to use the same exact information in a given field for all the Special Request items on one requisition.

1. Start from the PeopleSoft Financials home page:
   
   [Image: Screen shot of the PeopleSoft Financials home page with the Main Menu highlighted, showing the path to eProcurement and Requisition settings.]

   Click Main Menu, then click eProcurement, and then click Requisition.

2. On the eProcurement Home Page, in the upper right area, find Requisition Settings.
   
   [Image: Screen shot of the eProcurement Home Page with the Requisition Settings option highlighted.]
3. On the Requisition Settings page, fill in whichever available fields (text boxes) you want to have show up automatically on each Special Request item you plan to add to this order. In the example shown below, we entered the following fields:

A. **Supplier**— We chose Meredith Digital from the Supplier (vendor) list.

B. **Category**— All items will be paid with the same budget, so we chose the GDS_4301 category.

C. **Unit of Measure**— All items come packaged one to a package/unit, so we chose EA for “Each”.

D. **Chartfields**— We entered the budget string here so that all items will be paid with the same budget.

E. **OK**— When done entering the information, click the OK button.

4. Click the **Special Requests** link to start adding items to this requisition. *(All the information you entered into the Requisition Settings page will now automatically fill in for each Special Request item you create for this one order).*
5. The Special Request screen is displayed, with the information you entered earlier from the Requisition Settings page (Category, Supplier, etc.). This will save you time, as now you don't have to type all that information repeatedly for each item you add to this order.

6. For the first example item below, we filled in the **Item Description**, **Price**, **Quantity**, and the required **Additional Information**.
7. Since this printer cartridge is something we will be ordering again in the future, we decided to click a checkmark into the checkbox for **Request New Item**. This sends a request to the Strategic Sourcing Department, asking to have this item added as a Catalog *(stock or inventory)* item. If it’s accepted as such, the next time we order this item we might be able to find it as a Catalog item, instead of having to order it as a time-consuming Special Request item.

Click the **Add to Cart** button to add this item to your requisition.

8. A fresh, blank Special Request screen is displayed, to allow us to order another item. The same fields are automatically filled in for us once again, to save time, since the next item we want to order will be from the same Supplier, and will use the same Unit of Measure, and the same Category and Budget.
9. For our next item we fill in the required fields again (*Item Description, Price, Quantity*). This time we’re ordering a different printer cartridge for another printer used in our department.

When done, we click the same **Add to Cart** button as before (*not pictured here*).

![Special Requests](image)

10. The two printer cartridges are all we want to order on this requisition. In the upper right corner, click the **Checkout** button to go to the Checkout page (*used to be called the Review and Submit page*).

![Checkout](image)

Complete the requisition normally:

A. Run the Budget Check to pre-encumber the funds.

B. Save and submit the requisition.
Special Request Items
A Guide to Faster, Correct Ordering

This Job Aid illustrates the ways to fill in the necessary text fields for a Special Request item on an online eProcurement requisition form.

It’s very important to complete these fields correctly, otherwise your orders will be delayed or possibly canceled. This is especially true for Special Request orders, because they take longer to fill.

The steps in this Job Aid begin from a blank ePro requisition form. If you don’t know how to log into PeopleSoft eProcurement and arrive at a blank ePro requisition, then please refer to the Job Aid entitled How to Log Into PeopleSoft Financials.

NOTE: You should only use the Special Request page if you cannot order your item through the preset ePro catalogs, or through a Direct Connect vendor such as Office Depot or Waxie.

Important General Information about the Special Request Fields

- **Item Description**: Always type as much detail as you can about the item you’re ordering. Always begin with the noun for the item:
  - Type the noun for the item (Examples: Chair or Book or Lamp)
  - Then type the item’s Make (Examples: Acme or Safco or IBM)
  - Then type the item’s Model (Examples: Sec’y, Chair or A2B3C4 or Deluxe)
  - Then type the item’s Color, Size, etc. (Examples: Gray 24” aluminum base)

- **Price**: Price per unit without shipping or tax.

- **Quantity**: Numeral indicating how many you want for each Unit Of Measure (UOM).

- **Category**: Very important! Please refer to the Job Aid: How to Find Categories for Special Request Orders

- **Unit of Measure (UOM)**: Abbreviation indicating how the item comes packaged.
  - Example UOMs: EA (each) or SET (set) or GL (gallons)

- **Due Date**: Depends on what you’re ordering.
  - For Goods: Leave blank. It will be processed as soon as possible, by default.
  - For Services: Type in the date service is to be completed by.

- **Supplier**: Name of business (vendor) you are buying that item from.

- **Additional Information**: First always type your own name, phone, and site location. Include any additional details about the item you’re ordering that you could not fit into the Item Description field.

Start from the Special Request screen of a new, blank requisition.
Special Request Items
A Guide to Faster, Correct Ordering

I. Goods

You’ll know you’re ordering Goods items if the following is true:
- The item is physical...that is, you can touch it with your hand; it’s not a service.
- The item is worth less than $500 per unit.
- The item is not related in any way to an order for an Asset item on the same requisition.

**NOTE:** If you aren’t sure whether or not the item you’re ordering is a Good, *always ask!*

Below is an illustration of the correct way to complete the Special Request fields for Goods that are not Assets. Please keep in mind this illustration is only an example, and does not represent information to use on any specific order.

Example: How to Order an Office Chair

**Special Requests**

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

**Item Details**
- **Item Description:** Chair Model ABB350WQ Secretary Chair Gray
- **Price:** 75.00
- **Quantity:** 1
- **Category:** GDS_4303
- **Currency:** USD
- **Unit of Measure:** EA

**Supplier**
- **Supplier ID:** 0000001651
- **Supplier Name:** Office Furniture Warehouse

**Additional Information**
II. Asset Items

IMPORTANT NOTE: The Item Description must be in ALL CAPITAL LETTERS for Asset Items.

You’ll know you’re ordering an Asset item if the following is true:
- The item is worth $500 or more per unit.
- The item is a Good (a physical item, not a service).
- The item is non-consumable (it can’t be eaten or used up).
- The item is cheaper to repair than to replace.
- The item, while not an Asset by itself, is related to an obvious Asset item. For example, if you order a $650 bookcase and it costs $75 to ship it, then the $75 shipping fee is considered an Asset item and should be entered as such on the requisition. (Shipping fees must be entered as separate line items).

NOTE: If you aren’t sure whether or not the item you’re ordering is an Asset, always ask!

Below is an example of the correct way to complete the Special Request fields for an Asset item. Please keep in mind this illustration is only an example, and does not represent information to use on any specific order.

Example: How to Order a Computer Printer

Notice...all capital letters for Asset Items!

![Example Image]

*Item Description: PRINTER HP P4014N LASERJET
*Price: 1280.00
*Currency: USD
*Unit of Measure: EA
*Due Date:
*Supplier ID: 0000000329
*Supplier Name: Arey Jones Educational Soc.
Special Request Items
A Guide to Faster, Correct Ordering

III. Services

You’ll know you’re ordering a Service item if the following is true:

- The item is non-tangible; that is, you can’t actually touch it with your hand.
- The item is a task or series of tasks being performed by a non-district employee, such as an outside contractor. An example would be if you were hiring a landscaper to come trim the trees on your campus site.
- The item is not related in any way to an order for an Asset item on the same requisition.

NOTE: If you aren’t sure whether or not the item you’re ordering is a Service, **always ask!**

Below is an illustration of the correct way to complete the Special Request fields for Services. In this example we are suggesting a new vendor instead of inputting the Vendor ID number for one already established with the school district. Please keep in mind this illustration is only an example, and does not represent information to use on any specific order.

Example: How to Order Payment to an Outside Contractor
IV. Confirming Orders

Confirming Orders are Against District Policy
(Administrative Procedure 2415, Section C.4)

No one should be doing Confirming Orders

Definition: A Confirming Order happens when there is a District purchase for goods or services that is placed without the issuance of an approved requisition and purchase order. The requisition is then issued after the purchase, and the purchase order “confirms” the purchase.

If you violate the above policy, you must use the invoice to issue the eProcurement Requisition. Follow these guidelines:

- Start Item Description with: CONFIRMING ORDER (as in illustration, below).
- Issue the ePro Requisition to match the invoice.
- Create a line for each item and shipping, including the description on each line.
- DO NOT ADD A LINE FOR TAX ON ANY ePRO REQUISITION. This is done automatically later.
- Enter the correct supplier (vendor) you bought from on the ePro Requisition.
- If the supplier (vendor) is new, use the Suggest Supplier tool to enter the name, address, and contact information.
V. Pay in Advance (Hotels for Field Trips)

IMPORTANT! All Hotels Require Payment in Advance.

This Job Aid Refers to Overnight Field Trips with Students.

- Submit these requests **6-8 weeks PRIOR** to the trip.
- Most hotels want to receive payment 2-4 weeks prior to arrival date.
- All paperwork must be submitted in time for a Purchase Order and warrant (check) to be issued and mailed to the hotel.
- The following must be provided with the ePro Requisition:
  - Copy of hotel reservation or confirmation, which must state:
    - Hotel name
    - Hotel address
    - Hotel phone and fax
    - Number of rooms reserved
    - Room charge
    - Tax rate to be charged
    - Check-in and Check-out dates
    - Reason for the trip
    - Class or grade level of the students traveling
    - Teacher(s) in charge (*their names*)

TO START THE PROCESS:

- Create a Special Request item on an ePro requisition.
- Upload/attach the reservation/confirmation/invoice form to the ePro requisition **immediately**. (*See the Job Aid and/or Online Tutorial showing how to do this*).
- **Be Sure** to include all details stated in the bulleted list above.
- ePro Requisition ID number **must** be on the faxed paperwork.
- ePro Requisition must state:
  - Reason for the trip
  - Class or grade level of the students attending
  - Teacher(s) in charge
VI. ICA’s (Independent Contractor Agreements)

IMPORTANT! Complete ICA Form Eight (8) Weeks *Prior* to BOE Meeting

PRIOR TO SERVICES BEGINNING

- School Site or Department Completes:  
  Independent Consultant Agreement (ICA) Form
- (NOTE: This process is to be used for service agreements up to $10,000).
- Complete all required information on the ICA form including: valid *(successfully budget-checked)* ePro Requisition number *(Contact Budget Analyst right away if budget error occurs).*
- Ensure consultant/vendor signs ICA Form, with Fed. ID # or SS#.
- Provide Form with completed description of services being rendered.
- Provide start and end date of service(s).
- Provide Unite Price or Rate of Pay/compensation with the total dollar amount.
- Provide Budget (Chartfield) String bad budget description.

Follow the Internal Approval Process:

1. Have your Principal or Dept. Head sign the ICA Form.
2. Submit to Area Superintendent, Director, or Cabinet Level Approver for signature. *(Vendor, Site Administrator, and Cabinet Level Rep signatures are all required!!!).*

*** FAILURE TO PERFORM ALL ABOVE STEPS WILL DELAY PROCESS***

3. Mail completed ICA Form via Interoffice School Mail with all approved documents attached to:  
   Strategic Sourcing and Contracts ATTN: Julio Gomez

4. Email a PDF of the ICA Form to Julio Gomez: jgomez1@sandi.net

SS&C Dept. will take the following actions:

5. Review, approve and/or disapprove all documents submitted.
6. Verify the ePro Requisition is Valid *(successfully budget-checked).*
7. Place on Board of Education (BOE) Agenda with recommendation for approval.
8. Create PO (Purchase Order) number following BOE approval, and forward ICA Form to Accounts Payable Dept.
Order from Web Suppliers
Office Supplies, Custodial Supplies, etc...

Please follow the steps in this Job Aid when you want to order items from our Web (a.k.a. Direct Connect) suppliers, such as Office Depot, or Waxie, for example.

1. Be sure you create a separate eProcurement requisition. Do not add any other items to the requisition. First, login to PeopleSoft-Financials and navigate to the eProcurement home page: Main Menu —> eProcurement —> Requisition

Always begin with a new, blank requisition form.

2. Click the Web link.
3. Scroll down the list of suppliers until you find the one you want to order from, and then single-click its link (to the right of its name). That will open a window to that supplier’s ordering website, which has special pricing for our school district.

4. After you finish choosing items, and placing those items in the shopping cart, look for a button or link that indicates you can “Check Out” from that supplier’s website. Follow the website’s instructions to checkout, which should automatically return you to the eProcurement requisition.
5. DO NOT add any other items to this requisition. Use a separate requisition for each order placed with a single supplier.

Give the Requisition a name so you can track it easily later on.

![Requisition Name: Office Supplies](image)

6. Place a checkmark into the Select All/Deselect All checkbox, at the lower left corner just below the last item.

![Select All / Deselect All](image)

7. Towards the right side of the page, click Mass Change.

![Mass Change](image)

8. Ignore all the textboxes along the top half of the page, and go directly to the bottom, where you need to fill in the budget Chartfield string. Do this, and then click OK.
9. Leave the default choice as **All Distribution Lines**, and then click **OK**.

![Distribution Change Options]

10. Complete the rest of the requisition normally: Run a successful **Check Budget**; and then **Save & submit** the requisition. Remember that the “Pre-Check Budget” feature is optional, and only tells you whether there are enough funds to cover this order by saying “Provisionally Valid”.

![Check Budget Pre-Check Budget]

**Important Things to Remember When Ordering**

- Never mix Web items *(such as Office Depot or Waxie)* with Catalog stock/inventory items *(ePro Catalog items)* on the same requisition.
- Order from only one supplier per requisition.
Compare Prices between Office Depot and Independent Stationers

Often, Independent Stationers sells the same product as Office Depot but at a lower price. This Job Aid shows how to take an Office Depot product ID number and enter it on the Independent Stationers website, to see what their price is for the same product. You might be surprised at how often the same product is offered at a much lower price at Independent Stationers.

First, you need to obtain the Office Depot ID number for their product you’re interested in.

1. After you log onto the SDUSD PeopleSoft Financial web portal, click:

   **Main Menu > eProcurement > Requisition**

2. Click the **Web** link:

3. Click the **Independent Stationers** link:
Compare Prices between Office Depot and Independent Stationers

4. In the upper left area of the page, enter the Office Depot ID number for their item, into the Independent Stationers search field, and click the orange Search button:

![Office Depot Item ID number](image)

5. Independent Stationers will cross reference Office Depot’s product with their own. The page will then display their findings. If they cannot match the exact same product, they will show you an equivalent product. **NOTE: You will NOT see the Office Depot web page appear on the Independent Stationers’ screen. You will only see the Independent Stationers’ pricing.**

In the example shown here, (August 2015), Independent Stationers sells the exact same Avery address labels for $62.97 that Office Depot sells for $74.99. **That’s a savings of $12.02.**

![Independent Stationers website](image)

![What the same product looks like on the Office Depot website.](image)

![Note the price difference.](image)
Track Your Office Depot Orders on the Office Depot Website

This Job Aid shows how to use our eProcurement’s Office Depot website to easily track items you’ve ordered from Office Depot. This is a great enhancement beyond what eProcurement software alone can do.

1. After you log onto the SDUSD PeopleSoft Financial web portal, click:

   **Main Menu > eProcurement > Requisition**

2. Click the **Web** link:

3. Click the **Office Depot** link:
Track Your Office Depot Orders on the Office Depot Website

4. Click the **My Account** link, and then click “My Account” in the drop-down menu.

5. You **cannot** find your order by using the ePro requisition ID number. You can find and track your order by choosing from the **Search By** menu:
   - **Ship to ID** *(this is your Dept. ID Location number: xxxxA)*
   - **P.O. Number** *(the PeopleSoft Purchase Order number, found on the Manage Requisitions page)*

You can also filter your search by **Status**: “Shipped”, “Delivered”, etc.

6. In the example shown here, we chose to search by the **“Ship to Id”**, which is the Location Code for a given site. We used 0003A just as an example. *(If you wish to search by this method, you need to ensure you have the correct Location Code for your site).*
7. A list of your Office Depot orders is displayed. The list offers details about each order. To view additional details about an individual order, click on the Order Number in the far left side.

Click an order number to see the details of your order, or to view delivery tracking information.

<table>
<thead>
<tr>
<th>Order Number</th>
<th>Order Date</th>
<th>Total</th>
<th>Status</th>
<th>Delivery Date</th>
<th>Changeable</th>
<th>PO Number</th>
<th>REG#</th>
<th>Contact</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>796299432-001</td>
<td>08/12/2015</td>
<td>$142.30</td>
<td>Return: In Process</td>
<td>08/12/2015</td>
<td>No</td>
<td>SDU50.00003526359</td>
<td></td>
<td>Leo Ganty/Loiena Gere</td>
<td>Return</td>
</tr>
<tr>
<td>786057474-001</td>
<td>08/10/2015</td>
<td>$31.45</td>
<td>Delivered</td>
<td>08/11/2015</td>
<td>No</td>
<td>SDU50.00002548425</td>
<td></td>
<td>Leo Ganty/Loiena Gere</td>
<td>Order</td>
</tr>
<tr>
<td>785563719-001</td>
<td>08/06/2015</td>
<td>$105.69</td>
<td>Shipped</td>
<td>08/07/2015</td>
<td>No</td>
<td>SDU50.0000263761</td>
<td></td>
<td>Leo Ganty/Loiena Gere</td>
<td>Order</td>
</tr>
<tr>
<td>785563716-001</td>
<td>08/06/2015</td>
<td>$508.12</td>
<td>Delivered</td>
<td>08/07/2015</td>
<td>No</td>
<td>SDU50.0000263761</td>
<td></td>
<td>Leo Ganty/Loiena Gere</td>
<td>Order</td>
</tr>
<tr>
<td>783514293-001</td>
<td>07/28/2015</td>
<td>$107.88</td>
<td>Shipped</td>
<td>07/29/2015</td>
<td>No</td>
<td>SDU50.00002633313</td>
<td></td>
<td>Leo Ganty/Loiena Gere</td>
<td>Order</td>
</tr>
<tr>
<td>785524326-001</td>
<td>07/28/2015</td>
<td>$51.50</td>
<td>Shipped</td>
<td>07/29/2015</td>
<td>No</td>
<td>SDU50.00002633313</td>
<td></td>
<td>Leo Ganty/Loiena Gere</td>
<td>Order</td>
</tr>
</tbody>
</table>

8. Comprehensive details about one order are displayed. There is even a link to “View Carton Details and Proof of Delivery” (if the order has been delivered).

Order Number: 785563716-001
Order Date: 08/06/2015
Ordered By: XINT
Last Modified By: XINT
Last Modified On: 08/07/2015
Tracking: 785563716-001
Status: Delivered
Shipped Date: View Carton Details and Proof of Delivery
Delivery Date/Time: 08/06/2015 08:30 AM - 05:00 PM
Comments: **PLEASE SHIP ASAP**

Shipping Information
Shipping Address:
ADAMS ELEMENTARY
4622 35TH ST
ADAMS ELEMENTARY
SAN DIEGO, CA
92116-3636
USA

Billing Information
Billing Contact:
Leo Ganty / Loiena Gere
(815)284-1158 Ext. 0000
Payment Method:
Account Billing
Amount: $508.12

Order Summary
<table>
<thead>
<tr>
<th>Description</th>
<th>Your Price/Unit</th>
<th>Quantity</th>
<th>B/O</th>
<th>Shipped</th>
<th>Total</th>
<th>Reorder Price/Unit</th>
<th>Reorder Qty</th>
<th>Desselect all</th>
</tr>
</thead>
<tbody>
<tr>
<td>FORAYS 60% Recycled Red &amp; Blue Pencil Storybook Paper, Conforms To T/Meas - Grade K-1, 4.1/2&quot; Picture Story Heading, 3/4&quot; Ruling, 3/8 Midline, 3/6&quot; Skip Space, 11 x 8 1/2&quot;, Pack of 500 Sheets</td>
<td>$3.87 / ream</td>
<td>25</td>
<td>0</td>
<td>25</td>
<td>$98.75</td>
<td>$3.87 / ream</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

September 2015
Track & Manage Your ePro Orders

Monitor Your Requisitions; Be Sure You Get Your Orders

You are expected to monitor and track your own eProcurement requisitions, to ensure you receive your items on time. Only by tracking your orders can you resolve delays, or otherwise troubleshoot potential problems.

This Job Aid shows you how to track your requisitions; and it also shows you how you can edit them, when possible. Editing includes changing an order, canceling an order, and reopening and/or resubmitting an order.

Important Note: Do not contact the Purchasing (Strategic Sourcing) Department just to ask the status of an order. Only contact them to ask about an order if it is late in coming; that is, at least 30 days have passed since the Purchase Order was created, and you haven’t received the items yet.

There is a screen in the eProcurement software called the Manage Requisitions page:

- View all your requisitions past and present, including each one’s current status.
- View who has approved a requisition, and when it was approved.

1. After you log into our PeopleSoft Financial online software, click:
   
   **Main Menu —> eProcurement —> Manage Requisitions**

![Diagram of the process steps]

1. Click Main Menu
2. Click eProcurement
3. Click Manage Requisition
2. The Manage Requisitions page opens up, automatically displaying all the orders you’ve created within the last seven days. Here’s what you can do to update and filter which requisitions display on this page:

A. Change the From and To dates to view requisition orders that were created within a particular day, date frame of several days, weeks, or months, at any time in the past.

B. Filter the display of requisition orders by either the Request Status (Open, Pending, Approved, etc.) or the Budget Status (Valid, Error, Not Checked), or both those filters together.

C. Whatever filters you choose, be sure to then click Search in order for the screen to display results of your filter parameters.

D. Your requisition orders will display at the bottom of your screen, with the most recent ones at the top of the list, and the oldest ones at the bottom.
3. Roughly in the center of the Manage Requisitions page, look for the Request State column. It will tell you the current status of your requisitions.

### Request State Definitions:

- **Approved**: Entire Requisition has been approved for processing.
- **Canceled**: Requisition has been canceled; it remains frozen until you choose to reinstate it.
- **Completed**: Requisition has completed all its steps. Does not necessarily mean your entire order is received yet.
- **Denied**: Entire Requisition has been denied.
- **Open**: Requisition has been created & saved, but not submitted.
- **P.O. Partially Canceled**: Purchase Order (created off the Requisition) has been partially canceled.
- **P.O. Partially Completed**: Purchase Order (created off the Requisition) has been partially completed.
- **P.O. Partially Created**: Purchase Order (created off the Requisition) has been partially created.
- **P.O. Canceled**: Purchase Order (created off the Requisition) has been entirely canceled.
- **P.O. Completed**: Purchase Order (created off the Requisition) has been entirely completed.
- **P.O. Created**: Requisition has generated a Purchase Order.
- **P.O. Dispatched**: Purchase Order (created off the Requisition) has been sent to a supplier for fulfillment.
- **Partially Dispatched**: Part of your order is on its way to you from our Supply Center.
- **Partially Received**: Part of your order has been received at our Supply Center.
- **Pending**: Requisition has been created, saved, and submitted.
- **Received**: Your entire order has been received at our Supply Center.
- **See Lines**: One or more items were denied, while the rest of the items were approved.
4. In the list, after you locate the requisition you want to track, you need to click its **Expand Section** button to reveal that requisition’s timeline. The Expand Section button looks like a tiny gray triangle on the far left side.

```
0000237114  MICR Verified Quote  SDUSD  07/26/2013  Received  Valid
0000237097  SES Renewal  SDUSD  07/26/2013  Partially Received  Valid
0000236593  Oracle Contract # 5593454  SDUSD  07/19/2013  Partially Received  Valid
0000236301  Scale Matrix Year 2  SDUSD  07/15/2013  Received  Valid
0000236074  Logical Choice Term PO ...  SDUSD  07/10/2013  PO(s) Dispatched  Valid
```

5. The requisition’s lifespan/timeline is displayed, as well as details about the items ordered (below the timeline). Going from left to right, each icon represents a step in the requisition’s progress. If the icon is lit up and brightly colored, then that step is either in process, or has been completed.
Request Lifespan (Timeline) Icon Definitions:

- **Requisition:** Details about the Requisition *(information about what is being ordered)*
- **Approvals:** Shows any/all district staff who will approve *(or has already approved)* the Req.
- **Inventory:** This icon lights up if a stock/inventory item is being ordered
- ** Purchase Order:** Indicates status of Purchase Order
- **Change Request:** Lights up if you ask our Buyers to make a change on the Req
- **Receiving:** Indicates receipts of items already received at our Supply Center
- **Returns:** RTV processes are being followed; if you want to return an item, contact Purchasing *(Strategic Sourcing)* Dept. and ask them what to do.
- **Invoice:** Indicates Purchase Order lines, including voucher and receiver
- **Payment:** Displays payment inquiry and results

Click the tiny gray triangle button again to collapse the Lifespan/Timeline:

6. The **Select Action** drop-down menu on the far right side of the Manage Requisitions page is used to do things or observe things about a given requisition. The choices you see displayed in this menu will change depending on the current status of the requisition. For example, the **Cancel** choice vanishes once the requisition has generated a Purchase Order, but a new choice might then appear, such as **Process Return**.

After clicking the action you want, be sure to click the yellow **Go** button to make it happen.
7. In the example shown below, we clicked View Approvals from the Select Action menu. The Approval Status page is displayed. Here, you can see when the requisition was either denied or approved, who did it, and when they did it.

Be sure to scroll all the way down the page. More information is usually to be seen.

To display a printable version of the requisition, which includes all the details of the order, click here.

The next page of this Job Aid shows examples of several of the more commonly used features of the Select Action menu choices.

Please be sure to read all the way to the last page of this Booklet, to see some very important information you need to know.
CANCEL: To cancel a requisition, click **Cancel**, then click **Go**. On the next screen you see, click the **Cancel Requisition** button. **NOTE:** If you don’t see **Cancel** on the Select Action menu, that means it is too late to cancel it.

COPY: To create and use a copy of a requisition, click **Copy**, then click **Go**. The next thing you see will be an exact replica of the requisition. You can then edit it, and/or submit it as a new order.

EDIT: To edit a requisition, click **Edit**, then click **Go**. If the requisition is waiting to be approved, you’ll see the **Message** pictured below. To go on and edit the req, you would click **OK**; to cancel the editing choice, you would click **Cancel**. **NOTE:** If you don’t see **Edit** on the Select Action menu, that means it is too late to edit it.
Important! What to Do if This Happens to You

- **Requisition Denied for Lack of Information.**
  
  Edit the requisition. Provide the missing information they asked for. Budget-check, and resubmit.

- **Items Not Received Within 30 Days of P. O. (only non-Catalog orders).**
  
  Watch for your orders to arrive. If you still haven’t received the items by 30 days after the date of the Purchase Order, contact the current eProcurement SME (Subject Matter Expert), and tell her right away. This helps resolve the delay, close out the Purchase Order, and save your site’s money. Currently, the SME is Robin Hoffpauir, (858) 522-5805, rhoffpauir@sandi.net

  How to find a requisition’s P.O. from the Manage Requisitions screen:

  1. Expand requisition’s Lifespan/Timeline
  2. Click to see P.O. Number & Date

- **Special Request Items? Do This.**
  
  Whenever you receive any Special Request items you ordered, as soon as you get them, immediately send an email message to the Supply Center to let them know.

  **Include the P.O. number.** Send this message:

  “P.O. #_____ We’ve received everything.”

  Send the email to: supctrec@sandi.net

- **Want to Return Something? Do This.**
  
  Web items (Office Depot, Waxie, etc.): You can return those yourself.

  Any Other Items: Do not return them yourself. Contact Strategic Sourcing Dept.

  (858) 522-5808
This Job Aid shows how to use eProcurement Templates. You can use pre-created templates provided by the school district, or you can create your own customized templates, which you can save, edit, delete, and share with other district employees.

1. From the eProcurement Home Page, click **Templates**.

2. On the Templates page, search for pre-created templates by either scrolling down the page, or by entering a keyword search.

3. Once you locate the template you want, click the gray triangle button on the left to display the list of items in that template.
4. The entire list of individual items is displayed, within that template. This means that when you order this template, you will automatically place one of each of the listed items on your ePro requisition. In essence, you are going to make a copy of this template and then submit that copy as your ePro requisition.

Type a number into the Quantity field, for how many you want. If you type a 1, you’ll get one of each item. If you type a 2, you’ll get 2 of each item, etc. Then, click the Add button to create your ePro requisition.

5. Hover your mouse over the Shopping Cart “lines” link in the upper right corner. The summary of your order will pop out, showing what has been placed on the requisition.

You can then edit your requisition as desired, before you submit it.

Click the Checkout button.
6. Edit your requisition as desired, and then complete and submit the requisition:
   a) Give your order a name (in the Requisition Name field).
   b) Enter the budget string to pay for everything.
   c) Run a successful “Check Budget” to pre-encumber the funds.
   d) Click the Save & Submit button to submit the order for approval and processing.

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How to Create Your Own Customized Template

You can turn any eProcurement requisition into a template... even ones that have Special Request items, or Web supplier items. The template will retain anything you put on the requisition, including comments, and the budget strings.

First, build your requisition. Then, before you run the budget check or submit it, check the “Save as Template” checkbox, and save it. Then you can go ahead and finish the order, and submit it normally. The next time you want to submit that same order again, just call up your template, order a copy of it, edit the copy if you wish, run a successful budget check, and submit it.

**TIPS:**

- When you use your template for the first time, you might want to edit the quantities so that there is only one of each item, and then resave the template.
- Be sure to give your template a good name that reflects what is in it.
- Once you create and save a template, you can always edit it or delete it in the future.
- You can choose to share your template with another district employee.
1. Once you have all the items you want on your eProcurement requisition that will become a template, and you also have given it a name, and added the budget numbers to pay for it, you should be on the “Checkout” screen (used to be called the “Review and Submit” page).

Click the **Select All** checkbox to place a checkmark next to each line item.

Underneath the last line item, about in the center of the screen, look for the **Add to Templates** link, and click it.

2. You’ll see a page with any previously made templates listed at the top. Below that, in the **Add a new template** area, type a name and description for your template, and then click **OK**.
3. At this point, you can finish the active requisition that you just used to make a template and place the order, or not.

To check and see how your new template looks, navigate to the eProcurement Home Page, and click **Templates** again.

4. Scroll down to the bottom of the Templates list, and you should see your new custom template there. Click its gray triangle button to display the details of your template.

5. To manage your templates, at the very bottom of the list of templates, click the **Manage Personal Templates** link.

6. Here you can edit your templates, allow sharing with other employees, or even delete a template if you don’t want it anymore.
Upload Attachments to Your ePro Order
Attach Files to Go Along with Your Orders

When any document (*estimate, list, spreadsheet, receipt, etc.*) must accompany an eProcurement requisition, the preferred procedure is to electronically upload (*attach*) the document to the requisition before submission. Typically, such document attachments provide necessary information in order to process the order. An example of this is when you place an order that includes a written estimate, and you want that estimate to accompany the ePro requisition.

This Job Aid walks you through the steps to upload/attach a document to an item on an ePro requisition. The steps illustrated below begin from the point at which we have already created the requisition, and we are starting from the **Checkout** screen (*used to be called the Review and Submit screen*).

1. Locate the line item to which you want to attach a document or other type of file. Scroll over to the far right side of the screen, and click on the **Add** link next to the empty text bubble.

2. Click the **Add Attachments** button.

3. If you see this **SQL** error message pop up, just click **OK** and ignore it. It’s a glitch in the software that doesn’t mean anything. The IT folks are working to get rid of this message. Just know that it won’t keep you from completing any tasks in PeopleSoft.
4. Click the **Browse** button. Locate the document or other type of file on your computer you want to attach to this ePro order. When you find the file, double-click on it.

![File Attachment](image)

5. When you see the file loaded into the textbox, click **Upload**.

![File Attachment](image)

6. You’ll see that the file has been attached. You can add another file; click **View** to see what’s in the file itself; click a checkmark to **Send to Supplier** so they will see the attachments; and click **OK** to continue with the order.

![File Attachment](image)

7. After you clicked **OK**, you’ll be back on the Checkout screen. Over on the right side, where you originally clicked **Add**, it now says **Edit** with a paper clip icon, to show that there is an attachment.

You can then finish up the order normally (**enter budget string, run the budget check, and submit**).
The eProcurement Report
View Details of All ePro Orders in Your Entire Department/School

This Job Aid shows how to run a query (report) that displays all details about every eProcurement requisition created by anyone within your department, office, or school site.

1. After logging into the PeopleSoft Financial online system, you must navigate to the Reporting Tools page.

2. After clicking Reporting Tools, click Query, and then click Query Viewer.
3. Type the query name **SD_SITES_EPRO_REQS** into the begins with field, and then click **Search**:

4. For the “SD_SITES_EPRO_REQS” choice, click “**Excel**” under “Run to Excel”.

5. Enter the following information into the fields:

   **Department:** Your Cost Center/Department ID no.

   **Req Date Greater Than:** A date in the past, to begin the time frame within which you want to see ePro orders.

   **Req Date Less Than:** A date up to today, to end the time frame within which you want to see ePro orders.

   For example, if you want to see all ePro orders created between July 1, 2013 and Jan. 27, 2014, then those are the two dates you should enter here.

   Then, click the **View Results** button.
6. If the report does not automatically open in an Excel spreadsheet, look at the bottom of your screen. If you see the message displayed below, click either **Open** or **Save**.

![Image of the Open or Save dialog box]

7. The spreadsheet should open in Excel. Look at the top of the screen for a possible message saying you are in **Protected View**. Click to **Enable Editing**. Then you can filter/edit/save the report.

![Image of Excel spreadsheet in Protected View]

8. To quickly and easily adjust the width of all the Excel columns, so that all the excess spaces are eliminated and all the data can be completely seen and not hidden, try this little maneuver:

   1. Click the blank gray button in between the A and the 1 in the upper left corner.
   2. Hover the mouse on the small vertical line that divides the A from the B, until it becomes a double-headed black arrow. Then double-click.
   3. The columns are instantly adjusted. Click anywhere to deselect the spreadsheet.

![Image demonstrating the column adjustment technique]
Anytime you’d like assistance with **GENERAL SPECIAL REQUEST ORDERS**, please don’t hesitate to contact Robin Hoffpaur, the eProcurement SME (Subject Matter Expert).

Robin  (858) 522-5805    rhoffpaur@sandi.net

Anytime you’d like assistance with **ASSET ORDERS**, please don’t hesitate to contact one of the experts listed below. Our goal is to support you and help you be successful.

Tammi  (858) 522-5857    tmoffett@sandi.net  
Maggie  (858) 522-5855    mclifton@sandi.net  
Rose  (858) 522-5850    rgustafson@sandi.net

If you need additional assistance with any kind of eProcurement topic, please go online to: www.sandiegounified.org. Then log into the **Staff Portal**; then click the **Technical Support** link on the left; and finally click the **PeopleSoft** link in the middle.