



SAN DIEGO
Community College District
Be. Belong. Become.

**PEOPLESOFT USER MANUAL FOR
PURCHASING**

November 15, 2024

Revised

SAN DIEGO COMMUNITY COLLEGE DISTRICT PEOPLESOFT USER MANUAL FOR PURCHASING

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SAN DIEGO

Community College District

To: Current and Prospective Suppliers/Vendors/Contractors/Consultants/Lecturers

Subject: Reminder – Notice on Gifts and Gratuities

The San Diego Community College District (District) values the services and products that are provided by your organizations. Those products and services allow the District to continue in our mission of providing accessible, high-quality learning experiences at an affordable price to meet the educational needs of the San Diego community.

As the end of the calendar year approaches, we would like to take this opportunity to remind you of the District's continued commitment to ethics and integrity throughout the procurement process – beginning with the individuals who request a product or service; to the District Buying and Contracts Staff; to the end-users and individuals who receive the service or product. This applies throughout the District.

The District encourages participation in the procurement process, whether your organization is large, small, or a non-profit entity -- we welcome you! Our goal is to find appropriate products and services at competitive prices, in a timely fashion, with efficiency, in a legal and professional manner.

It is the District's expectation that those who conduct business with San Diego Community College District refrain from offering gifts, gratuities, favors, entertainment, etc., either directly or indirectly to District employees. The "Conduct of Contractor" terms and conditions are located on the District website and referenced on each Purchase Order for your convenience (<http://www.sdccd.edu/about/departments-and-offices/business-technology-services-division/business-services/purchasing-vendors/vendors-suppliers/general-terms-and-conditions.aspx>).

We value your continued work with the district and thank you for your support and agreement with this expectation as we maintain uncompromising integrity and professionalism in all business transactions that support the San Diego Community College District's mission.

If you have any questions or concerns, please contact our office at (619) 388-6562.

Kelly Rosas
Manager, Business Services

San Diego Community College District

CAL-Card Program – State of California Purchasing Card

Reminder: The CAL-Card is issued to you, as an individual employee. You cannot transfer your CAL-Card credit card to another employee. You are responsible for all charges and can be held personally liable for purchases made via the CAL-Card that were not approved, in advance, by your Approving Official.

The CAL-Card is to be used only for authorized District Business. CAL-Card transactions are subject to review at any time by SDCCD Business Support Services, Purchasing and Contract Services, Accounts Payable, and external auditors.

Items purchased via CAL-Card are to be shipped to a District address. Shipment to a home address or other non-District address is not approved.

Misuse or fraudulent use of the CAL-Card credit card may result in suspension of credit card privileges, disciplinary procedures, termination of employment, and/or criminal prosecution.

CAL-Cards cannot be used to charge items for anyone other than the cardholder. Cards are issued in the individual Cardholder's name with a signature required on the reverse side of the card. If an attempt to purchase is made by a person other than the Cardholder, the transaction can be declined, and the card can be confiscated.

Authorized Uses - The CAL-Card credit card should only be used for the purchase of administrative and instructional supplies that would be legitimately purchased within the 4000 object codes (See the Budget and Accounting Manual). The card MAY NOT be used to purchase minor equipment under \$200 or any services not approved).

The card can also be used for minor services within the 5000 object codes. Any services would have to fall under the District transaction limit of \$200.

Prohibited Uses (not an all-inclusive list)

Prohibited Purchases include:

- **Minor Equipment <\$200**
- **Capital Outlay/Equipment >\$200**
- **Alcoholic Beverages**
- **Restaurant Meals**

Prohibited Practices:

Cash Advances

Cash Refunds - Requesting a cash refund for a credit card purchase

Splitting Transactions - Asking the merchant to put charges exceeding \$200 on multiple charge sliPeopleSoft.

Personal Purchases - Using the card to make a purchase of merchandise for personal use.

Cardholder Statement of Account -- At the end of a billing cycle, U.S. Bank will send each cardholder the Cardholder Statement of Account that shows all transactions they made during the billing cycle. The cardholder is required to review and attest to the accuracy of the statement and forward it along with their Purchase Log, Reconciliation Report, and receipts to the Approving Official within **five (5)** working days of receipt. If there are no transactions during the billing cycle, no statement will be sent.

Approving Official Report -- The Approving Official will review the Cardholder's Statement, Purchase Log, Reconciliation Report, and receipts for accuracy, completeness and appropriateness of the purchases. The Approving Official will then sign off on the log sheet and report, forwarding the packet to Accounts Payable for payment within the designated time period. Failure to forward the statement to the Approving Official or Accounts Payable within the designated time period may result in suspension of credit card privileges.

Cal-Card Agreement – the below statement was signed by all CAL-Card holders prior to receipt of the individual CAL-Card credit card:

AGREEMENT

I, the undersigned, request and acknowledge my responsibility for a District Purchasing Card. I have read and understand the terms and conditions for use of the credit card and the consequences to me personally for any misuse of it. I agree not to loan, give possession, misuse, modify, or alter the assigned card. I further agree to retain auditable copies of logs and receipts for the current year and the three previous years, to maintain monthly Purchase Logs and reconcile them to monthly Cardholder Statements of Account, to file timely disputes of any unauthorized charges on the appropriate forms, to submit any changes to my status (address, phone number, etc.) to my Approving Official, and to report immediately any lost, stolen, or misplaced card immediately to the bank, and, within one (1) working day, notify Purchasing & Contract Services and my Approving Official.

I understand that the card is to be turned over to my Manager or Approving Official upon resignation, retirement, termination for any reason, or when the reason/need to have the card is no longer valid (e.g., reassignment, promotion).

I recognize that the card is issued in my name and is only for my use in the performance of my job and only for authorized District business.

I have read and understand these terms, recognize that violation of these may be the cause for disciplinary action, and further acknowledge and authorize that any monies owed to me as an employee of the District, including any pay warrants, may be withheld until I return the card and all statements are satisfactorily reconciled. I also recognize that money owed to me personally by the District may be adjusted to compensate for any losses resulting from unauthorized use of the card.

All CAL-Card statements must be submitted to District Accounts Payable by the 4th of each month via payment request.

Purchasing and Contract Services Department Frequently Asked Questions (FAQs)

1. How is a supplier searched for in PeopleSoft?

Please refer to the Suppliers tutorial that starts on **page 10** of the PeopleSoft User Manual for Purchasing.

2. What if the supplier is not in PeopleSoft? How do I obtain a Supplier ID? What is the process for entering a supplier into PeopleSoft?

If the intended supplier does not exist in PeopleSoft, a new Supplier ID number will need to be established. To establish a new supplier, the requestor must first send the blank SDCCD Supplier Application form to the supplier for their completion and request an IRS form W-9 from the supplier. Use the following link to access the supplier intake form:

<http://www.sdccd.edu/about/departments-and-offices/business-technology-services-division/business-services/purchasing-vendors/forms.aspx>

Upon completion, the supplier shall return the two documents to the requestor. The requestor will review the documents for completeness, accuracy, and legibility. If incomplete, inaccurate or illegible, the requestor will return the document(s) to the supplier for revision. If complete, the requestor enters the supplier's information (from completed documents) into the PeopleSoft supplier database, and upload both forms as a combined .pdf document in the supplier's profile.

****NOTE:** All foreign suppliers must first be TIN matched by Accounts Payable prior to approval and entry into PeopleSoft. Initiator/requestors must first submit the completed Supplier Application and W8 forms to purchasing. Purchasing will forward the forms to Accounts Payable for review and approval. Accounts Payable will perform a TIN match and notify Purchasing if the supplier is approved to move forward or if additional information is required. Once approved, Purchasing will notify the requestor to enter the supplier's information into the PeopleSoft supplier database.

After input by department, email notification is sent to Purchasing and Contract Services, at supplierintake@sdccd.edu, who will review the data and respond accordingly.

Once the supplier is approved, the supplier may be used when drafting a requisition. For instructions on how to set up a supplier in PeopleSoft, please refer to the step-by-step tutorial that starts on **page 10** of the PeopleSoft User Manual for Purchasing.

Please note that if a supplier is set up for services, the supplier will need to be TIN matched through the IRS TIN matching process by District Accounts Payable. The TIN matching process is scheduled each week on Tuesday and Thursday afternoons. A supplier requiring TIN matching cannot be approved by Purchasing and Contract Services until District Accounts Payable has verified the suppliers IRS status. Please allow ample time for supplier approval when TIN matching is required.

3. What if the supplier is a consultant?

All suppliers, consultants, companies, lecturers, or performers who will be paid via check issued through PeopleSoft must have a current supplier profile. See above answers regarding checking for or obtaining a supplier profile.

Consultants, lecturers, performers, and those providing professional services to SDCCD will also have a services agreement included with their Purchase Order. To facilitate review and signature by Purchasing and Contract Services, it is recommended that the draft agreement, Scope of Work (SOW), and draft payment schedule be emailed to the Procurement Specialist.

The following items, if \$5,000 or less, no longer need to be processed through requisitions but can be paid via the online payment request process in PeopleSoft:

- ❖ Subscriptions
- ❖ Non-Software licensing
- ❖ Membership fees
- ❖ Sponsorship/Advertising
- ❖ Honorarium- one-time lectures
- ❖ Fees for Street Fairs/Outreach /Local promos
- ❖ Deposits for events which meet the above criteria

The purchase requisition for the requested services should be completed through the workflow approval process in PeopleSoft. A copy of the draft agreement must be uploaded with the purchase requisition. When the purchase order is completed, the Procurement Specialist will upload the completely executed agreement in PeopleSoft. **See Board Policy AP 6330.**

See pages 39 and 40 for the BPO process.

4. When requesting a quote for budgetary purposes, does the shipping or freight need to be included?

When a supplier sends a quote, 'freight' or 'shipping', if applicable, is to be shown as a separate line.

- ❖ Shipping/freight is not taxable
- ❖ Shipping and Handling is taxable

Shipping may be estimated by the quoting supplier and may actually be a different amount on an invoice as opposed to the original quote.

If supplier adds shipping to the invoice but it was not previously part of the quote

- ❖ this may require a change order in order to pay the invoice
- ❖ this may have an impact on your budget
- ❖ this may delay payment, adding steps and revision of existing documents must necessarily be performed by the requester

Please clarify BEFORE the supplier provides a quote whether a shipping charge will occur.

****NOTE: Freight** must be added as a separate line item using **Category Code 962-86** and **DL (Dollar)** should be selected for the **Unit of Measure** on that line. (i.e., if the freight cost is \$25 that will be the **Quantity** and the **Price** will always be a \$1.00).

See **page 38** for instructions on how to enter a freight line.

5. I am drafting a requisition, what is the expected lead time between the request for an item or service and when a purchase order is issued (dispatched) to a supplier?

Procurement Specialists perform many tasks as part of their purchasing responsibilities. Solicitation issuance, troubleshooting, negotiation, process application, and customer service follow-up are part of those responsibilities.

It is asked that requesters and end users consider adding time for those activities when initiating a request

and also have a reasonable expectation as to when the purchase order will be issued to a supplier and when the ordered items will arrive, or the service period of performance will start.

After a completed purchase requisition goes through the approval cycle, a pre-encumbrance budget check will occur to verify fund availability for the purchase request.

Following the purchase requisition approval cycle, the Procurement Specialist will receive the request in their PeopleSoft queue for review. An example of checks made during the review – does the cost exceed current bid threshold, is there a complete description, proper category code, asset information (if an asset is being purchased), review of any attached quote, clarification on any notes, and whether another source of supply is available that would benefit SDCCD or the end user (i.e., pricing, delivery, quality). Final location/destination for delivered items must be stated.

Following the review and other Purchasing and Contract Services actions, the Procurement Specialist will use the purchase requisition, its budget, and line item(s) to complete the purchase.

If for some reason the purchase requisition cannot be used, the Procurement Specialist will move the purchase requisition back to the requestor. The Procurement Specialist will add appropriate comments, identifying why the requisition was returned and what can be done to clear that issue.

The purchase order queue lists those purchase orders ready for electronic print and email (dispatch) to appropriate supplier.

The Procurement Specialist will perform an encumbrance budget check, review the purchase order content, and prioritize issuance (dispatch) of each purchase order. Order complexity, lead time, and shipping are considered by the Procurement Specialist when completing a purchase order.

6. How do I enter a requisition?

Please refer to the step-by-step tutorial regarding requisitions that starts on **page 27** of the PeopleSoft User Manual for Purchasing.

7. Whom do I contact if I am having trouble entering a requisition into PeopleSoft?

Each campus has a direct resource in their respective Business Services Office. Purchasing and Contract Services works directly with each Business Office, as well as with requestors and end users. In contacting your respective Business Services Office first, it allows for that office to determine if the campus requires additional resources. All departments may reach out directly to the Purchasing and Contract Services Department as needed.

8. Where do I attach supporting documentation (i.e., quotes, scope of work, payment schedules)?

All supporting documents are to be attached as one single attachment to Line one of the purchase requisition. If the purchase requisition exceeds \$10,000, three quotes are needed. Each quote must be uploaded as a separate attachment on line one of the purchase requisition. Please refer to **page 41** of the PeopleSoft User Manual for Purchasing.

9. How do I create a Blanket Purchase Order?

Please refer to the step-by-step tutorial on how to enter a requisition as a “**Blanket**” requisition that starts on **page 39** of the PeopleSoft User Manual for Purchasing.

10. Can I create a Blanket requisition for supplies?

Blanket Purchase Orders are intended for service renewals, maintenance service agreements, rental services, professional services, and subscriptions/memberships.

11. How can I see if a purchase requisition has been approved?

A confirmation will be emailed to the requestor once the requisition is final and approved. To check the status of a purchase requisition in PeopleSoft, drill down into the Manage Requisitions screen. Enter the **Requisition ID** number and click search. To access **Manage Requisitions**, use the following navigation: **Financials 9.2 > eProcurement > Manage Requisitions**. Click the gray triangle to the far left under **Req ID** to expand the details of the requisition. Click on any of the highlighted icons to obtain additional information.

This area will also show whether or not the purchase order has been dispatched to the supplier.

12. How do I check the balance on a Blanket Purchase Order?

To check the balance of a **Blanket Purchase Order** in PeopleSoft, use the following navigation:

Financials 9.2 > Purchasing > Purchase Orders > Review PO Information > Purchase Orders. To search for a purchase order, enter the **PO ID** number in the **Search Criteria** field. Click on the **Activity Summary** and a new window will open that provides the activity against the PO.

13. How should I enter the description for each line item?

The **ARMA format is recommended** for purchase requisitions. This helps to give some consistency to purchase requisitions and purchase orders being processed. See the **ARMA Rules on pages 75 and 76** of the PeopleSoft User Manual for Purchasing. If you have further questions, please contact the **Central Distribution Center at 619-388-1180**.

14. What end user contact information is needed on requisitions?

The end user's name, email address, and location are required. This information should be entered in the **Requisition Comments and Attachments** section of the requisition and all three boxes at the bottom of the box should be checked.

15. If a supplier gives me an agreement to sign, what should I do?

If the agreement document is one provided by the supplier, the supplier may request we sign it first. This is common for documents that originate with the supplier. In this circumstance, a few additional steps may be required. Still attach the agreement to line one of the purchase requisition. The Procurement Specialist will review the agreement and forward it to the Purchasing Supervisor who will then either sign the agreement and forward it to the supplier for their signature, or will request revisions from the supplier, if needed. Purchasing will continue to communicate with the supplier until the revisions are completed and the agreement is fully executed. Please note, agreements provided by the supplier almost always require revisions. The process can take time, particularly if the supplier has to forward the revisions to their legal department for review.

After the revisions are complete, and all signatures are obtained, the Procurement Specialist will upload the fully executed agreement to the purchase order and it will be dispatched to the supplier. Please note that all agreements and contracts related to Purchasing and Contract Services must be signed by an authorized signatory per the annual District Signature Authority delegation.

16. Why does purchasing change the supplier that the department entered on the requisition?

The supplier entered on the purchase request is often a suggested source of supply, particularly when the request is for goods or supplies. The San Diego Community College District Procurement Specialists use techniques that maximize cost savings, take into consideration availability, and ensure full and open competition where practicable. For some products, the District may utilize suppliers that have volume-based purchase agreements.

17. Does the supplier get a copy of the Purchase Order?

Yes. All purchase orders are issued (dispatched) via email. All suppliers must have a current email address in PeopleSoft within the supplier database to receive the applicable purchase order.

18. How do I request that a Change Order be processed for a Purchase Order?

All change requests to a purchase order must be initiated by the end-user at the requisition level. This allows for review and workflow approvals through PeopleSoft. Be sure to alert your Procurement Specialist prior to completing a purchase requisition to confirm that a requisition is needed. Once approved and processed, the purchase order will then be updated and the change order will be dispatched via email to the supplier, if needed. Please refer to the step-by-step tutorial for end users regarding change orders that start on **page 47** of the PeopleSoft User Manual for Purchasing.

19. What happens if the supplier delivers directly to the requestor?

All goods must be delivered to the campus **Stockroom and or Central Distribution Center. DO NOT SHIP ITEMS TO YOUR HOME ADDRESS.**

End users should not accept delivery; instead re-route the supplier to the Stockroom/Distribution Center so the ordered items can be received into PeopleSoft. District Office, DSC, and Continuing Education receiving needs to be done through the Distribution Center. To facilitate this, ensure that the “ship to” location is identified on the purchase requisition as the Central Distribution Center (CDC). The CDC Ship To location code is **DISCDC0100**.

Please note that if the items ordered are oversized/heavy in nature, this information should be included on the initial purchase requisition so that Purchasing and Contract Services can add special notes for the driver to coordinate delivery with the end user.

If the supplier does not follow the instructions on the purchase order and re-routing of the item is not possible, end users must notify the Stockroom or the Central Distribution Center within **48 hours** of receipt of goods.

As a reminder, end users are **NOT** to receive items in PeopleSoft. If the item(s) were delivered directly to the end user, then the end user will need to contact the appropriate Stock Room/Central Distribution Center to notify them that the order has been received. For a list of receiving contacts per location, please refer to **page 46** of the PeopleSoft User Manual for Purchasing or your campus Business Service Office.

20. What should the requestor do if they do not receive an item that was listed on the purchase order?

The end user/requestor should look up the purchase order number and contact the supplier to see if the item(s) were shipped. Next, the end user should obtain the tracking number from the supplier and track the order.

If the item(s) were delivered, the requestor will need to contact the appropriate Stock Room/Central Distribution Center to confirm receipt and coordinate delivery of the item.

21. What is the process for returns and Exchanges?

See Returns & Exchanges Board Policy AP 6330.16.

22. Is there an occasion when a Confirmation Purchase Order is used?

All authorized purchases will have a purchase order issued via PeopleSoft and transmitted (dispatched) to the supplier via email. Purchases made by individuals other than SDCCD Procurement Specialists are unauthorized purchases and may result in the individual being financially responsible for that unauthorized purchase or result in the supplier not receiving payment from SDCCD. The District requires regular purchase orders be issued pursuant to the California Education Code prior to the procurement of materials, supplies or services.

This does not apply to purchases made via approved processes related to CAL-Card usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current form to be completed and have it signed by your Campus VPA. This form details the unauthorized purchase and what steps will be taken to ensure only authorized purchases are made going forward. See Board Policy 6330, AP 6330.14.

23. What is SAM.gov registration?

Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

For Board Policy reference, click here: <https://www.sdccd.edu/about/leadership/board-of-trustees/board-policies/index.aspx>

Thank you for your contributions to this FAQ section! Please e-mail us with questions at purchase@sdccd.edu.

PEOPLESOFT (PEOPLESOFT) SUPPLIER APPLICATION PROCESS

When a requestor decides to engage a 'new supplier' to purchase future products or services the requestor will;

Verify whether this anticipated supplier currently is entered and approved in the PeopleSoft system and if so, use that Supplier ID number when creating the requisition.

If the intended supplier does not exist in PeopleSoft, then a new Supplier ID number will need to be established. Completing the Supplier Application form and IRS W-9 form is required as the initial step by the requestor (*It is recommended that these two blank forms be forwarded by the requestor to the supplier to complete (supplier has all the necessary information, first hand).

Use the following link to access the most current forms: [Forms - Purchasing | San Diego Community College District](#)

Upon completion, the supplier shall return the two forms to the requestor. The requestor will review the forms for completeness, accuracy, and legibility.

If incomplete, inaccurate or illegible, the requestor will return the form(s) to the supplier for revision.

If complete, the requestor will perform the data entry into PEOPLESOFT from the completed forms.

The supplier's W-9 and Supplier Application forms are uploaded in the supplier's profile for filing purposes and access by both Accounts Payable (AP) and Purchasing.

Thereafter, a Supplier ID is issued within PEOPLESOFT. Enter that 10-digit Supplier ID number in the box (top right) of the Supplier Application form.

The data as entered will remain in an 'unapproved' status within PEOPLESOFT until purchasing is notified and reviews and approves the content.

The requestor then emails supplierintake@sdccd.edu requesting approval by Purchasing. Enter ONLY the supplier name and supplier ID number in the subject line of the email.

Purchasing will review and notify the requestor via email when the supplier is approved.

Thereafter, the requestor may obtain a quote and draft the requisition within PEOPLESOFT, including the now approved supplier (ID).

Purchasing is responsible for reviewing the data entry performed by the requestor and either approving in PEOPLESOFT or sending the data back to the requestor for revision.

The submitted W9 form is also (only) reviewed by Purchasing for completeness. No decision or recommendation is made by Purchasing as to the actual tax status of the named supplier.

A cursory review is then performed by Purchasing as to the W9 content. The purpose of this task is to identify the possibility of the named supplier, individual or named partnership as potentially qualifying for Federal 1099 tax status. Purchasing reviews 1099 supplier status for analysis and determination by A/P staff. Purchasing will notify A/P if a new supplier needs to be TIN matched prior to approval.

For assistance regarding the supplier process, please contact the Purchasing and Contract Services Department at 619-388-6562.

SUPPLIERS

PeopleSoft can be accessed through the District website by selecting the **Employees** tab, and navigating to the **My SDCCD Portal** link. You can also go directly to the link below.

Use the following link: <http://myportal.sdccd.edu/>

****NOTE:** Add this website to your internet favorites for easy access.



By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID:

Password

[Sign In](#)

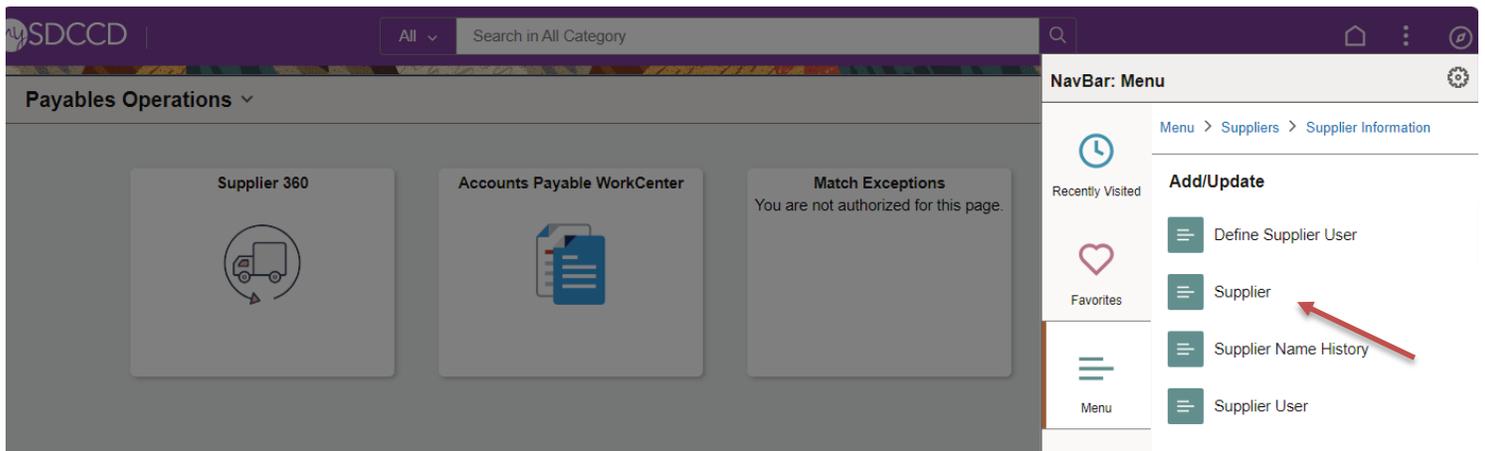
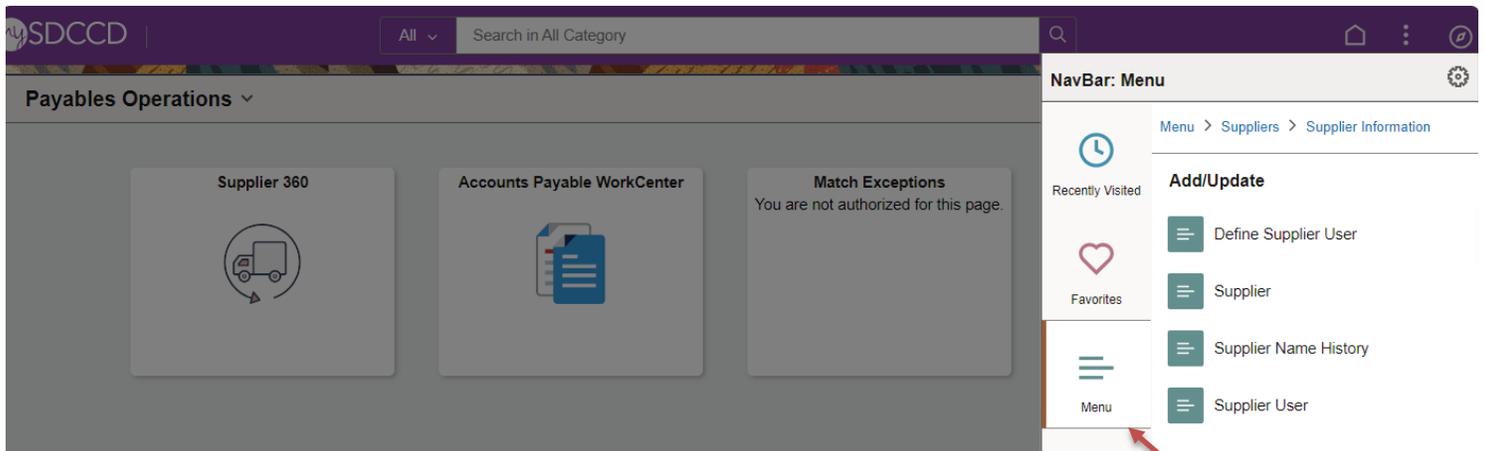
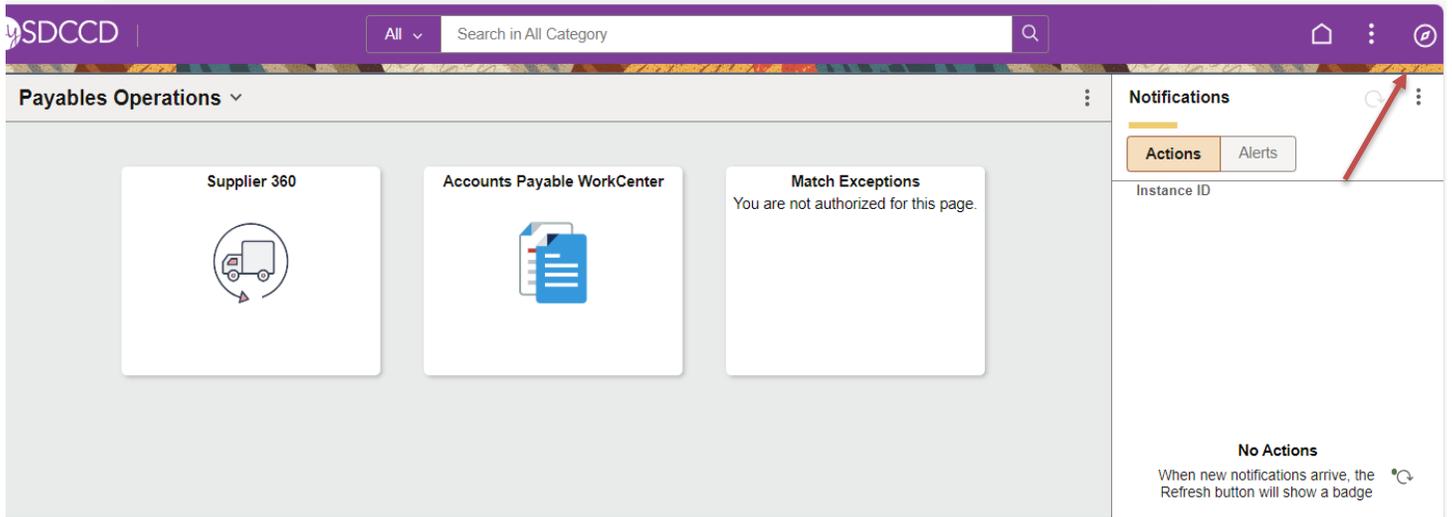
[Forgot your Password?](#)

Regular system maintenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

[Need Assistance? Student Help | Employee Help](#)

To access the **Supplier** database, click on the **NavBar** icon  in the top right of the screen. Then click the **Menu** icon and use the following navigation:

❖ **Suppliers > Supplier Information > Add/Update > Supplier**



****NOTE: All fields MUST be completed in CAPITAL LETTERS; turn your keyboard CaPeopleSoft Lock on.**

Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

To search for an existing supplier, enter the **Supplier ID** number or **Supplier Name** in the search field below and click **Search**. If searching with a Supplier ID number, click on the dropdown arrow in that field and click **contains** prior to searching.

Supplier Information

Find an Existing Value

⊕ Add a New Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches Choose from recent searches ✎

🔖 Saved Searches Choose from saved searches ✎

SetID = 🔍

Supplier ID contains 🔍

Persistence =

Short Supplier Name begins with 🔍

Our Customer Number begins with 🔍

Supplier Name begins with 🔍

^ Show fewer options

Case Sensitive Include History Correct History



If the supplier does not exist in PeopleSoft, a new Supplier ID will need to be established. To add a new supplier, click on **ADD a New Value** and follow the steps below.

****NOTE: The Supplier ID number must be a 10-digit numerical number containing no alpha or characters. Do not manually enter an ID number. ID numbers should be auto generated from PEOPLESOFT with the exception of an employee or student. To add an Employee/Student, see page 15.**

Supplier Information

Find an Existing Value

⊕ Add a New Value 

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches  🔖 Saved Searches 

SetID =

Supplier ID begins with

Persistence =

Short Supplier Name begins with

Our Customer Number begins with

Supplier Name begins with

^ Show fewer options

Case Sensitive Include History Correct History



In the next screen, click **ADD** and PeopleSoft will automatically assign a new **10-digit Supplier ID number** once the supplier information is entered and saved in PeopleSoft.

Supplier Information

Add a New Value

🔍 Find an Existing Value

*SetID 🔍

*Supplier ID

*Persistence ▼



To add an **Employee or Student**, replace **NEXT** in the **Supplier ID** field with that **Employee or Students ID** number and add three leading zero's (000xxxxxx) to the number. Ensure that there are 10-digits (numerical) and click **ADD**.

****NOTE: Employees with ID numbers that begin with 333 do not need 3 leading zeros added.**

Supplier Information

Add a New Value

🔍 Find an Existing Value

*SetID 🔍

*Supplier ID 

*Persistence ▼

Open the **IDENTIFYING INFORMATION** tab and complete all fields marked in **Red** below:

- ❖ **Supplier Name** – Enter the **Business Name (alpha only)** from Line 2 of the W-9 form. If Line 2 is blank, enter the Name from Line 1. If both line 1 & 2 are populated, enter line 2 for the Supplier Name and then enter line 1 under Payment/Withholding Alt Names in the Address tab.
If entering an individual's name, enter the first name, middle initial, and last name with no commas.
- ❖ **Supplier Short Name** – Enter the first 10 characters of the supplier's name, alpha only, **NO SPACES**.
- ❖ **Classification** – Select the appropriate classification for the Supplier. (Note: HCM stands for Human Capital Management and this is selected for Human Resources related suppliers)
- ❖ **Check for Duplicate** – Click this to verify if the supplier is already active in PEOPLESFT.
- ❖ **Additional ID numbers** – Click on and expand the **Additional ID Numbers** tab to enter the Tax ID.

Expanding the **Additional ID Numbers** tab will bring you to the screen below and allow you to enter the **Supplier's Tax ID** number found on **Part I – Taxpayer Identification Number (TIN)** on the W-9 form. Enter the **TYPE** (select either **EIN** or **SSN**) and then enter the **ID NUMBER**. Ensure that there are 9-digits only with no alpha and no dashes.

Click on the **ADDRESS** tab and complete the fields marked in **Red** below:

- ❖ **Description** – Enter the first line of the Supplier address if there is only one address. If there are two addressed to be entered, enter the type of address for each sequence in the Description field (i.e., mailing address or remit address etc.).
 - **C/O** – If an address has a C/O it will need to be entered twice. Once with the C/O and once without. More information on entering an address with a C/O can be found on **page 16**.
- ❖ **Address 1** – Re-enter the first line of the supplier address and then complete with City, State and Postal.
- ❖ ****NOTE: A Physical address is required for all new suppliers and the W9 form must include a physical address. We cannot accept a PO BOX on the W9 form.**
- ❖ **Email ID (REQUIRED)** – Enter the supplier’s email address (**not the web address**) where the Purchase Order will be dispatched to. Ensure that the email address is a current and valid address.
- ❖ **Telephone (REQUIRED)** – Enter the business phone number with area code.

****NOTE:** If the supplier included a **Payment Remittance Address** on the Supplier Intake form, see **page 20** for instructions on how to enter the additional **Remit** address.

Identifying Information **Address** Contacts Location Custom

SetID SHARE
Supplier ID NEXT Short Supplier Name Supplier

Supplier Address Find | View All First 1 of 1 Last

Address ID 1
Description 3375 CAMINO DEL RIO S

Details Find | View All First 1 of 1 Last

Effective Date 10/02/2018 Effective Status Active

Country USA United States

Address 1 3375 CAMINO DEL RIO S

Address 2

Address 3

City SAN DIEGO

County Postal 92108

State CA California

Email ID ENTER A VALID EMAIL ADDRESS HERE

Payment/Withholding Alt Names

Phone Information Personalize | Find | View All First 1 of 1 Last

*Type	Location	Prefix	Telephone	Extension
Business Phone		619	388-6562	

To add an address with C/O information, click on the **Plus Sign (+)** to the top right of the screen in the **Supplier Address** field to create an additional **Address field** and complete the following fields marked in **Red** below:

- ❖ **Description** – Enter **C/O** and then the type of address (i.e., mailing address or remit, etc.).
- ❖ **Address 1** – Enter the first line of the supplier address and complete with City, State and Postal.
- ❖ **Email ID** – Enter the supplier's email address (**not the web address**).
- ❖ **Telephone** – Enter the business phone number with area code.

Identifying Information **Address** Contacts Location Custom

SetID SHARE
Supplier ID NEXT Short Supplier Name Supplier

Supplier Address Find | View All First 1 of 1 Last

Address ID **+** **-**

Description **C/O Mailing**

Details Find | View All First 1 of 1 Last

Effective Date 10/02/2018 Effective Status Active **+** **-**

Country USA United States

Address 1 3375 CAMINO DEL RIO S

Address 2

Address 3

City SAN DIEGO

County Postal 92108

State CA California

Email ID ENTER A VALID EMAIL ADDRESS HERE

▶ Payment/Withholding Alt Names

Phone Information Personalize | Find | View All First 1 of 1 Last

*Type	Location	Prefix	Telephone	Extension	
Business Phone		619	388-6562		+ -

If both line 1 & 2 of the W9 are populated, use the Payment/Withholding Alt Names section of the Address tab to make note of the additional name.

❖ Put the name from line 1 of the W9 as Name 1

Identifying Information **Address** Contacts Location Custom

SetID SHARE
Supplier ID NEXT Short Supplier Name Supplier

Supplier Address [Search] | [Navigation] | 1 of 1 | View All

Address ID 1 [Add] [Remove]
Description [Text Field]

Details [Search] | [Navigation] | 1 of 1 | View All

Effective Date 01/10/2024 [Calendar] Effective Status Active [Dropdown] [Add] [Remove]

Country USA [Search] United States

Address 1 [Text Field]
Address 2 [Text Field]
Address 3 [Text Field]
City [Text Field]
County [Text Field] Postal [Text Field]
State [Search]
Email ID [Text Field]

Payment/Withholding Alt Names

Payment Alternate name

Name 1 [Text Field]
Name 2 [Text Field]

To add a second address such a **Payment Remittance Address** click on the **Plus Sign (+)** to the top right of the screen in the **Supplier Address** field to create an **Address ID 2** and complete the following fields marked in **Red** below:

- ❖ **Description** – Enter **REMIT ADDRESS**.
- ❖ **Address 1** – Enter the first line of the supplier address and complete with City, State and Postal.
- ❖ **Email ID** – Enter the supplier’s email address (**not the web address**).
- ❖ **Telephone** – Enter the business phone number with area code.

Identifying Information **Address** Contacts Location Custom

SetID SHARE
Supplier ID NEXT Short Supplier Name Supplier

Supplier Address Find | View All First 1 of 1 Last

Address ID 1 Description REMIT ADDRESS

Details Find | View All First 1 of 1 Last

Effective Date 10/03/2018 Effective Status Active

Country USA United States

Address 1
Address 2
Address 3

City
County **Postal**
State
Email ID

▶ Payment/Withholding Alt Names

Phone Information Personalize | Find | View All | First 1 of 1 Last

*Type	Location	Prefix	Telephone	Extension
Business Phone				

Next, click on the **CONTACTS** tab and complete the fields marked in **RED** below:

- ❖ **Description** – This is a reference field; enter a description for the type of supplier entered (i.e., Goods, Professional Services, Student Stipend, Rent/Leases, etc.).
- ❖ **Name** – Enter the contact name for the supplier.
- ❖ **Email ID** – Enter the email address.
- ❖ **Telephone** – Enter the contact telephone numbers.

Identifying Information | Address | **Contacts** | Location | Custom

SetID SHARE

Supplier ID NEXT Short Supplier Name Supplier

Supplier Contact Find | View All First 1 of 1 Last

Contact ID 1 + -

Description

Details Find | View All First 1 of 1 Last

Effective Date 10/03/2018 + -

Effective Status Active

Type

Name

Title

Address

Internet http:// View Internet Address

Email ID

Phone Information Personalize | Find First 1 of 1 Last

*Type	Prefix	Telephone	Extension
Business Phone			

Click on the **LOCATION** tab and complete the fields marked in **RED** below:

- ❖ **Location** – Enter **MAIN**.
- ❖ **Sales/Use Tax** – Click on **Sales/Use Tax** and see the screen below if tax is applicable.

****NOTE: For questions regarding 1099 supplier set-up, contact Accounts Payable at 619-388-6554.**

Identifying Information | Address | Contacts | **Location** | Custom

SetID SHARE
Supplier ID NEXT Short Supplier Name Supplier

A supplier location is a default set of rules which define how you conduct business with a supplier.

Location Find | View All First 1 of 1 Last

***Location** MAIN Default RTV Fees Attachments (0)

Description

Details Find | View All First 1 of 1 Last

*Effective Date 10/03/2018 Effective Status Active

Expand All Collapse All

Options Payables Procurement **Sales/Use Tax** 1099

▶ Additional ID Numbers

▶ Comments

▶ Internet Address

▶ VAT

Expand All Collapse All

Click on **Sales/Use Tax Applicability** and select the tax classification indicated on the Supplier Intake form and click **OK**.

Tax Options Help

SetID SHARE Location MAIN
Supplier ID NEXT Description
Short Supplier Name
Supplier Name

Sales/Use Tax Applicability

*Sales/Use Tax Applicability **Sales Tax** Ultimate Use Code
*Ship To Location Non Taxable Tax Destination
Sales Tax
Use Tax

▼ Sales Tax and Use Tax Options

Sales Tax Tolerance

*Sales Tax Tolerance Default from Higher Level

Currency Code Amount 0.000
Rate Type Percent 0.00

OK Cancel

Click on the **IDENTIFYING INFORMATION** tab and complete the fields marked in **RED** below:

- ❖ Attach the **Supplier Application Form AND W9** as **ONE** pdf file.
 - Click on Attachments -> Add attachment -> Select the file from your computer
- ❖ **Description: SUPPLIER INTAKE W9**
- ❖ **Select OK to save**

Summary **Identifying Information** Address Contacts Location Custom

SetID SHARE *Supplier Name IVY AI INC
Supplier ID 0003003909 Additional Name
*Supplier Short Name IVY AI INC IVY AI INC-001
*Classification Outside Party
HCM Class
*Persistence Regular
*Supplier Status Approved

Withholding
 Open For Ordering
 VAT Registration

*Supplier Audit Default
 Supplier Audit Template ID SDCCD TEMPLAT

Supplier Relationships

Supplier Attachment

SetID SHARE Supplier ID 0003003909
IVY AI INC

Details

File Name	Description	User	Name	Date/Time Stamp	
IVY_AI_INC_SI_W9.pdf	SUPPLIER INTAKE W9	3330003848	Baylee McGuire	06/12/2024 2:33:40PM	<input type="button" value="-"/>

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Once all information has been entered, return to the **Identifying Information** tab and click **SAVE**. The new **Supplier ID** number will be assigned automatically by PeopleSoft. The **Supplier ID** number can be found on the **Summary** tab once the supplier information is saved. **Note this ID number as it will be needed for the next step.**

****NOTE: The data as entered will remain in an 'Unapproved' status until purchasing is notified and reviews and approves the content.**

Identifying Information | Address | Contacts | Location | Custom

SetID SHARE *Supplier Name

Supplier ID NEXT Additional Name

*Supplier Short Name

*Classification

HCM Class

*Persistence

*Supplier Status

Withholding

Open For Ordering

VAT Registration

*Supplier Audit

Supplier Audit Template ID

Attachments (0)

Supplier Relationships

Corporate Supplier InterUnit Supplier

Corporate SetID InterUnit Supplier ID

Corporate Supplier ID Supplier Hierarchy

Create Bill-To Customer

Create Bill To Customer

▶ Supplier Rating

▶ Supplier Logo

▶ Additional ID Numbers

▶ Duplicate Invoice Settings

▶ Government Classifications

▶ Standard Industry Codes

▶ Additional Reporting Elements

▶ Comments

After establishing the Supplier in People Soft, email supplierintake@sdccd.edu for approval.

****NOTE: Enter ONLY the full name of the supplier as entered in PeopleSoft and the ID number in the subject line of the email.**

To make changes to an existing supplier's profile, email a completed **Supplier Intake Form** indicating the changes to supplierintake@sdccd.edu. **All edits to a supplier's profile must be completed by the Purchasing and Contract Services Department.**

The Purchasing and Contract Services Department will review the data entered and send a notification to the requester via email indicating either that the supplier has been approved or whether additional information is needed.

Information to gather prior to creating a requisition in PeopleSoft

- ❖ Campus Business Unit, contact the campus Business Office to identify an approved supplier; for DIS01 Business unit, contact the Purchasing and Contract Services Department to identify an approved supplier.
- ❖ Formal, valid quote from supplier.
- ❖ A current valid supplier email address where the purchase order will be dispatched to.
- ❖ Appropriate chartfield and category code for the expenditure.
- ❖ Delivery location, end location and departmental contact information.
- ❖ All documents, such as quotes, pictures, agreements, etc. are in one file for attachment to the requisition
- ❖ Consultant, Lecture or Performance agreement, if applicable.

Things to Remember

- ❖ All authorized purchases will have a purchase order issued via PeopleSoft and transmitted (dispatched) to the supplier via email. Purchases made by individuals other than SDCCD Procurement Specialists are unauthorized purchases and may result in the individual being financially responsible for that unauthorized purchase or result in the supplier not receiving payment from SDCCD. The District requires regular purchase orders be issued pursuant to the California Education Code prior to the procurement of materials, supplies or services.

This does not apply to purchases made via approved processes related to CAL-Card usage.

If an unauthorized purchase has been made, contact the Purchasing and Contract Services Department to request the current confirmation form to be completed and have t h e f o r m signed by your Campus VPA. This form details the unauthorized purchase and what steps will be taken to ensure only authorized purchases are made going forward. Please see Board Policy 6330, AP 6330.14.

- ❖ **BLANKET ORDERS:** Blanket orders are intended for renewals, maintenance service agreements, rentals, professional services, and subscriptions/memberships.
- ❖ **SHIP TO VS. LOCATION:** **Ship To** is where the goods will be shipped, and **Location** is where the end user is – where the goods will remain.
- ❖ **CATERING:** All Catering requisitions must use **Category Code 901-00**.
- ❖ **SHIPPING/FREIGHT:** Add as a separate line item on the purchase requisition. Use **Category Code 962-86** and select **DL** (Dollar) for the **Unit of Measure** on that line. See **page 38** for instructions on how to enter the freight line.
- ❖ **SALES TAX: DO NOT** add Sales Tax to the purchase requisition; tax will be allocated to the purchase order automatically. Please ensure that the chartfield used has sufficient funds to allocate tax.
- ❖ **PAYMENT REQUESTS:** Payments for items such as those below \$5,000 or less, no longer need to be processed through purchase requisitions but can be requested via online payment request through PeopleSoft with appropriate backup documentation. These payment requests will route through the usual non-travel workflow for the general ledger string being used to cover the cost of the items.
 - Subscriptions
 - Non-Software licensing
 - Membership fees
 - Sponsorship/Small Advertising
 - Honorarium- one-time lectures
 - Fees for Street Fairs/Outreach/Local promos
 - Deposits for events which meet the above criteria

- ❖ **AGREEMENTS:** For our District agreements, please complete all blank fields, and have the campus representative and supplier sign, then attach the agreement to line one of the purchase requisition. When the Procurement Specialist receives the purchase requisition in their queue, they will review the attached agreement. The Procurement Specialist will then forward the agreement to the Purchasing Supervisor for signature. Or, if revisions are needed, the Procurement Specialist will return the agreement to the requester to complete the revisions.

If the agreement document is one provided by the supplier, the supplier may request we sign it first. This is common for documents that originate with the supplier. In this circumstance, a few additional steps may be required. Still attach the agreement to line 1 of the requisition. The Procurement Specialist will review the agreement and forward it to the Purchasing Supervisor who will then either sign the agreement and forward it to the supplier for their signature, or will request revisions from the supplier, if needed. Purchasing will continue to communicate with the supplier until the revisions are completed and the agreement is fully executed. Please note, agreements provided by the supplier almost always require revisions. The process can take time, particularly if the supplier has to forward the revisions to their legal department for review.

In either of the above scenarios, after the revisions are complete, and all signatures are obtained, the Purchasing Supervisor will return the fully executed agreement to the Procurement Specialist so that the purchase order can be processed. The fully executed agreement will be attached to the purchase order when it is dispatched to the supplier.

****NOTE:** If there is an agreement that is particularly complex, or if you have questions prior to requisition entry, please feel free to forward the questions to the Procurement Specialist at any time.

- ❖ **VEHICLES:** When entering a requisition for a vehicle, including utility carts, trailers, and any vehicle that will be used on a public road, ensure the following language is included. Also note, all utility vehicles must be properly equipped to be street legal. The suppliers will know what equipment is required, but includes horn, seat belts, brakes, lights and license plates.

PLEASE CONTACT OUR DISTRICT'S CENTRAL RECEIVING DEPARTMENT AT LEAST 24-HOURS IN ADVANCE TO COORDINATE DELIVERY AND INSPECTION. THE VEHICLES MUST BE DELIVERED TO CENTRAL RECEIVING FOR INSPECTION AND ACCEPTANCE.

CENTRAL RECEIVING:
619-388-1180
9315 HILLERY DRIVE
SAN DIEGO, CA 92126

THE BILL OF SALE AND CERTIFICATE OF ORIGIN (MSO) MUST BE PROVIDED AT TIME OF DELIVERY.

THE SAN DIEGO COMMUNITY COLLEGE DISTRICT WILL REGISTER THE VEHICLES WITH DMV AS CALIFORNIA EXEMPT.

THE VEHICLES MUST BE DELIVERED WITH A FULL TANK OF GAS/FULL CHARGE AND ONE SPARE KEY.

A PURCHASE ORDER WILL BE ISSUED FOR THE VEHICLES REFLECTING NET-30 TERMS AND INVOICING INSTRUCTIONS. PAYMENT WILL NOT BE MADE UPON DELIVERY.

REQUISITIONS

This Requisition Manual explains how to enter each component of a requisition, and how they relate to each other. In PeopleSoft, requisitions consist of four components:

- ❖ **HEADER** – Where general information pertaining to the entire order is stored and displayed. This includes data such as the suggested Supplier, Procurement Specialist, Ship-To, and Due Date.
- ❖ **LINES** – Where the description, unit of measure, category, and quantity for each item you are ordering.
- ❖ **SCHEDULE** – Where the due date, ship to address, and unit price are stored for each item on the order.
- ❖ **DISTRIBUTION** – Where the accounting information (i.e., the general ledger chartfield string) is entered.

PeopleSoft through can be accessed through the District website by selecting the **Employees** tab, and then navigating to the **PeopleSoft My Portal** link. You can also go directly to the link below.

Use the following link: <http://myportal.sdccd.edu/>

****NOTE: Add this website to your internet favorites for easy access.**



By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID:

0000000000

Password

.....

Sign In

[Forgot your Password?](#)

Regular system maintenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

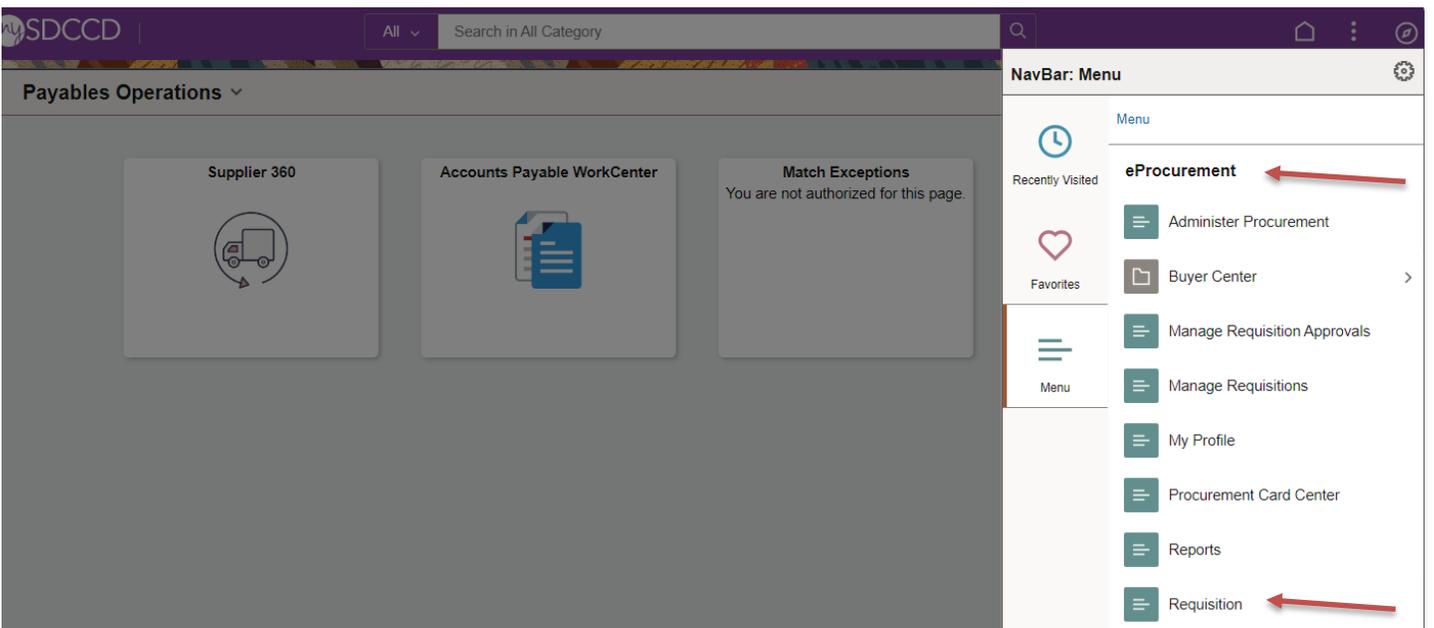
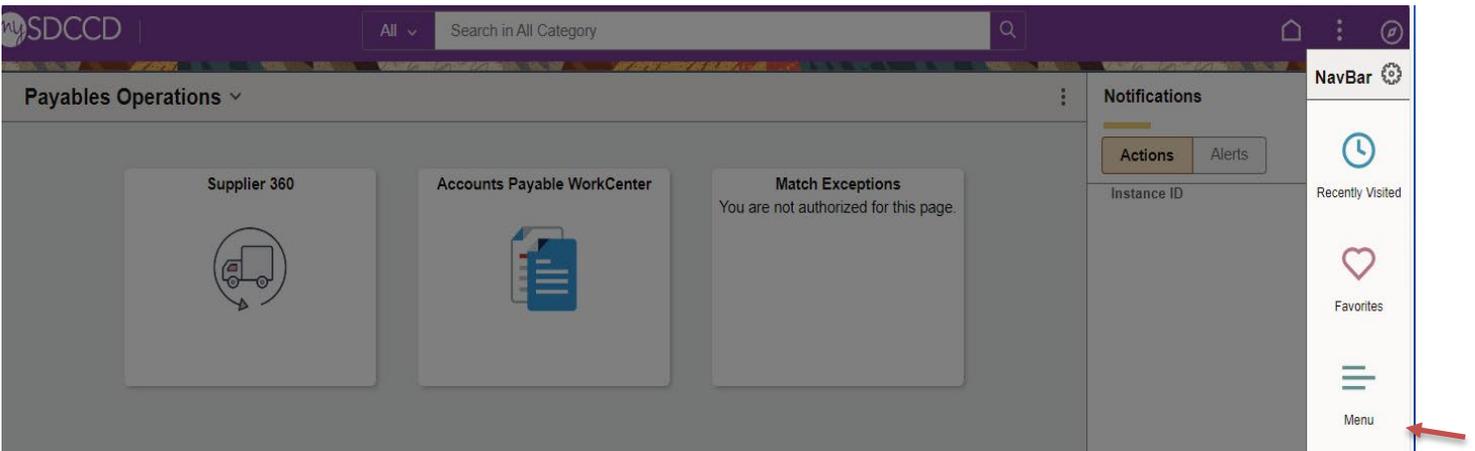
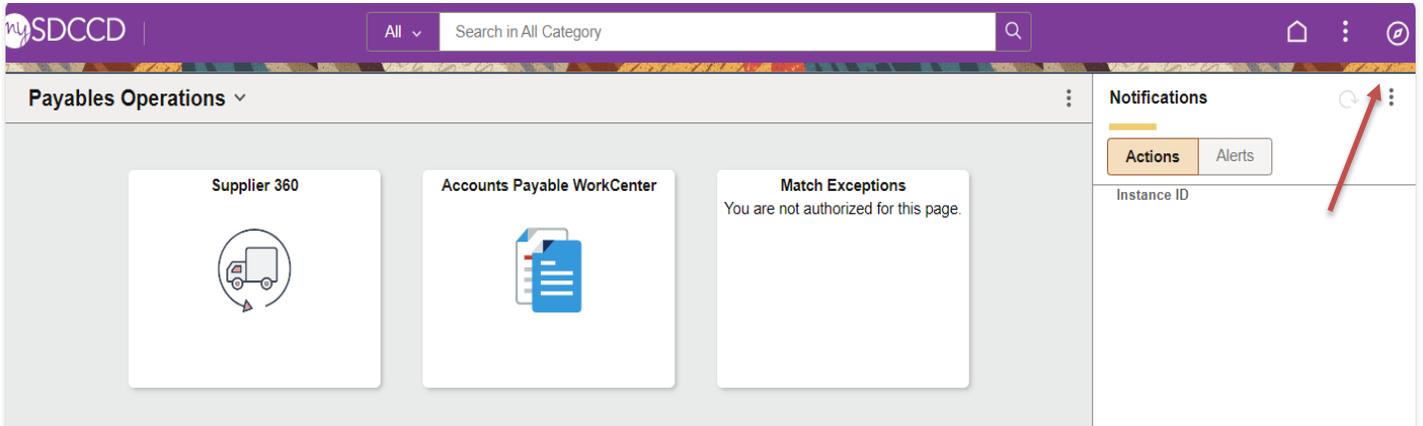
[Need Assistance? Student Help | Employee Help](#)

To access the **Create Requisition** screen, click on the Finance Dashboard icon.



To access **Create Requisitions**, click on the **NavBar** icon  in the top right of the screen, then click the **Menu** icon and use the following navigation:

❖ **eProcurement > Requisition**



Requisition Settings

Business Unit District Operations Bid No/Quote

*Requester Azucena Murillo Priority

*Currency [Custom Fields](#)

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 ?

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To [Add One Time Address](#)

Due Date Attention

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 Un
1	<input type="text"/>	<input type="text" value="DIS"/>	<input type="text" value="DIS01"/>	<input type="text"/>	<input type="text" value="74300"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

OK Cancel

****NOTE: All fields MUST be completed in CAPITAL LETTERS; turn your keyboard CaPeopleSoft Lock on.**

Below is the **Requisition Settings** page where all the information contained in the requisition header is entered. Complete all fields marked in **RED**, except for the Procurement Specialists as they no longer will be assigned by location, now they will be assigned by category code. See details for each field below.

Requisition Settings

DIS01
 KGOMEZ Medium
 USD

Default Options Default **Override**

If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

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 below 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.

EA

Shipping Defaults

DIS

Distribution Defaults

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	<input type="text"/>	DIS <input type="text"/>	DIS01 <input type="text"/>	<input type="text"/>						

See details for **Account's** entry on **page 35**.

To look up the **Business Unit (BU)**, click on the magnifying glass and select the correct BU. If this field has already defaulted to the correct BU, disregard this step.

In the **Bid No/Quote** field, enter the appropriate bid number or quote number.

Requisition Settings

Business Unit: DIS01 (magnifying glass icon) ← District Operations
*Requester: KGOMEZ (magnifying glass icon) Kristina Gomez
*Currency: USD
Bid No/Quote: QUOTE# 1234 ←
Priority: Medium (dropdown)

Click on **Override** in the **Default Options** field. By clicking **Override**, all of the information that is completed on the **Requisition Settings** page will transfer to the requisition.

Requisition Settings

Business Unit: DIS01 (magnifying glass icon) District Operations
*Requester: KGOMEZ (magnifying glass icon) Kristina Gomez
*Currency: USD
Bid No/Quote: QUOTE# 1234
Priority: Medium (dropdown)

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.

In the **Supplier** field, enter the **Supplier ID** number or to search for a supplier by their name, click on the magnifying glass and enter the supplier's name and click **Find**.

Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

Business Unit: DIS01 (magnifying glass icon) District Operations
*Requester: KGOMEZ (magnifying glass icon) Kristina Gomez
*Currency: USD
Bid No/Quote: QUOTE# 1234
Priority: Medium (dropdown)

Default Options (?)

- Default
- Override**

Line Defaults (?)

Note: The information in this page does not reflect the data in the corresponding fields on the requisition.

Supplier (magnifying glass icon)

Supplier Location (magnifying glass icon)

Supplier (magnifying glass icon)

Supplier Search

Supplier ID (input field)

Name: UNISOURCE (input field) →

Short Supplier Name (input field)

Alternate Supp Name (input field)

City (input field)

Country (input field) (magnifying glass icon) State (dropdown)

Postal Code (input field)

Find (button) Reset (button)

Select (button) Cancel (button)

Enter search criteria to find a supplier.

On the following screen, select the appropriate **Supplier ID** number from the menu and click **Select**.

Requisition Settings

Business Unit: DIS01 District Operations Bid No/Quote: QUOTE# 1234
*Requester: KGOMEZ Kristina Gomez Priority: Medium
*Currency: USD

Supplier Search

Supplier ID: Find
Name: UNISOURCE Reset
Short Supplier Name:
Alternate Supp Name:
City:
Country: State:
Postal Code:

Search Results

	Supplier ID	Supplier Name	Default Location	Default Location Description	Address	City	State	
<input checked="" type="radio"/>	0002004882	UNISOURCE WORLDWIDE INC	MAIN	PAPER PLUS	6815 FLANDERS DR	SAN DIEGO	CA	
<input type="radio"/>	2 0002060188	UNISOURCE SOLUTIONS	MAIN	5010 SHOREHAM PL STE 110	5010 SHOREHAM PL STE 110	SAN DIEGO	CA	

Select Cancel

Next, indicate the **Category** which best defines the items that are being ordered. For a list of **Category Codes**, refer to page 77.

- ❖ **Category** – Click the magnifying glass and enter a **Category** number or to search by description, click **Description** and enter a key word to search for the appropriate code.

Requisition Settings

Business Unit: DIS01 District Operations Bid No/Quote: QUOTE# 1234
*Requester: KGOMEZ Kristina Gomez
*Currency: USD

Supplier: 0002004882
Supplier Location: MAIN
Unit of Measure: EA

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Category FURNITURE Find
Browse Categories: Category Description
Return

Category

All Procurement Specialists are assigned by Category Code. End users will enter a category code and the system will route to the Procurement Specialist based on the code. The Procurement Specialist field should be left blank.

Please refer to **page 77** for the list of category codes.

Line Defaults ?

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

Supplier: 0002004882

Supplier Location: MAIN

Buyer: [Red Box]

If you know the **Ship To** location, enter the information into the **Ship To** field. To search for the Ship To location, click the magnifying glass to **Look up** and select a **Ship To** location.

****NOTE:** Orders should be shipped to **Receiving** at the respective campus **Stockroom/Distribution Center**. **DO NOT** use **DIS** for orders. All computers, with the exception of Mesa and Miramar, should be shipped to the Central Distribution Center using **Ship To Location DISCDC0100**. **DO NOT SHIP TO YOUR HOME ADDRESS!**

Business Unit: DIS01

*Requester: KGOMEZ

*Currency: USD

Default Options ?

Default

Override

Line Defaults ?

Note: The information below does not reflect the data in the data in the corresponding fields on the selected lines

Supplier: 0002060188

Supplier Location: MAIN

Buyer: VWHITE

Shipping Defaults

Ship To: DIS

Due Date: [Calendar Icon]

Distribution Defaults

SpeedChart: [Search Icon]

Accounting Defaults

Chartfields1 | Details | Asset Information

Dist | Percent | Location | GL Unit

Look Up Ship To

SetID: SHARE

Ship To Location: begins with

Description: begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

View 100 | First | 1-42 of 42 | Last

Ship To Location	Description
CCHAV	Cesar Chavez Campus
CEDCEM0000	Cont. Ed Bldg CEM-Rm 0000
CIT	City College Campus Receiving
CIT00A0012	City College Bldg A - Rm 0012
CIT00B0202	City College Bldg B-RM 202
CIT00T0106	City College Bldg T - Rm 0106
DIS	DO NOT USE FOR SHIPMENTS!
DIS0DO0100	Dist Ofc Bldg DO - Rm 0100
DIS0DO0105	Dist Ofc Bldg DO - Rm 0105
DIS0DO0120	Dist Ofc Bldg DO - Rm 0120
DIS0DO0125	Dist Ofc Bldg DO - Rm 0125
DIS0DO0170	Dist Ofc Bldg DO - Rm 0170
DIS0DO0210	Dist Ofc Bldg DO - Rm 0210
DIS0DO0260	Dist Ofc Bldg DO - Rm 0260
DIS0DO0270	Dist Ofc Bldg DO - Rm 0270
DIS0DO0275	Dist Ofc Bldg DO - Rm 0275
DIS0DO300A	Dist Ofc Bldg DO - Rm 300A

In the **Attention** field, indicate the name of the point of contact for the order and the building/room number.

Next, enter the **Accounting Defaults** under the **Chartfields1** field. On this tab, you will need to do the following:

- ❖ Select the end **Location** where the items will be located once received. This is needed both for inventory purposes and delivery by receiving.
- ❖ Define the **Chartfields** where items are to be expensed. Include the **GL Unit, Fund, Dept, Product and Account**. If CE, also include the **Operating Unit**.

Requisition Settings

Business Unit District Operations Bid No/Quote
 *Requester Kristina Gomez Priority
 *Currency

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier Category
 Supplier Location Unit of Measure
 Buyer

Shipping Defaults

Ship To Add One Time Address 
 Due Date Attention

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	<input type="text"/>	<input type="text" value="DIS"/>	<input type="text" value="DIS01"/>	<input type="text"/>	<input type="text" value="74300"/>	<input type="text"/>				

To expense items over multiple chartfield strings, scroll to the far right of the **Chartfields1** tab and click on the plus sign (+) and enter the number of rows that need to be added. If applicable, indicate the percentage that applies to each Chartfield string. ****Note: Ensure that Sales Tax is accounted for when splitting budgets.**

Accounting Defaults Personalize | Find | First 1 of 1 Last

Chartfields1 | Details | Asset Information

Account	Oper Unit	PC Bus Unit	Project	Activity	Affiliate	Fund Affil
<input type="text"/>						



Accounting Defaults Personalize | Find | First 1-2 of 2 Last

Chartfields1 | Details | Asset Information

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Unit	Project
1	50.0000	<input type="text" value="DIS"/>	<input type="text" value="DIS01"/>	<input type="text"/>						
2	50.0000	<input type="text" value="DIS"/>	<input type="text" value="DIS01"/>	<input type="text"/>						

Select the **Asset Information** tab if:

- ❖ Any singular item is over \$1000, including shipping & tax
- ❖ Any line item contains Computer/AV/IT/Equipment with a value of \$200 or greater
- ❖ Any line item contains a monitor
- ❖ Any line item contains a Firearm

Select the appropriate **AM Business Unit**. Then select the **Profile ID** that best describes the asset. When finished, click **OK** to be directed to the **Create requisition screen**.

Accounting Defaults Personalize | Find | First 1 of 1 Last

Chartfields1 | Details | **Asset Information**

AM Business Unit	Profile ID	Capitalize	Cost Type	Description
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Click on the **Special Requests** link to enter all line items.

Create Requisition

Welcome Kristina Gomez

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.

Catalog
Browse Catalogs

CATEGORY

Special Requests
Create a non-catalog request

Templates
Browse Company and Personal Templates

External Catalogs
Browse Supplier Website Items

Web
Browse Supplier Websites
Office Solutions Punch Out

Forms
Create and Submit Forms

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

Express Item Entry
Create an Express Requisition

Favorites
Browse Favorite Items and Services

Recently Ordered
View recently ordered items and services
Desk Highlighters, Chisel Ti...
Liquid Coffee Creamer, Franc...
Liquid Coffee Creamer, Itali...
Plastic Cutlery, Heavyweight...
Green Tea K-Cups, 24/Box
More...

On the **Special Requests** screen, appropriate information will need to be entered for each line of the requisition. All fields marked in **RED** below need to be completed:

- ❖ **Item Description** – Please follow the **ARMA Rule** which is: **Noun, Description, Manufacturer, and Model/Product Number**. The noun is always first, followed by the description, manufacturer if applicable, and the model or product number as entered below. Only 35 characters will fit on this line. Include all remaining description details in the **Additional Information** box. See **pages 75-76** for information on **ARMA Rules**.
- ❖ Enter the **Price, Quantity, and Unit of Measure**.
- ❖ Enter the correct **Category** code for each line item being entered.
- ❖ Check all three **“Send to”** and **“Show at”** boxes.

****NOTE: Freight** – See **page 38** for instruction on how to enter a separate line for freight.

When each line is completed, click on **Add to Cart** at the bottom of the screen. Note that there is a maximum of **50 line items** that can be entered per requisition.

****NOTE: For BLANKET requisitions, see pages 39 & 40, if not a BLANKET, skip pages 39 & 40.**

Special Requests ?

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

Item Details

*Item Description	CHAIR, STEEL CASE, EASY CHAIR, BLUE, W/CASTERS, PN 1234ABC		
*Price	250.00	*Currency	USD
*Quantity	1	*Unit of Measure	EA
*Category	425-48	Due Date	

Supplier

Supplier ID	0002004882	
Supplier Name	UNISOURCE WORLDWIDE	UNISOURCE WORLDWIDE INC
Supplier Item ID		

[Suggest New Supplier](#)

Manufacturer

Mfg ID	
Manufacturer	
Mfg Item ID	

Additional Information

Send to Supplier Show at Receipt Show at Voucher

Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

Add to Cart

Freight must be added as a separate line item using **Category Code 962-86** and **DL (Dollar)** should be selected for the **Unit of Measure** on that line. (i.e., if the freight cost is \$25 that will be the **Quantity** and the **Price** will always be a \$1.00).

Special Requests

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

Item Details

*Item Description	FREIGHT	*Currency	USD
*Price	1.00	*Unit of Measure	DL 
*Quantity	25	Due Date	
*Category	962-86 		

Supplier

Supplier ID	0002002986 
Supplier Name	SOUTHLAND TECHNOL 
Supplier Item ID	

[Suggest New Supplier](#)

Manufacturer

Mfg ID	
Manufacturer	
Mfg Item ID	

Additional Information

 Send to Supplier  Show at Receipt  Show at Voucher

Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

[Add to Cart](#)

To add additional line items, follow the process above. Once all lines have been entered, click on **Checkout** at the top of the page to be directed to the **Checkout – Review and Submit** screen.

****NOTE: SKIP PAGES 39 & 40 UNLESS THIS IS A BLANKET REQUISITION**

Blanket requisitions are intended for renewals, maintenance service agreements, professional services, rentals, and subscriptions/membershiPeopleSoft. Use the appropriate templates. See pages 71-74.

On the **Create Requisition** screen, appropriate information will need to be entered for the Blanket PO. All fields marked in **RED** below need to be completed:

- ❖ **Item Description** – Enter **BLANKET ORDER** only
Include appropriate template and all remaining description details in the **Additional Information box**.
- ❖ **Price** – Enter the price.
- ❖ **Quantity** – Enter a Quantity of 1.
- ❖ **Category** – Check if the category defaulted, if not, re-enter the Category Code.
- ❖ **Additional Information** – Use the appropriate template and include a description of the services, term of agreement, department and point of contact.
- ❖ Check all three **“Send to”** and **“Show at”** boxes.

When complete, click on **Add to Cart** at the bottom of the screen. Then click on **Checkout** at the top of the screen to be directed to the **Checkout Review and Submit** screen

Special Requests ?

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

Item Details

*Item Description	BLANKET		
*Price	4000.00	*Currency	USD
*Quantity	1	*Unit of Measure	EA
*Category	918-07	Due Date	

Supplier

Supplier ID	0002004892	
Supplier Name	THE SAN DIEGO UNION	Suggest New Supplier
Supplier Item ID		

Manufacturer

Mfg ID	
Manufacturer	
Mfg Item ID	

Additional Information

ADVERTISING SERVICES PURCHASING DEPARTMENT JULY 1, 2020 - JUNE 30, 2021	Use appropriate template in this box.	
---	--	--

<input checked="" type="checkbox"/> Send to Supplier	<input checked="" type="checkbox"/> Show at Receipt	<input checked="" type="checkbox"/> Show at Voucher
--	---	---

Request New Item

Request New Item A notification will be sent to a buyer regarding this new item request.

Add to Cart

At the **Checkout - Review and Submit** screen, click on the line **Details** icon below **Details**.

Checkout - Review and Submit

Review the item information and submit the req for approval.

 My Preferences  Requisition Settings

Requisition Summary

Business Unit District Operations Bid No/Quote
*Requester Kristina Gomez Priority
*Currency

Cart Summary: Total Amount 4,000.00 USD

Expand lines to review shipping and accounting details



Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	BLANKET		THE SAN DIEGO UNION TRIBUNE, LLC.	1	EACH	4000.00	4000.00			

Select All / Deselect All Select lines to:  Add to Favorites  Add to Template(s)  Delete Selected  Mass Change

After clicking on the Details icon, the following pop-up box will appear. Check the **Amount Only** box under **Item Details** and then click **OK**.

Line Details

Line Details

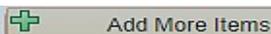
No Image Line 1 BLANKET Line Status Open

Item Details

Merchandise Amount 4000.00 USD
Item ID
Category 918-07
Original Substituted Item Description
Physical Nature

RFQ Required
 Device Tracking
 Zero Price Indicator
 Amount Only
 Inspection Required

Click **Yes** on the next pop-up message that appears to be directed back to the **Checkout - Review and Submit** screen to continue the requisition.



Message

The quantity will be set to 1 for an amount only line. The system will reprice the line. Continue? (10150,238)
The **Requisition** quantity will be set to 1 for an amount only line, the system will reprice the requisition line for you.

***NOTE: ALL DOCUMENTS MUST BE UPLOADED AS ONE SINGLE ATTACHMENT**

Next, add all supporting documents to the purchase requisition. This should be done on **Line one** of the purchase requisition under the **Comments** field. Click on the **Edit** icon to upload all attachments.

****NOTE:** If the purchase requisition exceeds \$10,000, three quote are required. Each quote must be uploaded as a separate attachment on line one of the purchase requisition; see below.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit District Operations Bid No/Quote
*Requester Kristina Gomez Priority
*Currency

Cart Summary: Total Amount 250.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH	250.00	250.00			

Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change

Total Amount 250.00 USD

Next, click on **Add Attachments** and select the correct file from the appropriate folder, then click **Upload**.

****NOTE:** Click on the plus (+) sign at the far right to upload each quote as a separate attachment.

Line Comment

Business Unit DIS01 Requisition Date 03/16/2021 Status Open

Line 1

Comments Find First 1 of 1 Last

Use Standard Comments Entered On:

1

Send to Supplier Show at Receipt Show at Voucher

After verifying the attachments, check all three "Send to" and "Show at" boxes below. Check the **Send to Supplier** box and click **OK** to save and return to the checkout screen.

Line Comment

Business Unit DIS01 Requisition Date 03/16/2021 Status Open

Line 1

Comments Find First 1 of 1 Last

Use Standard Comments Entered On: 03/16/2021 2:54:24PM

1

Send to Supplier Show at Receipt Show at Voucher

Attached File	User/Date Time	View	Send to Supplier
1 Unisource_Worldwide.pdf	KGOMEZ2021-03-16-16.49.22.556	<input type="button" value="View"/>	<input checked="" type="checkbox"/>

****NOTE: DO NOT add Sales Tax as a line item. Sales Tax will be allocated to the purchase order automatically.**

If additional lines need to be added, click on **Add More Items**, then follow the same process as above. There is a maximum of **50 line items** that can be entered per requisition.

In the **Requisition Comments and Attachments** box, enter the following information: **Quote Number, Date, Location, Department, Room Number, Point of Contact, and supplier email address**. Also enter any line(s) that are non-taxable in this box and any special shipping instructions. Indicate if the end location is different than the shipping location.

Then check all three **“Send to”** and **“Show at”** boxes.

Checkout - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit District Operations Bid No/Quote
*Requester Kristina Gomez Priority
*Currency

Cart Summary: Total Amount 250.00 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	CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	1	EACH	250.00	250.00		Edit	

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

Total Amount 250.00 USD

Shipping Summary

[Edit for All Lines](#)

Ship To Location DIS0DO0270
Address 3375 Camino Del Rio South
San Diego, CA 92108-3883
Attention To KRISTINA GOMEZ/RM 270
Comments

NOTE:
Do not add attachments here. All attachments should be uploaded as one single attachment to line one of the requisition.

Requisition Comments and Attachments

Enter requisition comments

ENTER QUOTE#, DATE, LOCATION, DEPT, ROOM #, POINT OF CONTACT, SUPPLIER'S EMAIL ADDRESS, ALL NON-TAXABLE LINE ITEMS

Send to Supplier Show at Receipt Shown at Voucher

[Add more Comments and Attachments](#)

Approval Justification

Enter approval justification for this requisition

[Check Budget](#)

[Pre-Check Budget](#)

[Save & submit](#)

[Save for Later](#)

[+ Add More Items](#)

[Preview Approvals](#)

Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each **Line** item, and the corresponding **Accounting Lines** to expand and review the information within.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit District Operations Bid No/Quote

*Requester Kristina Gomez Priority

*Currency

Cart Summary: Total Amount 250.00 USD

Expand lines to review shipping and accounting details

Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
1	CHAIR, STEEL CASE, "EASY", CHA		UNISOURCE WORLDWIDE INC	<input type="text" value="1"/>	EACH	250.00	250.00		Edit	
Shipping Line 1		*Ship To	<input type="text" value="DIS"/>	Add Shipto Comments	Quantity	<input type="text" value="1"/>				
		Address	3375 Camino Del Rio South San Diego, CA 92108-3883	Add One Time Address	Price	250.00	Price Adjustment			
		Attention To	Kristina Gomez				Pegging Inquiry			
		Due Date	<input type="text"/>				Pegging Workbench			

Accounting Lines

*Distribute By SpeedChart

Accounting Lines								Personalize	Find	View All	First	1 of 1	Last
Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event					
1	Open		<input type="text" value="DIS"/>	<input type="text" value="1"/>	100.0000	250.00	<input type="text" value="DIS01"/>	<input type="text"/>					

Select All / Deselect All

Select lines to:

Add to Favorites

Add to Template(s)

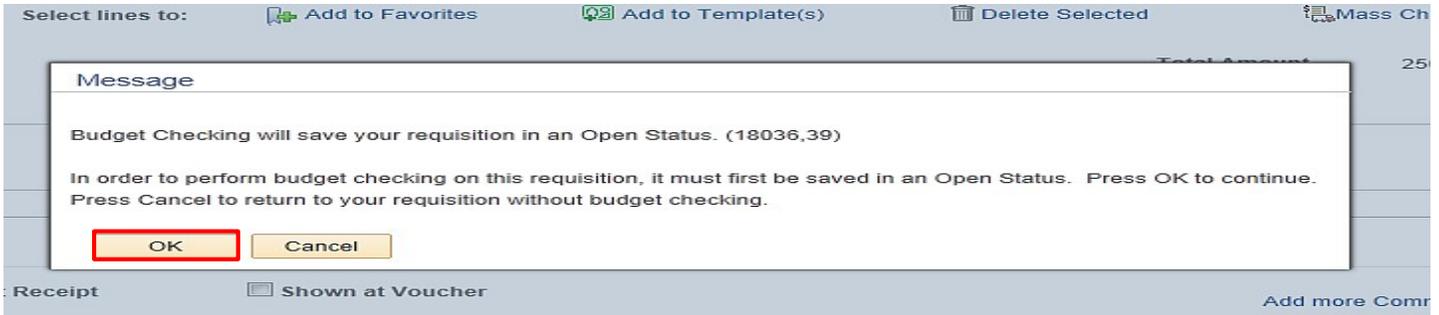
Delete Selected

Mass Change

Once the requisition is complete, click on **Check Budget** at the bottom left of the page.

****NOTE: Purchase requisitions that contain budget errors will not be saved or submitted. Budget issues will need to be resolved with the appropriate person within your department.**

Click **OK** on the pop-up message that appears.



The **Budget Check Status** will show as **VALID** if the purchase requisition has passed **Budget Check** and the system will automatically issues a **Requisition ID** number.



The **Requisition ID** is located at the top of the **Edit Requisition – Review and Submit** page. Note the **Requisition ID** number for your records.

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit	DIS01	District Operations	Bid No/Quote	CHAIR FOR MAIN OFFICE
Requester	KGOMEZ	Kristina Gomez	Requisition ID	DOR0007126
Currency	USD		Priority	Medium

Once there is a valid **Budget Check** and a **Requisition ID** number is issued at the top of the page, scroll to the bottom of the page and click on **Save & Submit** to save the purchase requisition and submit it for approval, sourcing, and dispatching to the supplier. The purchase requisition remains editable while the status is open or pending.

To save the purchase requisition to be completed at a later time, click on **Save for Later** and note the Requisition ID.

****NOTE:** To **Save for Later**, check the budget first in order to generate a **Req ID** number.



The final page is the **Confirmation** page. This is a summary of the purchase requisition and includes all of the approvals necessary to start the process of converting the purchase requisition into a purchase order. Once the purchase requisition is approved by the Procurement Specialist, a confirmation will be emailed to

Confirmation

Your requisition has been submitted.

Requested For	Kristina Gomez	Number of Lines	1
Bid No/Quote	DOR0007126	Total Amount	250.00 USD
Requisition ID	DOR0007126	Pre-Encumbrance Balance	250.00 USD
Business Unit			
Status	Pending		
Priority	Medium		
Budget Status	Valid		

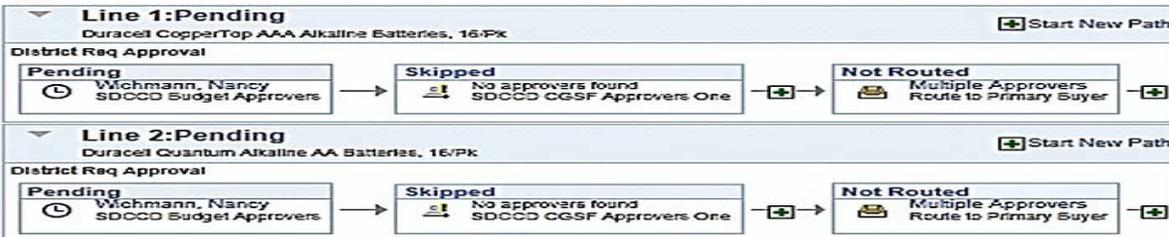
View printable version

Edit This Requisition

Check Budget

Pre-Check Budget

Req Approval



To check the status of the purchase requisition or to view the workflow in PeopleSoft, use the following navigation to access **Manage Requisitions**:

❖ **Financials 9.2 > eProcurement > Manage Requisitions**

Select the **Business Unit** and enter the **Requisition ID** number then click search. To expand the details of the workflow, click on the triangle to the far left under **Req ID**. Here, the status of the order can be reviewed by clicking on any of the highlighted icons below. An un-highlighted icon means that there has not been any activity in that field yet.

****NOTE:** Icons for **Inventory & Returns** fields are currently not in use.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit DIS01	Bid No/Quote	Request State	Budget Status
Requisition ID DOR0007126			
Date From	Date To		
Requester KGOMEZ	Entered By	PO ID	

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Bid No/Quote	BU	Date	Request State	Budget	Total	
▼ DOR0007126	DOR0007126	DIS01	12/18/2017	PO(s) Completed	Valid	113.20 USD	[Select Action] Go

Requester: Kristina Gomez | Entered By: Kristina Gomez | Priority: Medium | Pre-Encumbrance Balance: 0.00 USD

Below are the next steps in the workflow process after a requisition has been submitted:

- ❖ **APPROVALS:** The purchase requisition will move through the workflow approval process. If the purchase requisition is denied it will be routed back to the end user for corrections and/or additional information. If the purchase requisition is approved by all approvers, it will then be routed directly to the Procurement Specialist.
- ❖ **PURCHASE ORDERS:** The Procurement Specialist will review the requisition for accuracy. If all is correct, the Procurement Specialist will process the purchase requisition and dispatch a purchase order. Purchase orders are dispatched directly to the supplier via the email address in PeopleSoft. If the purchase requisition is denied, it will be routed back to the end user for corrections and/or additional information.
- ❖ **CHANGE ORDERS:** Changes that need to be made to a purchase order after it has been dispatched to the supplier, will require a change order. Change orders must be initiated by the end-user at the purchase requisition level. This allows for review and workflow approvals. Once approved, the purchase order will then be updated and sent back to the supplier via email. Please refer to the step-by-step tutorial for end users regarding the **Change Orders** process that starts on **page 47** of this manual.
- ❖ **RECEIVING:** End users should not accept deliveries; instead, re-route the suppliers to the Stockroom/Distribution Center so the ordered items can be received into PeopleSoft. District Office, DSC, and Continuing Education receiving needs to be processed through the Distribution Center as well. **DO NOT SHIP ANYTHING TO YOUR HOME ADDRESS.**

As a reminder, end users are **NOT** to receive items in PeopleSoft. If the item(s) were delivered directly to the end user, then the end user will need to contact the appropriate Stock Room/Central Distribution Center within **48 hours of receipt of goods** to notify them that the order has been received.

All tangible items must be received in PeopleSoft. If goods are not received in PeopleSoft, this will cause a Match Exception at invoicing and could potentially delay payment to the supplier until the match exception is resolved.

Receiving Contacts Per Location:

LOCATION	CONTACT	PHONE	EMAIL
District Office / Continuing Ed	Gary Waldrop / Ernie Ueckert	619-388-1180	distributioncenter@sdccd.edu
Miramar College	Stanley Herivaux	619-388-7445 619-388-7819	sherivaux@sdccd.edu
Mesa College	Frank Fernandez	619-388-2761	ffernandez@sdccd.edu
City College	Eddie Michael Jr.	619-388-3258	emichel001@sdccd.edu

- ❖ **RETURNS:** See Return & Exchanges Board Policy AP 6330.16. If you need further assistance, contact the Stockroom/Distribution Center or contact the appropriate Procurement Specialist.
- ❖ **INVOICE:** All invoices should be submitted directly to the Accounts Payable Department. Once received, Accounts Payable will process the invoice.
- ❖ **PAYMENT:** All supplier payments are processed by Accounts Payable. For questions regarding supplier payments, please contact the **Accounts Payable Department** at **619-388-6554**.

CHANGE ORDERS

The **Change Order** process is used when a purchase order has been created and something changes (price increase/decrease, qty., item(s) are no longer available, etc.). All changes to a purchase order must be initiated by the end-user at the purchase requisition level. This allows for review and workflow approvals. Once approved and processed, the purchase order will then be updated and emailed back to the supplier.

****NOTE:** A change order cannot be completed if an active voucher is linked to the purchase order, or if the budget status is not valid.

Below are the steps to process a change order for any purchase order that has not been received. If the purchase order has been received, the end user will need to request from their respective **Receiving Department** to have the purchase order “un-received” until the change has been processed. Once the change is complete, it is the end user’s responsibility to notify receivers to re-receive the purchase order in PeopleSoft.

Use the following navigation to process **Change Orders**:

❖ **Finance Dashboard > NavBar > Menu > eProcurement > Manage Requisitions**



By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID:

0000000000

Password

.....

Sign In

Forgot your Password?

Regular system maintenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

Need Assistance? [Student Help](#) | [Employee Help](#)

The screenshot displays the mySDCCD application interface. At the top, there is a search bar and a navigation menu. The main dashboard is titled "Payables Operations" and contains three tiles: "Supplier 360", "Accounts Payable WorkCenter", and "Match Exceptions". The "Match Exceptions" tile displays the message "You are not authorized for this page." On the right side, there is a "NavBar: Menu" panel with a settings gear icon at the top. The menu items are categorized by letter: A (Accounts Payable), B (Billing), C (Commitment Control), and E (Employee Self-Service, Enterprise Components, eProcurement, eSettlements). Red arrows point to the settings gear icon, the "eProcurement" item, and the "Menu" icon in the main dashboard.

Then click Manage Requisitions

****NOTE: To search for a purchase order or purchase requisition that needs to be edited, the Business Unit and either the Requisition ID or the PO ID fields MUST be populated.**

Enter the information in the fields marked in **RED** below and click **Search**.

Manage Requisitions

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit	MIR01	Bid No/Quote	
Requisition ID		Request State	All but Complete
Date From		Date To	
Requester		Entered By	
		PO ID	MIR0001111

Search Clear Show Advanced Search

Once the correct **Req ID** number is located, click on the dropdown on the far right, select **Edit** and click **GO**.

****NOTE: If you do not have the Edit option, notify your campus Business Services Office to obtain access. If you are at the District Office, contact the IT Help Desk to request access.**

Requisitions ?

To view the lifespan and line items for a requisition, click the Expand triangle icon.

To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Bid No/Quote	BU	Date	Request State	Budget	Total	
MRR0001031	415183 2/24/16	MIR01	03/01/2016	PO(s) Created	Valid	950.73 USD	Edit Go

This pop-up message should appear stating, "The Requisition is approved". Click **OK** on that message to be directed to the **Edit Requisition – Review and Submit** screen below.

Request State All but Complete Budget Status

Date To 06/07/2016

Message

This requisition is approved. Editing this requisition may restart the approval process. (18036,6249)

Click OK to continue, or click Cancel to go back.

OK Cancel

MIR01 03/01/2016 PO(s) Created Valid 950.73 USD Edit Go

On the **Edit Requisition – Review and Submit** screen, click on the line item description to drill into any of the line(s) that need to be edited/adjusted.

****NOTE: If there is a lock next to the line item, it cannot be edited. Contact the Procurement Specialist for assistance**

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

 My Preferences
  Requisition Settings

Requisition Summary

Business Unit	<input type="text" value="MIR01"/>	San Diego Miramar College	Bid No/Quote	<input type="text" value="415183 2/24/16"/>
Requester	<input type="text" value="CMORENCE"/>	Cheyanna Morence	Requisition ID	MRR0001031
Currency	USD		Priority	<input type="text" value="Medium"/>
			Track Batch	1
			Current Change Reason	

Cart Summary: Total Amount 950.73 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	MOLD RELEASE 3EA		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="3"/>	EACH	11.475	34.43		 Edit	
▶ 2	UNI-DIRECTIONAL FIBERGLASS TAP		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="100"/>	EACH	1.573	157.30		 Edit	
▶ 3	AN426AD3-5 RIVETS, 5LBS AT \$33		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="5"/>	EACH	28.688	143.44		 Edit	
▶ 4	GLOVES* 10EA PKG OF 100		AIRCRAFT SPRUCE & SPECIALTY CO	<input type="text" value="10"/>	EACH	11.475	114.75		 Edit	

On the **Edit Requisition** page under the **Create Requisition** field, adjustments can be made to the description/price, or quantities of the requisition. Edit as many lines as necessary by following the process above and click **Apply** to each. Add any additional comments in the **Additional Information** box below.

Special Requests 

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

Item Details

*Item Description	UNI-DIRECTIONAL FIBERGLASS TAPE 3" 100YDS		
*Price	1.573	*Currency	USD
*Quantity	100	*Unit of Measure	EA
*Category	035-00 	Due Date	03/15/2016 

Supplier

Supplier ID	0002001070 		
Supplier Name	AIRCRAFT SPRUCE & SP 	AIRCRAFT SPRUCE & SPECIALTY CO	Suggest New Supplier
Supplier Item ID	01-06800		

Manufacturer

Mfg ID	<input type="text"/> 
Manufacturer	
Mfg Item ID	<input type="text"/>

Additional Information



- Send to Supplier Show at Receipt Show at Voucher

Request New Item

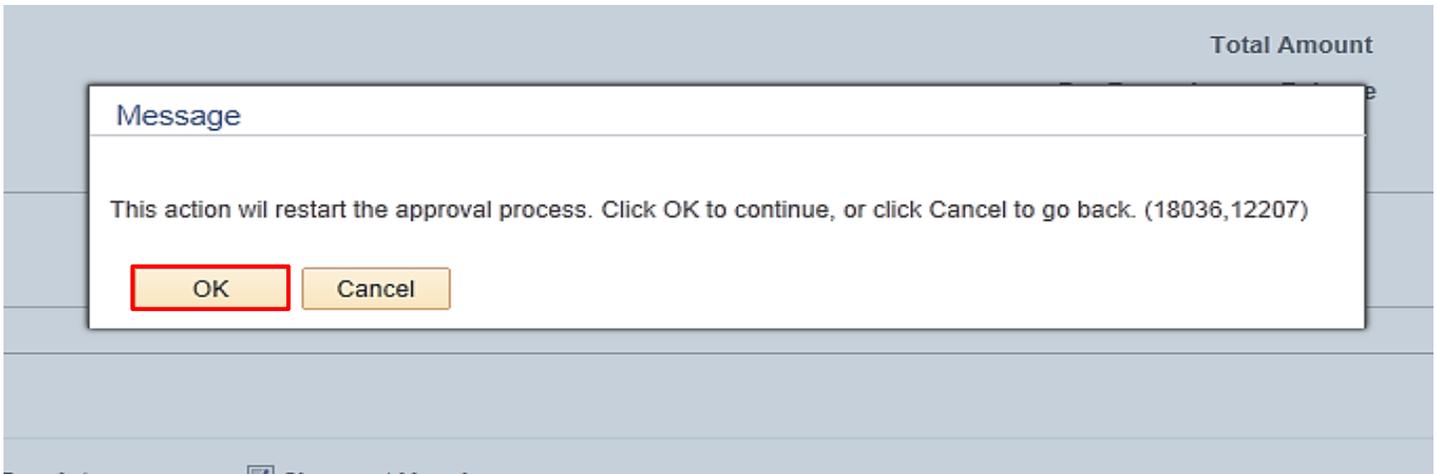
- Request New Item A notification will be sent to a buyer regarding this new item request.

Apply

Once completed, you will be routed back to the **Review and Submit** page. Scroll to the bottom of the screen and click on **Check Budget**.

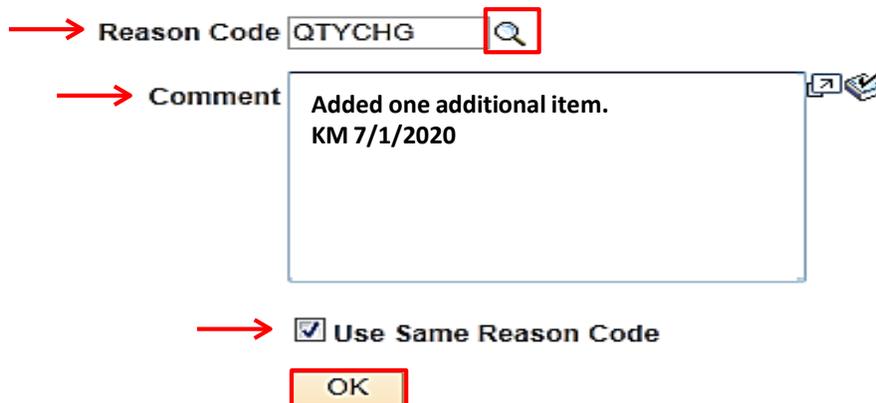


Click **OK** on the pop-up message that appears below.



The **Change Order** box will appear. Please select a **Reason Code** (select the code that is most applicable). In the comment box, provide a description of the change(s). At the end, add the end user/initiator's initials and date of change (see example). Then Check the **Use Same Reason Code** box then click **OK**. If the reason is to increase/decrease a Blanket Order, enter the new amount in the comments box.

Enter a reason code and comment for making changes that are being tracked.



The final page is the **Confirmation** page and here the **Change Request(s)** is listed at the bottom of the page. All change orders will go back through the workflow approval process, which is detailed below.

Once approvals are completed, the system will automatically notify the assigned Procurement Specialist that there is a change to the purchase order.

Confirmation

Your requisition has been submitted.

Requested For	Cheyanna Morence	Number of Lines	11
Bid No/Quote	415454 02/26/16	Total Amount	939.50 USD
Requisition ID	MRR0001033		37.75 USD
Business Unit	MIR01		
Status	See Lines		
Priority	Medium		
Budget Status	Valid		
Track Batch	2		

 View printable version
  Edit This Requisition
  Check Budget
  Pre-Check Budget

Req Approval

Line 2: Pending  View/Hide Comments
 ENGINE OIL PRESSURE GUAGE  Start New Path

Miramar Req Approval

Pending

 Omelas, Lynne
SDCCD Budget Approvers

→

Not Routed

 Multiple Approvers
MIR01_ePro_Level_Two_Apprs

→

Not Routed

 Multiple Approvers
SDCCD CGSF Approvers One

→

Not Routed

 Multiple Approvers
Route to Primary Buyer

→

Comment History

Change Request/Line Approval Summary 			
Line	Item Description	Change Request	Line Re-Approval
2	ENGINE OIL PRESSURE GUAGE	Created	Routed for Approval

DIRECT CONNECT ORDERS

You can **access PeopleSoft** through the District website by selecting the **Employee** tab, and then navigating to the **PeopleSoft My Portal** link or go directly to the link below.

Use the following link: <http://myportal.sdccd.edu/>

All orders **MUST** be placed through PeopleSoft using either Chrome or Firefox.



By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID:

0000000000

Password

.....

Sign In

[Forgot your Password?](#)

Regular system maintenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

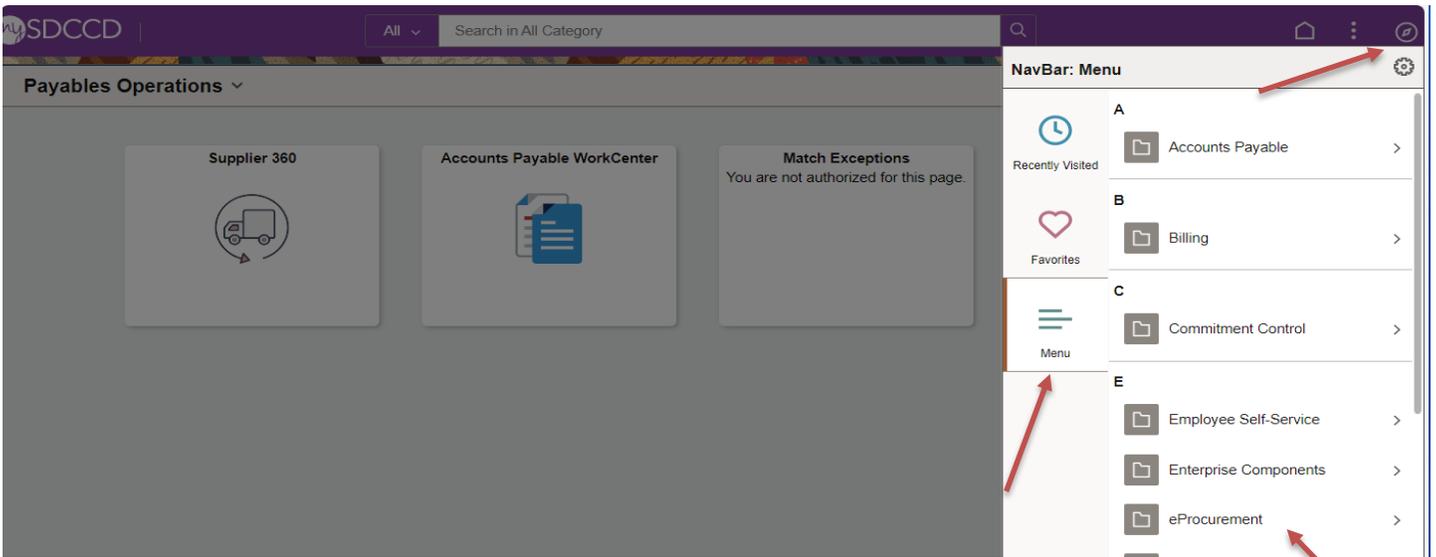
[Need Assistance?](#) [Student Help](#) | [Employee Help](#)

To access the **Create Requisition** screen, click on the **Finance Dashboard** icon.



To access the **Create Requisition** screen, click on the **NavBar** icon  in the top right of the screen. Then click the **Menu** icon and use the following navigation:

❖ **eProcurement > Requisition**



Then click the **Requisition** icon



Requisition Settings

Business Unit District Operations Bid No/Quote

*Requester Azucena Murillo Priority

*Currency [Custom Fields](#)

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 ?

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To [Add One Time Address](#)

Due Date Attention

Distribution Defaults

SpeedChart

Accounting Defaults [Personalize](#) | [Find](#) | [Print](#) | First 1 of 1 Last

Chartfields1	Details	Asset Information							
Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Un
1	<input type="text"/>	<input type="text" value="DIS"/>	<input type="text" value="DIS01"/>	<input type="text"/>	<input type="text" value="74300"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

On the **Requisition Setting** page, click **Override**, skip all other fields and click **OK** at the bottom to advance to the **Office Solutions Create Requisition** page.

Requisition Settings

Business Unit San Diego Miramar College Bid No/Quote

*Requester Kelly Rosas Priority

*Currency

Default Options ?

- Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- Override** If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To Add One Time Address

Due Date Attention

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	<input type="text"/>	<input type="text" value="MIR"/>	<input type="text" value="MIR01"/>	<input type="text"/>						

To access the Office Solutions unique website for pricing and item numbers, go to www.officesol.com and enter the following login information:

- ❖ User: sdccdpc
- ❖ Pwd: sdccdpc@

****NOTE:** This site can be utilized for product search and pricing only. The **Check-Out** feature is not active in this site. **Orders must be placed through PeopleSoft using either Chrome or Firefox as your browser.**

To process an order through PeopleSoft, click on the **Office Solutions Punch Out** link to be directed to the ordering website.

Create Requisition ?

Welcome Kristina Gomez

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.

- Catalog**
Browse Catalogs
CATEGORY
- Special Requests**
Create a non-catalog request
- Templates**
Browse Company and Personal
- Web**
Browse Supplier Websites
Office Solutions Punch Out
- Forms**
Create and Submit Forms
- ePro Services**
Request Services
- Express Item Entry**
Create an Express Requisition
- Favorites**
Browse Favorite Items and Services
- Recently Ordered**
View recently ordered items and

On the next screen, the following message will appear. It should automatically take you to the Office Solutions ordering page within 5 seconds; if not, click on **Enter Catalog**.

If you have not been navigated to the catalog within 5 seconds, please click **Enter Catalog**.

Enter Catalog

****NOTE: The minimum order amount is \$35.00; before tax. A purchase order will not be dispatched to Office Solutions unless the total is \$35.00.**

Use the search field to find items to be purchased. Add selected items in the appropriate quantities to the shopping cart. When complete, click **View Cart** to review the order. Then **Checkout** to be transferred to **PeopleSoft's Checkout – Review and Submit** page.



Problem solved.

800.859.0128
We're here to help! Give us a call.

Search by Item or Keyword



Welcome

SHOPPING CART
0 item(s) - \$0.00



Chat is Offline

Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each line item to expand and review the information in the **Accounting Lines**.

Click on **Select All/Deselect All** and then **Mass Change** to identify **Ship To** and **Accounting Information**.

Checkout - Review and Submit

Review the item information and submit the req for approval.

My Preferences Requisition Settings

Requisition Summary

Business Unit San Diego Miramar College Bid No/Quote

*Requester Rosas, Kelly Priority

*Currency

Cart Summary: Total Amount 42.83 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	
<input checked="" type="checkbox"/>	1	Mesh Desk Organizer, 1 Vertica	OFFICE SOLUTIONS	1	EACH	42.83	42.83		Add		
<input checked="" type="checkbox"/> Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected <input checked="" type="checkbox"/> Mass Change										Total Amount	42.83 USD

In the pop-up, enter the **Ship To** location and the appropriate **Accounting Information** in fields below and click **OK**.

Edit Lines/Shipping/Accounting for Selected Lines

Help

Line Information ?

Note: The information below 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 ID Supplier Location

Buyer Category

Shipping Information

Ship To Location

Address

Due Date

Attention

Comments

Accounting Lines

Please enter GL Business Unit before selecting other chartfield values

Accounting Information								Personalize Find	First	1 of 1	Last
Chartfields1	Details	Asset Information									
Percent	Location	GL Unit	Fund	Dept	Activity	Account	Oper Unit				
1	<input type="text"/>	<input type="text" value="MIR01"/>	<input type="text" value="1110"/>	<input type="text" value="74300"/>	<input type="text" value="677020"/>	<input type="text" value="4002"/>	<input type="text"/>				

Load Values From Defaults

Click **OK** on the **Distribution Change Options** pop-up message that appears.

Distribution Change Options [X]

Help

For the selected requisition lines that are available for sourcing, 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 the distribution line numbers.
- Replace Distribution Lines**
Remove the existing distribution lines and replace with the distribution lines changes.

The **Requisition Comments and Attachments** field **MUST** include the following information:

- ❖ **Campus/Location, Department, Building, Room Number, and Requester's First and Last name.**

Requisition Comments and Attachments

Enter requisition comments

Campus/Location, Department, Building, Room Number, and Requester's First and Last name.

- Send to Supplier
- Show at Receipt
- Shown at Voucher

[Add more Comments and Attachments](#)

Once the purchase requisition is complete, click on **Check Budget** at the bottom left of the screen.

****NOTE: Purchase requisitions that contain budget errors will not be saved or submitted. Issues with budget errors will need to be resolved with the appropriate person within your department.**

Click **OK** on the pop-up message that appears below.

Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Ch

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.

Receipt Shown at Voucher Add more Comr

The **Budget Check Status** will show as **VALID** if the requisition has passed **Budget Check** and the system will automatically issue a **Requisition ID** number.

Check Budget Pre-Check Budget Budget Checking Status **Valid**

Preview Approvals

The **Requisition ID** is located at the top right of the **Edit Requisition – Review and Submit** page.

****Note the Requisition ID number for your records.**

→ Edit Requisition - 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	MRR0002463
Requester	KROSAS	Rosas, Kelly	Requisition ID	MRR0002463
*Currency	USD		Priority	Medium

Once there is a valid **Budget Check** and a **Requisition ID** number is issued, scroll to the bottom of the screen and click on **Save & Submit**.

Check Budget Pre-Check Budget Budget Checking Status: **Valid**

Preview Approvals

The final page is the **Confirmation** page. This is a summary of the requisition and includes all of the approvals necessary to start the process of converting the purchase requisition into a purchase order.

Once the purchase requisition is approved by the Procurement Specialist, a confirmation will be emailed to

→ Confirmation

Your requisition has been submitted.

Requested For Rosas, Kelly	Number of Lines 1
Bid No/Quote MRR0002463	Total Amount 42.83 USD
Requisition ID MRR0002463	Pre-Encumbrance Balance 42.83 USD
Business Unit MIR01	
Status Pending	
Priority Medium	
Budget Status Valid	

 View printable version

 Edit This Requisition

 Check Budget

 Pre-Check Budget

Req Approval



Apply Approval Changes

 Create New Requisition

 Manage Requisitions

To check the status of the purchase requisition in PeopleSoft, access the **Manage Requisitions** screen and use the following navigation:

❖ **Nav Bar**  **Menu > eProcurement > Manage Requisitions**

Enter the **Requisition ID** number and click search. Click on the grey arrow to the left under **Req ID** to expand the details of the purchase requisition. Here the status of the purchase requisition can be reviewed.

DIRECT CONNECT (GRAINGER) ORDERS

You can **access PeopleSoft** through the District website by selecting the **Employee** tab, and then navigating to the **PeopleSoft My Portal** link or go directly to the link below.

Use the following link: <http://myportal.sdccd.edu/>

All orders **MUST** be placed through PeopleSoft using either Chrome or Firefox.



By logging into mySDCCD, you are agreeing not to disclose confidential information protected by privacy laws. Unauthorized access and/or use of this system is prohibited.

User ID:

0000000000

Password

.....

Sign In

[Forgot your Password?](#)

Regular system maintenance takes place between 04:00 and 06:00 AM PST on Thursday mornings. During this period certain sections of the system may not be available for use.

[Need Assistance?](#) [Student Help](#) | [Employee Help](#)

To access the **Create Requisition** screen, click on the **Finance Dashboard** icon.



Welcome to mySDCCD



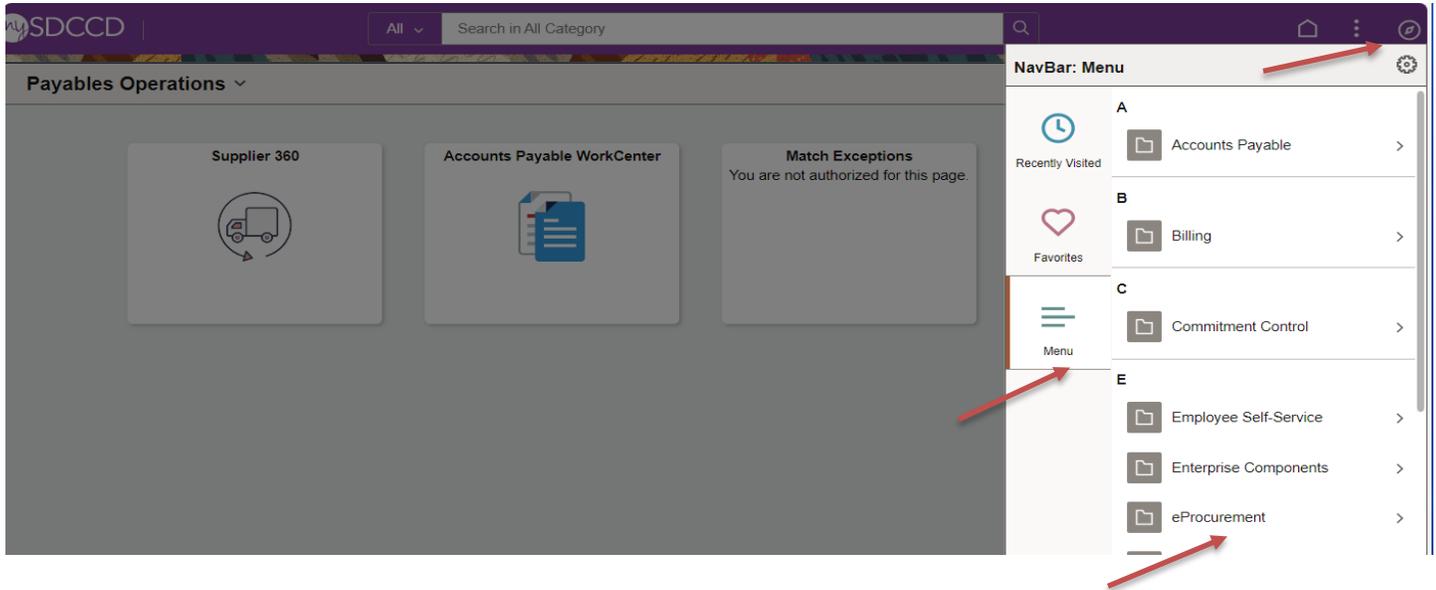
Employee Dashboard



Finance Dashboard

To access the **Create Requisition** screen, click on the **NavBar** icon  in the top right of the screen. Then click the Menu icon and use the following navigation:

❖ **eProcurement>Requisition**



Then click in the requisition icon

The screenshot shows the 'Requisition' form in the SDCCD application. The form is titled 'Requisition' and contains various fields for requisition settings, default options, line defaults, shipping defaults, distribution defaults, and accounting defaults. The 'Requisition Settings' section includes fields for Business Unit (DIS01), District Operations, Bid No/Quote, *Requester (AMURILLO001), Azucena Murillo, Priority (Medium), and *Currency (USD). The 'Default Options' section has radio buttons for 'Default' and 'Override'. The 'Line Defaults' section includes fields for Supplier, Category, Supplier Location, Unit of Measure (EA), and Buyer. The 'Shipping Defaults' section includes fields for Ship To (DIS), Due Date, and Attention. The 'Distribution Defaults' section includes a SpeedChart field. The 'Accounting Defaults' section includes a table with columns for Dist, Percent, Location, GL Unit, Fund, Dept, Product, Account, Oper Unit, and PC Bus Un.

Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit	PC Bus Un
1		DIS	DIS01		74300				

OK Cancel

On the **Requisition Setting** page, click **Override**, skip all other fields and click **OK** at the bottom to advance to the **Grainger Create Requisition** page.

Requisition Settings

Business Unit District Operations Bid No/Quote

*Requester Kristina Gomez Priority

*Currency

Default Options ?

- Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.
- Override** If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Line Defaults ?

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

Supplier Category

Supplier Location Unit of Measure

Buyer

Shipping Defaults

Ship To Add One Time Address

Due Date Attention

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	<input type="text"/>	<input type="text" value="DIS"/>	<input type="text" value="DIS01"/>	<input type="text"/>						

To process an order through PeopleSoft, click on the **Grainger Punch Out** link to be directed to the Grainger ordering website.

Create Requisition

Welcome Kristina Gomez



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.



Catalog

Browse Catalogs

CATEGORY



Web

Browse Supplier Websites

Grainger Punch Out

Office Solutions Punch Out



Express Item Entry

Create an Express Requisition



Special Requests

Create a non-catalog request



Forms

Create and Submit Forms



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

FEE, REGULATORY FEE

LAPTOP, HP PROBOOK 450, G8 V...

****NOTE: The minimum order amount is \$35.00; before tax. A purchase order will not be dispatched to Grainger unless the total is \$35.00.**

Use the search field to find items to be purchased. Add selected items in the appropriate quantities to the shopping cart then click on **View Cart** to review the order. When complete, click on **Submit Cart**.

All Products ▾

Enter keyword, item, model or part #



Bulk Order ▾

Account ▾



Custom Catalog

View >

 All Products Market Basket

Click **Yes** on the pop-up message to be transferred to **People Soft's Checkout Review and Submit** page.

Submit Cart ?

Thank you for visiting Grainger!

You are about to transfer products to your internal procurement system.

These products will not be shipped until an order is received from your company.

For customer service, please contact ePro Customer Care at 1-877-202-2592, voice prompt 3.

Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each line item to expand and review the information in the **Accounting Lines**.

Click on **Select All/Deselect All** and then **Mass Change** to identify **Ship To** and **Accounting Information**.

Checkout - Review and Submit

Review the item information and submit the req for approval.

 My Preferences  Requisition Settings

Requisition Summary

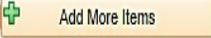
Business Unit District Operations Bid No/Quote

*Requester Kristina Gomez Priority

*Currency

Cart Summary: Total Amount 42.12 USD

Expand lines to review shipping and accounting details



Requisition Lines

Line	Description	Item ID	Supplier	Quantity	UOM	Price	Total	Details	Comments	Delete
 1	 TK52416673T Fire-Resistant Was		GRAINGER	1	EACH	42.12	42.12		 Add	

Select All / Deselect All Select lines to:  Add to Favorites  Add to Template(s)  Delete Selected  Mass Change

Total Amount 42.12 USD

Shipping Summary

 Edit for All Lines

Ship To Location DIS
Address 3375 Camino Del Rio South
San Diego, CA 92108-3883
Attention To Kristina Gomez
Comments

In the pop-up, enter the **Ship To** location and the appropriate **Accounting Information** in fields below and click **OK**.

Line Information 

Note: The information below 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 ID

Supplier Location

Buyer

Category

Shipping Information

Ship To Location

Add One Time Address

Due Date

Attention

Comments

Accounting Lines

SpeedChart

Please enter GL Business Unit before selecting other chartfield values

Accounting Information									Personalize	Find	First	1 of 1	Last
Dist	Percent	Location	GL Unit	Fund	Dept	Product	Account	Oper Unit					
1	<input type="text"/>	<input type="text"/>	DIS01	1110	74300	677020	4002						

Click **OK** on the **Distribution Change Options** pop-up message that appears.

Distribution Change Options

For the selected requisition lines that are available for sourcing, 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 the distribution line numbers.
- Replace Distribution Lines
Remove the existing distribution lines and replace with the distribution lines changes.

The **Requisition Comments and Attachments** field **MUST** include the following information:

- ❖ **Campus/Location, Department, Building, Room Number, and Requester's First and Last name.**

Requisition Comments and Attachments

Enter requisition comments

Campus/Location, Department, Building, Room Number, and Requester's First and Last name.

Send to Supplier

Show at Receipt

Shown at Voucher

Add more Comments and Attachments

Once the purchase requisition is complete, click on **Check Budget** at the bottom left of the screen.

****NOTE: Purchase requisitions that contain budget errors will not be saved or submitted. Issues with budget errors will need to be resolved with the appropriate person within your department.**

 **Check Budget**

 Pre-Check Budget

 Save & submit

 Save for Later

 Add More Items

 Preview Approvals

Click **OK** on the pop-up message that appears below.

Select lines to:

 Add to Favorites

 Add to Template(s)

 Delete Selected

 Mass Ch

Message

Budget Checking will save your requisition in an Open Status. (18036,39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue.
Press Cancel to return to your requisition without budget checking.

OK

Cancel

Receipt

Shown at Voucher

Add more Comr

The **Budget Check Status** will show as **VALID** if the requisition has passed **Budget Check** and the system will automatically issue a **Requisition ID** number.



The **Requisition ID** is located at the top right of the **Edit Requisition – Review and Submit** page.

****Note the Requisition ID number for your records.**

Edit Requisition - Review and Submit

Review the item information and submit the req for approval.

[My Preferences](#) [Requisition Settings](#)

Requisition Summary

Business Unit	DIS01	District Operations	Bid No/Quote	DOR0012754
Requester	KGOMEZ	Kristina Gomez	Requisition ID	DOR0012754
*Currency	USD		Priority	Medium ▼

Once there is a valid **Budget Check** and a **Requisition ID** number is issued, scroll to the bottom of the screen and click on **Save & Submit**.



The final page is the **Confirmation** page. This is a summary of the requisition and includes all of the approvals necessary to start the process of converting the purchase requisition into a purchase order.

Once the purchase requisition is approved by the Procurement Specialist, a confirmation will be emailed to the requester.

Confirmation

Your requisition has been submitted.

Requested For	Kristina Gomez	Number of Lines	1
Bid No/Quote	DOR0012754	Total Amount	42.12 USD
Requisition ID	DOR0012754	Pre-Encumbrance Balance	42.12 USD
Business Unit	DIS01		
Status	Pending		
Priority	Medium		
Budget Status	Valid		

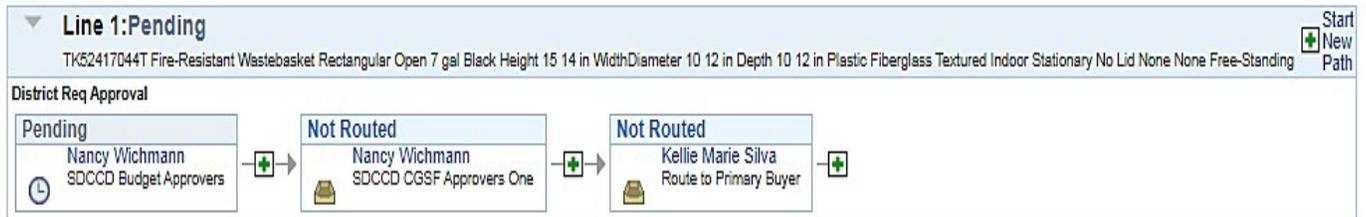
 View printable version

 Edit This Requisition

 Check Budget

 Pre-Check Budget

Req Approval



Apply Approval Changes

 Create New Requisition

 Manage Requisitions

To check the status of the purchase requisition in PeopleSoft, access the **Manage Requisitions** screen and use the following navigation:

❖ **Nav Bar**  **Menu>eProcurement>Manage Requisitions**

Enter the **Requisition ID** number and click search. Click on the grey arrow to the left under **Req ID** to expand the details of the purchase requisition. Here the status of the purchase requisition can be reviewed.

TEMPLATE LANGUAGE – BLANKET ORDER

Templates can be amended to meet District/Department needs; these are a suggestion.

Copy and paste the template language needed into the **Additional Items** on the create requisition page. This language **MUST** be included on all purchase requisitions that are blanket order requisitions. In addition, the Amount Only box needs to be checked on Checkout – Review and Submit page. **Please note: Amount Only is the PeopleSoft language, however the industry standard is BLANKET ORDER.**

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 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 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 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 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 PO

SERVICE TEMPLATE

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

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

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

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

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

SUPERSEDES PO

SUBSCRIPTION TEMPLATE

NEW/RENEW SUBSCRIPTION TO _____ FOR CAMPUS/DEPT

ACCOUNT NO:

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

LABEL TO:

CAMPUS

DEPT/ROOM

DISTRICT TITLE OF PERSON RECEIVING SUBSCRIPTION

STREET ADDRESS

SAN DIEGO CA 921XX

CONTACT PERSON: NAME/PHONE OR E-MAIL

SUPERCEDES PO

SUPPLIES TEMPLATE

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

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

AUTHORIZED PERSON(S): NAME/PHONE

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

SUPERCEDES PO

CATERING

CATERING SERVICES FOR SAN DIEGO [CAMPUS OR DISTRICT DEPARTMENT]: [EVENT]

DATE:

DELIVERY LOCATION:

CAMPUS

DEPT/ROOM

STREET ADDRESS

SAN DIEGO CA 921XX

DELIVERY TIME:

PICKUP TIME (IF APPLICABLE):

CONTACT PERSON:

[NAME]

[TELEPHONE NUMBER]

PRICED SUMMARY TO BE PROVIDED AT TIME OF DELIVERY. SEND INVOICES AND MONTHLY STATEMENT TO ACCOUNTS PAYABLE AT APINVOICE@SDCCD.EDU

SUPPLIERS PROVIDING FOODSERVICE TYPE SERVICES TO THE SAN DIEGO COMMUNITY COLLEGE DISTRICT ARE REQUIRED TO MAINTAIN A VALID HEALTH PERMIT FROM THE COUNTY OF SAN DIEGO AND INSURANCE COVERAGE AS STIPULATED IN SECTION 18 OF THE DISTRICT'S GENERAL TERMS AND CONDITIONS, WHICH APPLY TO ALL PURCHASE ORDERS ISSUED BY THE DISTRICT. A COPY OF THE HEALTH PERMIT AND CERTIFICATE OF INSURANCE MUST BE PROVIDED PRIOR TO DELIVERY OF ANY FOOD RELATED SERVICES. EMAIL THE DOCUMENTS TO NWICHMAN@SDCCD.EDU. A LINK TO OUR GENERAL TERMS AND CONDITIONS, WHICH ARE INCORPORATED HEREIN, IS PROVIDED AT THE BOTTOM OF THIS PURCHASE ORDER.

PAYMENT TERMS FOR GOODS AND SERVICES PROVIDED TO THE SAN DIEGO COMMUNITY COLLEGE DISTRICT ARE NET 30. PAYMENT IS MADE FOLLOWING DELIVERY OF GOODS OR COMPLETION OF SERVICE AND RECEIPT OF AN ACCURATE AND COMPLETE INVOICE SUBMITTED IN ACCORDANCE WITH THE PURCHASE ORDER.

ARMA RULES

The **ARMA format will be required** to approve requisitions and dispatch purchase orders for consistency and clarity of receiving. To ensure that your orders are processed, please follow these formatting rules:

ARMA Item Description: Noun, Description, Manufacturer (if applicable), Model/Product Number

1. The NOUN is always FIRST, followed by the description, then the manufacturer if applicable, and finally the model or product number.

Example A: TYPEWRITER, ELECTRIC, IBM, MODEL 8533

Example B: BOOK, ENGLISH FOR EVERYONE, ISBN 0-123-456-78 – (Note: Publishers rarely look at the title when filling orders. So it's very important to have the ISBN number correct.)

Example C: CONSULTANT SERVICES, FOR GRANT WRITING Equipment

2. When purchasing equipment, all options, components, and enhancements should be bundled with the equipment. However, separate operating pieces of equipment which may function independently of the equipment, should be separated (its own line item).

EXAMPLES:

- A. COMPUTER, SDCCD Q87M-E/CSM MT BASE SYSTEM MATX BLK
3EA \$710.00 EA \$2,130.00
031206 INWIN CASE Z589T.E350TBL USB 3.0 MATX 80+ 350W 3 \$0.00 EA \$0.00
RG1551 ASUS MB Q87M-E/CSM LGA1150 A/V/GBE VPRO MATX 3 \$0.00 EA \$0.00
UK1833 INTEL CPU I5-4690 3.5GHz/6M 4C 8T LGA1150 3 \$0.00 EA \$0.00
#BX80646I54690
TX1345 KINGSTON DDR3 2GB 1600MHZ CL11 #KVR16N11S6/2 6 \$0.00 EA \$0.00
PK0308 WESTERN DIGITAL HD 500GB SATA 7200 RPM 64MB #WD5003AZEX 3 \$0.00 EA \$0.00
031637 ASUS DVDRW +/- CDRW SATA BLK OEM# DRW-24F1STG 3 \$0.00 EA \$0.00
031730 MICROSOFT OS WIN 10 HOME OEM 64BIT 3 \$0.00 EA \$0.00
007208 LABOR - INSTALL SDCCD W7P 64BIT IMAGE 3.00 \$0.00 HOUR \$0.00
005004 STI BASIC SYSTEM CONFIGURATION 3 \$0.00 EA \$0.00
005008 STI 4 YEAR ONSITE WARRANTY 3 \$0.00 EA \$0.00
SERIAL STI SYSTEM SERIAL NUMBERS 3 \$0.00 EA
- B. KEYBOARD, KB 600 WIRED BLK USB ONLY #ANB-00001, P/N# V29332 MICROSOFT
3EA \$10.00 EA \$30.00
- C. MOUSE COMFORT 4500 BLACK #4EH-00004, P/N# KL3561, MICROSOFT
3EA \$15.00 EA \$45.00
- D. MONITOR LCD 22" WIDE 1680X1050 W/SPKR, P/N#PC1881, NEC
6EA \$212.00 EA \$1,272.00
- E. ELECTRONIC WASTE FEE-15 TO 35 INCHES, P/N# EWRF15
6EA \$4.00 EA \$24.00

IF TABLETS ARE ORDERED IN LOTS, THEY MUST BE LISTED AS **EACH** AND NOT AS A **LOT**.

EXAMPLE: IPAD, APPLE 9.7" PRO, 128GB

15EA \$729.00 (NOT 1LT @ \$10)

ALL INDIVIDUAL INFORMATION TECHNOLOGY ELECTRONIC COMPONENTS OVER \$200, NEED TO BE LISTED AS A SEPARATE LINE ITEM. THEY SHOULD NOT BE LISTED AS A LOT/KIT.

For Systems Furniture or Furniture orders EXAMPLES ARE:

WORKSTATION, 8.5x9L, (5) TACKBOARDS, (3) SHELVES, (2), TASKLIGHTS, (2) OVERHEADS, BBF PEDESTAL, LATERAL FILE, CHERRY LAMINATE, GREEN FABRIC, METALLIC PAINT 1 LT
\$2,122.36

CABINET, PEDESTAL, MOBILE, METAL 1EA \$285.33

BOOKCASE, 5 SHELF ADJUSTABLE 1EA \$325.00

CABINET, LOCKER 1EA \$465.00

CABINET, LATERAL FILE, 2-DRAWERS, 36W METAL 1EA \$378.49

CHAIR, HIGH BACK LEATHER ADJUSTABL 5EA \$645.00

THE RULE IS THAT IF THE FURNITURE IS NOT BOLTED, GLUED, AND/OR WEILDED TO EACH OTHER, IT NEEDS TO BE LISTED AS A SEPARATE LINE ITEM. SYSTEMS FURNITURE ORDERED IN LOTS MUST BE LESS THAN \$4,500. ANYTHING OVER THAT MUST BE LISTED AS A SEPARATE OR AS ANOTHER LINE ITEM.

CATEGORY CODES

Use the following link to access the most recent Purchasing Specialist Category Code Assignment

<https://www.sdccd.edu/departments/business/purchasing/forms.aspx>

STATUS DEFINITIONS

Purchase Orders (PO)	
Initial	A PO has a status of <i>Initial</i> when it is first added to the system. This status may change once a Procurement Specialist is selected in the PO, depending upon how the Procurement
Open	If the Procurement Specialist is set up with this Default PO Status, an initial PO will become <i>Open</i> . A Template PO may always have an <i>Open</i> status. A PO with this status cannot be
Pending Approval	A PO cannot be budget checked or entered into the approval process until it is in <i>Pending Approval</i> status. There is a checkmark that shows on <i>Open</i> POs that can be clicked to change the status to " <i>Pend Appr.</i> "
Approved	When the workflow approval process is complete, the PO status changes from <i>Pending Approval</i> to <i>Approved</i> . After the PO is approved, any change in amount or ChartFields causes the system to return the PO status back to <i>Pending Approval</i> . <i>Approved</i> POs are available for the PO Dispatch/Print process.
Dispatched	If the PO has been approved and has a valid budget status, the PO status changes from <i>Approved</i> to <i>Dispatched</i> .
Canceled	Canceling an entire PO before it has been dispatched changes the status to <i>Canceled</i> . <u>Canceling cannot be reversed.</u>
Pending Cancel	Canceling a dispatched PO changes, the status to <i>Pending Cancel</i> . The PO must be re-dispatched and budget-checked to move the status from <i>Pending Cancel</i> to <i>Canceled</i> .
Complete	Running the Close Purchase Orders process changes the status to <i>Complete</i> .
Approval Status	
Initial	The status of any PO or requisition when first brought into the "Approve Amounts" process.
In Process	If the requester or Procurement Specialist cannot give full approval of a requisition or PO, the status of <i>In Process</i> shows after the initial approval is saved.
Complete	The requisition or PO receives a <i>Complete</i> approval status after the final approval has been done. These three approval statuses will only show in the Approve Amounts screen.

Purchase Requisitions	
Open	The <i>Open</i> status displays by default from the requester. This status may change once a requester is selected, depending upon how the requester is set up.
Pending Approval	The purchase requisition is not eligible for the approval process until an authorized user changes this status to <i>Pending</i> . This may be done by pulling in the requester or clicking the “Open” checkmark to change the status to <i>Pending</i> .
Approved	The purchase requisition has been fully approved.
Line Approved	This status means that one or more purchase requisition lines have been approved.
Denied	The purchase requisition has been denied by the Approver.
Canceled	The purchase requisition was canceled on the header.
Complete	Running the Close Requisitions process changes the status to <i>Complete</i> .
Receipts	
Open	Not all edits have passed. If any receipt lines have a status of <i>Open</i> , the receipt header has a status of <i>Open</i> .
Received	When all lines are in <i>Received</i> or <i>Canceled</i> status, the receipt header will have a status of <i>Received</i> .
Hold	Receipt is on <i>Hold</i> until released by user. This status may be used when items are received damaged.
Moved	This status occurs when the receipt has been interfaced with Asset Management or Inventory in PeopleSoft.
Closed	All interface requirements have been fulfilled and no further processing is required. Running the Close Receipts process changes the status to <i>Closed</i> .
Canceled	The receipt has been <i>Canceled</i> on the header; the lines will go to a <i>Canceled</i> status as well. <u>Canceling cannot be reversed</u> .
Budget Status	
Not Chk"d	(<i>Not Checked</i>) – Either the document has not been budget checked or the budget checking <u>process</u> failed. This can happen for reasons other than the accounting information being incorrect.
Valid	The purchase order or purchase requisition has been successfully budget checked.
Error	The document has failed to budget check because of an error in the distribution information.