Navigation

1. Click \leq or > on the home screen until Procurement is visible. Click **Procurement**.



NOTE: There may be no arrows on the home screen. Arrows only appear if you have access to multiple modules which require you to scroll through the options to locate a specific module.

2. Click Purchase Requisitions.



3. On the **Requisition** screen, click the **Shopping List** drop down arrow then select *Inventory Catalog.*

Requisitions		More To	asks 🔻 🛛 Man	age Requisitions	Shopping Lists	-
Shop by Category -	Search		Inventory Catalog		30	este
				Create Snopping List		

4. The Inventory Catalog screen displays.

Shopping Lists						Do	ne 🗑 o
Manage My Shopping Lists		Inventory Catalog (30 Item	s)		Search Shapping Lit	is Q Sort B	y 🔹 🔝 🚥
Inventory Catalog	30	Add All Items to Cart	Sudeet Chars - 14"	Open Front D	B Ma	н 502-328	
		1 W	138.60 Exch	ST228 Each		10.02 Edu	
		Construct File - 4 Dr. Whock Internally Ordenatio ● \$225.38 Each 1 阳	Studeet Chairs - 18" Internally Oxderable @ \$33.86 Each 1 11	H-201 Internally Oxdenable (B) \$22.95 Each 1 W	•	Studen Chars - 16" Internally Oxferable (0 546.00 Each 1 1	Stacking
		Table - 35x90 (Gen Purpose)	Mobile Chaldboard Statuse Each	Test Ren - Filing I Internally Octavable @ 5440.00 Each	Gatavets		
		1 W 🚥	1 W	1 W	•		20-30 4)

Adding Items to the Purchasing Requisition

1. Enter the *quantity* to be ordered for desired items in the shopping list.

Shopping Lists						Done	₩ 0
Manage My Shopping Lists		Inventory Catalog (30 Ite	ems)	Search S	Shopping Lists	Q Sort By	• 📰 =
# Public Shopping Lists		intentory camegices no.	1107				
Inventory Catalog	30	Add All Items to Cart					
		Record Boxes	Student Chars - 14*	Open Front Desk		H-502-320	
		Internally Ordarable @ \$1.62 Each	Internally Orderable @	Internally Orderable () \$72.00 Each	Internally \$8.02 Er	Orderable 0	
		1 🗑 😋	4 W 🖘	1 🗑 🧲	2	1 1	

2. Click the *shopping cart* next to the quantity field to add to a purchasing requisition

Shopping Lists					Done W 0
Manage My Shopping Lists		Inventory Catalog (30 Iter	ns)	Search Shopping Lis	is Q Sort By 🔹 🏥 tat
Inventory Catalog	30	Add All Items to Cart			
		Record Boxes	Student Chars - 14*	Open Front Desk	H-502-320
		Internally Criterable @ \$1.52 Each 1 1	Internally Croarable \$39.00 Each 4	Internally Orderable @ \$72.00 Each 1 習	Internally Orderable 0 56.02 Each 1 W

- 3. Continue to add items to the shopping card as needed.
- 4. Click (Shopping Cart located in the upper right) and then click *Review* to review the requisition before submitting.



NOTE: Items remain in the shopping cart until they are deleted, the **Done** button is selected or until the **Review** button is selected to edit the requisition.

Completing the Purchasing Requisition

1. The **Edit Requisition** screen is divided into several sections. The first section is called the **Header**. The header lists information which applies to all requisition lines.

The **Description** field defaults to the item description of the first requisition line.

uisitioni	ng BU SDP_BU	Justification				Requisi	tion Amount	300.00 U	SD
* Descr	ription Student Chairs - 14*					Appro	val Amount	300.00 US	SD
						12	Attachments ?	None -	
quisition	1 Lines	al Wrap				,	Augenments 1	None T	
ctions +	> Lines Vew ▼ Format ▼	+2 Wrep Category Name	* Quantity	UOM Name	* Pric	 Amount (USD) 	Funds State	us	Delete
Actions +	h Lines View • Format • 🖉 💥 📄 Freeze 🛣 Detach Description Student Chars - 14*	el Wrep Category Name 5012150200	* Quantity	UOM Name Each	* Pric 30.00 US	e Amount (USD)	Funds Statu	us	Delete ×

NOTE: In the image above, the default **Description** field in the header is the same as the description in the first line of the requisition: Student Chairs - 14".

Update the **Description** field in the header by typing a *name for the requisition* which incorporates a description for the entire requisition and is meaningful to you.

Edit Req	uisition: RQ10363			Shop	Check Funds	Manage Approvals	View PDF	Save	• Subn	nit
Requisitioni * Desci	ng BU SDP_BU Iption Furniture Room 302	Justification				Requisit Appro Fi	tion Amount oval Amount unds Status Attachments	300.00 U 300.00 U Not resen	ISD ISD ved	
Requisition	Lines									
Requisition	Lines View 🔻 Format 💌 📄 🖋 🗶 💿 Freeze 📷 Detach 🚽 Wrap									
Requisition	Lines View ¥ Format ¥ 📄 🖋 💥 🗐 Freeze 🛣 Detach el Wrap Description	Category Name	* Quantity	UOM Name	* Prie	ce Amount (USD)	Funds Stat	tus	Delete	
Actions V Line	Lines View Format Format Freeze Free	Category Name	* Quantity	UOM Name Each	* Pric 39 00 US	2e Amount (USD) 5D 156.00	Funds Stat	tus	Delete	

2. Select a *requisition line* by clicking in the area at the front of the line. Do **not** click on the blue description text in the line.

Each **requisition line** needs to be reviewed for the following information:

- Line Detail: Update quantity on line items.
- **Delivery**: Update information such as requester, delivery date or delivery location, if necessary.
- **Billing**: Update charge account information.

Information on how to update these sections continues on Step 3.

Edit Requisition: RQ10363		Shop	Check Funds Man	age Approvals View PDF	Save V Submit
Requisitioning BU SDP_BU * Description Furniture Room 302	Justification		4	Requisition Amount Approval Amount Funds Status Attachments	2 300.00 USD 2 300.00 USD 3 Not reserved 3 None 🕂
Requisition Lines					
Actions View Vermat V 📋 N X 🖩 Freeze 🔐 Detach 🚽 Wrap	Category Name	* Quantity UOM Name	* Price	Amount (USD) Funds St	atus Delete
1 Student Chairs - 14"	5612150200	4 Each	39.00 USD	156.00 Not reserve	ed 🗙
2 Open Front Desk	5610170300	2 Each	72.00 USD	144.00 Not reserve	ed 🗙
Total				300.00	
4 Roue Selected 1 Columns Hidden 8					۶.
▲ Delivery		* Deliver-to Location Deliver-to Address Destination Type	Feltonville Intermediate P238 E. Wyoming Ave., Expense V	(7310) Q Philadelphia, PA 19120, Unite	d States
Project Costing Details Project Costing Details Project Expanditure Expanditure	Contract Eunding	Charge Account		* Budget Date	* Percentage Quant
Number Task Number Item Date Type Organization	Number Source				
۹			Đ,	06/02/2020	100
4		_	Total		100
Source Source Organization Central Warehouse		Source Subinventory			

3. Line Detail: In the Quality field, update the *quantity*, if needed. No other fields can be updated.

uisition	Lines	Alexan		3				
Line	Description	Category Name	* Quantity	JOM Name	* Price	Amount (USD) Fur	nds Status	Delete
1	Student Chairs - 14"	5612150200	4	Each	39.00 USD	156.00 Not	reserved	×
2	Open Front Desk	5610170300	2	Each	72.00 USD	144.00 Not	reserved	×
Total						300.00		

NOTE: Ordered an item by mistake? Select the line and then click the "**X**" under the **Delete** column for that line.

4. **Delivery**: Update the **delivery** fields. Updating delivery fields is rare.

▲ Line 1: Details					
Delivery					
* Requester	Doe, John	٩	Deliver-to Location Type	Internal 🛩	
Urgent	No 🛩		* Deliver-to Location	Feltonville Intermediate (7310)	Q
Requested Delivery Date	06/08/2020		Deliver-to Address	238 E. Wyoming Ave., Philadelphia	, PA 19120, United States

- **Requester** This field defaults to you. If someone else needs to receive the item, enter their name in the field. Changing the name of the requester is rare and typically only completed by certain individuals.
- **Urgent** This drop down menu will default to No. Do not update this menu. If this is an urgent request, contact purchasing, **purchasing@philasd.org**, after submitting the requisition.
- **Requested Delivery Date** This field defaults to seven days. Leave as is. You cannot set the delivery date in the past.
- **Deliver-to-Location Type** Leave as the default.
- **Deliver-to-Location** This field defaults to the location you set in your requisition preferences. If an item needs to be delivered to another location, update this field. **You should only have one delivery location per requisition.**
- **Deliver-to-Address** This field will populate based on the Deliver-to-Location selection.

5. **Billing**: The **Billing** fields should be reviewed, and some fields may need to be updated.

⊯ Billing View ▼ F	Format 👻	🗙 < 🔟 Freeze 📰 🕻	Detach 🚽 Wrap						
Project Number	Task Number	Project Costing Expenditur Expenditure Item Date Type	g Details Expenditure Contract Organization Number	Funding Source	Charge Account	* Budget Da	te * Percentage	Quantity	Amount (USD)
٩						06/01/2020	5 6 100	10	100.00
					-	Total	100	10	100.00

- Project Costing Details This area is used by select individuals who order items or services for projects. Enter the *project number* in the Project Number field and other fields in this area. If you need to complete these fields, you will be directed to do so. Schools do not use this field.
- **Charge Account** This field defaults to the charge account set up as the primary account in your requisition preferences. When reviewing this section, you must complete one of the following:
 - o Leave the charge account set to your default Charge Account.
 - Select a previously saved favorite *charge account* from the Charge Account
 Nickname drop down. See <u>Setup Purchasing Requisition Preferences Stepper</u>
 for how to save favorite charge accounts.
 - o Click
 [■] to enter charge accounts or choose an Alias. See the <u>Enter a Charge</u>
 <u>Account Stepper</u> for more information.
- Budget Date This field defaults to today's date. Leave as is.
- **Percentage, Quantity and Amount** Refer to the <u>Split Charge Accounts Stepper</u> if you need to use more than one charge account for a line item on a requisition.
- 6. Repeat steps 3-6 (Delivery and Billing review) for each line item included on the requisition.

Submitting Your Requisition

 When you finish updating the requisition line(s), click *Save* located in the upper right corner of the screen. <u>You MUST click *Save*</u>. This action allows information in the Charge Account field to be updated with additional account information.



2. Click Check Funds.



The ERP checks the charge account in each requisition line to verify there is money in the corresponding account. The funds either pass or fail. **Requisitions which fail funds check cannot be submitted, even if only one line fails the funds check.**

Funds Pass		Funds	Fail	
Confirmation	×	Error	1	×
The transaction passed the funds check pro-	ocess.	The transaction failed the funds	check process. (XCC-67537	0)
View Funds Check Results	ок	View	Funds Check Results OK	٢

Funds Fail? Contact your administrator/principal for next steps. Refer to the <u>Check Why</u> <u>Funds Fail Stepper</u> for more information. 3. Optional: Click *Manage Approvals* to view the approval workflow.



In the example below, the requisition would be approved by School Approver2.

Depending on the items being purchased or the funds being used, other departments such as Curriculum, Grants or IT may display in the workflow.

Click *Back* to return to the **Requisition** screen.



NOTE:

- Do **not** click *Submit* from this screen.
- See the <u>Financial Approval Workflow Stepper</u> to learn more approvals.

 If you are not ready to submit the requisition for approval, click the drop down arrow on the *Save* button then click *Save and Close*. This places the requisition in an incomplete status. It can be opened and edited at any time.

Shop	Check Funds	Manage Approvals	View PDF	Save	•	Sub <u>m</u> it
				<u>S</u> a	ve an	d Close
	1			-		

5. If you are ready to submit the requisition for approval, click *Submit*.



6. A confirmation popup window will display. Click **OK** to close the popup. Click **View PDF** to view a PDF of the requisition.

🥝 Confirma	ation	×
Requisition RQ10361 was submitted.		
	View PDF	0 <u>K</u>

<u>Next Steps</u>

The requisition is sent for approval before a transfer order is created. You receive an email once the requisition is approved by all approvers and again when the purchase order is created.

If any approver rejects a requisition, you receive an email of the rejection with a note on what may need to be adjusted. Any other approvers next in line for approval do not see the requisition. The requisition, once resubmitted, has to go through the entire approval process again.