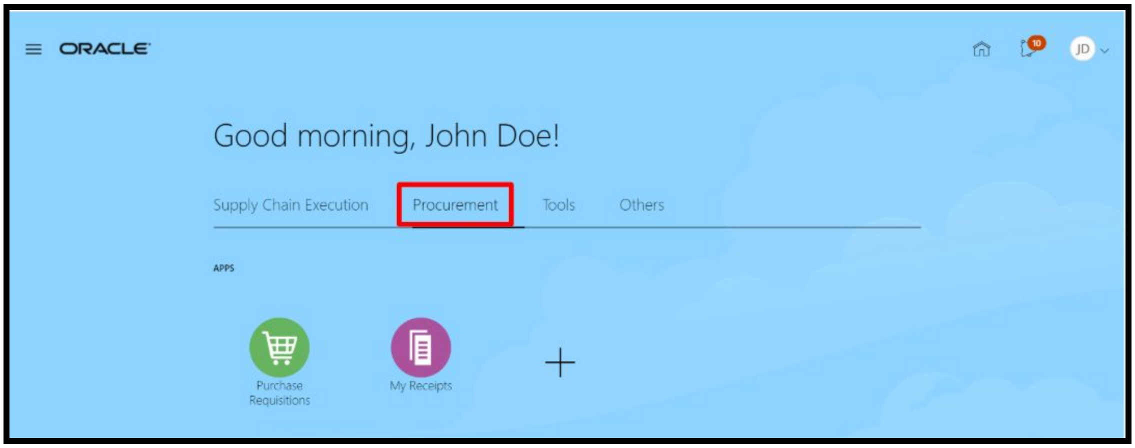
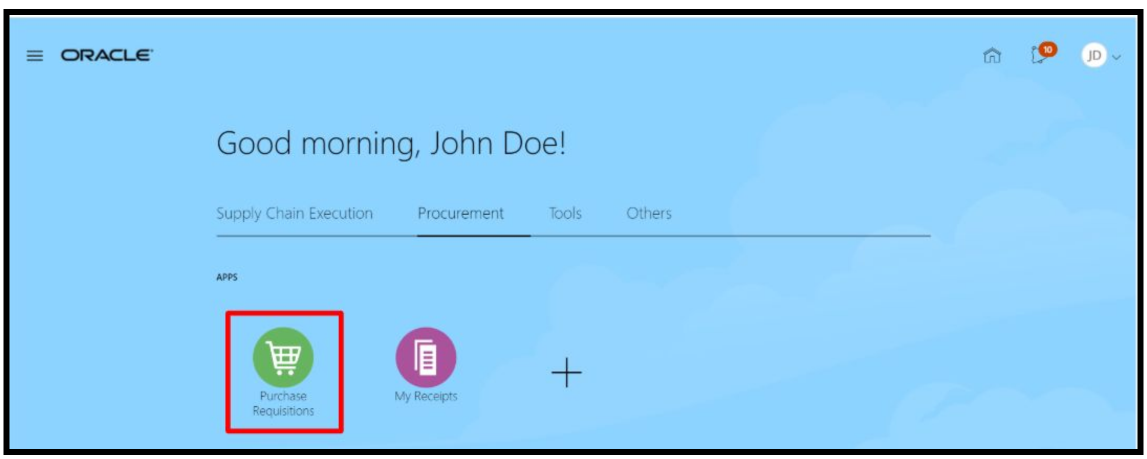
Navigation

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



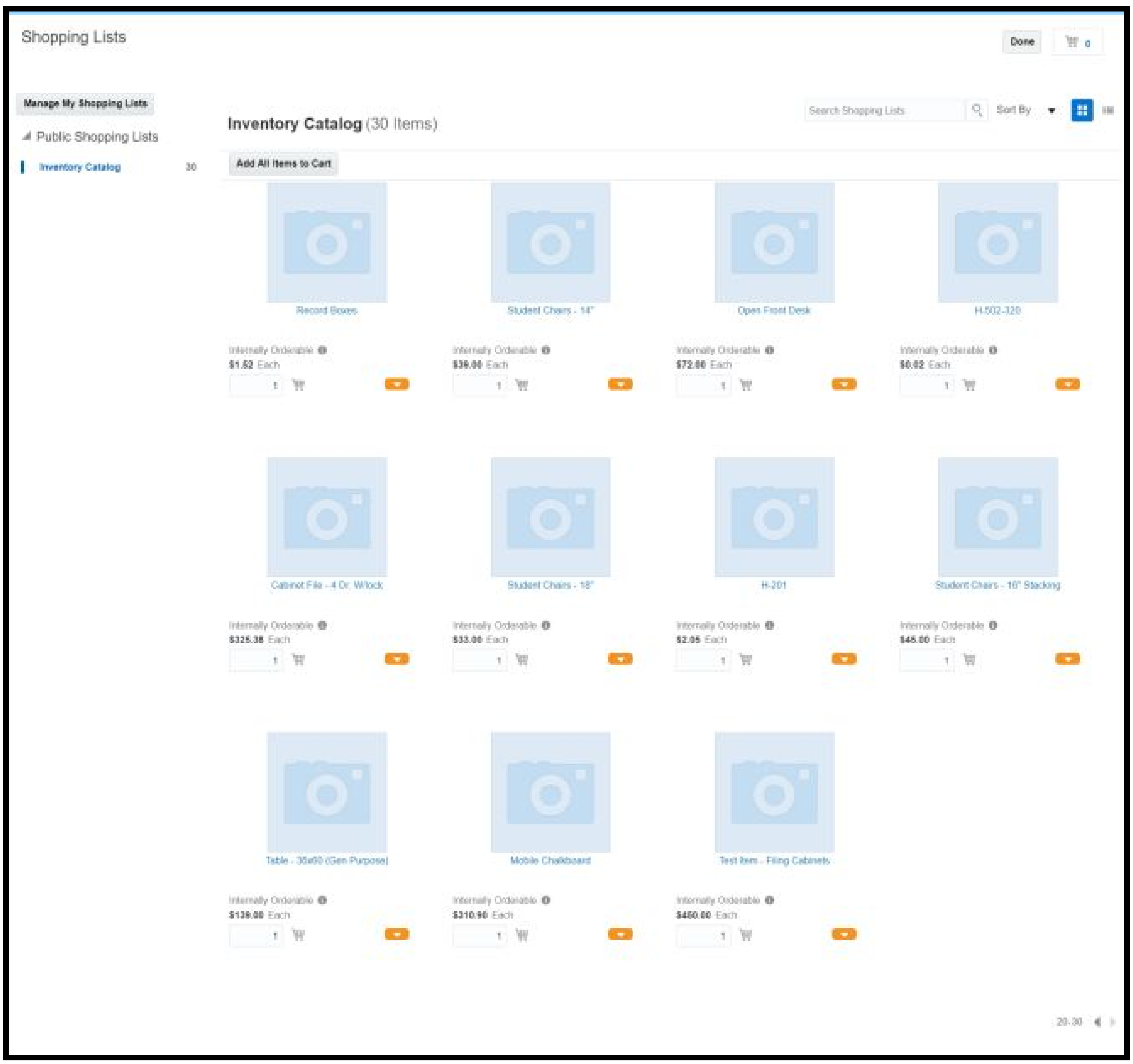
NOTE: There may be no arrows on the home screen. Arrows only appear if you have access to multiple modules which require you to scroll through the options to locate a specific module.

2. Click ***Purchase Requisitions***.



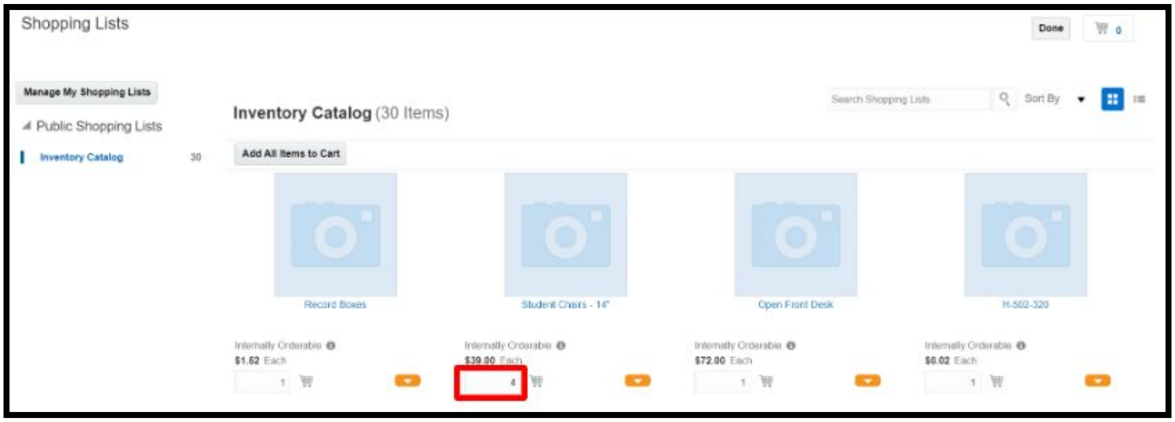
3. On the **Requisition** screen, click the **Shopping List** drop down arrow then select ***Inventory Catalog.***

4. The **Inventory Catalog** screen displays.

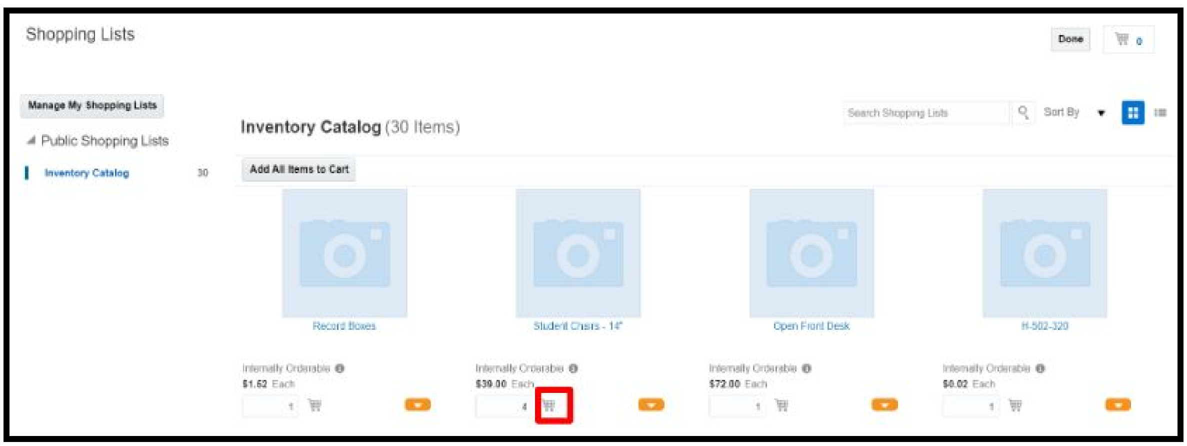


Adding Items to the Purchasing Requisition

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

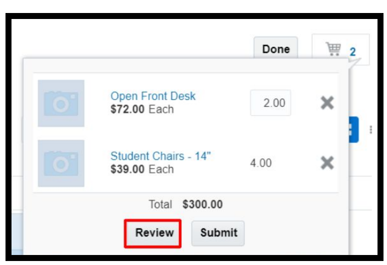


2. Click the ***shopping cart*** next to the quantity field to add to a purchasing requisition



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.

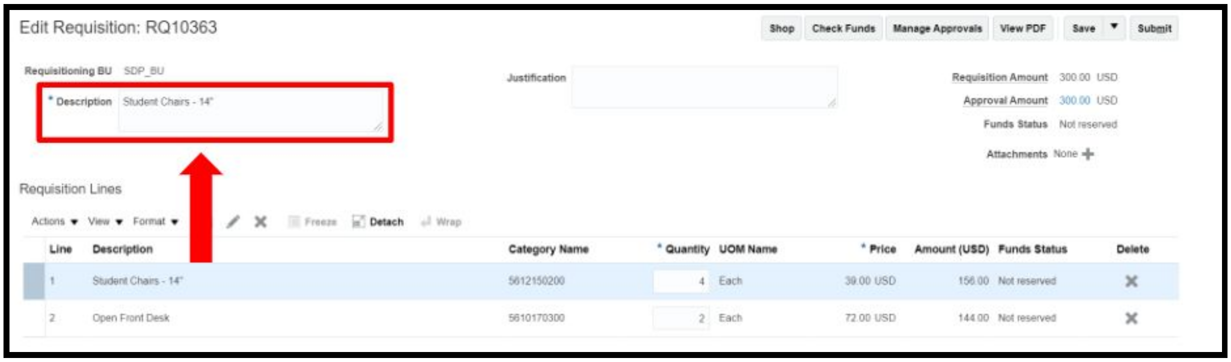


NOTE: Items remain in the shopping cart until they are deleted, the ***Done*** button is selected or until the ***Review*** button is selected to edit the requisition.

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.

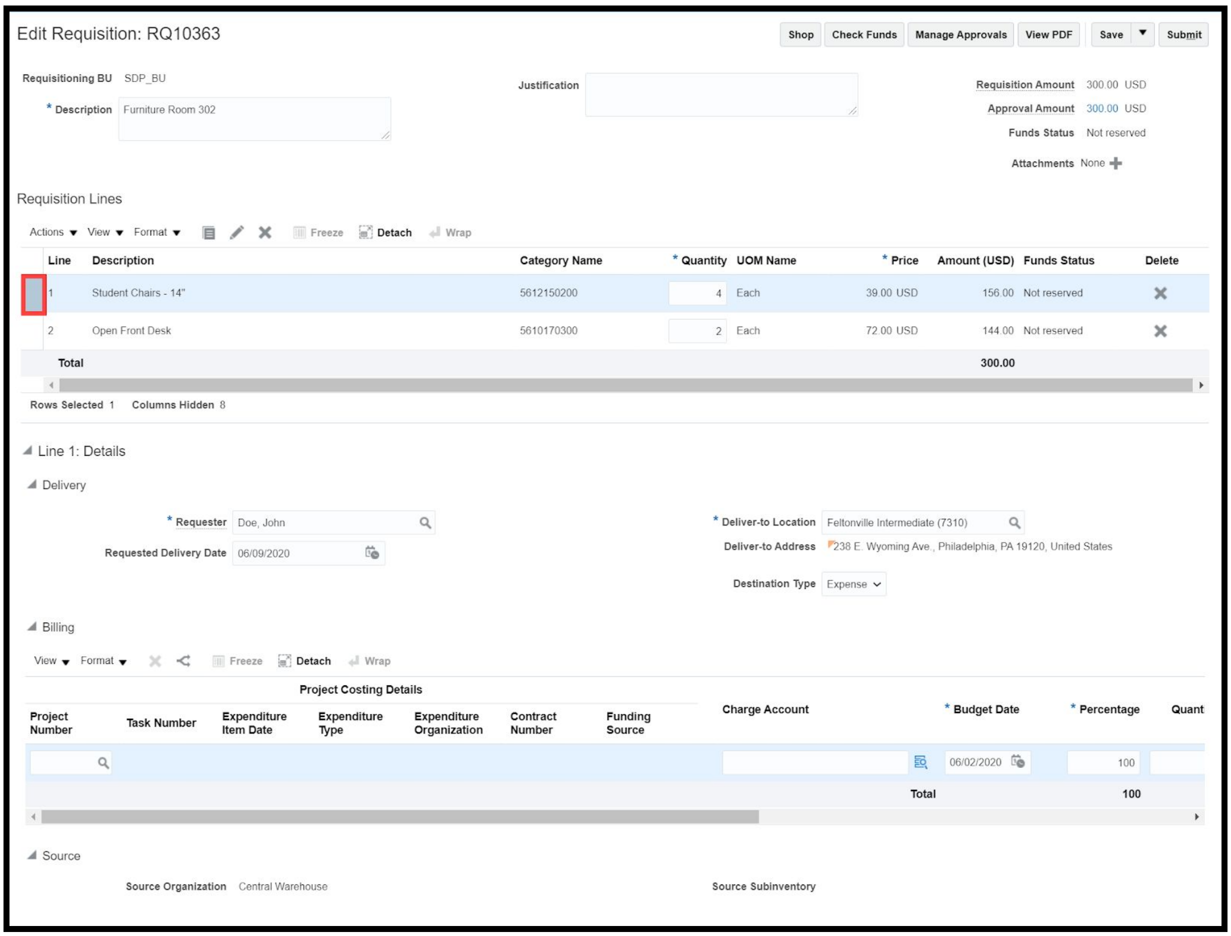


   NOTE: In the image above, the default **Description** field in the header is the same as the description in the first line of the requisition: Student Chairs - 14".

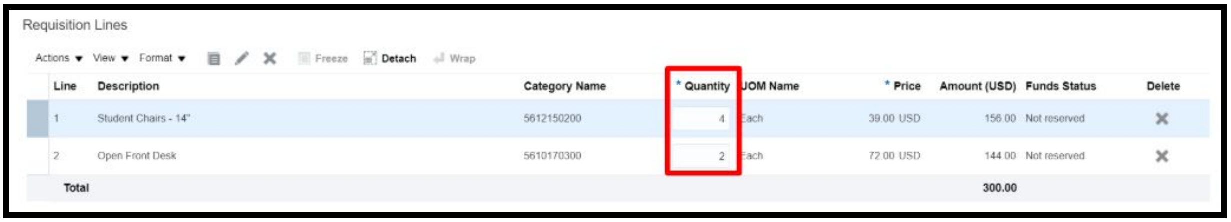
   Update the **Description** field in the header by typing a ***name for the requisition*** which incorporates a description for the entire requisition and is meaningful to you.

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.



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



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.

- **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.

- **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.
  - o Select a previously saved favorite ***charge account*** from the **Charge Account Nickname** drop down. See Setup Purchasing Requisition Preferences Stepper for how to save favorite charge accounts.
  - o Click to enter charge accounts or choose an Alias. See the Enter a Charge Account Stepper for more information.
- **Budget Date** – This field defaults to today's date. Leave as is.
- **Percentage, Quantity and Amount** - Refer to the Split Charge Accounts Stepper 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.

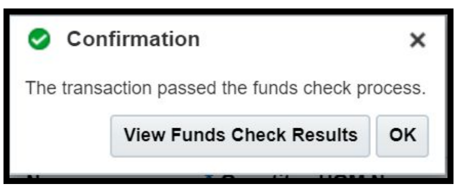
Submitting Your Requisition

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

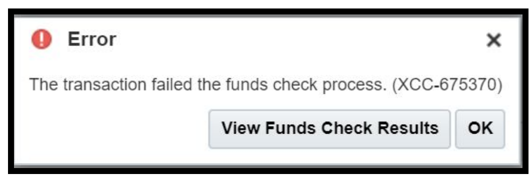
2. Click ***Check Funds***.

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



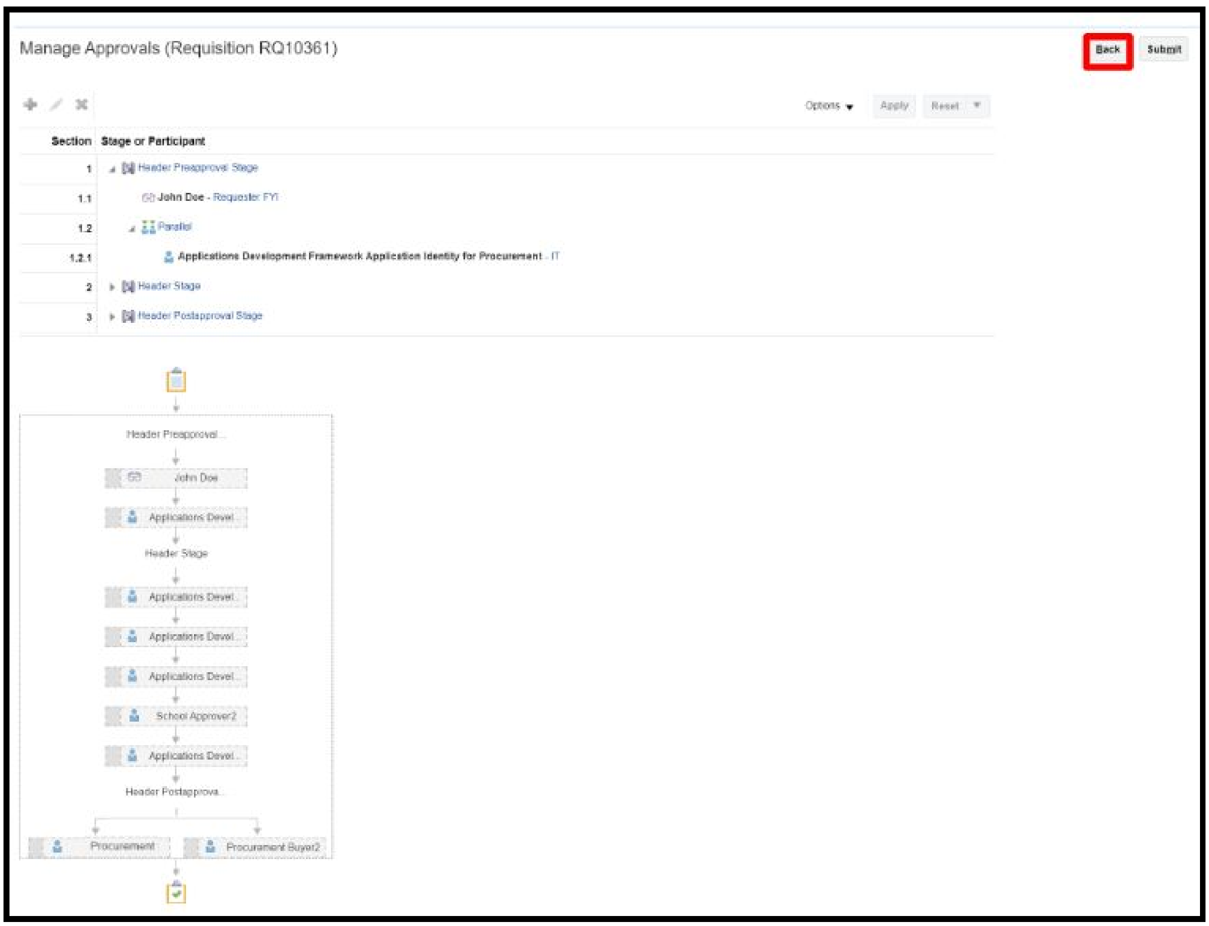
Funds Fail? Contact your administrator/principal for next steps. Refer to the Check Why Funds Fail Stepper for more information.

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.

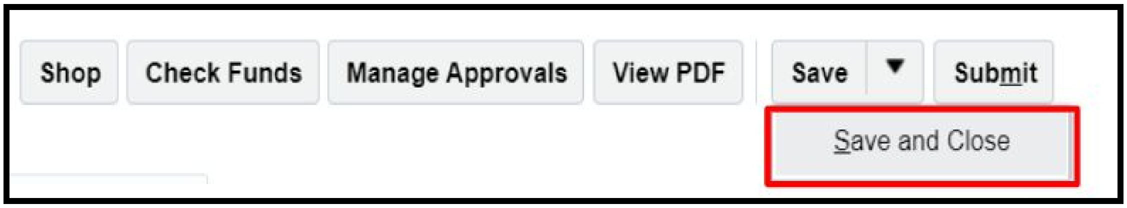
Click ***Back*** to return to the **Requisition** screen.



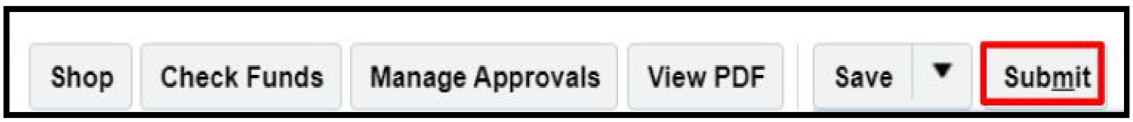
NOTE:

- Do **not** click ***Submit*** from this screen.
- See the [Financial Approval Workflow Stepper]() to learn more approvals.

4. **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.



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.

Next Steps

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.