# SMUSD e-Procurement Requisition to Vendors Procedure

**Navigation:** Main Menu > eProcurement > Requisition

| Step | Action |
|---|---|
| 1. | Click on **Main Menu** |
| 2. | Click on **eProcurement** |
| 3. | Click on **Requisition** |
| 4. | Click the **Requisition Settings** link. |
| 5. | **Requisition Name** field: Naming document is up to you. We recommend naming so that you can search and find orders quickly for reference & re-ordering (Ex. Chromebooks, Math Textbooks, PE Supplies, Desk for Principal, etc.) |
| 6. | **Supplier:** Click on magnifying glass and type vendor Name in the **Name** field, Click **Find.** Click on the Supplier ID for the correct vendor. Please **DO NOT** select a Supplier ID that begins with **"FS"** – these are for CNS department use only. NOTE: All existing vendors in FIS that were paid in the last two years, moved to PeopleSoft with existing "Vendor Code" as new "Supplier ID". New vendors added to PeopleSoft will be numbered "1", "2", "3", etc. |
| 7. | **Category**: Using the lookup. Click on the magnifying glass; Search By: **Description**. Use key words: **Book; Computer; Furnishings; School; Service; Supplies; Toner,** or refer to Category Code "cheat sheet". *ONLY select Category Code on the Requisition Settings screen if all items being ordered are the same category (Office Supplies; Computer Laptops; iPads). If a mix of items, category should be selected at the line item levell. |
| 8. | **Ship To**: Ship To for Requisitions to Outside Vendors will ALWAYS be **"999" District Warehouse.** |
| 9. | **Due Date:** Enter the date when you need to have the product/service |
| 10. | **Attention** field. If you are ordering all items for a specific teacher, you may type their Name and/or Rm # in this field. If your order is split for different departments/staff members, you may utilize the Attention field in the individual line item in the Check-Out process instead of on this screen. |
| 11. | Click **OK.** |
| 12. | Click the **Special Request** link. |
| 13. | Enter **Item Description**. **"Lenovo IBM ThinkPad T450s 20BX-14" Core i5 5300U"** (Please include Manufacturer & Model # in this field.)<br>*NOTE: All items will need to be typed on the requisition. We cannot accept attached lists for orders. |
| 14. | Enter **Price**. **"1,432.99"** |
| 15. | Enter **Quantity**. **"1"** |
| 16. | Enter **Unit of Measure**, or choose from lookup. (Ex: **EA, BX, CA, DZ, PK, RL**) |
| 17. | Enter **Category** using the lookup if you're mixing different types of items on the requisition, (Ex. Printer, Laptop & Carry Case all on same requisition). Refer to Step 7 above, for making selections. |
| 18. | Enter **Supplier Item ID**. This is the supplier's (vendor's) catalog # or ISBN # for books<br>**"361672" or "9781234567x"** |
| 19. | Click **Add to Cart**. If adding more items go back to **Step 13.** |
| 20. | Click **Checkout** button. |
| 21. | If all items are being charged to the same chartstring- go to **Step 22-25**. If not, skip to **Step 26.** |
| 22. | Check **Select All/Deselect All.** |
| 23. | Click the **Mass Change** link. |
| 24. | Enter the **Location** field using the lookup. This Location should be the Site/Department to where you want the Warehouse Staff to deliver your order. (Ex. M&O submits req for work to be done at WPMS, select WPMS as Location; SPED submits req for supplies to be delivered to a teacher at AD, select AD as Location.) |
| 25. | Enter chartstring (budget #) **except for OBJECT** (which defaults from selected category code) if entire order is being charged to a single account. Click **OK**. |
| 26. | If multiple chartstrings for the requisition, click the **+** to add additional line(s) for entering multiple chartstrings. Click **OK** |
| 27. | **Distribution Change Options**: Select **All Distribution Lines**; Click **OK** |
| 28. | If multiple chartstrings for a single item, click on the gray arrow to the left of each line item description; click the gray arrow to the left of "Accounting Lines", and enter chartstring there. If you are charging each line item to multiple account #'s, click the **+** to add additional lines for entering a second chartstring. Object codes should be shown and are based on category code that was selected. |

| | |
|---|---|
| 29. | Please attach backup to the 1st line item on the requisition. Click "Add" next to the "cloud bubble" under **Comments.** Click on Add Attachments, click on Browse. Select your document, click Open and then click Upload. Click **OK**. |
| 30. | **Requisition Comments:** Enter any comments needed. (Ex: Per NCEPC Furniture Bid; For Mary Jones/TOES; Per Quote #SQ-12345). Click "Send to Supplier" if information should be printed on the po.<br>Click "Show at Receipt" if you need to communicate to the W/H staff (ie. Deliver to "Tech Shop" or "Please deliver 1 to TOES and 1 to AD") |
| 31. | **Approval Justification.** Justification for purchase (Ex. Snacks needed for PSAT Testing, or Boys Soccer Uniforms, etc.) |
| 32. | Click **Save & Submit**. |
| 33. | **Confirmation:** Confirmation page shows the Requisition Name, Requisition ID and any pending Approvals |
| 34. | Click on **Check Budget**. You should see **"VALID"** for budget status. **"ERROR"** means the Chartstring isn't valid and a budget revision will need to be processed. Contact Accounting. If you receive a warning Message that reads: **"There are "x" distribution lines whose budget status is either error or warning."** – click **OK,** but you must submit a BAR to cover your negative balance. |