

Purchasing Services Index

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Warehouse Supervisor:

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COMMODITY ASSIGNMENTS:

DAN SANCHEZ

Vehicles, Operations Support, Confirming Requisitions (Dan/Marjeanne)
Furniture, (Dan/Mel) Blanket Orders, Computers & Peripherals,
Audio Visual Equipment

MELANIE GUTIERREZ

Books/Textbooks, Sports Equipment, Music Supplies & Equipment,
Classroom Educational Materials, Subscriptions, Nutrition,
Child Development, Office Depot Accounts, Amazon Accounts,
Office & Technical Equipment,
Supply Works and Home Depot Accounts,
Science, Special Education,
Chargeback Increases/Decreases

MARJEANNE TORRES

Travel-Airfare, Car Rental, Hotel, Registrations,
Ray Morgan Copiers, Blanket Increases/Decreases,
Elevator Services, Invoices, Form 40, Donations, Private Schools

Jessica Sulli

Service Agreements

Travel Made Easy

All District Travel is centrally made through Purchasing Services.

In order to process Travel Requests you must have the following:

- Travel Request Form (#ACC-F014) SIGNED by all approvers must be to Purchasing at least 30 days prior to travel date.
- Escape on-line Conference/Travel Requisitions are created and submitted and APPROVED by Budget.
- Backup (flyers, registration forms etc.) scanned and attached to the requisitions
- Send the total packet to Marjeanne Torres, Purchasing Box 830, or Faxed to 916 399-2021, or E-mailed (Marjeanne-Torres@scusd.edu or Travel@scusd.edu) FOR PROCESSING. (Please note any special instructions)
- Must have a separate requisition for each portion of the trip. (flights, hotel, car rental)

IMPORTANT INFORMATION

AIRFARE RESERVATIONS

- Names must be LEGAL NAMES (what is on the driver's license) No Exceptions
- BIRTHDATES are required, every time travel is requested.
- Gender of attendee
- Please select times and dates for arrivals and returns, or your ideal time frames. The earlier it is booked the better the price. We always try to use Southwest Airlines for travel in California.
- Tickets are non-refundable. *****Note: If you cancel your flight and do not reschedule, a voucher will be issued to YOU by the airlines. This is non-transferable. Cancelling a flight reservation will require YOU to reimburse the District for the ticket.

Please note: Effective October 1st 2020 a California "REAL ID" will be required for all air travel.

REGISTRATIONS

- Complete registration form with all information. Most vendors will accept credit card payments; otherwise A/P may issue a check. If there is a Registration form, please fill out and send to me.
- **A Requisition number is NOT a PO.

HOTELS

- Need the hotel name, phone number, and address.
- Note if you are sharing rooms, any special accommodations should be clearly listed.
- Check in date and check out date must be listed.
- District pays for room, tax and parking when required. Incidentals are not covered by the District; most hotels will require a personal credit card at time of check-in for incidentals.
- If your requested hotel is not available, you will need to provide alternate options.
- Purchasing does not select your hotel.

Enterprise CAR RENTAL

- Need name of person who will be responsible for the rental vehicle, this **must be a SCUSD employee**. See enterprise 2019/2020 attachment.
- Need pick-up date and time and location.
- Need also drop-off date and time.

PLEASE NOTE: RESERVATIONS CANNOT BE MADE UNTIL ALL DOCUMENTS ARE APPROVED. PLEASE DO NOT SUBMIT LAST MINUTE PAPERWORK FOR TRAVEL.
WE ASK FOR 30 DAYS ADVANCE NOTICE.

Vendor Quick Reference

VENDOR NAME	VENDOR #
All West Coachlines	001930
Apple	004950
Barnes & Noble	007425
Book En More	313861
CDW-G	122960
Demco	106122
Enterprise - Car Rentals	108473
Follett	105545
General Binding Corp or GBC	033700
Gopher Sports	106852
Grainger	035831
Kaplan Early Learning	007914
Lakeshore	049121
MacMillan/McGraw	003847
Moore Medical	101928
Office Depot	118487
Ray Morgan	308700
RISO	000220
School Specialty	009743
Silverado Stage	128910
Supply Works	313076

HELPFUL HINTS / ESCAPE ON-LINE

- Escape On-Line requisitions must be in **CAPS**.
- Detailed description **REQUIRED** for each line item for all requisition types. Please include item number, product number, ISBN, etc. Do not use. "See Attached".
- Instructions for the vendors: Create a message in the requisition. Do not insert in note tab.
- Please utilize the note tab for Buyer Instructions.
- **Blanket Order Requisition:**
 - Select:
 - Vendor Requisition
 - Department: Purchasing
 - Blankets are non-taxable
 - Change Order Type to **Blanket Order** (listed in **Section 2**)
- **For Chargeback Blanket Orders:**
 - Select:
 - Vendor Requisition
 - Department: Chargeback
 - Comments: Specify Vendor- **Office Depot, Ray Morgan or Supply Works - (these are the only authorized Chargeback vendors)**
 - Vendor ID: list six-digit vendor code
 - Chargeback are non-taxable
- Some vendors have multiple addresses in the vendor file. Please select the correct address.
 - To select a vendor:
 - Type the first three characters in the vendor ID field
 - F4 or click on the drop down
 - Note: If you cannot find the correct address, please email Buyer for assistance.
- All backup documentation is scanned into the "Attachment" tab of each requisition.

- All confirming requisitions must have invoices, receipts, sign-in sheets etc., scanned and attached in the Attachment tab. Send all original receipts to Accounts Payable, Box 802B. Once scanned it is not necessary to send backup to Budget or Purchasing Services.
- **Confirming requisitions must be under \$400.00.** If over, please submit “Purchasing” requisition with a notation under comments to “Treat as Confirming”.
- For food purchases: Agenda, sign-in sheets and receipts must be scanned and attached to the attachment tab and they must be approved by the Chief Business Office. Purchasing Services contacts the Chief Business Office directly for all food purchases. Please allow extra time for processing.
- Please **“DO NOT”** use the Miscellaneous Vendor ID unless it requires a new vendor set-up. If so, in the note tab, **providing a W-9 form from the new vendor** will reduce the amount of time to process the request. Name, address, phone number & fax number are also needed.

Service Agreements

- School Sites and Departments should not pay presenters directly and then require a reimbursement. A Services Agreement requisition must be created and submitted.
- All vendors are required a submittal of an IRS W9 form and 1099. Please contact the Contract Specialist for assistance.

Reminders

- **Reminder: It is crucial that you keep track of your requisition status from start to finish.** Please do so before contacting Purchasing Services.
- To expedite your requisition please make sure your pricing is correct. In addition, be sure to include shipping costs when applicable.
- All Purchase Orders (when the order is sent directly to your site) must be Received Online (ROL) once you receive the merchandise.
- When requesting a **“RUSH”** in approving your requisition, please remember all requisitions are approved in approval order.
- All computer, peripherals, and software must be created on a **Technology Requisition.**

- **U.S. Mailings:**

FOR ALL MAILINGS you must submit a “Request for Central Administration of U.S. Mail” (form #40-20372). It must have your budget code, and authorized signature and number of pieces being mailed and must go through the mailroom at Serna.

All mail being returned from the Post Office is now being charged by the Post Office at full price “First Class”. **The return fee will be charged to your budget code.** This includes using Metro Mail and other outside mail services. Please update your student/parent or employees address or data base to avoid these extra charges.

NOTE: All mail processed through the mail room at the Serna Center is charged to the department/site. This includes all cum folders being sent and all return mail (letters and postcards)

Chargeback Requisition

Chargeback requisitions are used to set up a budget account that your online purchases or that your copier rental/lease can be “charged back” against. Starting with the 2018-2019 school year the only vendors that should be going on a chargeback requisition are the following:

Supply Works (Clean Source)	Vendor #313076
Office Depot	Vendor #113902
Ray Morgan Copier	Vendor #308700

To create a new Chargeback requisition you will need to complete the **REQUISITION, ITEMS** and **ACCOUNTS** tabs.

- 1) Under the “**Finance**” section click on “**Requisitions**” then on “**Vendor Requisitions.**”
- 2) From “**Vendor Requisitions.**” Click “**New**” choose “**Chargeback**”
- 3) On the first tab, which is the “**Requisition**” tab, you will need to have your **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
 - 3a) **VENDOR ID #** list six-digit vendor ID number.
- 4) **SAVE AND CLOSE** the “**Requisitions**” tab before you move on.
- 5) Next, Click “**Items**” tab.
- 6) From “**Items**” Click “**New**”
- 7) In addition to the “**Order Quantity: 1, Order Unit: Each, Unit price: Your Dollar amount** and **Taxable: No**” please see an example of the verbiage to include in the “**Description**” below:

Blanket order with Office Depot for the (Insert Current Year Here) School Year. Not to exceed (Insert your Dollar Amount Here)
- 8) **SAVE AND CLOSE** the “**Items**” tab before you move on to the next tab.
- 9) Next click the “**Accounts**” tab.
- 10) From “**Accounts**” click “**New**”
- 11) Add your budget code.
- 12) **SAVE AND CLOSE** the “**Accounts**” tab.

SUBMIT THE REQUISITION

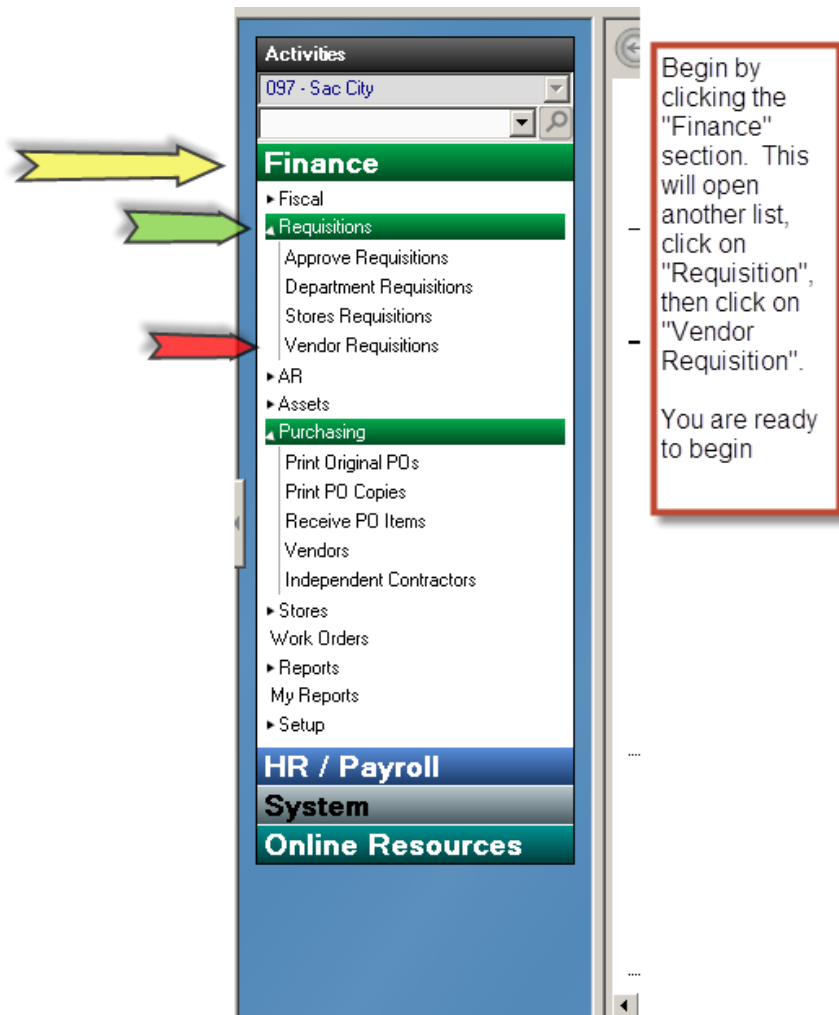
Chargebacks in “**Ready for Payment**” status that have a PO prefix of “**CHB**” have been processed and are ready to use for online purchases.

Chargeback Requisition

Blanket requisitions are Purchase Orders with “Blanket PO” as an “Order Type”. These requisitions are used for the purchase of supplies that are needed continuously throughout the school year, such as custodial supplies.

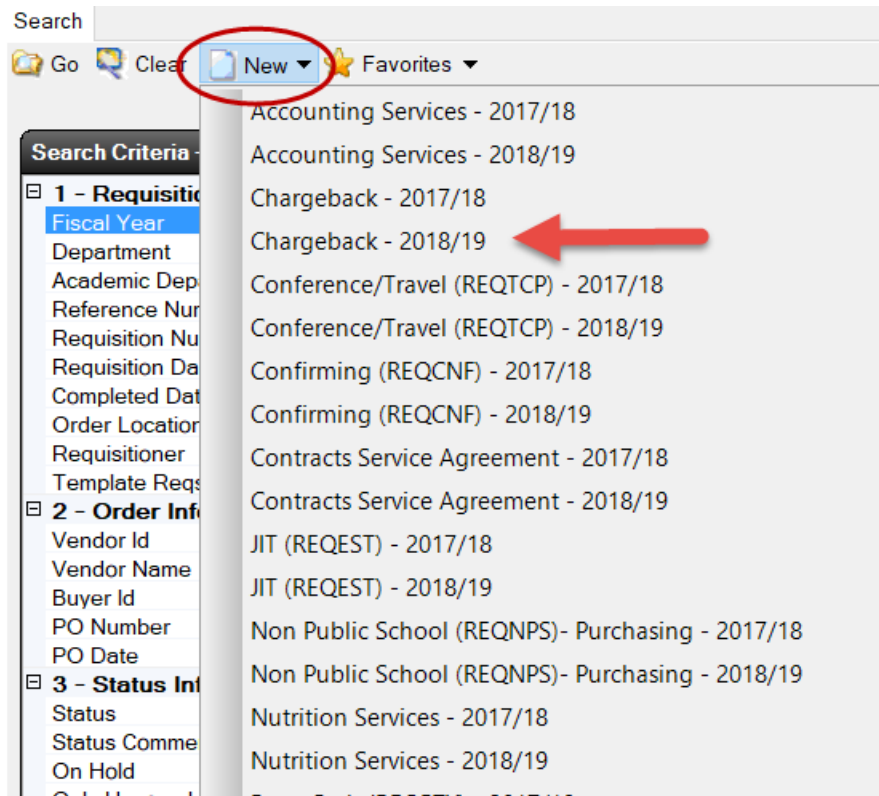
To create a new Chargeback requisition you will need to begin by logging into the Escape System.

Let’s begin! After logging into the Escape system click on “**Finance**” located on the left side of your screen; click on “**Requisitions**” then on “**Vendor Requisitions**”.



Continue to next section

From the “Vendor Requisition” click “New” then choose “Chargeback”.



Note: Your most common requisition types can be created using the above process by clicking on the desired requisition type you want to create.

Continue to next section

Prior to continuing you will need to have your **Order Location** and **Delivery Location** number; this is normally your site number. *Note: If the item(s) to be purchased are to be delivered to another location other than your site, you will need to list that Delivery Location Number.*

Requisition | Items | Accounts | Payments | Quotes | Approvals | Assets | Attachments | Notes | History

Requisition/Vendor Information

1 - Requisition Information

Dept Id: CHRGBCK {Chargeback}

Academic Department

Requisitioner: Dan Sanchez

Request Date: 7/26/2018

Order Location: 0830 {PURCHASING SERVICES}

Delivery Location: 0830 {PURCHASING SERVICES}

Room

Comment: Chargeback for Custodial Supplies

Responsibility

Category

Goods and Services Category

2 - Vendor Information

Order Type: Blanket PO

Online Order

Online Order Contact

Vendor Category

Vendor Id: 313076 {INTERLINE BRANDS INC}

Vendor Address Id: 1

Vendor Name: SUPPLY WORKS

Street Address: 230 HARRIS AVE UNIT 11

City State Zip: SACRAMENTO, CA 95838

Phone / Fax: (916) 923-5039 x0 / (855) 329-2532

Allows Emailing POs: No

Quote Number

3 - PO Information

Leave order type as Blanket PO (default). This can be changed when creating other types of requisitions when needed.

At this point Save/Close your document; make a **note of the requisition number** listed to the left of the screen. Click "OPEN" to continue entering your Chargeback information.

Search | List

Open | New | Copy | Export | Tasks | Grid

Req #	PO #	Order Type	Req Date	Total Amt	Outstanding	Requisitioner	Loc	Comment
CH19-00340		Blanket PO	7/26/2018	0.00	0.00	Dan Sanchez	0830	Chargeback for Custod

Continue to next section.

Click on the **ITEMS** tab and then click on **NEW**. You are ready to begin.

Search List Form

Delete Prev Next Close Cancel Tasks

Req# CH19-00340, PO# , FY 2019 {2018/2019}, Status: Open

Requisition Items Accounts Payments Quotes Approvals Assets Attachments Notes History

Open New Export Tasks

Line	Qty	Unit	Description	Unit Price	Extended Cost	Asset	Qty Rcvd	Date Rcvd	Qty To Rcv	Catalog #	Stores #

In the Description enter your order information, **see example below:**

***** BLANKET PURCHASE ORDER *****

FOR THE PURCHASE OF CUSTODIAL SUPLIES FOR THE 2019-2020 SCHOOL YEAR

FROM 07/01/2019 TO 06/30/2020

NOT TO EXCEED: \$2500.00

AUTHORIZED SIGNATURES:

Dan Sanchez

Marjeanne Torres

Enter **Unit Price**; this is the amount of this blanket order. Click on **Taxable**, click the drop down arrow and click **“NO”**. Click **Save/Close**.

Req# CH19-00340, PO# , FY 2

Requisition Items Accounts Payments Quotes Approvals Assets Attachments Notes History

Open New Export Delete Prev Next Save/New Save/Close Cancel Tasks

1 - Item Order Information

Line Item #	0
Order Quantity	1
Order Unit	EACH
Description	***** BLANKET PURCHASE ORDER *****FOR THE PURCHASE OF C
Unit Price	2,500.0000
Extended Cost	2,500.00
Taxable	No
Stores Item #	
Vendor Catalog #	
Message Before	
Message After	

2 - Account Information

Line	Qty	Unit	Description
			FROM 07/01/2018 TO 06/30/2019
			NOT TO EXCEED: \$2500.00

Description

***** BLANKET PURCHASE ORDER *****

***** BLANKET PURCHASE ORDER *****

FOR THE PURCHASE OF CUSTODIAL SUPPLIES FOR THE 2018-2019 SCHOOL YEAR

FROM 07/01/2018 TO 06/30/2019

NOT TO EXCEED: \$2500.00

OK Cancel

This section is now complete. Continue below.

At this point your requisition is in **“Open”** status. Save/Close the requisition making note of the requisition number. Notify your **Custodial Operations Supervisor** of your order and requisition number, they will complete your order and submit to Purchasing for processing.

Finance - Requisitions - Vendor Requisitions

Search List Form

Delete Prev Next Save/Close Cancel Tasks

Req# CH19-00340, PO# , FY 2019 {2018/2019}, Status: Open

Requisition	Items	Accounts	Payments	Quotes	Approvals	Assets	Attachments	Notes	History		
Open	New	Export	Tasks								
Line	Qty	Unit	Description	Unit Price	Extended Cost	Asset	Qty Rcvd	Date Rcvd	Qty To Rcv	Catalog #	Stores #
1	1	EACH	***** BLANKET PURCHASE OR	\$2,500.0000	\$2,500.00	No	0				

The above steps are for the creating of a **CUSTODIAL SUPPLY REQUISITION** only.

FOR ALL OTHER CHARGEBACKS, SUBMIT THE REQUISITION

Purchasing Requisition / Blanket

Blanket requisitions are Purchasing requisitions with “Blanket PO” as an “Order Type.” These requisitions are used almost like a checking account. You create a “Blanket” requisition for something that you receive frequent bills, on such as water service, transportation services, postage machine bills, etc.

To create a new Blanket requisition, you will to fill out the **REQUISITIONS, ITEMS,** and **ACCOUNTS** tabs. Under the “**Finance**” section click on “**Requisitions**” then on “**Vendor Requisitions.**” From “**Vendor Requisitions.**” Click “**New**” choose “**Purchasing**”

- 1) On the first tab, which is the “**Requisition**” tab, you will need to have your **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- 2) **SAVE AND CLOSE** the “**Requisitions.**” Tab before you move on to the next tab.
- 3) Next Click “**Items**” tab.
- 4) From “**Items**” Click “**New**”
- 5) In addition to the “**Order Quantity: 1, Order Unit: Each, Unit price: Your Dollar amount** and **Taxable: No**” please see an example of the verbiage to include in the “**Description**” below:

BLANKET PURCHASE ORDER

RENTAL OF HOT/COLD WATER DISPENSERS & WATER SERVICE

2019-2020 SCHOOL YEAR

FROM: 07/01/2019 TO 06/30/2020

ACCOUNT NO. 27445558010290

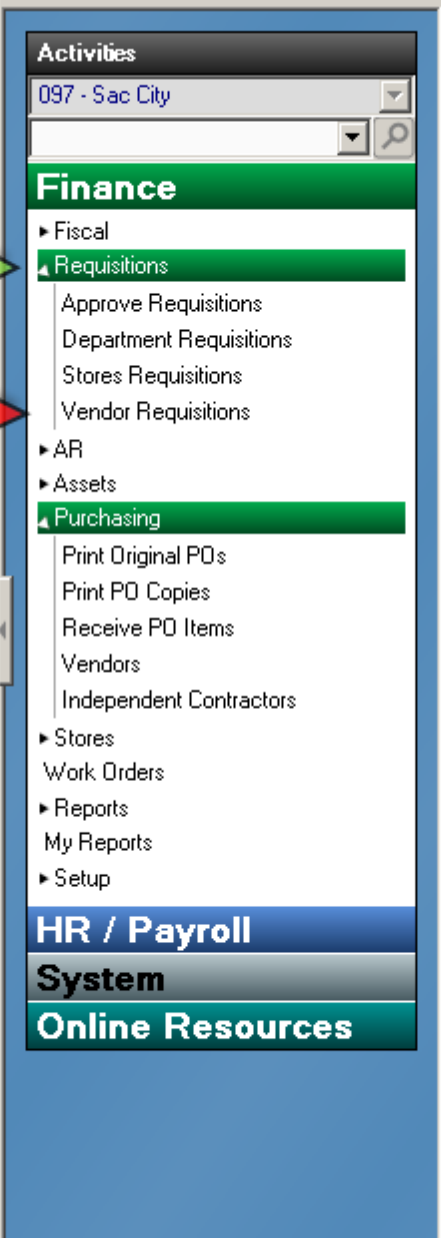
- 1) **SAVE AND CLOSE** the “**items**” tab before you move on to the next tab.
- 2) Next click the “**Accounts**” tab.
- 3) From “**Accounts**” click “**New**”
- 4) Add your budget code.
- 5) **SAVE AND CLOSE** the “**Accounts**” tab.

SUBMIT THE REQUISITION

Purchasing Requisition – Blanket Orders

Blanket requisitions are Purchase Orders with “Blanket PO” as an “Order Type”. These requisitions are used for the purchase of supplies that are needed continuously throughout the school year, such as art supplies.

To create a new Blanket requisition, you will need to Log-in to the Escape System and create a requisition, which in turn, will create the Blanket purchase order. To begin, follow the guide below to create your requisition.

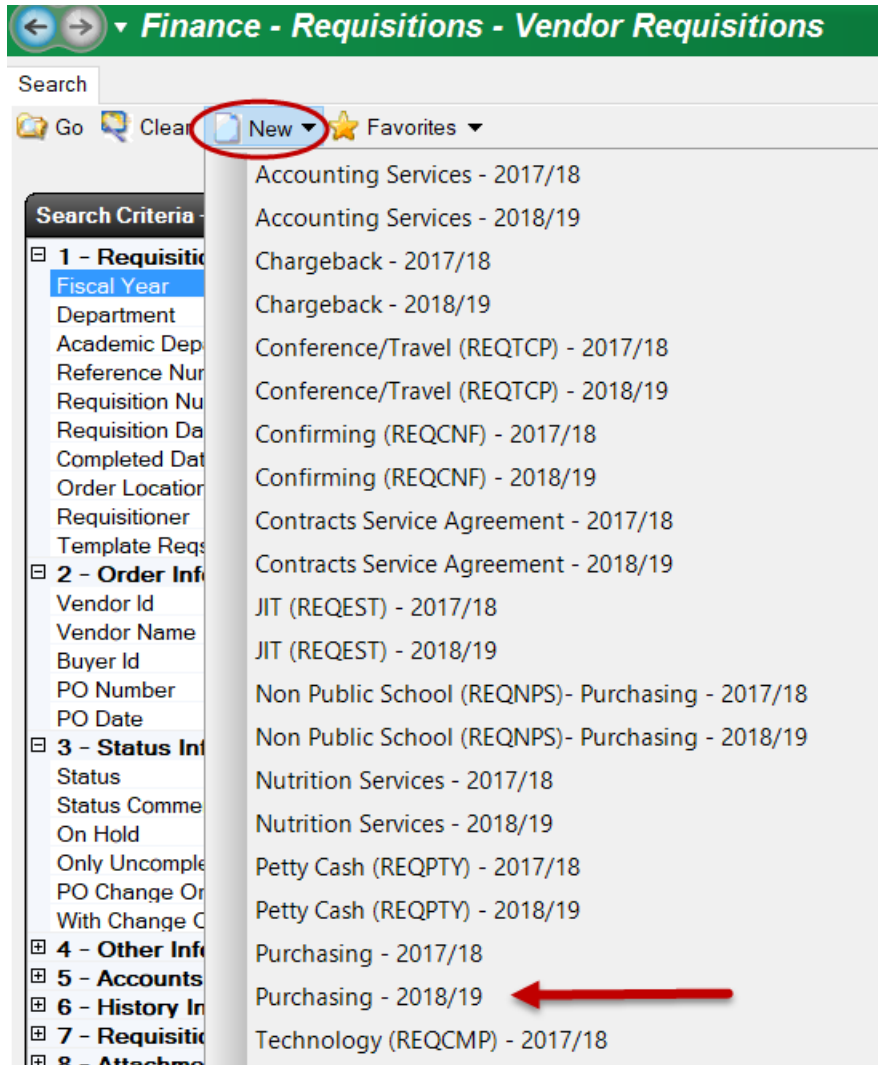


The screenshot shows a vertical navigation menu for the Escape System. At the top, it says 'Activities' and '097 - Sac City'. Below that is a search bar. The main menu is divided into sections: 'Finance' (highlighted in green), 'HR / Payroll' (highlighted in blue), and 'System' (highlighted in grey). Under 'Finance', there are sub-sections: 'Fiscal', 'Requisitions' (highlighted in green), and 'Purchasing' (highlighted in green). Under 'Requisitions', there are links for 'Approve Requisitions', 'Department Requisitions', 'Stores Requisitions', and 'Vendor Requisitions'. Under 'Purchasing', there are links for 'Print Original POs', 'Print PO Copies', 'Receive PO Items', 'Vendors', and 'Independent Contractors'. Other sections include 'AR', 'Assets', 'Stores', 'Work Orders', 'Reports', 'My Reports', and 'Setup'. At the bottom, there is a section for 'Online Resources'. Three arrows point to the 'Finance' section (yellow), the 'Requisitions' sub-section (green), and the 'Purchasing' sub-section (red).

Begin by clicking the "Finance" section. This will open another list, click on "Requisition", then click on "Vendor Requisition".

You are ready to begin

From “Vendor Requisition” click “New”, and then choose “Purchasing”.



This section is now complete. Continue below.

On the first tab, which is the “**Requisition**” tab, you will need to have your **ORDER LOCATION** number (this is your site number). Your **DELIVERY LOCATION** will be the same number. In the **COMMENT** enter “**Blanket Order for Art Supplies**”. Click on **ORDER TYPE** (the system defaults to PO with Receiving), click the drop down arrow and select **BLANKET PO**.

Finance - Requisitions - Vendor Requisitions

Search List Form

Delete Prev Next Save/Close Cancel Tasks

New V

Requisition Items Accounts Payments Quotes Approvals Assets Attachments Notes H

Requisition/Vendor Information

1 - Requisition Information

Dept Id	PURCH {Purchasing}
Academic Department	
Requisitioner	Dan Sanchez
Request Date	7/26/2018
Order Location	0830 {PURCHASING SERVICES}
Delivery Location	0830 {PURCHASING SERVICES}
Room	
Comment	Blanket Order for Art Supplies
Responsibility	
Category	
Goods and Services Category	

2 - Vendor Information

Order Type	PO with Receiving
Online Order	
Online Order Contact	
Vendor Category	
Vendor Id	
Vendor Address Id	
Vendor Name	
Street Address	
City State Zip	
Phone / Fax	
Allows Emailing POs	
Quote Number	

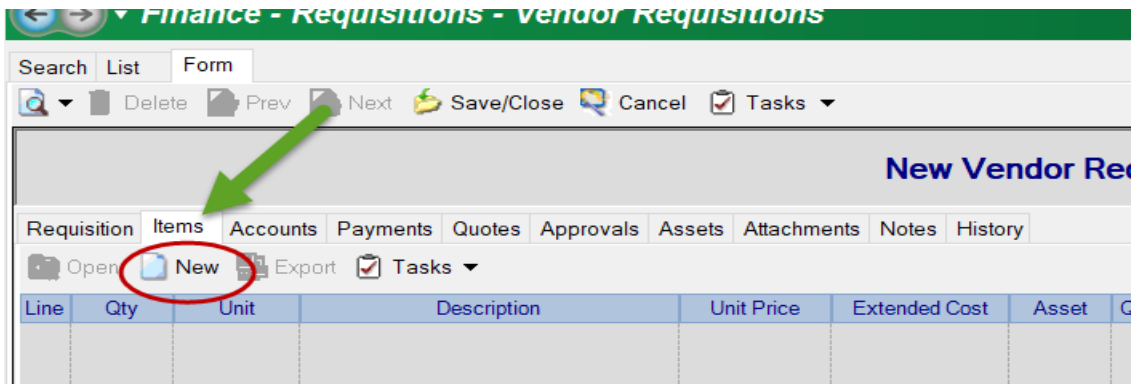
3 - PO Information

Order Type dropdown menu:

- PO with Receiving
- Description ^
- Blanket PO
- PO with Receiving

This section is now complete. Continue below.

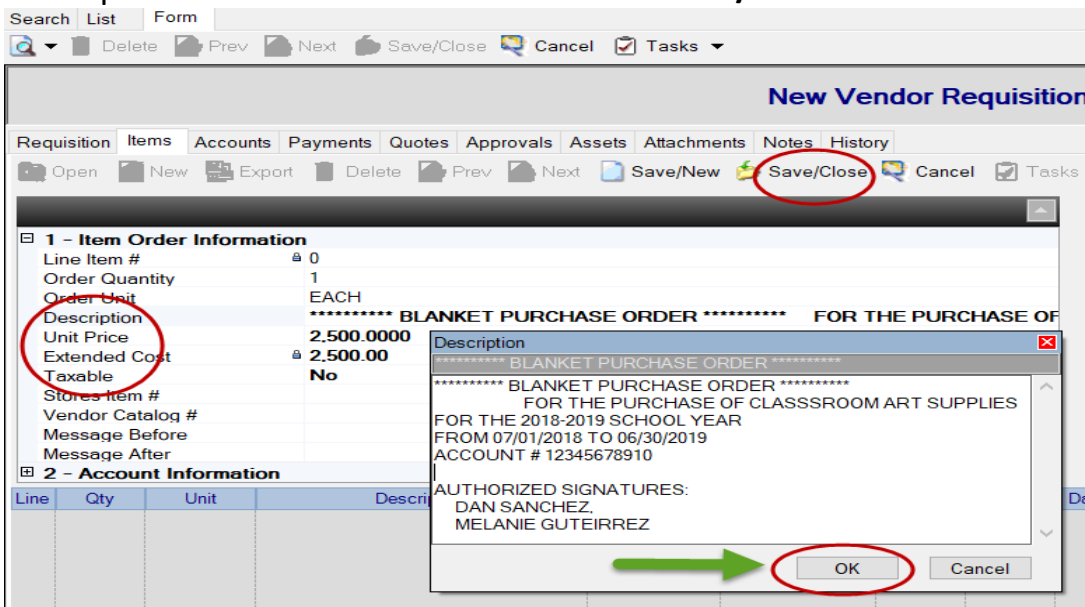
Click on the **ITEMS** tab and then click on **NEW**. You are ready to begin.



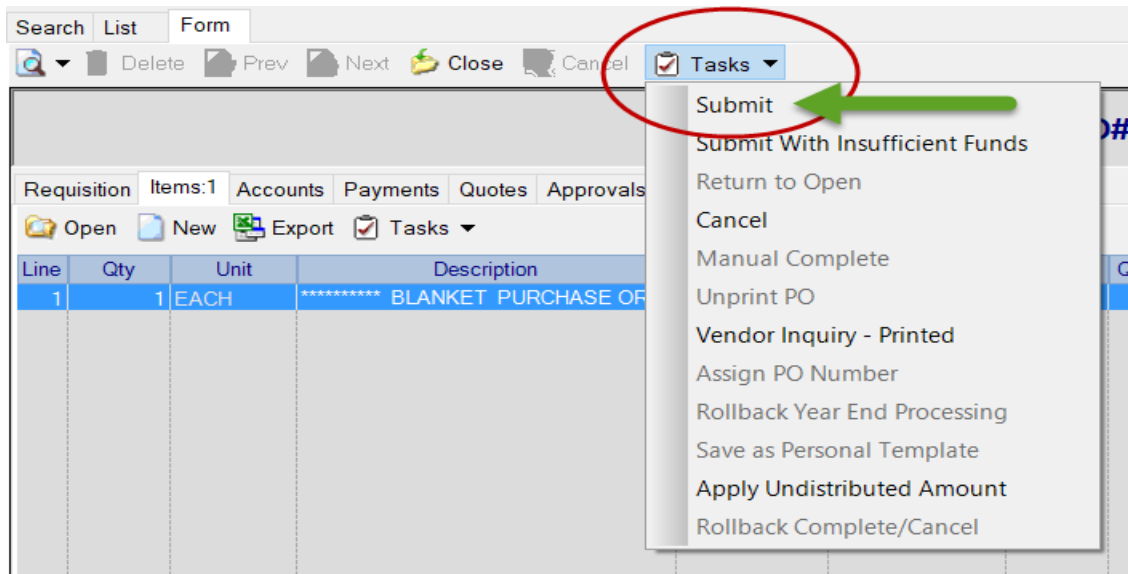
In the Description enter your order information, see example:

***** BLANKET PURCHASE ORDER *****
FOR THE PURCHASE OF ART SUPPLIES FOR THE 2018-2019 SCHOOL YEAR
FROM 07/01/2019 TO 06/30/2020
ACCOUNT # 12345678910
AUTHORIZED SIGNATURES:
DAN SANCHEZ,
MELANIE GUTIERREZ

Enter **Unit Price**; this is the amount of this Blanket order. Click on **Taxable**, click the drop down arrow and click **“NO”**. Click **Save/Close**.



This section is now complete. Continue below.

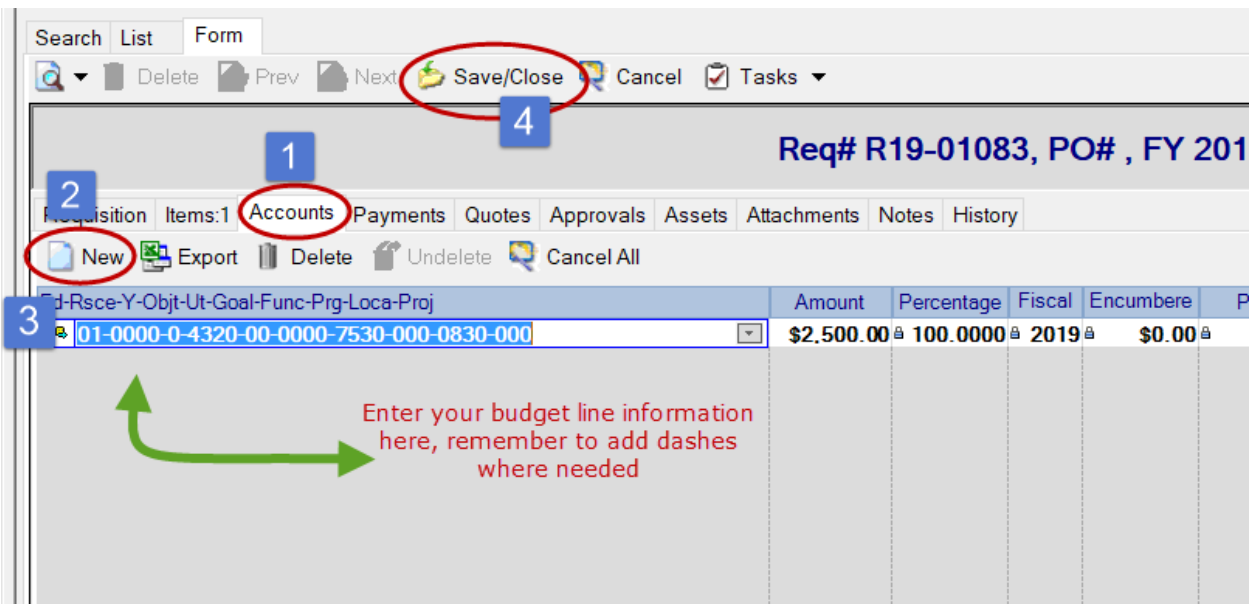


The following steps are to be followed to complete a Blanket Purchase Order for other vendors which are approved by the Purchasing Department.

Note: You will need to know the correct accounting line information, if unknown contact your fund specialist for assistance.

1. Click on the "ACCOUNTS" tab
2. Then click "New"
3. Enter your budget line account information
4. See example below.
5. Save/Close

NOTE: If you are not able to Save/Close you may have not saved and closed a tab or an item has not been entered correctly; review all tabs which you opened and look for the **red dot** indicating information required.



Your requisition is now ready to be submitted. Remember to write down your requisition number. Once the requisition is approved by Budget, the Purchasing Department will review and issue a Blanket order number. When contacting the Purchasing Department with questions regarding your order, please have your requisition number available.

Please contact the Purchasing Department if you have any questions.

Dan Sanchez, Purchasing Manager II, 916-643-9460
 Marjeanne Torres, Office Technician III, 916-643-9461
 Melanie Gutierrez, Buyer II, 916-643-9464

Confirming Requisition

Confirming requisitions are used to pay a vendor for an item or service you have already received. Confirming requisitions are for items or services totaling **\$400.00** or less. Always attach your back-up documentation to the requisition (receipts, invoices, etc.)

Confirming Requisition: To create a new Confirming Requisition, you will complete the following tabs: **REQUISITION, ITEMS**, and attach your documentation in the **“Attachment”** tab.

- 1) From **“Vendor Requisitions.”** Click **“New”** choose **“Confirming”**
- 2) On the **“Requisition”** tab, you will need to have your **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- 3) **SAVE AND CLOSE** the **“Requisitions,”** tab before you move on to the next tab.
- 4) Next Click **“Items”** tab.
- 5) From **“Items”** Click **“New”**
- 6) Click **“New”** for each new item you would like to add.
- 7) Each item will need to include **“Order Quantity: 1, Order Unit: Each, Unit price”** in the **“Description,** be sure to include the invoice number if there is an invoice pertaining to this requisition.
- 8) **SAVE AND CLOSE** the **“Items”** tab before you move on to the next tab.
- 9) Next click the **“Accounts”** tab.
- 10) From **“Accounts”** click **“New”**
- 11) Add your budget code.
- 12) **SAVE AND CLOSE** the **“Accounts”** tab.
- 13) Next click the **“Attachment”** tab.
- 14) From **“Attachment”** click **“New”**
- 15) Find and attach your document/s.
- 16) **SAVE AND CLOSE** the **“Attachment”** tab.

SUBMIT THE REQUISITION

Purchasing Requisition

Purchasing requisitions are the most commonly used. They are the standard requisition type. Examples of the commodities are: sports equipment, office supplies, novels and subscriptions. To create a purchasing requisition, you will need to complete the **REQUISITIONS**, **ITEMS**, and **ACCOUNTS** tabs.

Purchasing Requisition

- 1) From “**Vendor Requisitions.**” Click “**New**” choose “**Purchasing**”
- 2) On the “**Requisition**” tab, you will need to have your **ORDER LOCATION**, **DELIVERY LOCATION**, **COMMENT** and **VENDOR ID**.
- 3) **SAVE AND CLOSE** the “**Requisitions.**” Tab before you move on to the next tab.
- 4) Next Click “**Items**” tab.
- 5) From “**Items**” Click “**New**”
- 6) If you have a **quote** from the vendor, you may state this in your description instead of listing each item. You will need to attach the quote in the “**Attachment**” tab. **Screen print outs of web pages and/ or shopping charts are not acceptable.** In other cases, you will need to list each item.
- 7) Each item will need to include “**Order Quantity, Order Unit, Description and Unit price.**” *Descriptions must include an item number as well as a description.*
- 8) **SAVE AND CLOSE** the “**Items**” tab before you move on to the next tab.
- 9) Next click the “**Accounts**” tab.
- 10) From “**Accounts**” click “**New**”
- 11) Add your budget code.
- 12) **SAVE AND CLOSE** the “**Accounts**” tab.

SUBMIT THE REQUISITION

Purchasing as a Confirming Requisition

Confirming requisitions are used to pay a vendor for an item or service you have already received. *Purchasing requisitions are treated as a “confirming requisition” for items or services **OVER \$400.00**.* Always attach your back up documentation to the requisition. (receipts, invoices, etc.) To create a Purchasing/Confirming requisition, you will need to fill out the **REQUISITION, ITEMS, and ACCOUNTS** tab and attach your back up documentation in the **ATTACHMENT** tab. From “**Vendor Requisitions.**” Click “**New**” choose “**Purchasing**”

- 1) On the “**Requisition**” tab, you will need to have your **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.** **YOUR COMMENT SHOULD SAY: TREAT AS CONFIRMING.**
- 2) **SAVE AND CLOSE** the “**Requisition.**” Tab before you move on to the next tab.
- 3) Next Click “**Items**” tab.
- 4) From “**Items**” Click “**New**”
- 5) Click “**New**” for each new item you would like to add.
- 6) Each item will need to include “**Order Quantity, Order Unit, Description and Unit price.**” *“Be sure to include the invoice number if there is an invoice pertaining to this requisition.*
- 7) **SAVE AND CLOSE** the “**Items**” tab before you move on to the next tab.
- 8) Next click the “**Accounts**” tab.
- 9) From “**Accounts**” click “**New**”
- 10) Add your budget code.
- 11) **SAVE AND CLOSE** the “**Accounts**” tab.
- 12) Next click the “**Attachment**” tab.
- 13) From “**Attachment**” click “**New**”
- 14) Find and attach your document.
- 15) **SAVE AND CLOSE** the “**Attachment**” tab.

SUBMIT THE REQUISITION

Technology Requisition

Technology requisitions are used when you are purchasing computers, computer memory, licenses, downloads, etc. To create a Technology requisition you will need to fill out the **REQUISITION, ITEMS,** and **ACCOUNTS** tabs.

- 1) From “**Vendor Requisitions.**” Click “**New**” choose “**TECHNOLOGY**”
- 2) On the “**Requisition**” tab, you will need to have your **ORDER LOCATION, DELIVERY LOCATION, COMMENT** and **VENDOR ID.**
- 3) **SAVE AND CLOSE** the “**Requisition.**” Tab before you move on to the next tab.
- 4) Next Click “**Items**” tab.
- 5) From “**Items**” Click “**New**”
- 6) List the description of each item. Including item, SKU, or manufacturing numbers.
- 7) Each item will need to include “**Order Quantity, Order Unit, Description and Unit price.**”
- 8) **SAVE AND CLOSE** the “**items**” tab before you move on to the next tab.
- 9) Next click the “**Accounts**” tab.
- 10) From “**Accounts**” click “**New**”
- 11) Add your budget code.
- 12) **SAVE AND CLOSE** the “**Accounts**” tab.

NOTE: All the technology requisitions require the approval of the Chief Information Officer. Please allow extra time when ordering.

SUBMIT THE REQUISITION

How to Copy a Requisition?

1. Hover over the Requisition you would like to copy. (Should be blue)

The screenshot shows the 'Finance - Requisitions - Vendor Requisitions' interface. A table of requisitions is displayed with columns for Item #, PO #, Total Amt, Outstanding, Requisitioner, Loc, Comment, Buyer Id, Status, On Hold, Vendor Id, Vendor, Credit Card Id, Charged, # Chgs, Delivery, Completed, and Open Attachments. The requisition for 'SAC BEE SUBSCRIPTION REN' (Item # 118487) is highlighted in blue. The interface includes a search bar, a menu with options like 'Copy', and a sidebar with navigation links for Finance, HR/Payroll, and Online Resources.

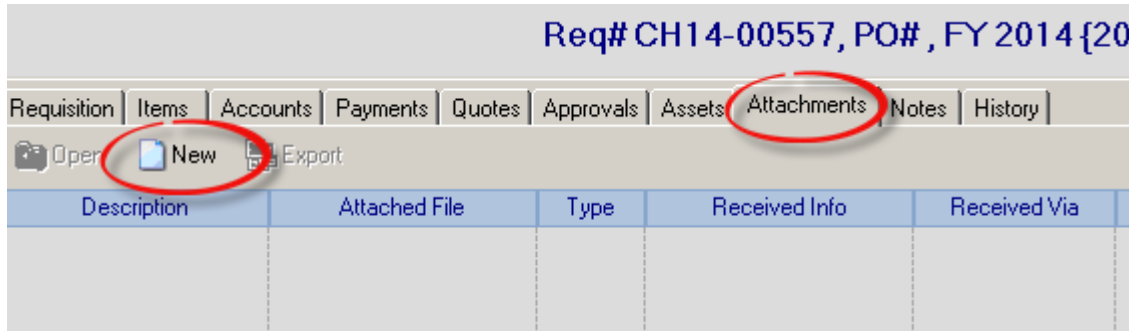
Item #	PO #	Total Amt	Outstanding	Requisitioner	Loc	Comment	Buyer Id	Status	On Hold	Vendor Id	Vendor	Credit Card Id	Charged	# Chgs	Delivery	Completed	Open Attachments
C19-0048		294.96	0.00	MARJEANNE Lib	0830	SAC BEE SUBSCRIPTION REN		Complete	No	118487	US BANK - SCUSD		0	0		7/25/2018	2 attachments available
C19-0055		496.00	496.00	Marjeanne Torres	0830	P.O BOX Service Fee		Cancelled	No	128615	SCUSD/TRAVEL C		0	0		8/23/2018	
C19-00296		225.00	225.00	Marjeanne Torres	0830	RENEWAL USPS CAPS ACCO		Ready for Pay	No	128615	SCUSD/TRAVEL C		0	0			1 attachment available
C19-00330		225.00	0.00	Marjeanne Torres	0830	PERMIT PRINTING P1 744 - USP		Ready for Pay	No	122716	USPS - MAILING R		0	0		12/1/2018	1 attachment available
CH19-00093	CH19-00029	1,200.00	1,200.00	Marjeanne Torres	0830	SUPPLY WORKS/SCUSTODIAL	TEVANS	Complete	Yes	213076	SUPPLY WORKS		0	0		7/25/2018	1 attachment available
CH19-00094	CH19-00011	3,360.00	2,009.81	Marjeanne Torres	0830	OFFICE DEPOT - OFFICE SUP	MELANIE	Ready for Pay	No	113902	OFFICE DEPOT		2/22/2019	1			1 attachment available
CH19-00095	CH19-00012	20,000.00	11,075.00	Marjeanne Torres	0830	OFFICE DEPOT - SERVICE SUP	MELANIE	Ready for Pay	No	113902	OFFICE DEPOT						
CH19-00096	CH19-00063	2,400.00	2,400.00	Marjeanne Torres	0830	CARDON CORPER	MELANIE	Ready for Pay	No	388700	RAY MORGAN/SC						
R19-02364	R19-00528	5/16/2017	0,943.76	0.00	MARJEANNE Lib	0830	BID ADVERTISING	MELANIE	Complete	No	075681	SACRAMENTO BE	6/7/2018	3		10/15/2018	3 attachments available
R19-01491	R19-00558	PO with Rece	8/17/2017	1,818.60	1,818.60	MARJEANNE Lib	0830	INH FORMS/ REPLENISHING	MELANIE	Ready for Pay	No	075978	SCUSD / CENTRAL		0	9/21/2017	
R19-02661	R19-01738	PO with Rece	10/24/2017	1,988.00	1,988.00	MARJEANNE Lib	0510	CJA Alcazar Field Trip	MELANIE	Ready for Pay	No	118487	U S BANK/SCUSD		0	11/23/2017	1 attachment available
R19-03402	R19-01786	PO with Rece	11/22/2017	618.00	0.00	MARJEANNE Lib	0830	P.O BOX RENEWAL FEE 8246	DAVIS	Complete	No	118487	U S BANK/SCUSD		0	2/19/2018	7/25/2018 1 attachment available
R19-00306	R19-01771	Blanket PO	6/1/2018	8,000.00	2,316.15	Marjeanne Torres	0830	DAILY JOURNAL FOR BID AD	MELANIE	Ready for Pay	No	022153	DAILY JOURNAL C		0		
R19-00306	R19-01775	Blanket PO	6/1/2018	10,000.00	9,393.97	Marjeanne Torres	0830	RDM- MAINT & SUPPLIES #1	MELANIE	Ready for Pay	No	110565	RICOH USA		0		
R19-00307	R19-01776	Blanket PO	6/1/2018	9,500.00	8,289.85	Marjeanne Torres	0830	DIPLOMA INSERTS - JOSTEN	MELANIE	Ready for Pay	No	040468	JOSTENS RIC/CP		0		
R19-00308	R19-00117	Blanket PO	6/1/2018	4,000.00	148.23	Marjeanne Torres	0830	SUPPLIES FOR MAILING MAC	TEVANS	Ready for Pay	No	001259	PITNEY BOWES G		0		
R19-00309	R19-01777	Blanket PO	6/1/2018	10,300.00	32.16	Marjeanne Torres	0830	MAIL METER EQUIPMENT	MELANIE	Ready for Pay	No	001259	PITNEY BOWES G	7/25/2018	1		1 attachment available
R19-00310	R19-01778	Blanket PO	6/1/2018	13,350.00	1,547.87	Marjeanne Torres	0830	PITNEY BOWES PRESORT #3	MELANIE	Ready for Pay	No	309990	PITNEY BOWES P	5/7/2019	1		1 attachment available
R19-00311	R19-01779	Blanket PO	6/1/2018	225,000.00	25,000.00	Marjeanne Torres	0830	RESERVE ACCOUNT/PITNEY	MELANIE	Ready for Pay	No	128680	RESERVE ACCOU		0		
R19-00312	R19-01910	Blanket PO	6/1/2018	600,000.00	115,466.76	Marjeanne Torres	0830	RAY MORGAN COMPANY CO	MELANIE	Ready for Pay	No	118827	RAY MORGAN CO		0		
R19-00313	R19-01811	Blanket PO	6/1/2018	5,100.00	4,538.00	Marjeanne Torres	0830	MICROSCOPE/SCIENTIFIC IN	MELANIE	Ready for Pay	No	079112	SCIENTIFIC INSTR		0		
R19-00314	R19-01812	Blanket PO	6/1/2018	225.00	0.00	Marjeanne Torres	0830	CONVEYANCE INVOICES (PE	MELANIE	Complete	No	106257	STATE OF CALIF		0	5/16/2019	
R19-00315	R19-01813	Blanket PO	6/1/2018	3,000,000.00	713,140.45	Marjeanne Torres	0830	MASTER AGREEMENT FOR C	MELANIE	Ready for Pay	No	118581	U S BANK/CPRO		0		
R19-00316	R19-01814	Blanket PO	6/1/2018	6,250.00	5,311.22	Marjeanne Torres	0830	BID ADVERTISING	MELANIE	Ready for Pay	No	075681	SACRAMENTO BE		0		
R19-01895	R19-00970	PO with Rece	8/23/2018	496.00	496.00	Marjeanne Torres	0830	PO BOX Service Fee # 24870	MELANIE	Ready for Pay	No	118487	SCUSD - US BANK		0	10/18/2018	2 attachments available
R19-03112	R19-02036	PO with Rece	12/4/2018	915.00	915.00	Marjeanne Torres	0830	BRM PERMIT ANNUAL FEES/	MELANIE	Ready for Pay	No	128615	SCUSD/TRAVEL C		0	1/6/2019	1 attachment available
V19-01489		Direct Payme	2/27/2018	1,050.00	0.00	Allie McKoy / Marge	0445	REGISTRATION - HBCUC	Complete	No	128615	SCUSD - TRAVEL		0		2/27/2018 3 attachments available	
V19-01490		Direct Payme	2/27/2018	1,771.38	0.00	Allie McKoy / Marge	0445	HOTEL HBCUC	Complete	No	128615	SCUSD - TRAVEL		0		2/27/2018 3 attachments available	
V19-01491		Direct Payme	2/27/2018	2,775.36	0.00	Allie McKoy / Marge	0445	AIRFARE HBCUC	Complete	No	128615	SCUSD - TRAVEL		0		2/27/2018 3 attachments available	

2. Click on the "Copy" Button top, third button.
3. Once you select "copy" button a prompt will pop up asking you to select the year you would like the NEW requisition to be.
4. Edit each field, update information, quantity and or descriptions, ensure budget line is correct, and submit your requisition.

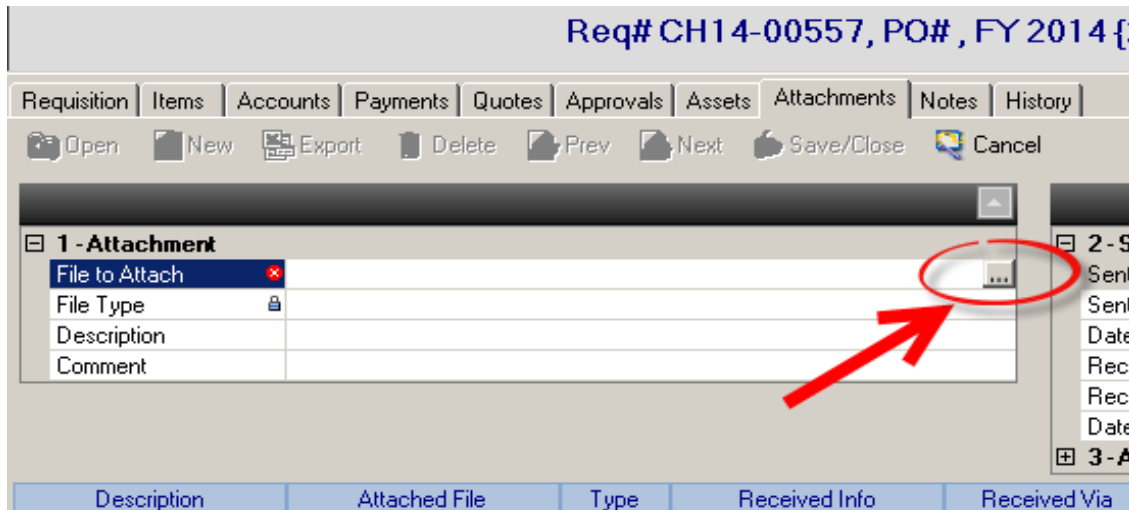
Attaching Documents to a Requisition

The following guidelines will take you through the steps to attach a document to your requisition. This process is the same for all types of requisitions. Attachments can be done at any time to the requisition even after the requisition has been submitted.

Open your requisition click on the “Attachments” tab and click “New”.

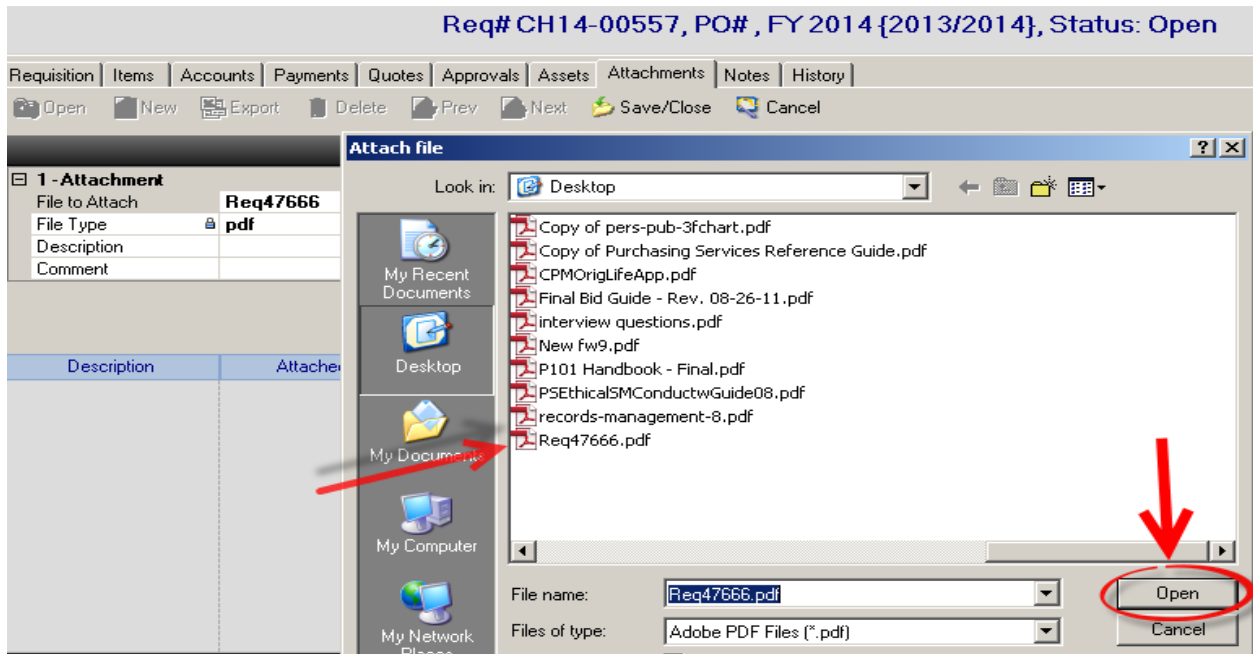


On the “File to Attach” line click on the box to open your saved files.

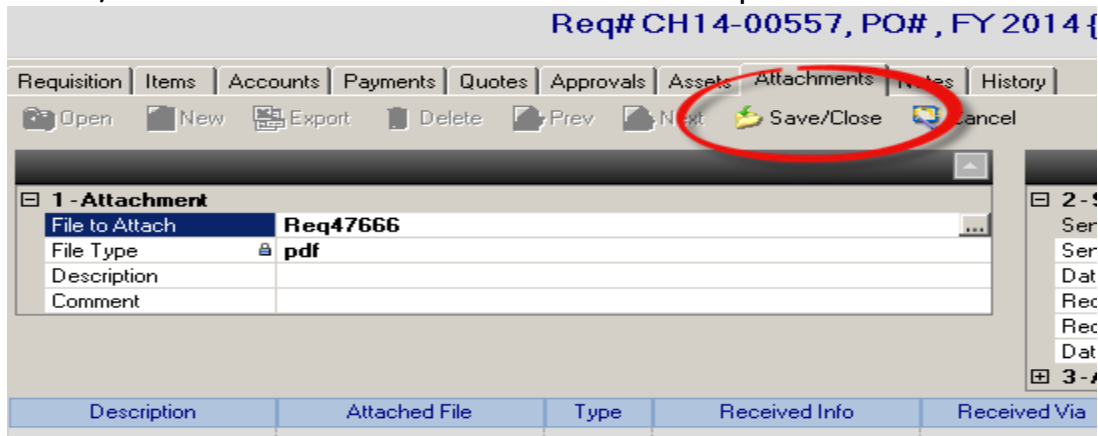


Note: documents can be scanned from your Canon Copier and sent to your email. Save your scanned documents to your desktop or to a folder for ease on finding them.

Click on your document, then click “Open”. This will attach the document to your requisition.



Once attached the file name will appear in the “File to Attach” line. Click “SAVE/CLOSE” to save the attachment to the requisition.



Click “Save/Close” to close and save all changes to your requisition. If another document is needed to be attached to this requisition Click on “New” and follow the same process as outline above. Remember to Save/Close each attachment.

Requisition Process Q & A

1. Who Creates my Requisition...Site Responsibility?
 - Yes, this is the site responsibility to create and submit the requisition. Note: Remember to check the status of all of your requisitions, and follow-up with the appropriate department.
2. Who Approves Your Requisition?
 - Categorical Staff, where applicable
 - Budget Department (Fund Specialists, Supervisor and Director)
 - Technology Services for computers and technology related items
 - Literacy and Curriculum (Textbook requisitions only)
 - Purchasing Department for final approval on all requisitions
3. What Does Purchasing Do with Your Requisition?
 - Process requisition: review and determine accurate description & product number, cost, delivery location, preferred vendor
 - Determine appropriate purchase limits, where applicable
 - Print Purchase Order and forward to vendor (email/fax/us mail)
4. How do I increase my Office Depot Chargeback?
 - Please submit a request to Purchasing. Include: Chargeback number, Increase amount, and what budget codes to use.
5. How do I check the status of my order?
 - Please contact Purchasing to assist you in the status of your order. (if in printed status)
6. How do I return or exchange products?
 - Please contact the Buyer that processed your order. They will assist you with the process, and act as the "liaison" between your site / department and the vendor.
7. How do I make adjustments to my travel and or cancel?
 - Please contact Marjeanne Torres as soon as possible. 916-643-9464

Warehouse Services

1) Warehouse Services:

a) Mail delivery:

i) Interoffice mail:

(1) Food, interoffice mail and freight are scheduled for daily delivery (freight may be delayed on days with higher volume of food). Children's Centers, have assigned days that they are serviced. Unions are to be picked up and or delivered as requested only. If the school/ site should have mail for the Unions, there will be no interruption; it will be delivered the next working day.

ii) County Mail:

(1) County mail directories can be purchased thru the Sacramento County Office of Education print shop for \$20.00 each. You can also access the same directory online under Sacramento County Office of Education 2017 Public School Directory.

(a) All county mail (non-district mail) must have the Districts name clearly labeled on the front of the package. If the school/ site are not shown in the directory, it will have to be sent by USPS. Please keep in mind that West Sacramento Schools are Yolo County and will have to be sent USPS.

iii) Student cumulative Files:

(1) When processing files to transport within the District, please butcher wrap and or box items using box tape to properly secure items. No CUMS will be picked up loose. All boxes must have lids and secured to the box for transport. The school to which you are sending to must be printed clearly on top of the box.

(2) Drivers have a schedule to which they maintain and adhere to. If you think that your outgoing mail should require a hand truck, please contact the Warehouse so that the driver can be prepared and help to expedite the delivery.

b) E-waste

i) Obtain the proper forms for recording the itemized equipment for surplus. You may find the form WHS-F004, by going onto the Districts intranet and using the search box, type WHS-F004, once populated, you may download the forms and enter on the computer or print and manually enter the required information (please write clearly for numbers can easily be transposed as letters).

ii) All e-waste must have the approval from the board to be picked up from the warehouse for surplus.

iii) Submit completed forms for approval to the Warehouse Supervisor, by email, fax, or interoffice mail box 835.

- iv) Once approved, the Warehouse will contact the site to schedule a pick up:
 - (1) All equipment must be palletized. If you do not have available pallets, please contact the Warehouse to have empty pallets dropped at your location.
 - (2) Please make sure that the product is in a location that can be accessible by pallet jack for pick up. If product is elsewhere on campus, the plant manager and or staff are required to assist the warehouse to load pallets to help expedite the pickup for the drivers are on a timely schedule and have other sites to meet deadlines.

Please note: No district property is to be given away or donated, this includes: (computers, tv, projectors monitors, etc. Please call Purchasing Services for any questions.

c) Universal Waste:

- i) Universal waste is now administered by Risk Management.
 - (1) You may obtain the procedures, labels, and request for pick up forms by using the Districts intranet and typing in the search box, Universal waste.
 - (2) Once all documentation has been completed, contact Risk Management at box 840 or Fax the completed request by dialing 399-2071. The Risk Management staff will schedule the pickup.

d) Request for pick up:

- i) If you wish for the Warehouse to transport any equipment to other sites, the request for services form (PUR-F001) must be filled out and emailed/ faxed/ or sent thru interoffice mail to the Warehouse, box 835 for scheduling. No product will be picked up without paperwork. The more information provided will help expedite processing.

WHEN IN DOUBT PLEASE



Contact Us

You're Purchasing TEAM,



Thank you!