SAN DIEGO
Community College District

PEOPLESOFT USER MANUAL FOR PURCHASING

August 25, 2026

Revised

SAN DIEGO COMMUNITY COLLEGE DISTRICT
PEOPLESOFT USER MANUAL FOR PURCHASING

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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 (https://PeopleSoft://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 slips PeopleSoft.
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 immediately report any lost, stolen, or misplaced card 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:
   https://PeopleSoft://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 uploads 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 W-8 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 supplier's 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 / non-technology)
- ❖ Non-Software licensing
- ❖ Membership fees
- ❖ SponsorshiPeopleSoft/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 the 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 $20,000, 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, firsthand).

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 W-9 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 W-9 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.

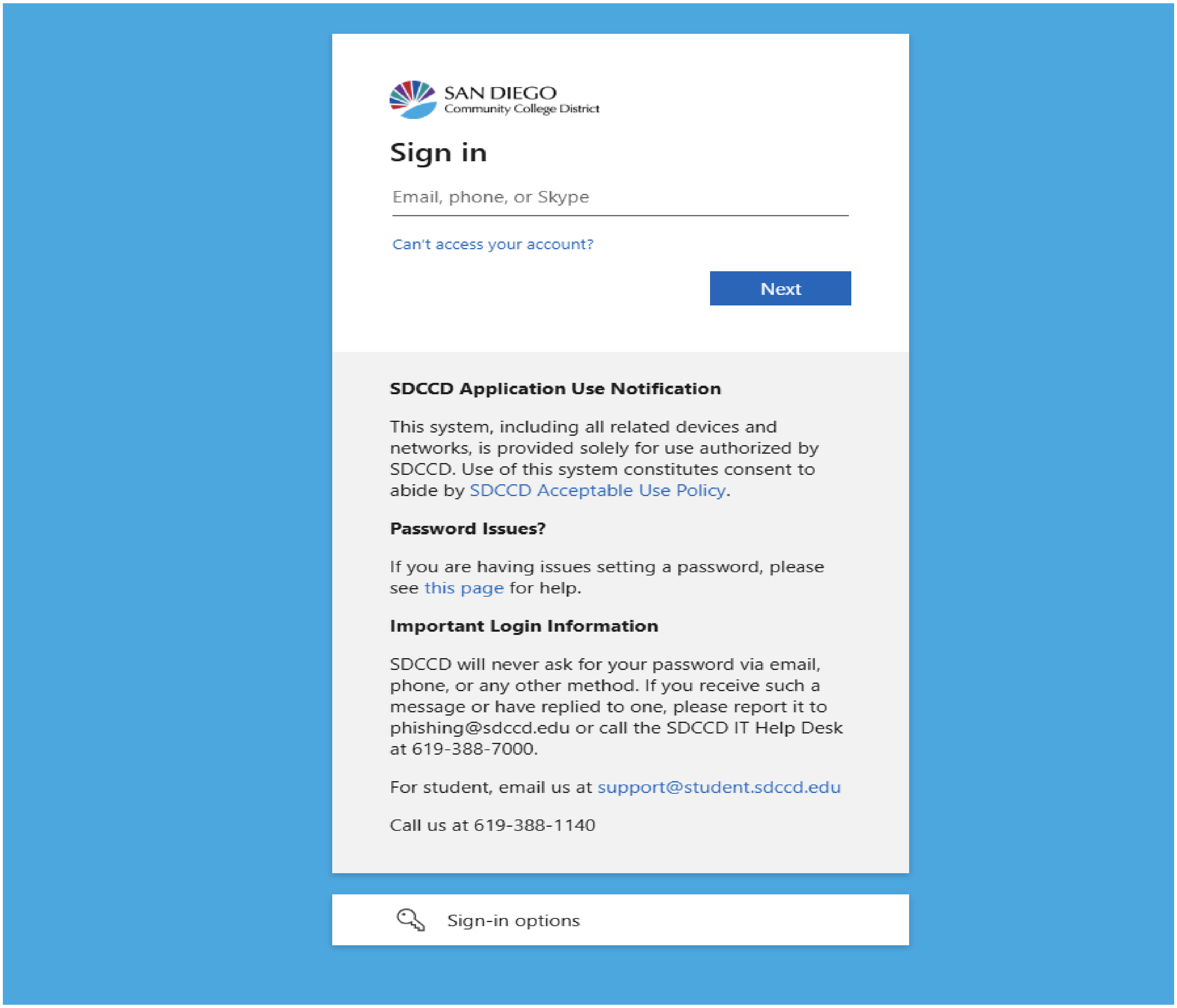
For assistance regarding the supplier process, please contact the Purchasing and Contract Services Department at 619-388-6562.

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/

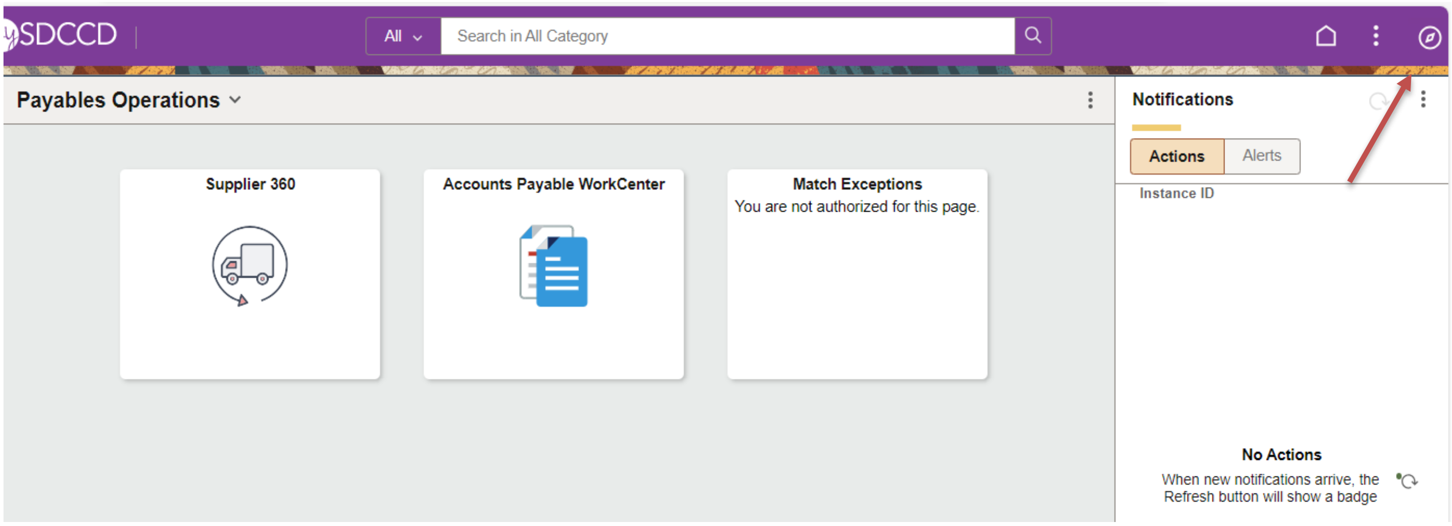
****NOTE: Add this website to your internet favorites for easy access.**

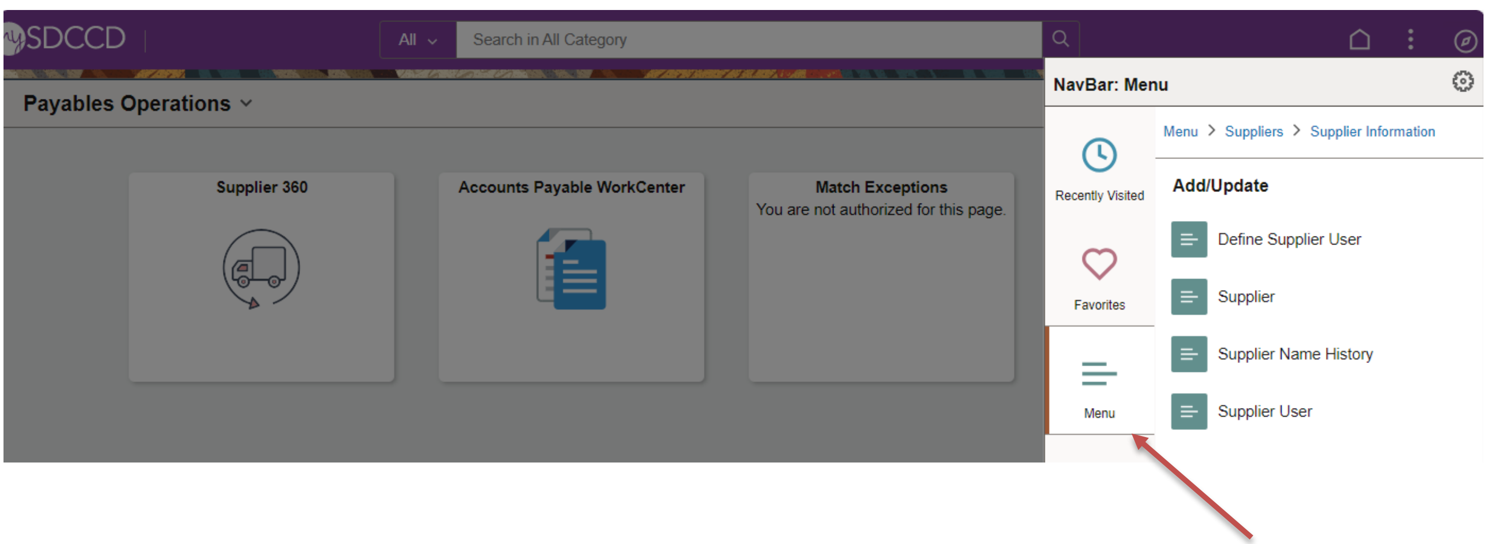


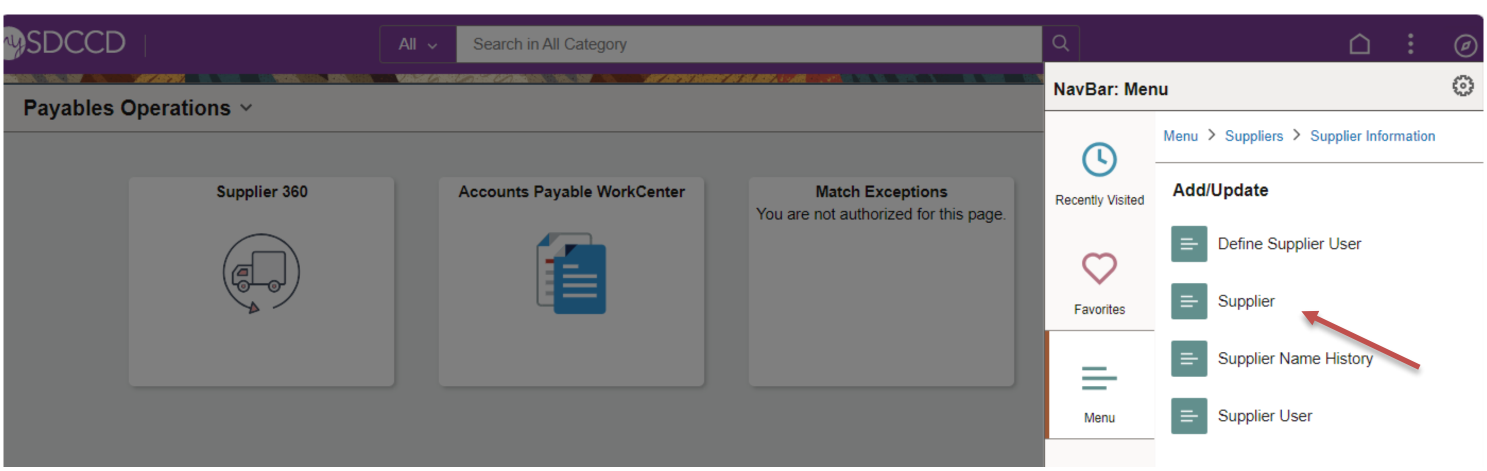
The District now uses Single Sign-On (SSO), which has replaced the traditional PeopleSoft login method. Users should sign in using their District email address and password through the SSO page. This allows for a more secure and streamlined login process across District systems.

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**



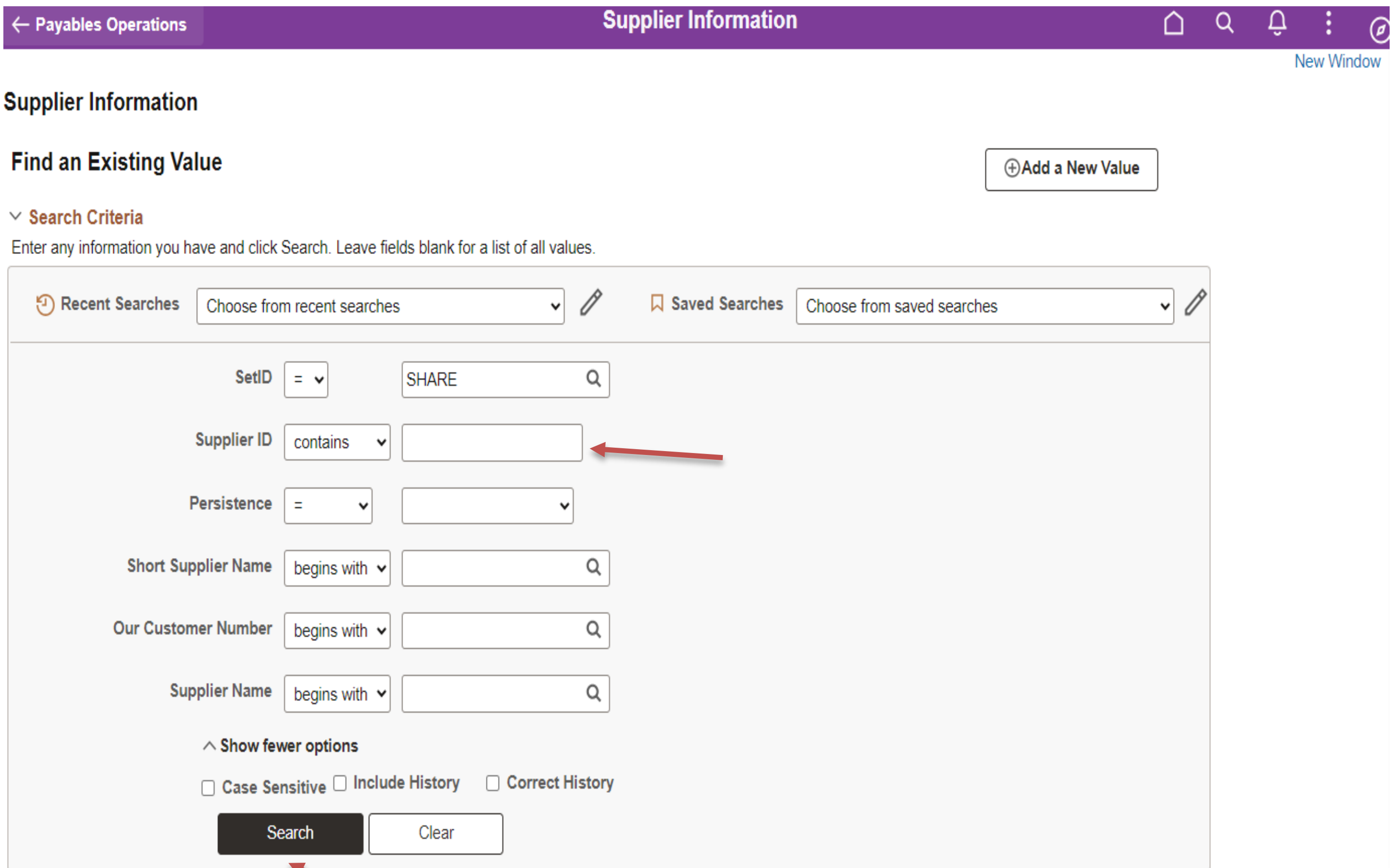




****NOTE: All fields MUST be completed in CAPITAL LETTERS; turn your keyboard CaPeopleSoft Lock on.**

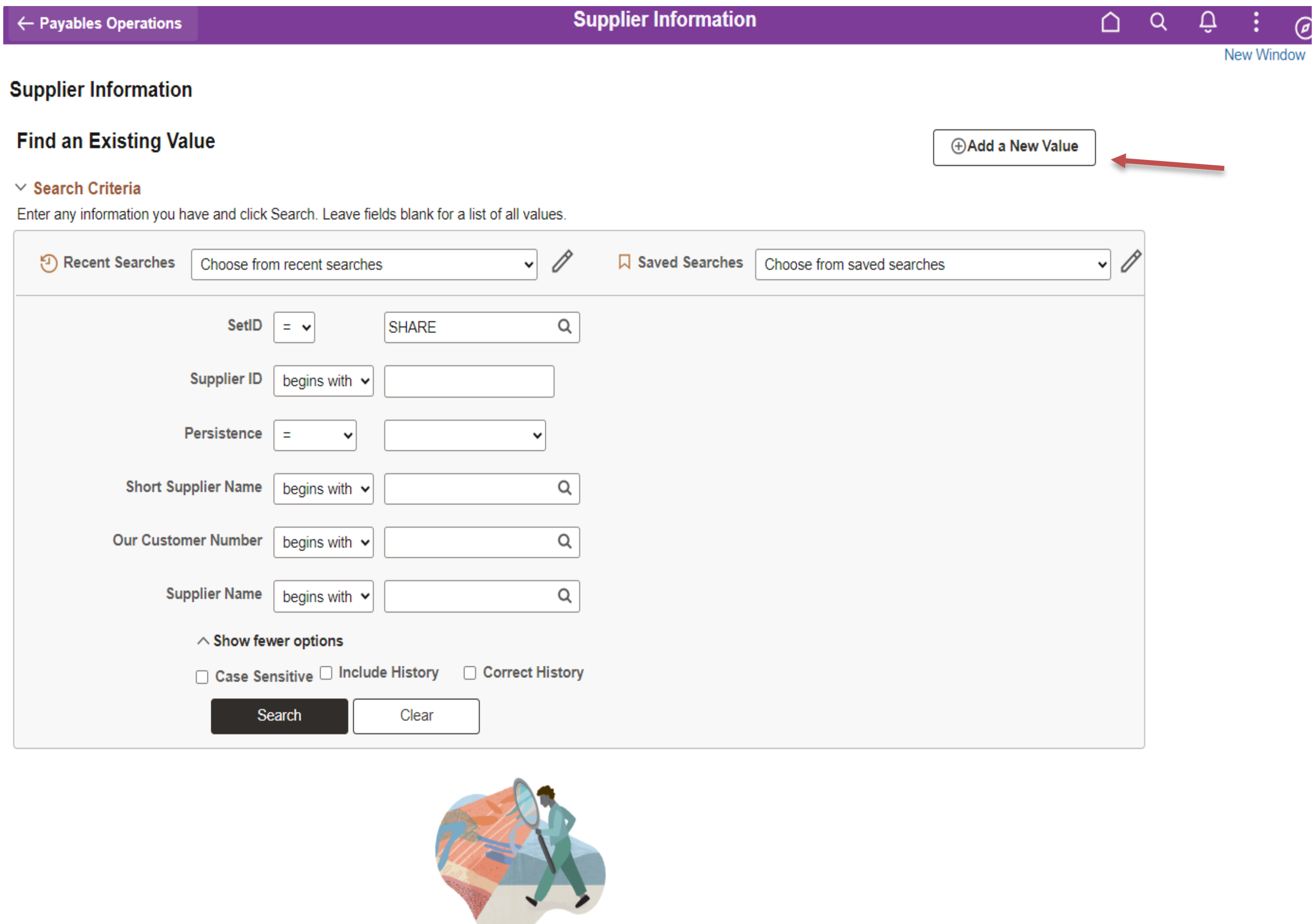
Debarment checks will be verified in SAM.gov for any order that is using Federal funds. SDCCD is not requiring vendors to register with SAM.gov.

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.

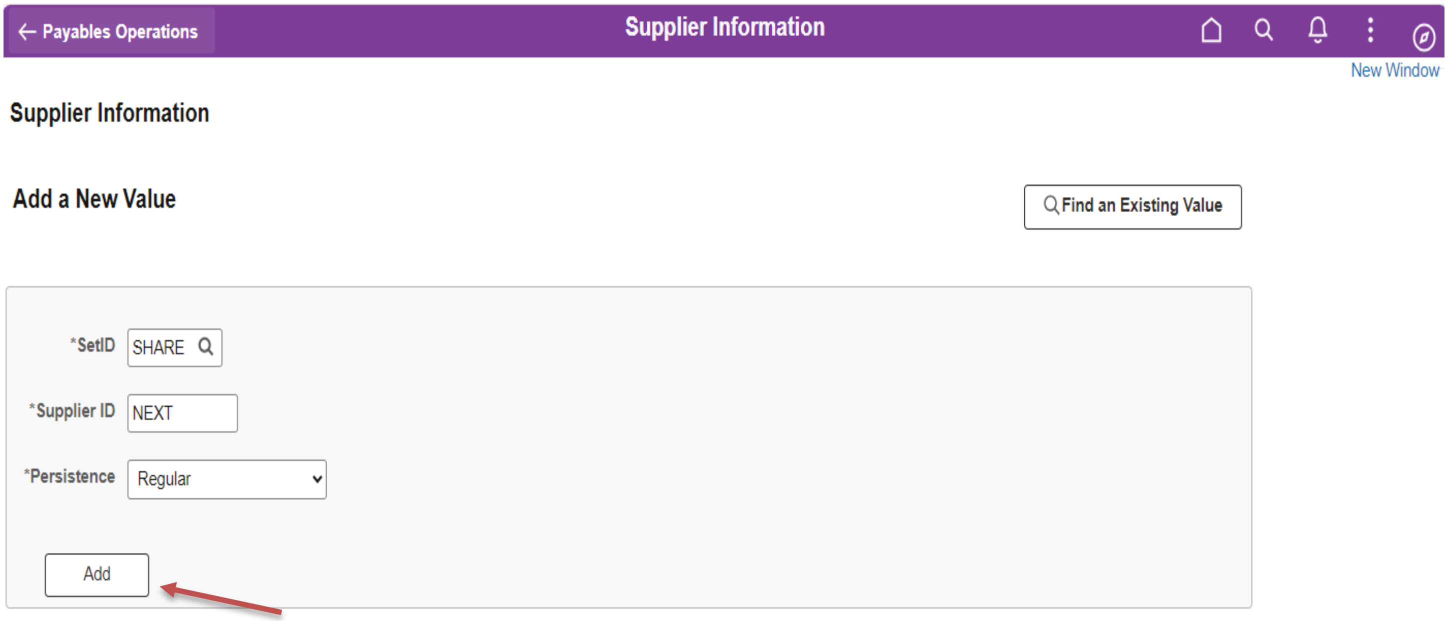


If the supplier does not exist in PeopleSoft, a new Supplier ID will need to be established. To add a new supplier, click on **ADD a New Value** and follow the stePeopleSoft below.

****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.**



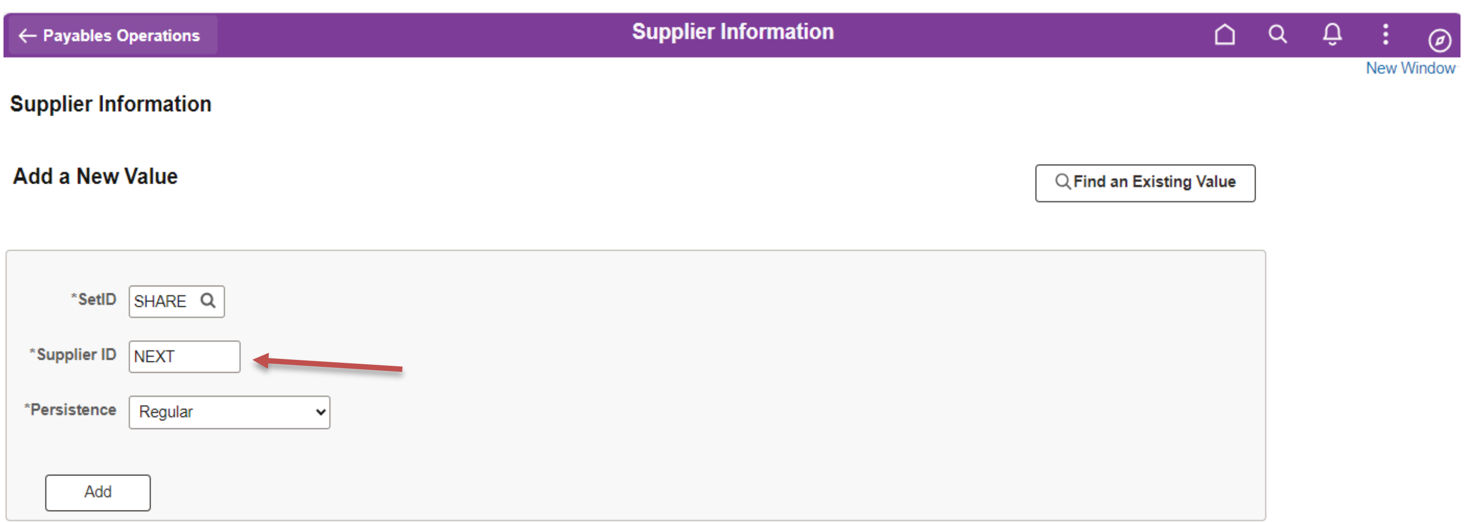
In the next screen, click **ADD** and PeopleSoft will automatically assign a new **10-digit Supplier ID number** once the supplier information is entered and saved in PeopleSoft.



To add an **Employee or Student**, replace **NEXT** in the **Supplier ID** field with the **Employee's or Student's ID number.** The Supplier ID must be 10 numerical digits.

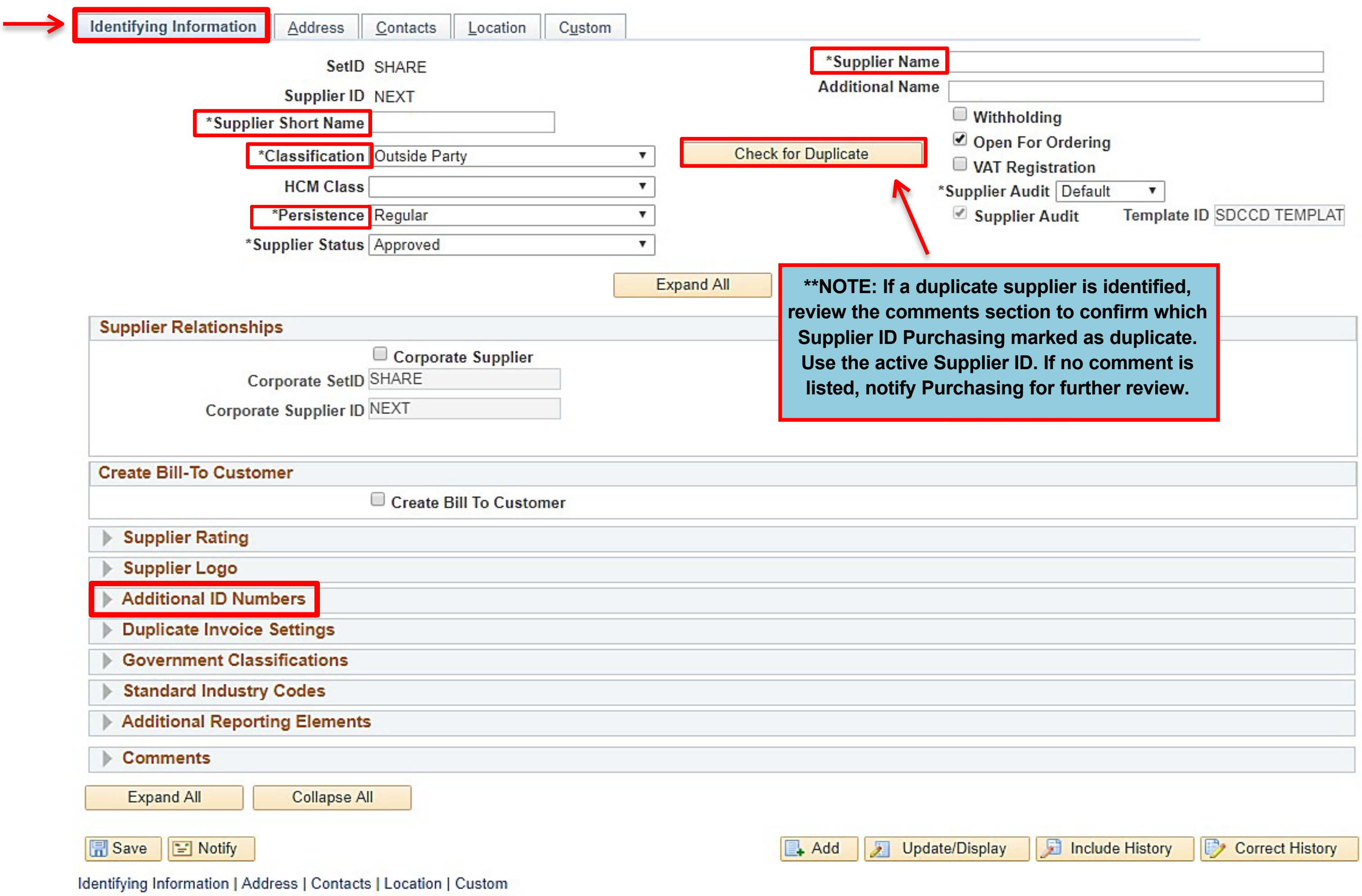
****NOTE:** If the Employee or Student ID is fewer than 10 digits, add leading zeros until the number reaches 10 digits. If the ID is already 10 digits, enter it as-is.

Once the 10-digit Supplier ID has been entered, click Add.



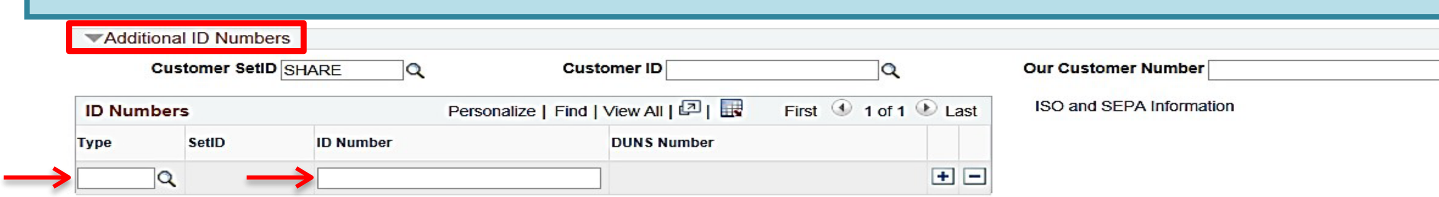
Open the **IDENTIFYING INFORMATION** tab and complete all fields marked in **Red** below:

- **Supplier Name** – Enter the **Business Name (ALL UPPERCASE)** from Line 1 of the W-9 form. If Line 1 is blank, enter the Name from Line 2. If both lines 1 & 2 are populated, enter line 1 for the Supplier Name and then enter line 2 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 PEOPLESOFT.
- **Additional ID numbers** – Click on and expand the **Additional ID Numbers** tab to enter the Tax ID**.**



****NOTE: If a duplicate supplier is identified, review the comments section to confirm which Supplier ID Purchasing marked as duplicate. Use the active Supplier ID. If no comment is listed, notify Purchasing for further review.**

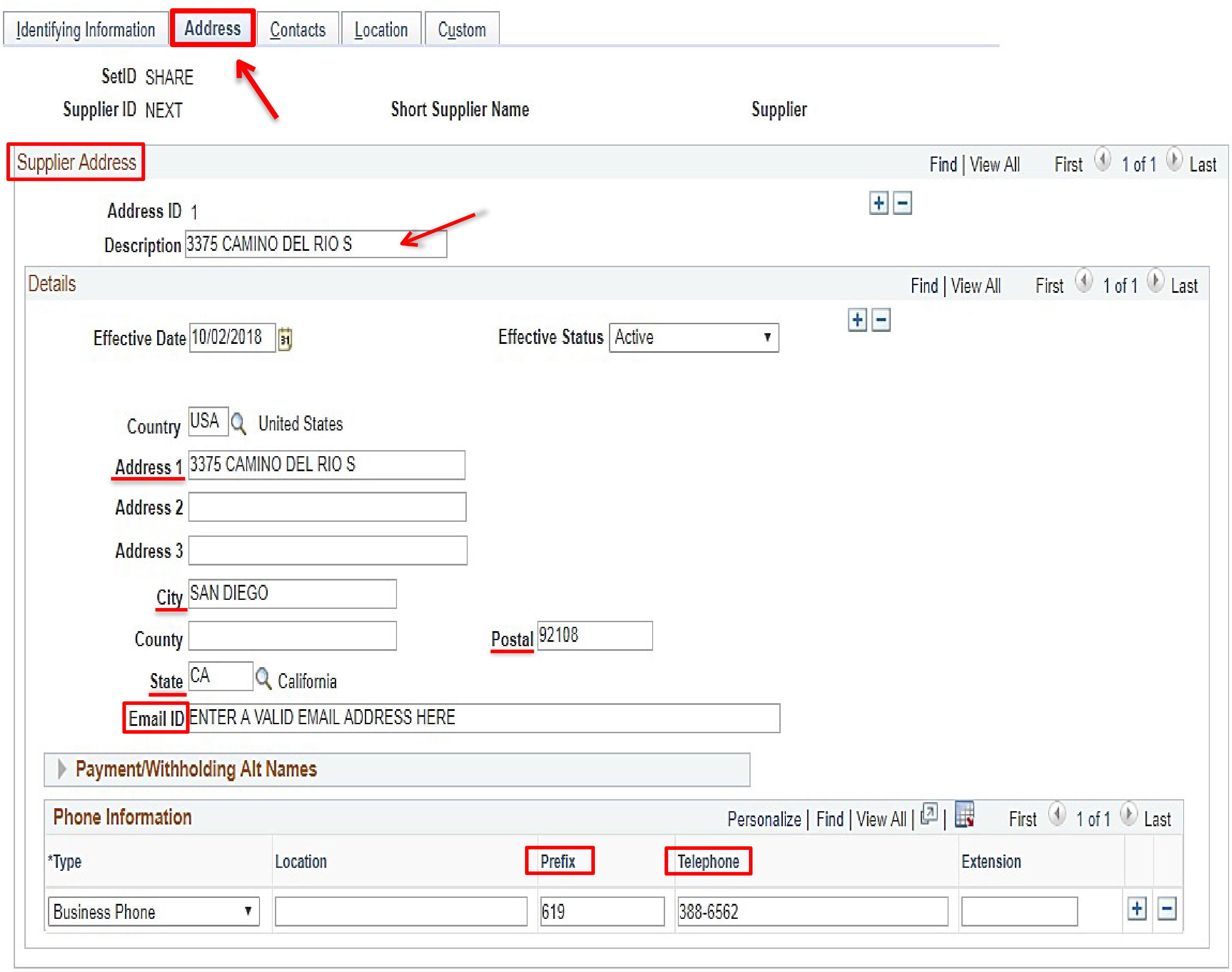
Expanding the **Additional ID Numbers** tab will bring you to the screen below and allow you to enter the **Supplier's Tax ID** number found on **Part I – Taxpayer Identification Number (TIN)** on the W-9 form. Enter the **TYPE** (select either **EIN** or **SSN**) and then enter the **ID NUMBER**. Ensure 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:

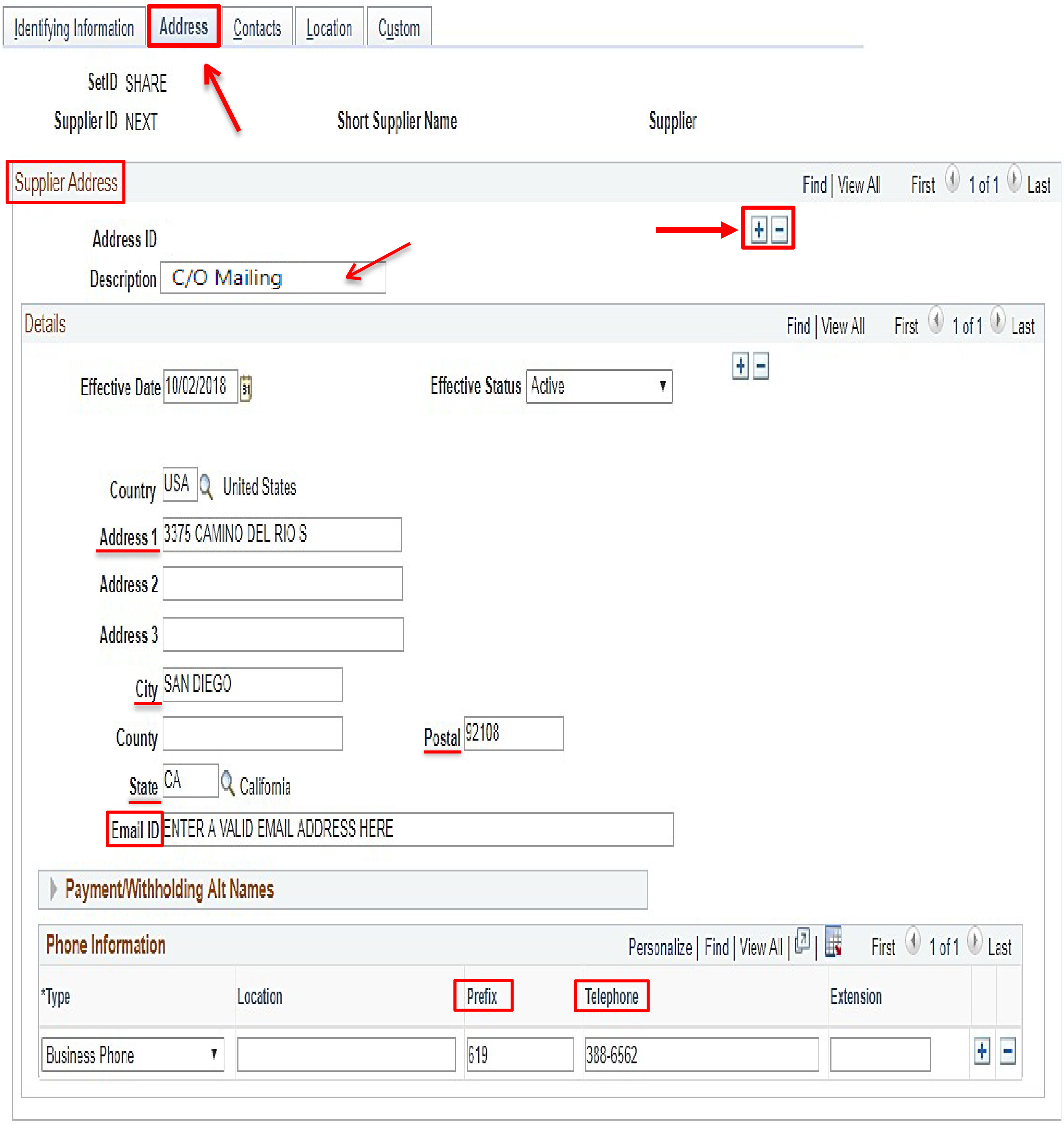
- **Description –** Enter the first line of the Supplier address if there is only one address. If there are two addresses to be entered, enter the type of address for each sequence in the Description field (i.e., mailing address or remit address etc.).
    - **C/O – If an address has a C/O it will need 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 W-9 form must include a physical address. We cannot accept a PO BOX on the W-9 form. A PO Box may only be listed as the remit address on the Supplier Intake 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**.**



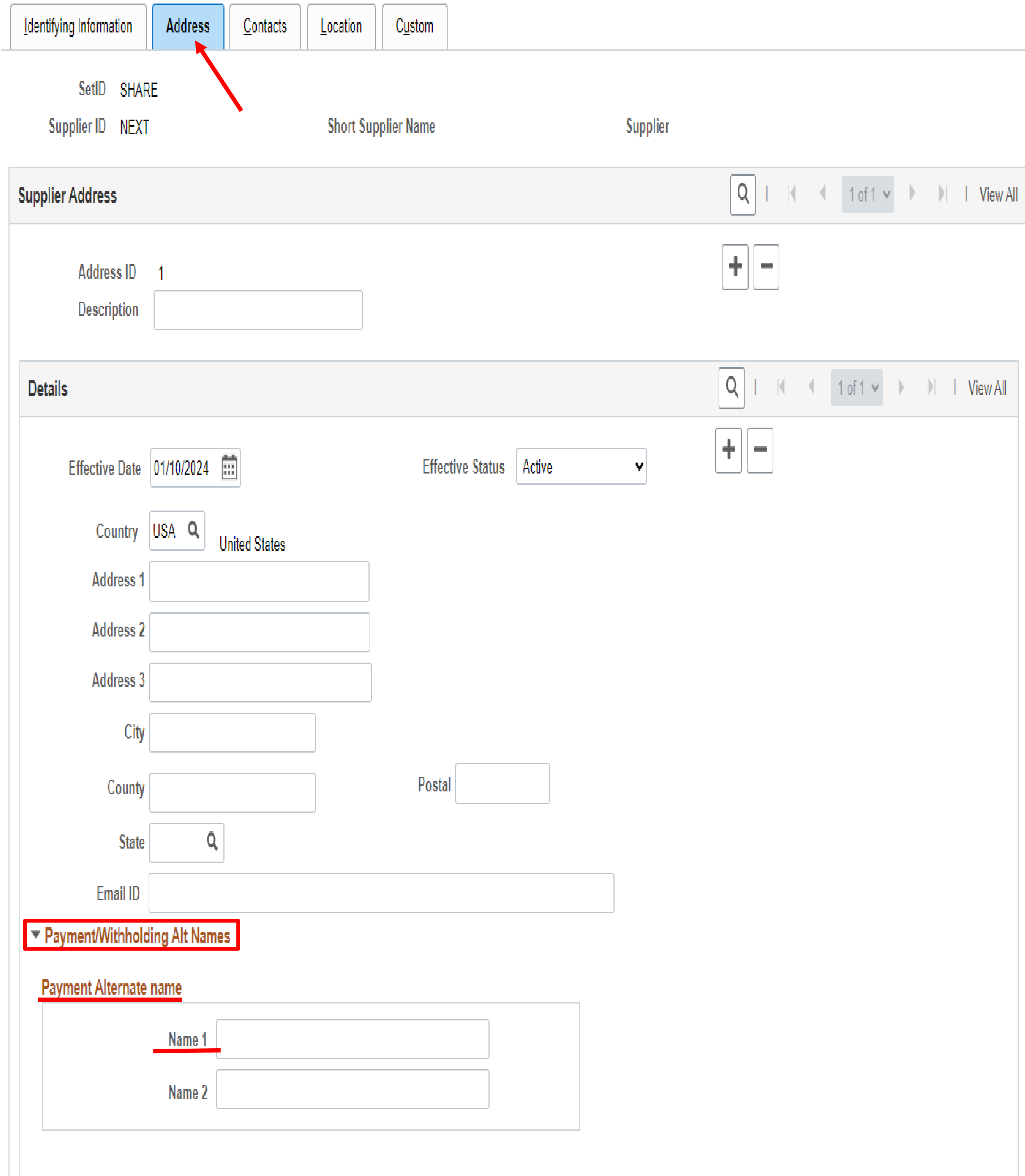
To add an address with C/O information, click on the **Plus Sign (+)** to the top right of the screen in the **Supplier Address** field to create an additional **Address field** and complete the following fields marked in **Red** below:

- **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.



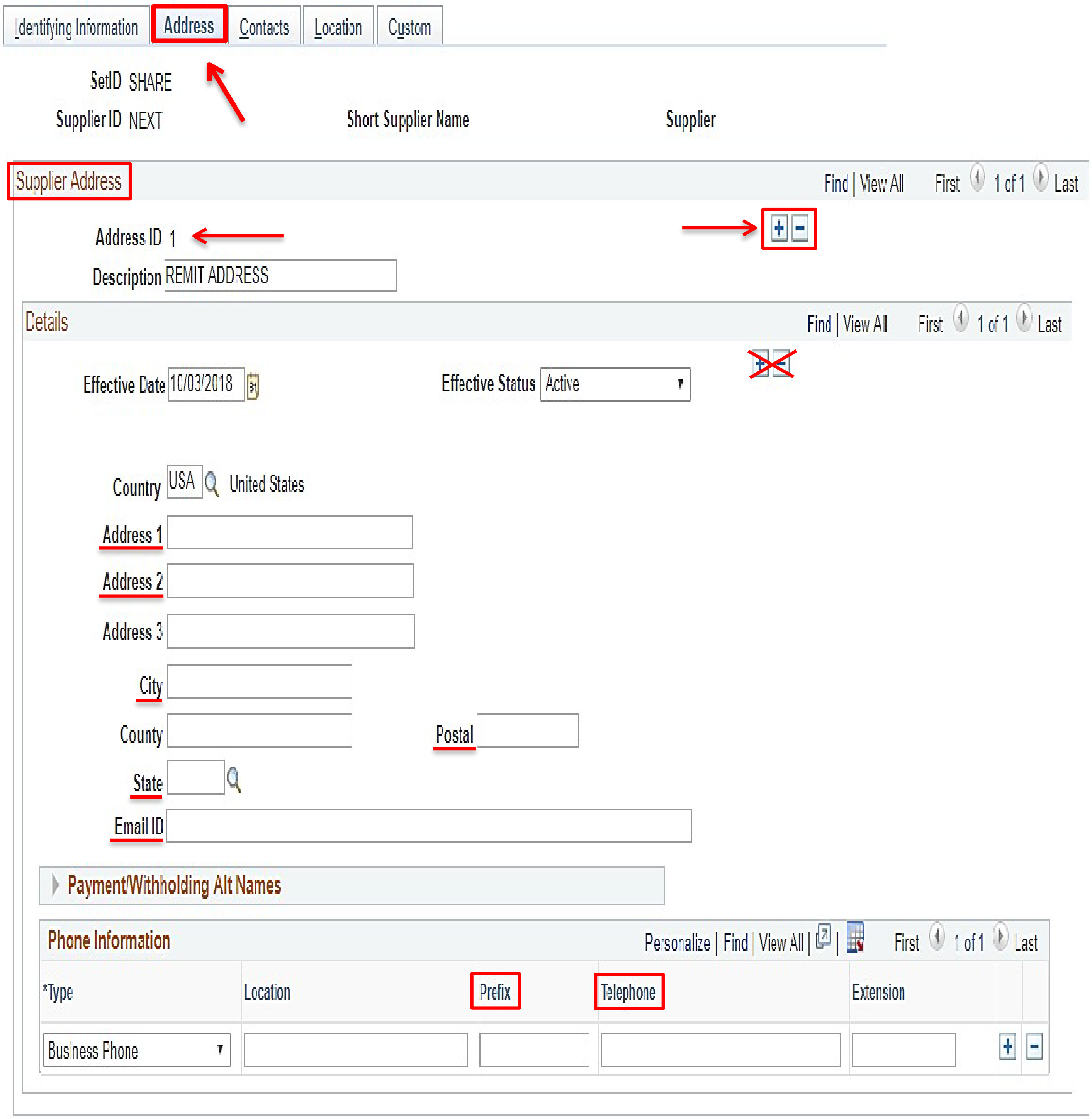
If both Lines 1 and 2 of the W-9 are populated, use the Payment/Withholding Alt Names section of the Address tab to enter the additional name.

- Enter the name from Line 2 of the W-9 in the Name 1 field.



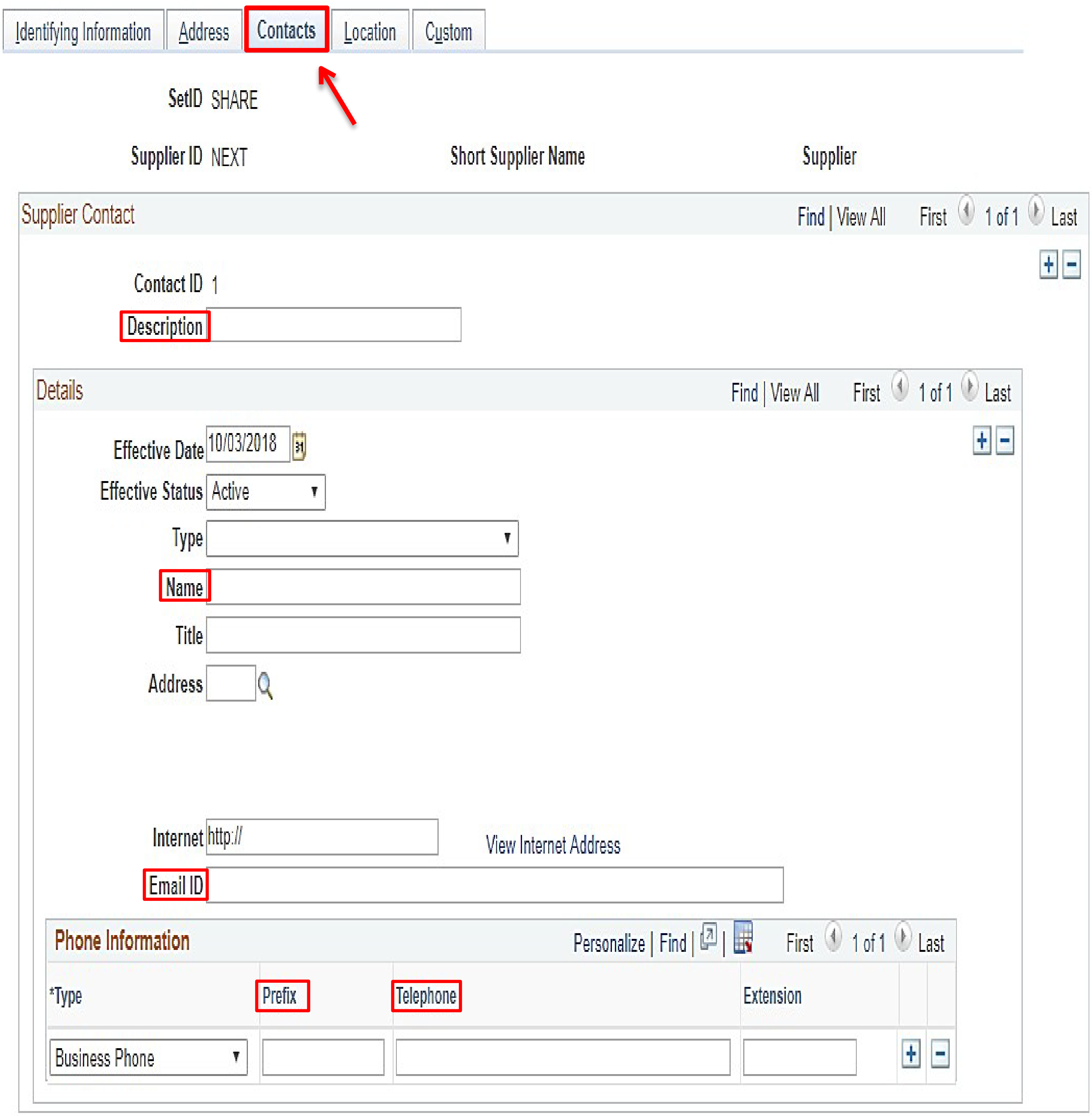
To add a second address such as a **Payment Remittance Address** click on the **Plus Sign (+)** to the top right of the screen in the **Supplier Address** field to create an **Address ID 2** and complete the following fields marked in **Red** below:

- ❖ **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.



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

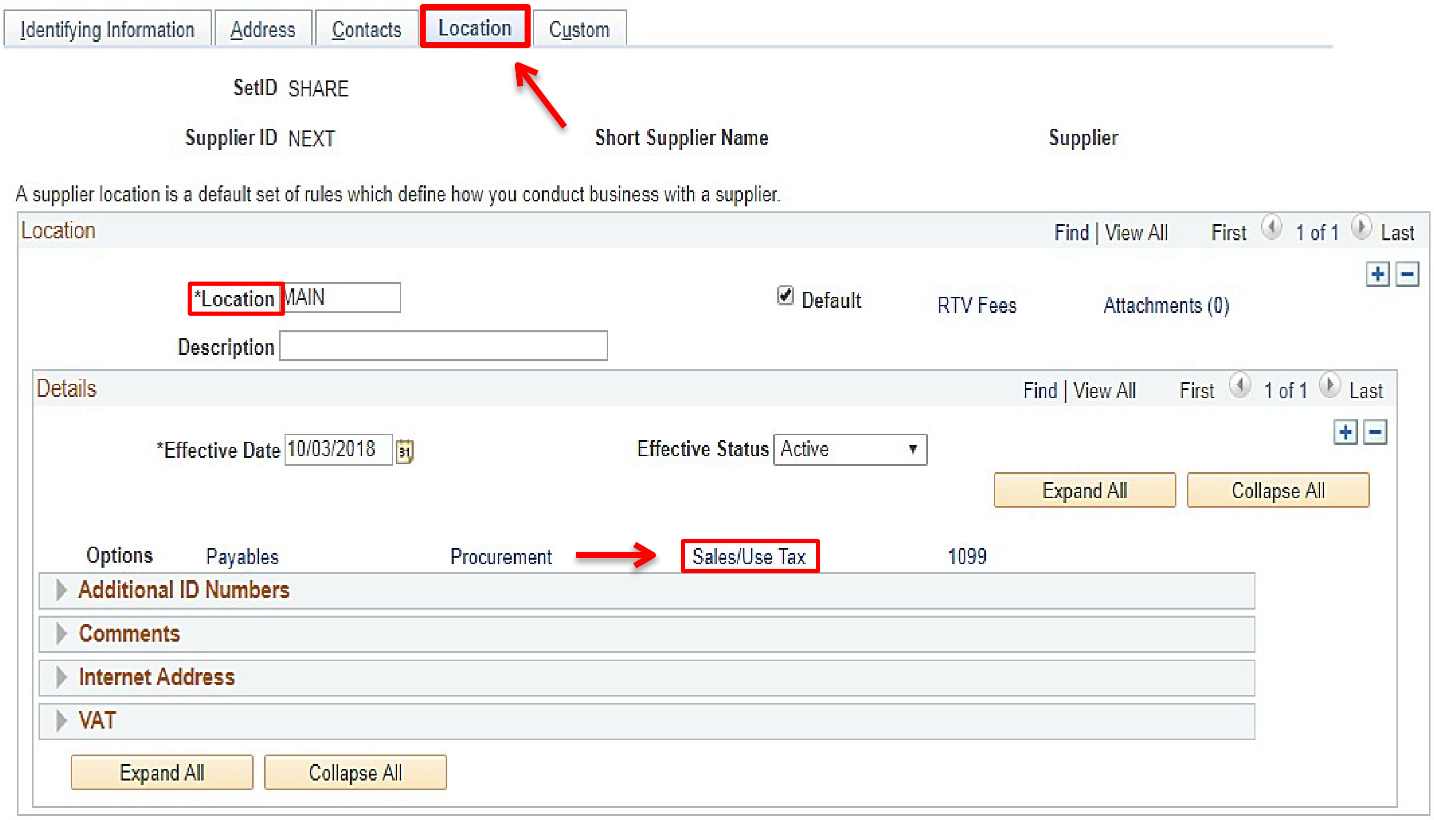
- **Description** – This is a reference field; enter a description for the type of supplier entered (i.e., Goods, Professional Services, Student Stipend, Rent/Leases, etc.).
- **Name** – Enter the contact name for the supplier.
- **Email ID** – Enter the email address.
- **Telephone** – Enter the contact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



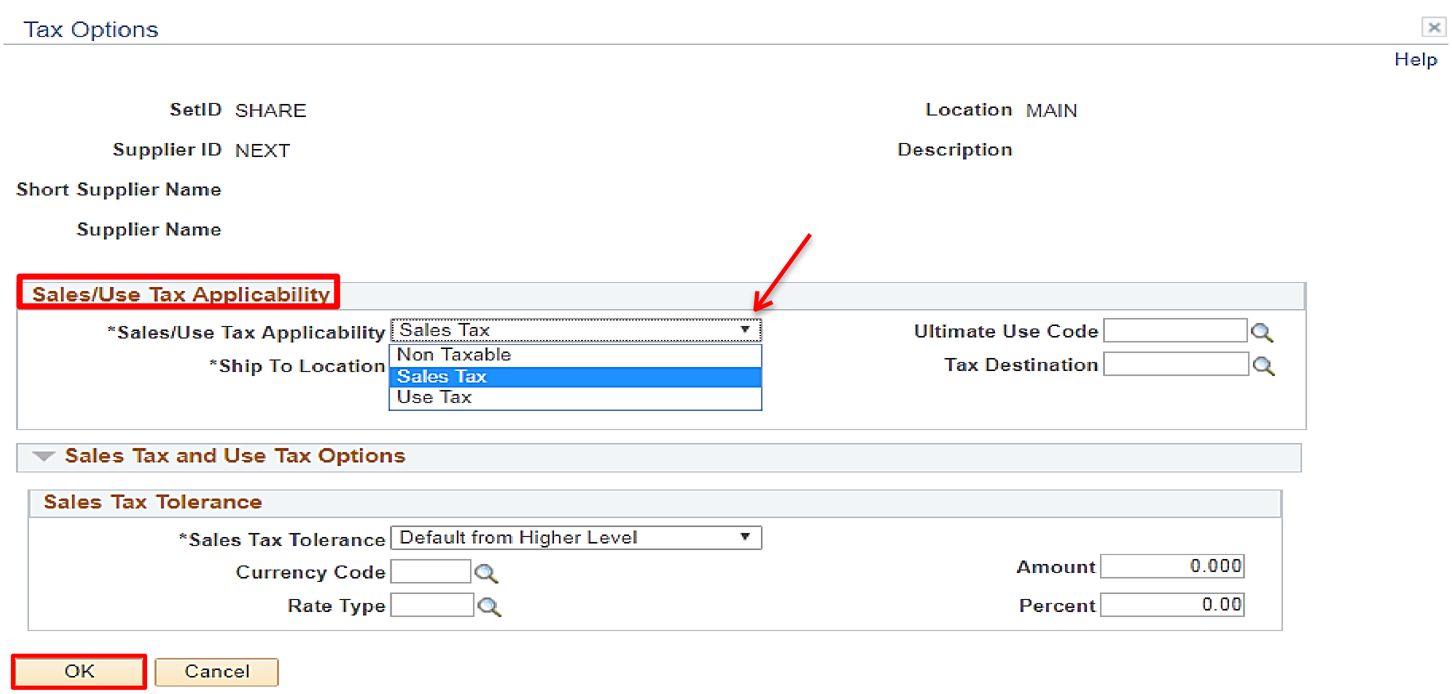
Click on the **LOCATION** tab and complete the fields marked in **RED** below:

- **Location** – Enter **MAIN**. **Please leave the description box blank.**
- **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.**

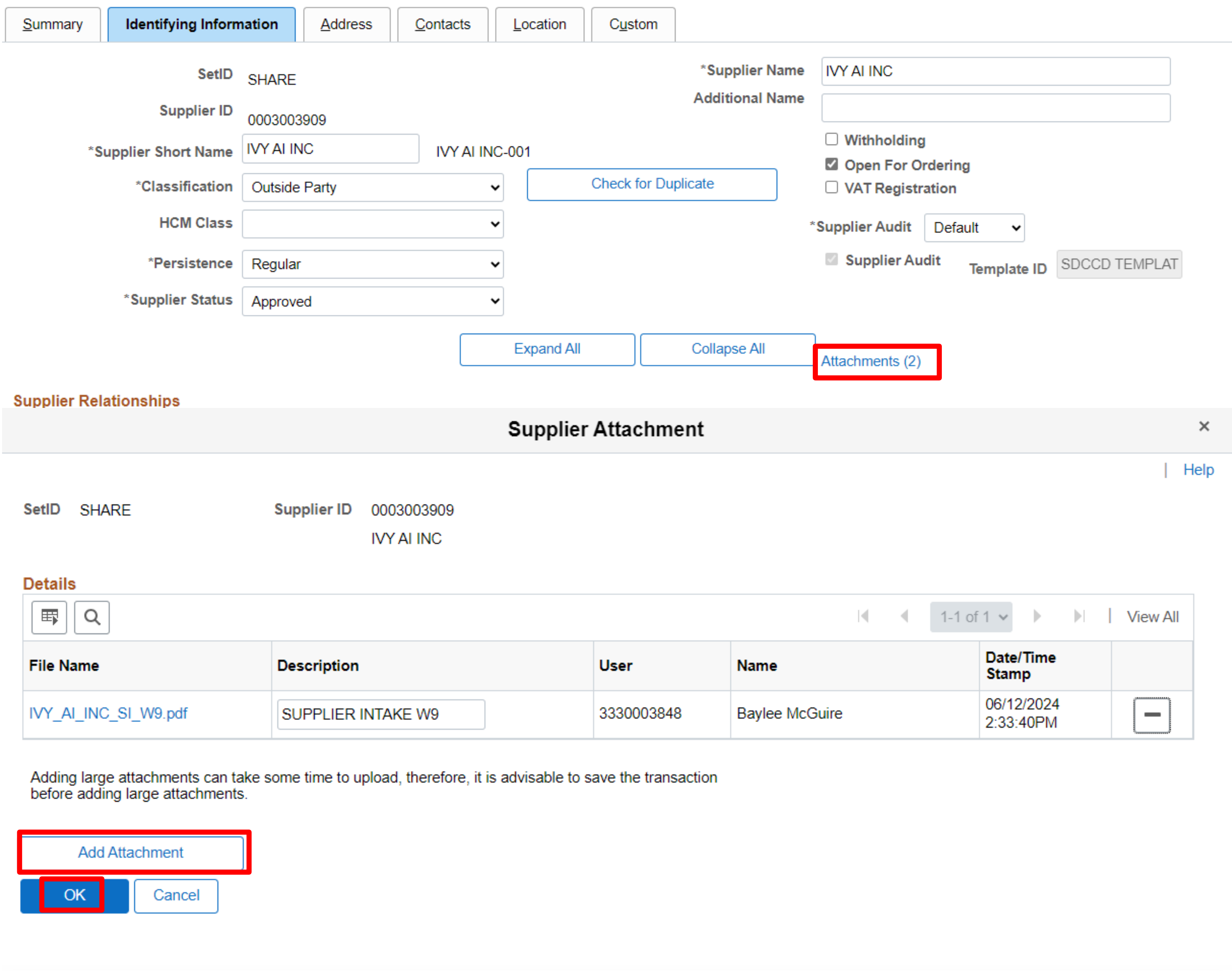


Click on **Sales/Use Tax Applicability** and select the tax classification indicated on the Supplier Intake form and click **OK**.



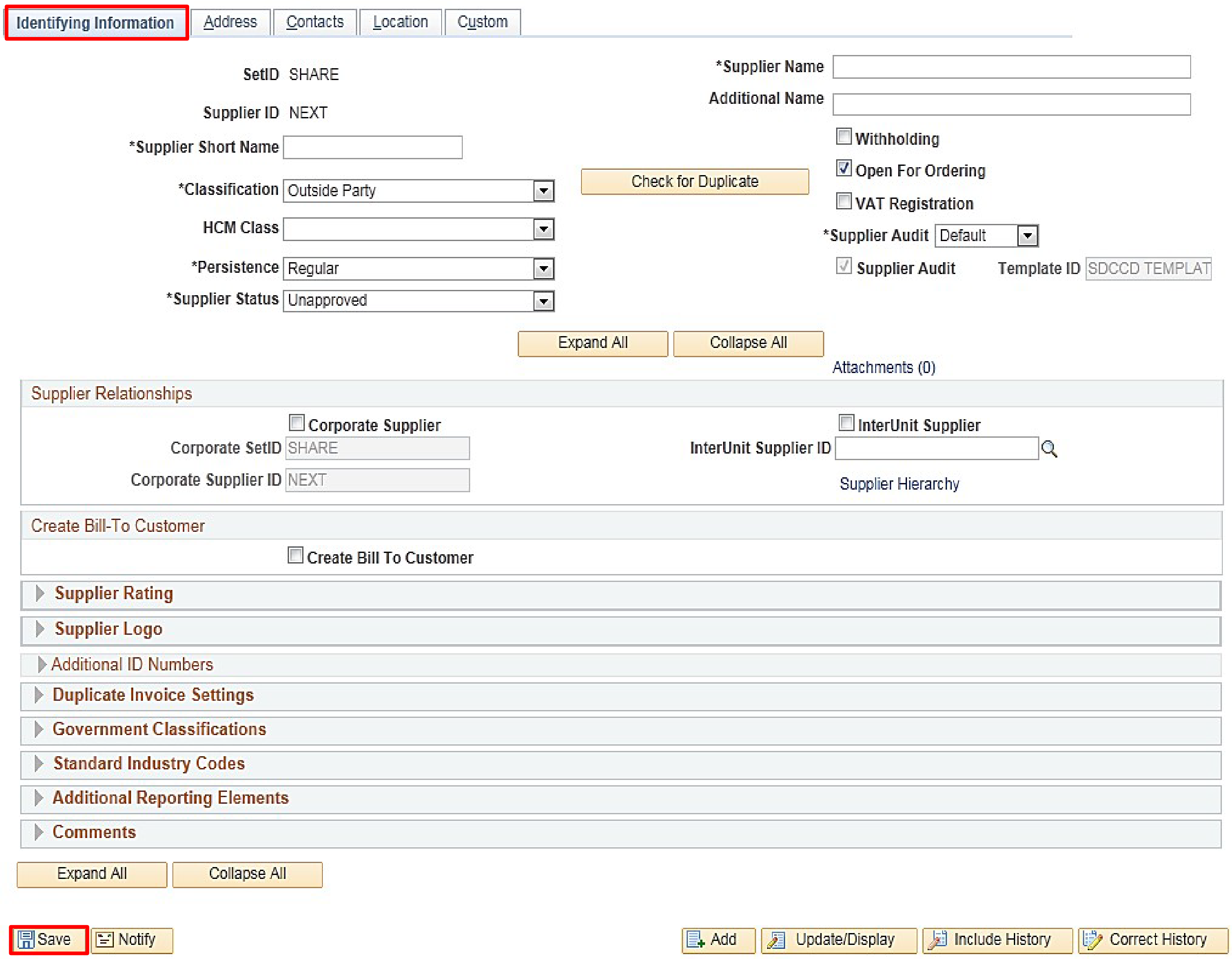
Click on the **IDENTIFYING INFORMATION** tab and complete the fields marked in **RED** below:

- Attach the **Supplier Application Form** AND **W-9** as **ONE** pdf file.
    - Click on Attachments -> Add attachment -> Select the file from your computer
- **Description:** SUPPLIER INTAKE & W-9
- **Select OK to save**



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.**



After establishing the Supplier in PeopleSoft, email supplierintake@sdccd.edu for approval. Feel free to cc Amin Alipour (salipourbaghal@sdccd.edu) as well.

****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 the form 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 items of $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 supplier will know what equipment is required, but required equipment generally 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

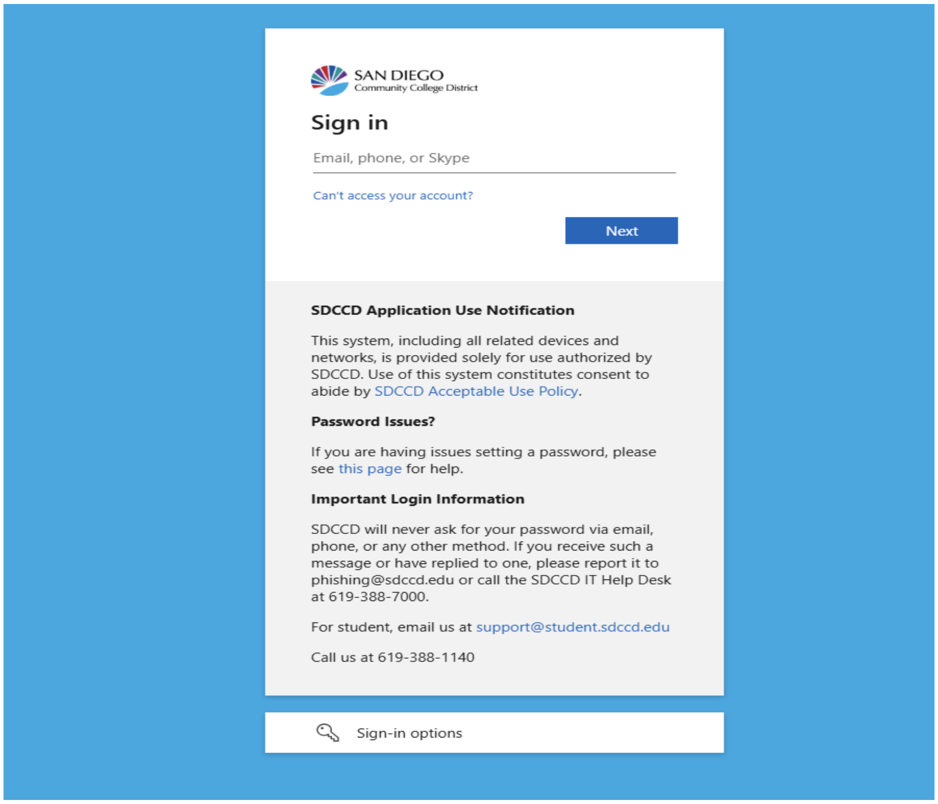
This Requisition Manual explains how to enter each component of a requisition, and how they relate to each other. In PeopleSoft, requisitions consist of four components:

- **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 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.**

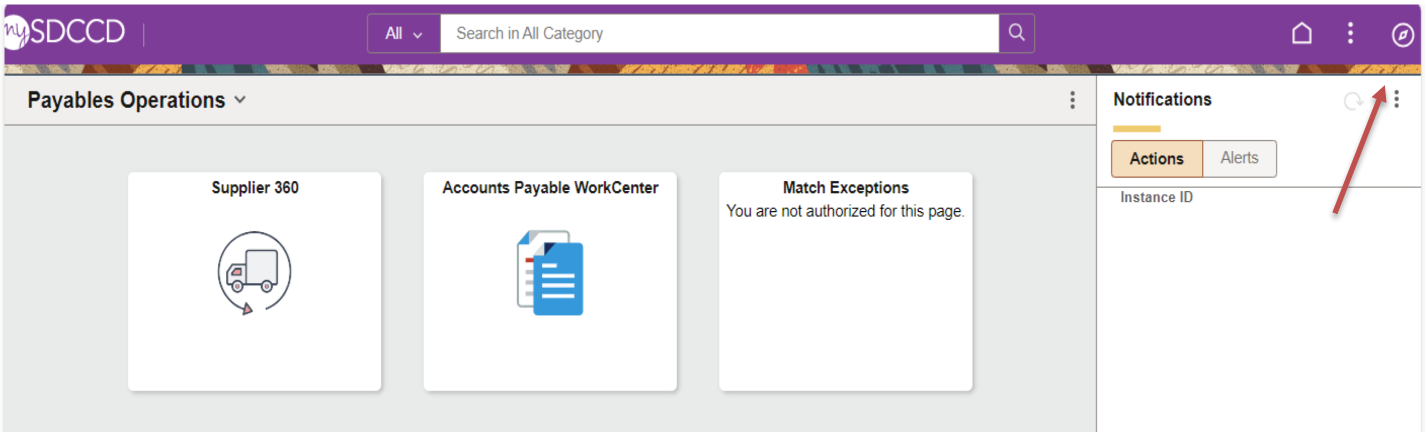


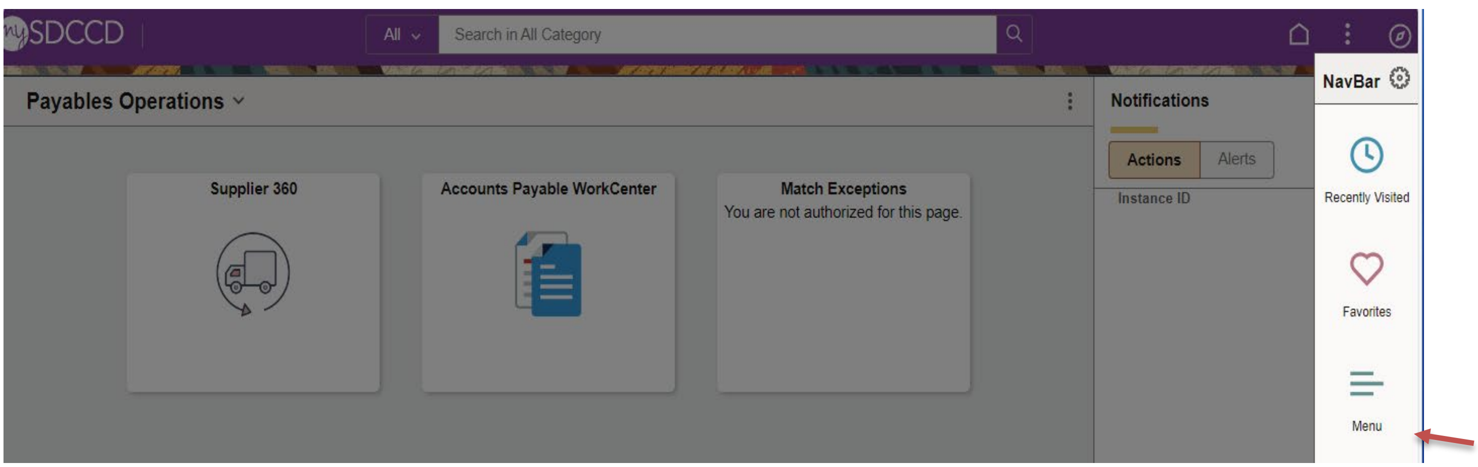
The District now uses Single Sign-On (SSO), which has replaced the traditional PeopleSoft login method. Users should sign in using their District email address and password through the SSO page. This allows for a more secure and streamlined login process across District systems.

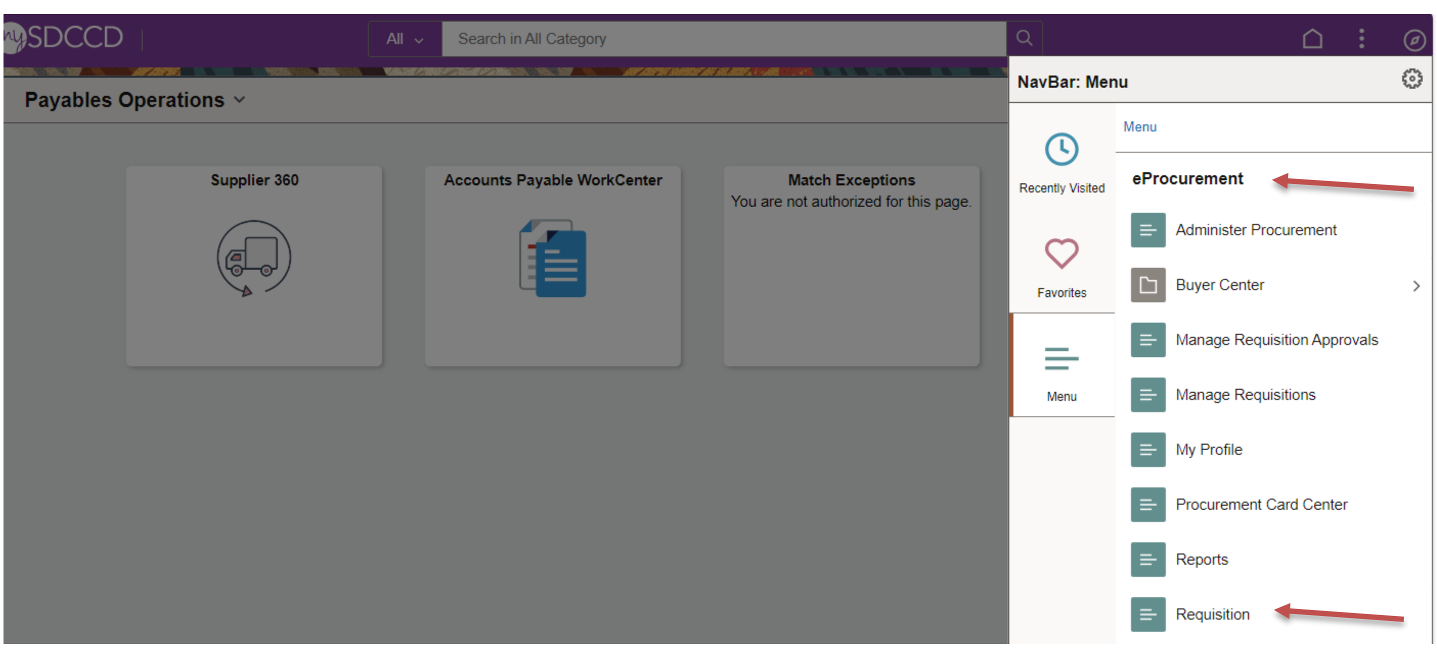
To access the **Create Requisition** screen, click on the Finance Dashboard icon.

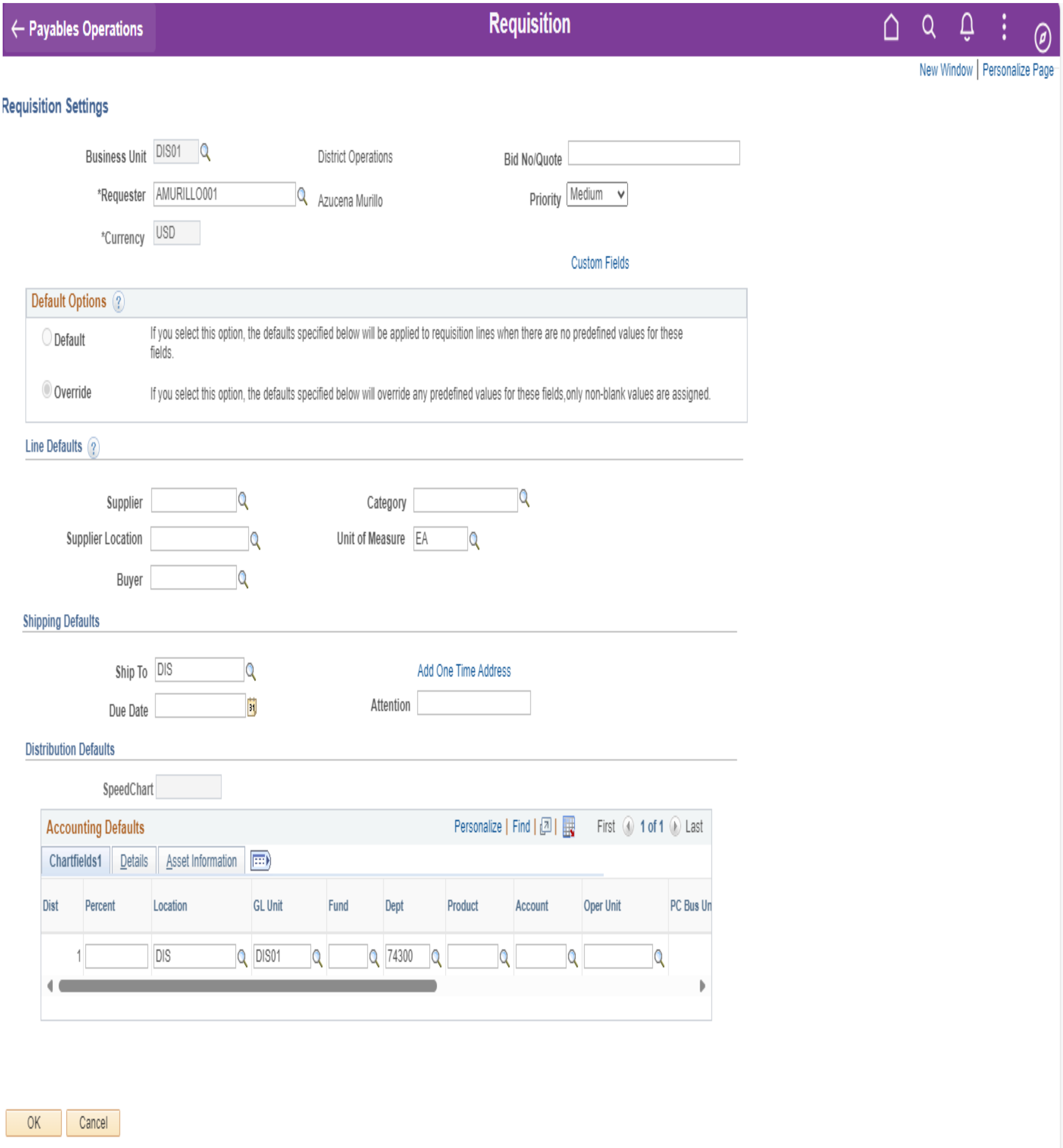
To access **Create Requisitions**, click on the **NavBar** icon in the top right of the screen, then click the **Menu** icon and use the following navigation:

- ❖ **eProcurement > Requisition**



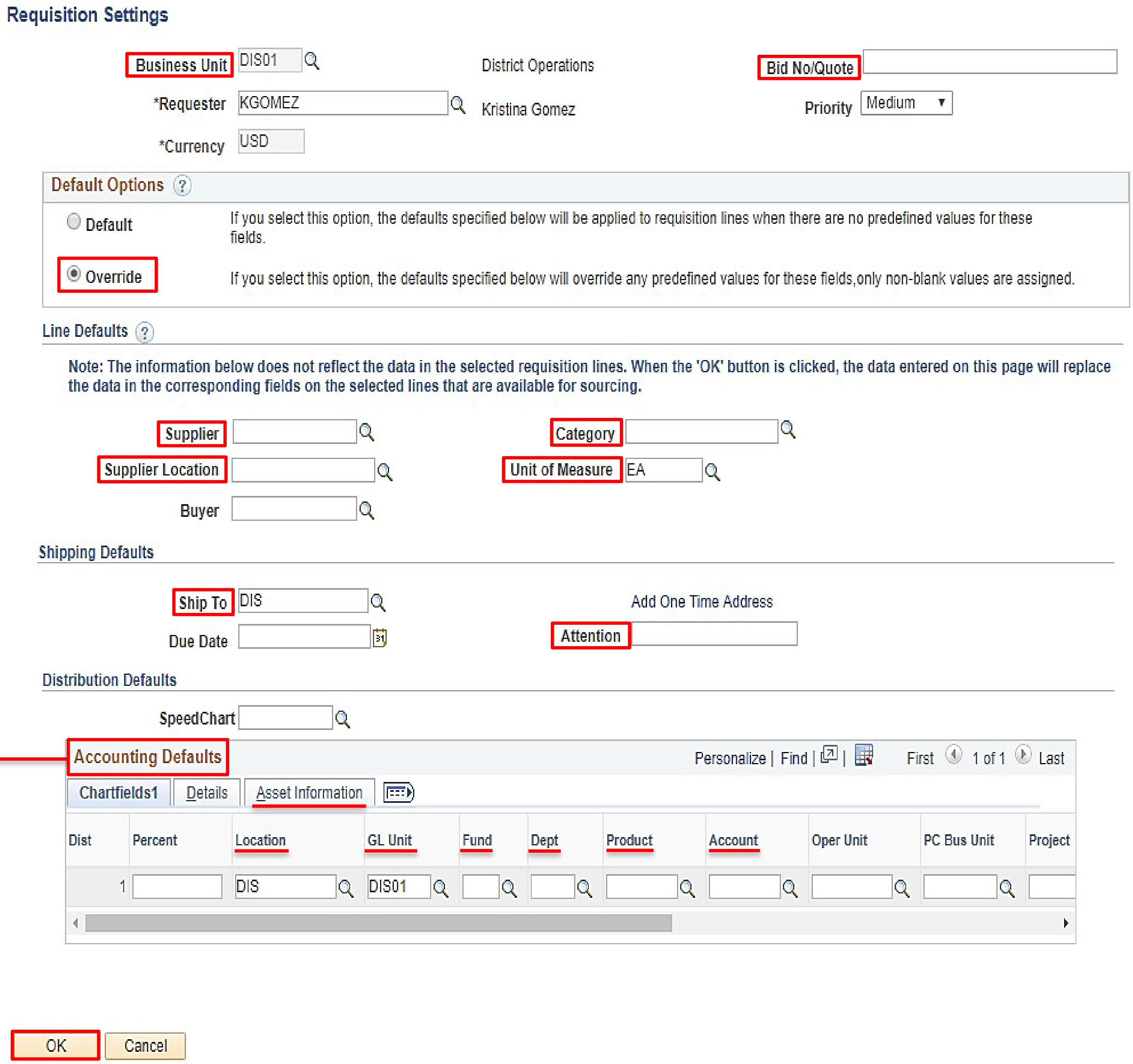





Payables Operations
Requisition
New Window | Personalize Page
Requisition Settings
Business Unit DIS01
District Operations
Bid No/Quote
*Requester AMURILLO001
Azucena Murillo
Priority Medium
*Currency USD
Custom Fields
Default Options
Default
If you select this option, the defaults specified below will 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 EA
Buyer
Shipping Defaults
Ship To DIS
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
DIS
DIS01
74300
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.

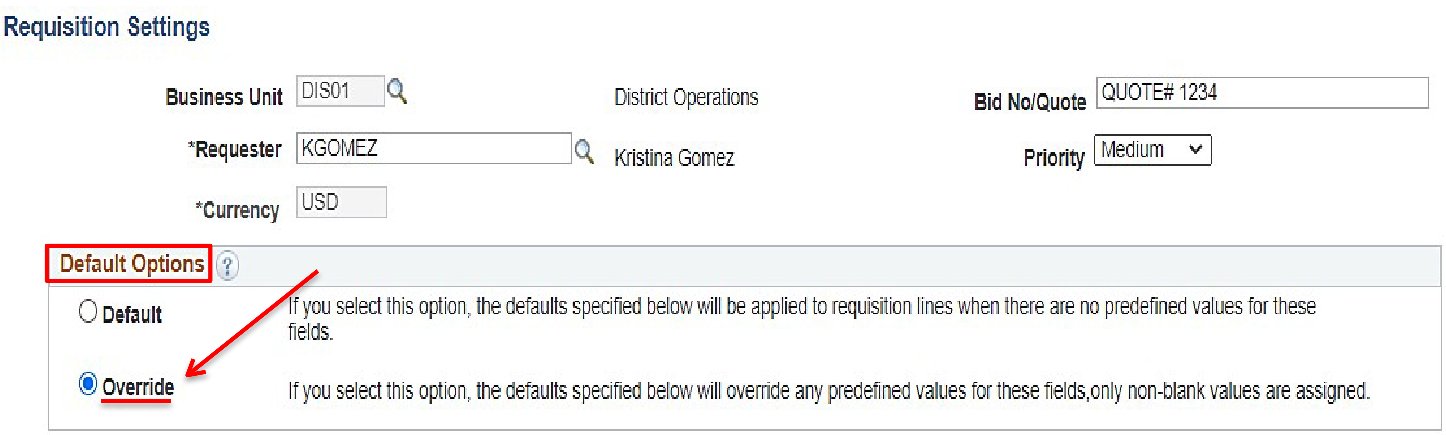


See details for **Account's** entry on **page 35.**

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.

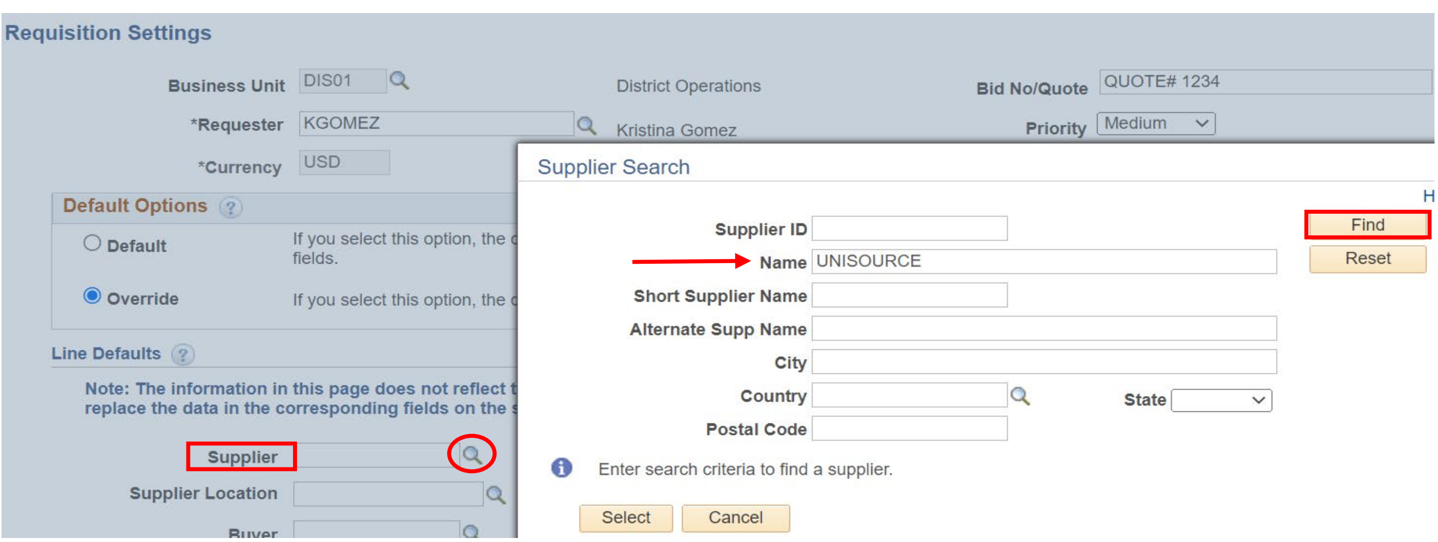
In the **Bid No/Quote** field, enter the appropriate bid number or quote number.

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.

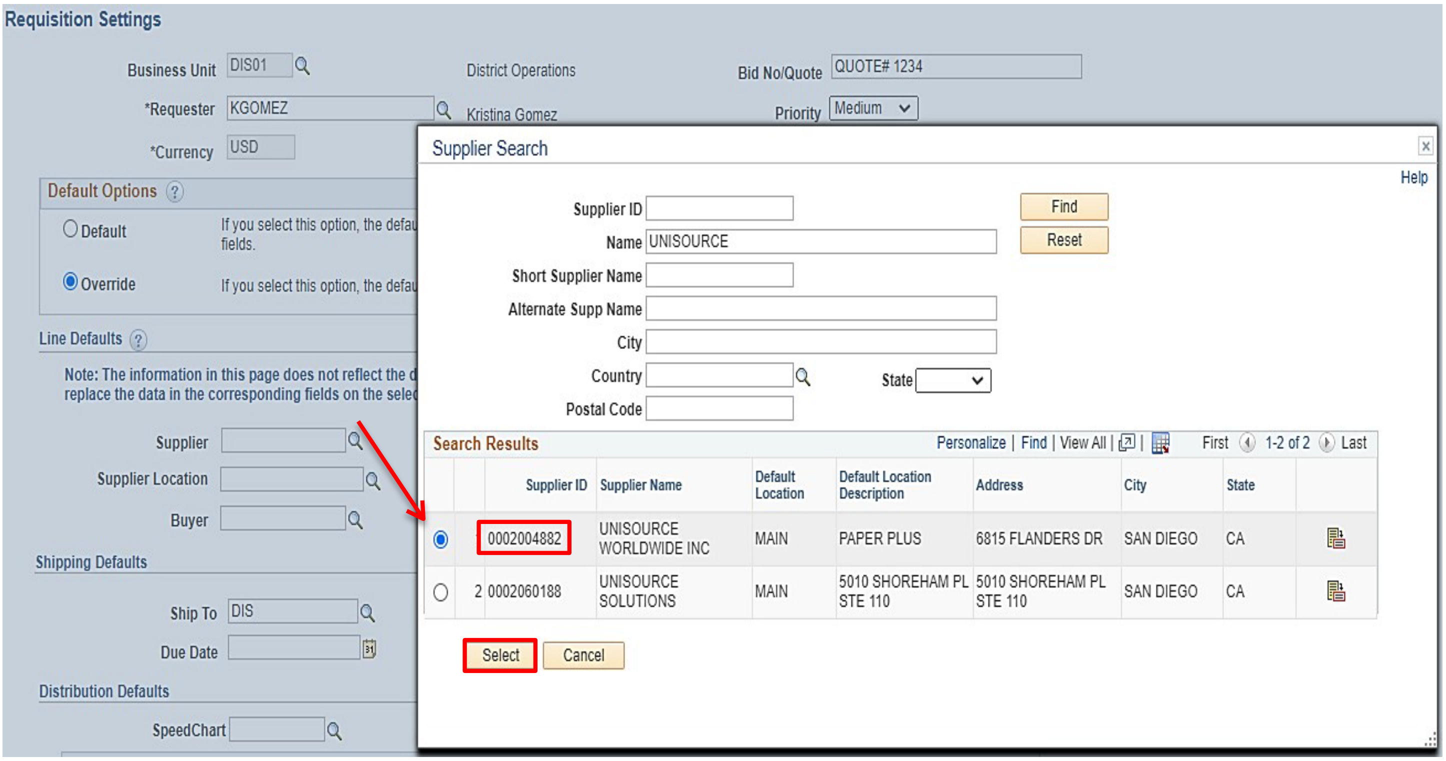


In the **Supplier** field, enter the **Supplier ID** number or to search for a supplier by their name, click on the magnifying glass and enter the supplier's name and click **Find**.

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.

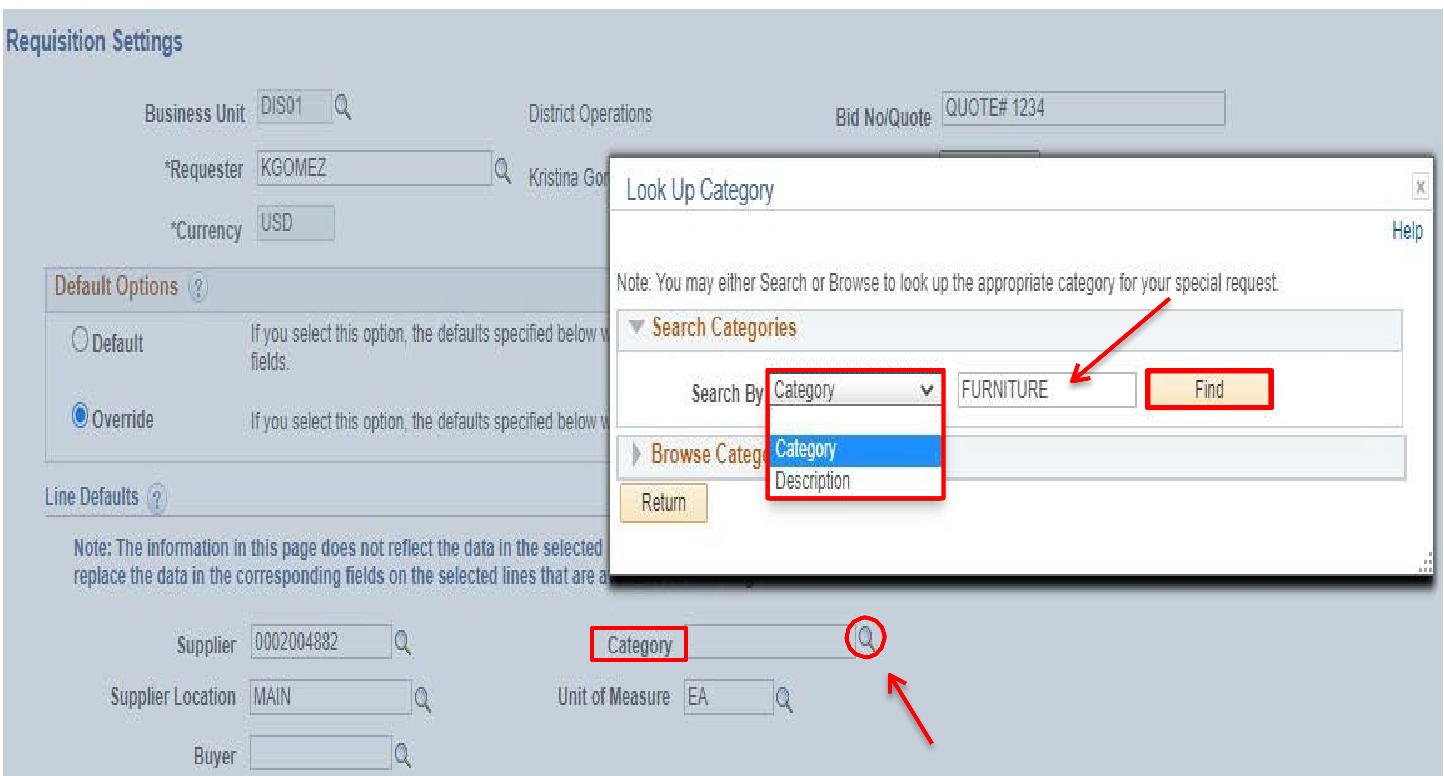


On the following screen, select the appropriate **Supplier ID** number from the menu and click **Select**.

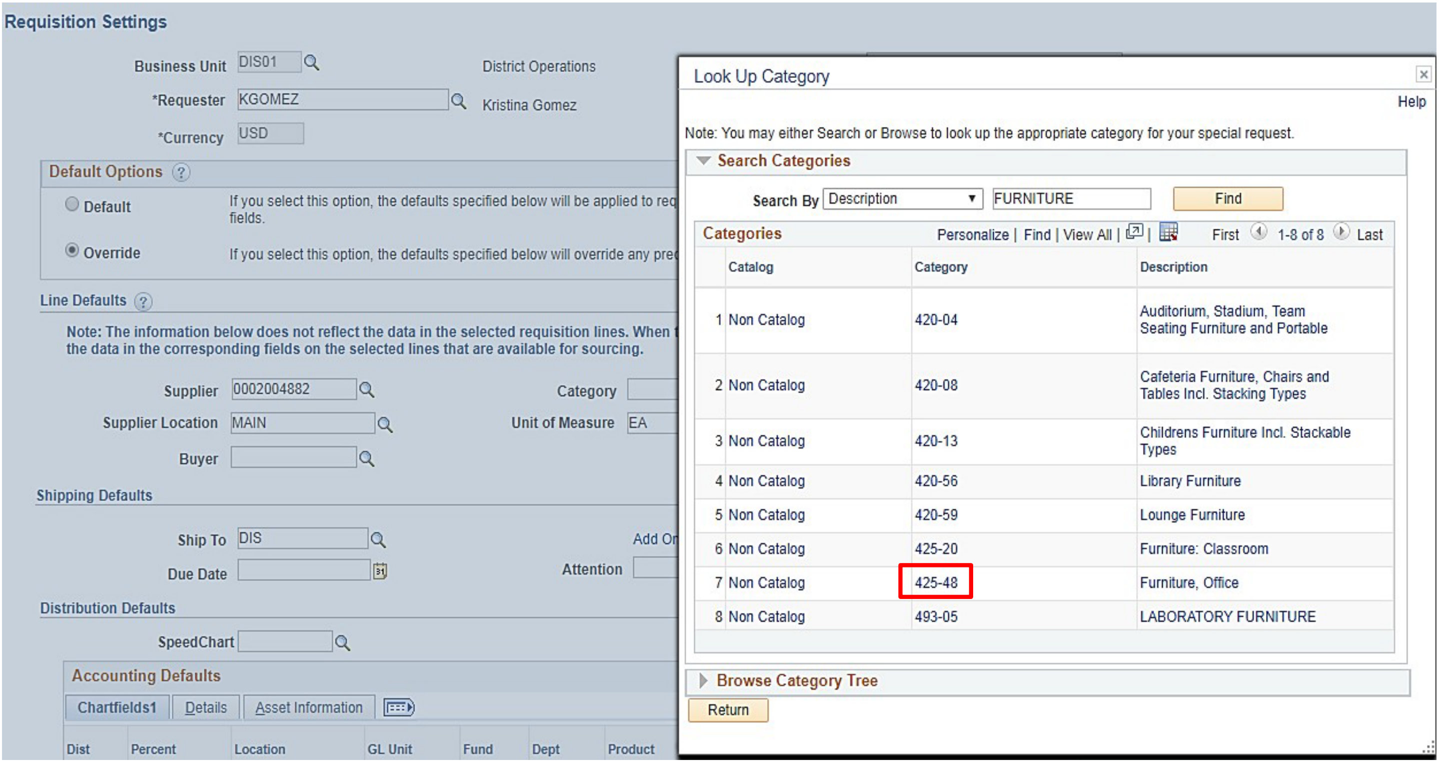


Next, indicate the **Category** which best defines the items that are being ordered. For a list of **Category Codes,** refer to **page 77**.

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



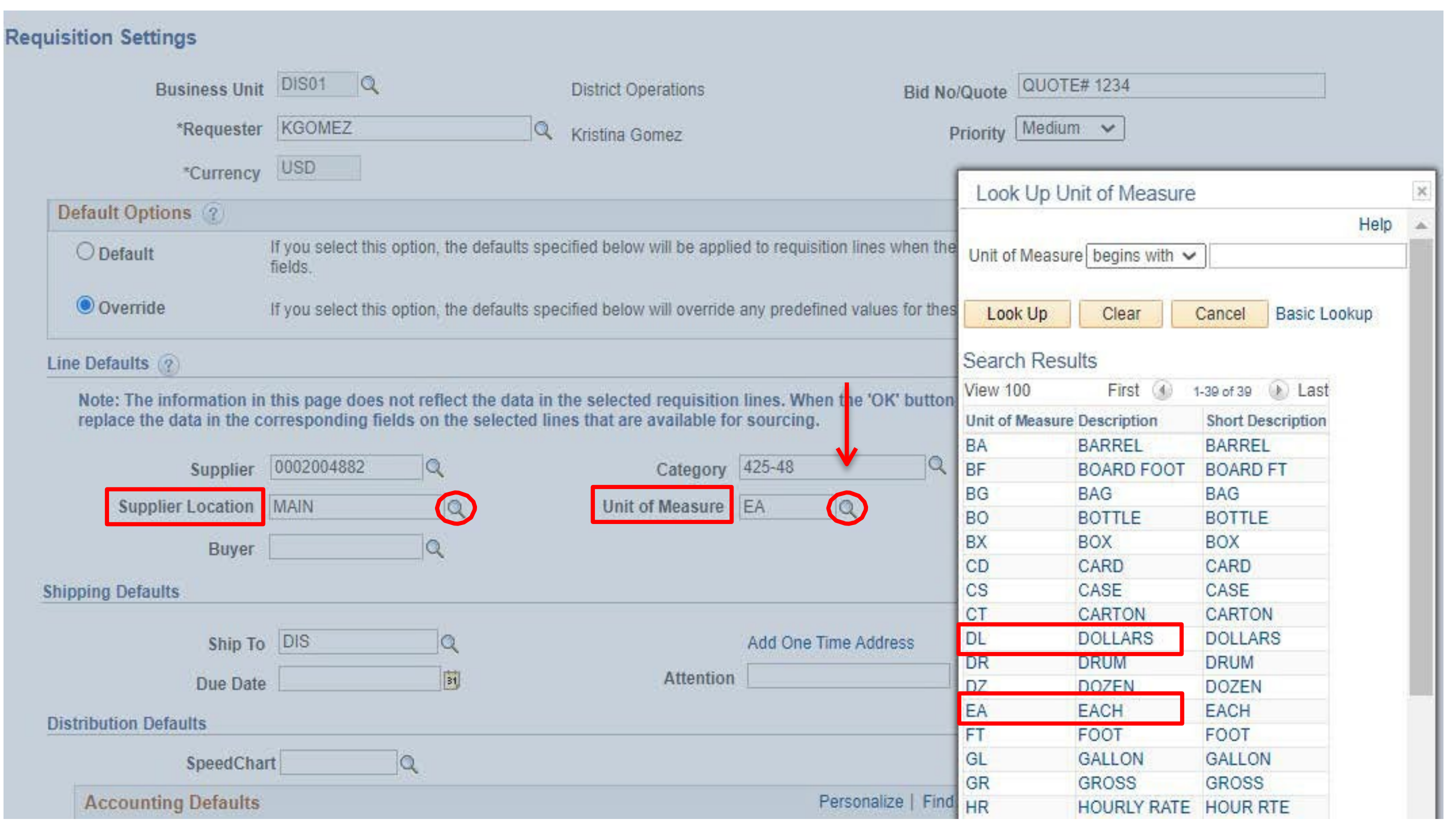
Double click on the correct **category number** to select the category code.



****NOTE: Contact the Purchasing Department for issues selecting a Supplier Location.**

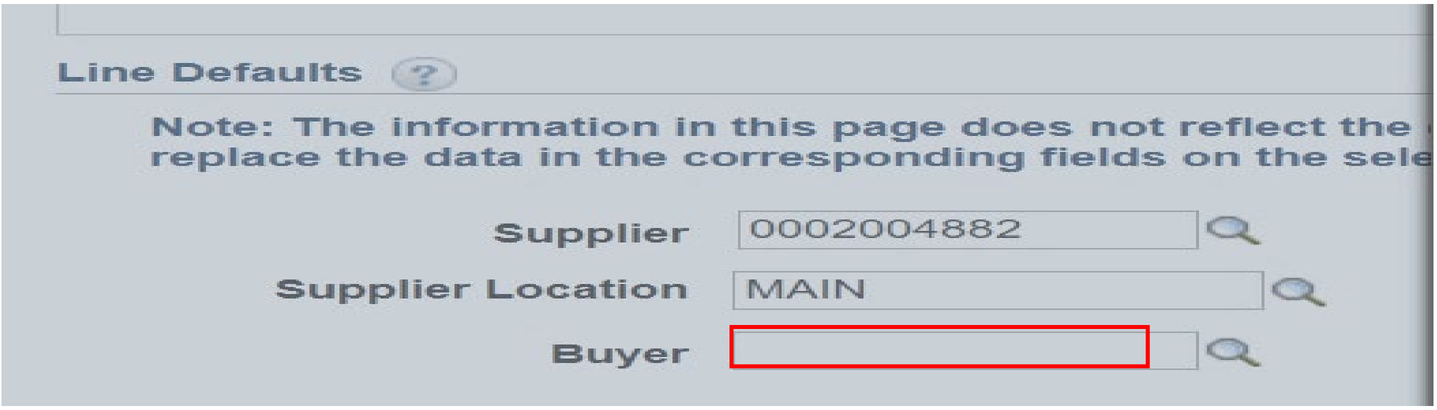
- **Supplier Location** – Click on the magnifying glass to select the current supplier address.
- **Unit of Measure** – Click on the magnifying glass to select the appropriate unit of measure

Select **DL** (Dollar) for freight. See **page 38** for instructions.



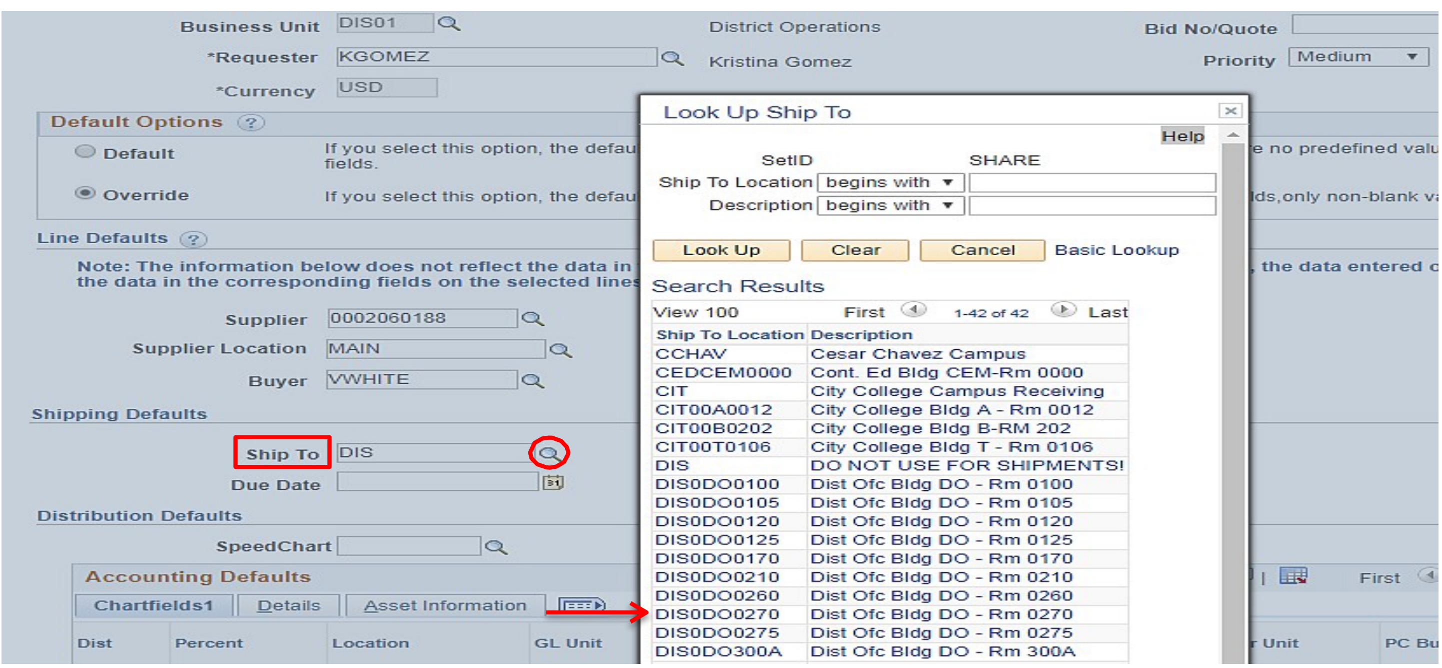
All Procurement Specialists are assigned by Category Code. End users will enter a category code and the system will route to the Procurement Specialist based on the code. The Procurement Specialist field should be left blank.

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



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.

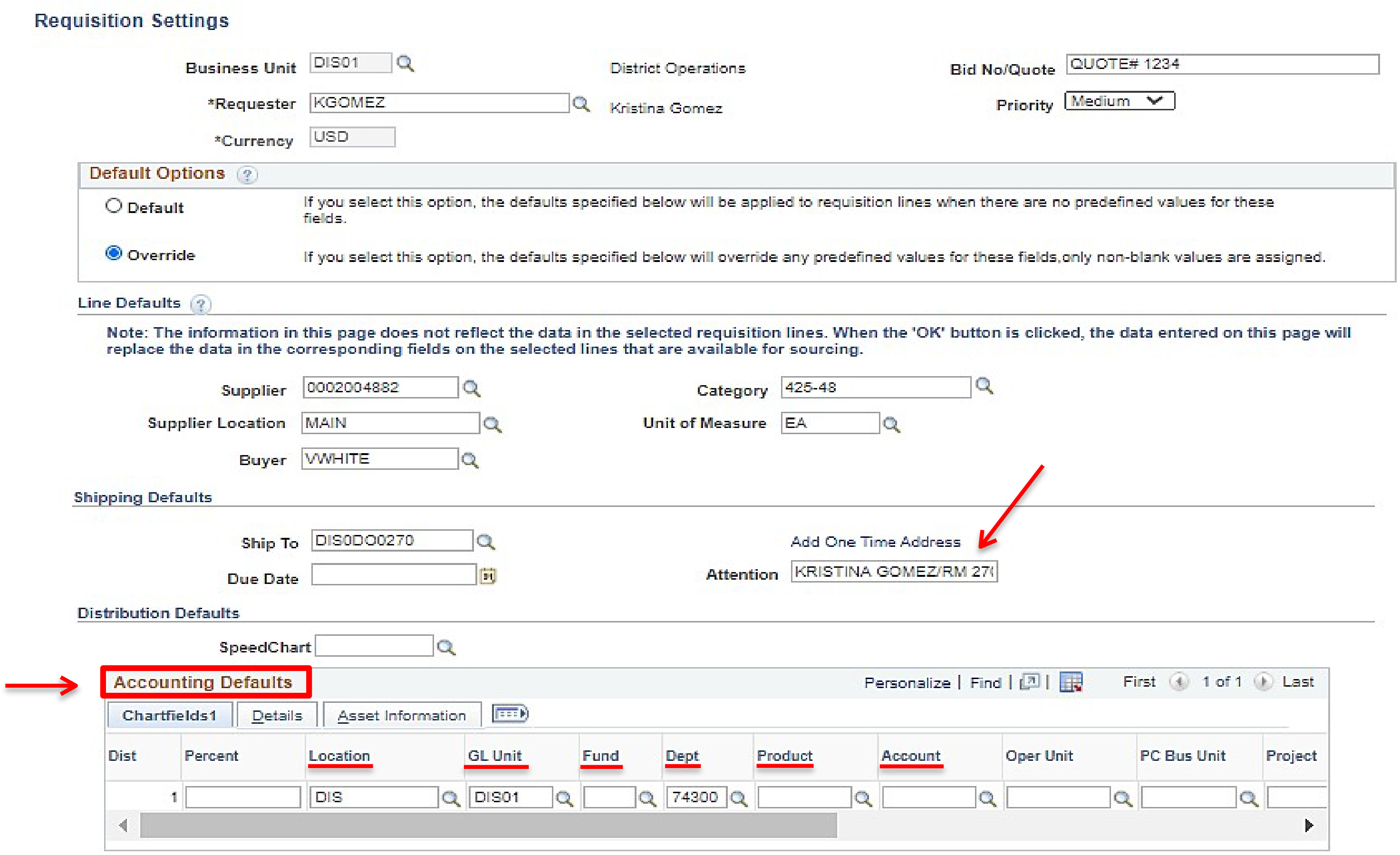
****NOTE**: Orders should be shipped to **Receiving** at the respective campus **Stockroom/Distribution Center**. **DO NOT** use **DIS** for orders. All computers, with the exception of Mesa and Miramar, should be shipped to the Central Distribution Center using **Ship To Location DISCDC0100**. DO NOT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



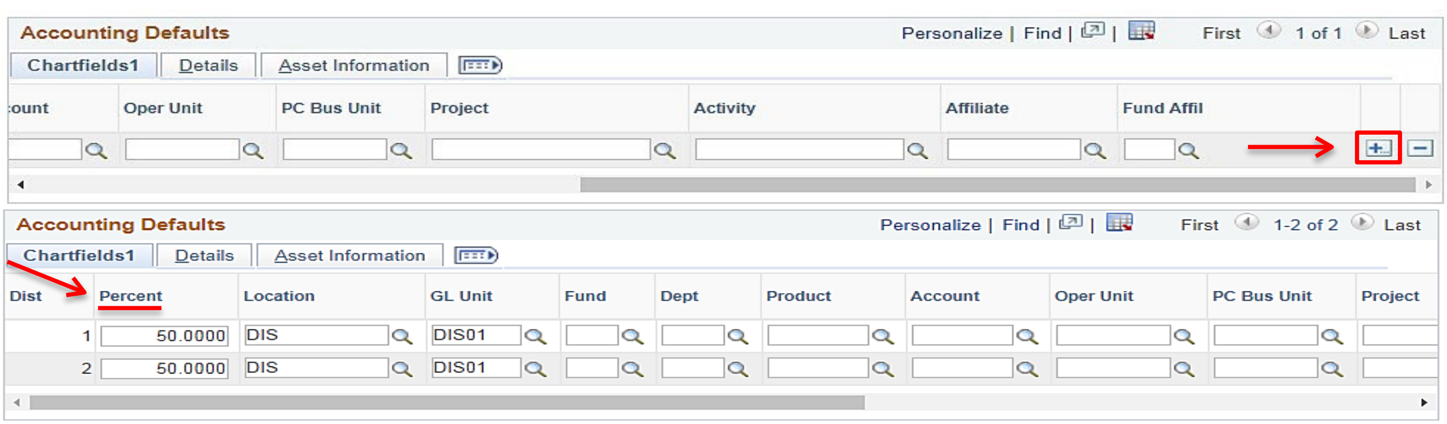
In the **Attention** field, indicate the name of the point of contact for the order and the building/room number.

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**.



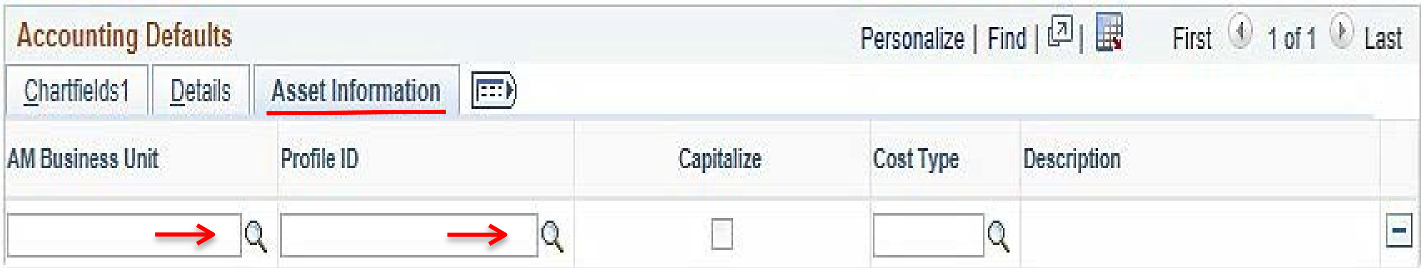
To expense items over multiple chartfield strings, scroll to the far right of the **Chartfields1** tab and click on the plus sign (+) and enter the number of rows that need to be added. If applicable, indicate the percentage that applies to each Chartfield string. ****Note: Ensure that Sales Tax is accounted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



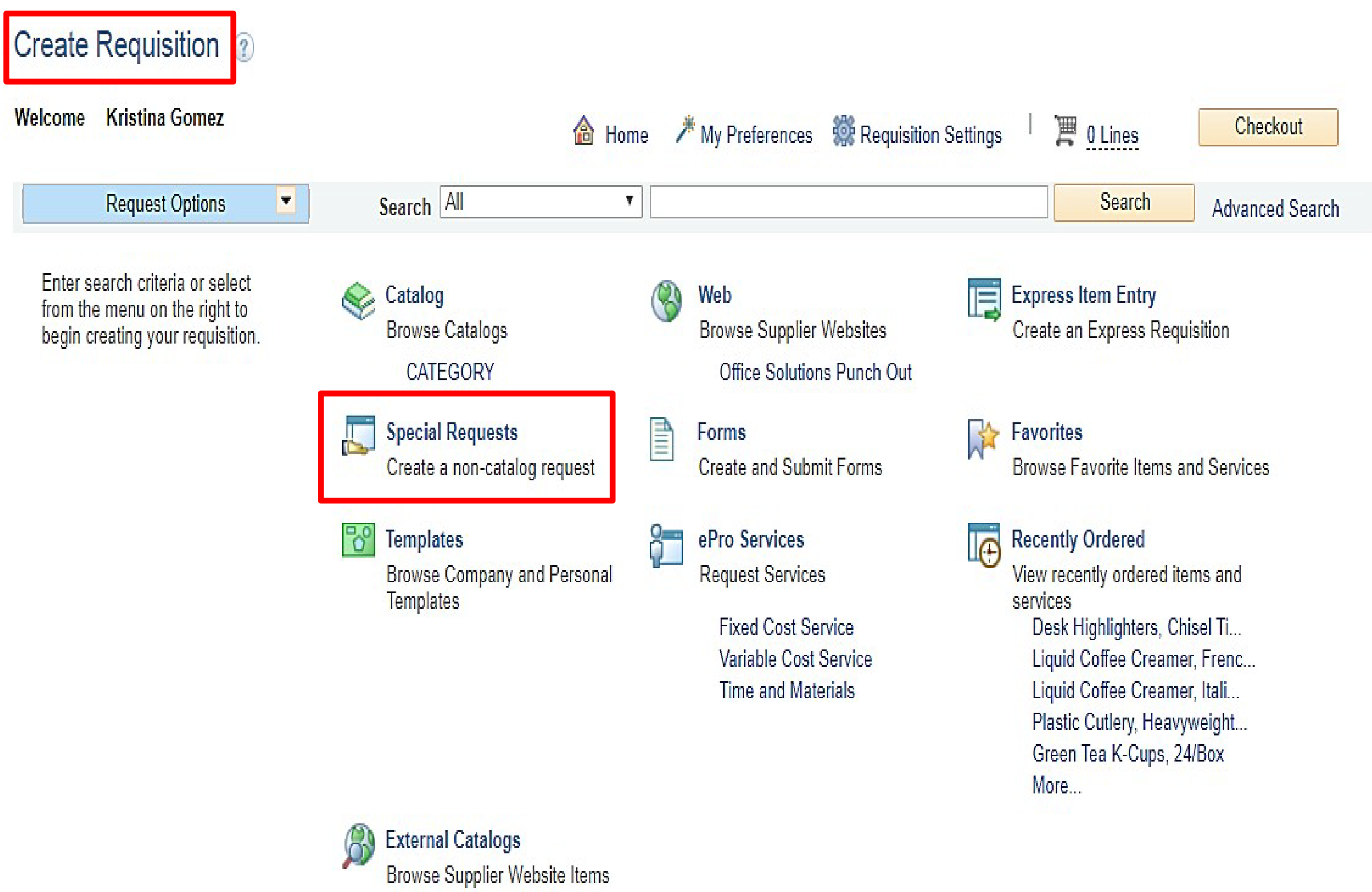
Select the **Asset Information** tab if:

- Any single item is over $1,000.00, including shipping & tax
- Any line item containing Computer/AV/IT Equipment with a value of $200 or greater
- Any line item containing a Monitor
- Any line item containing 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.**



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



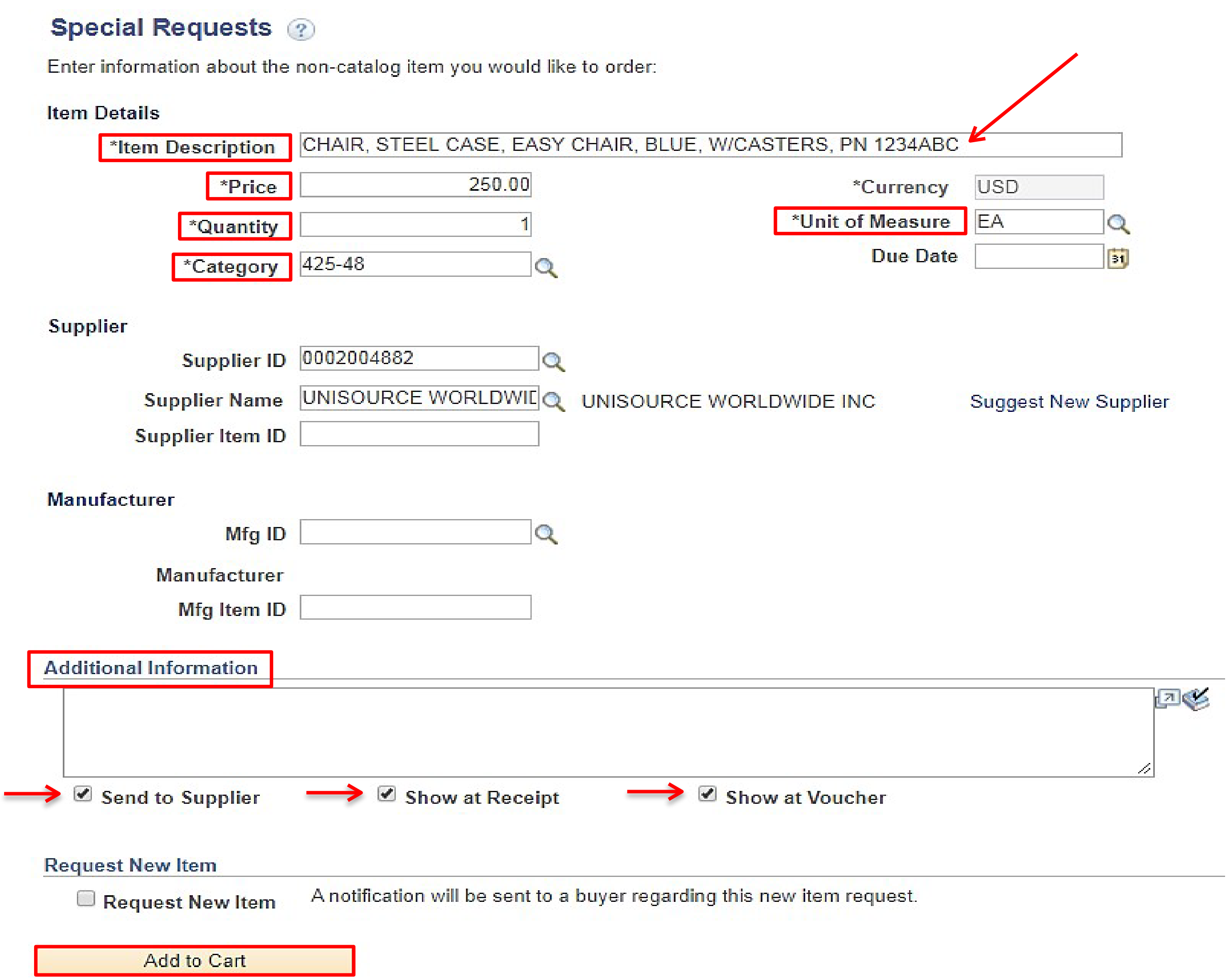
On the **Special Requests** screen, appropriate information will need to be entered for each line of the requisition. All fields marked in **RED** below need to be completed:

- **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.

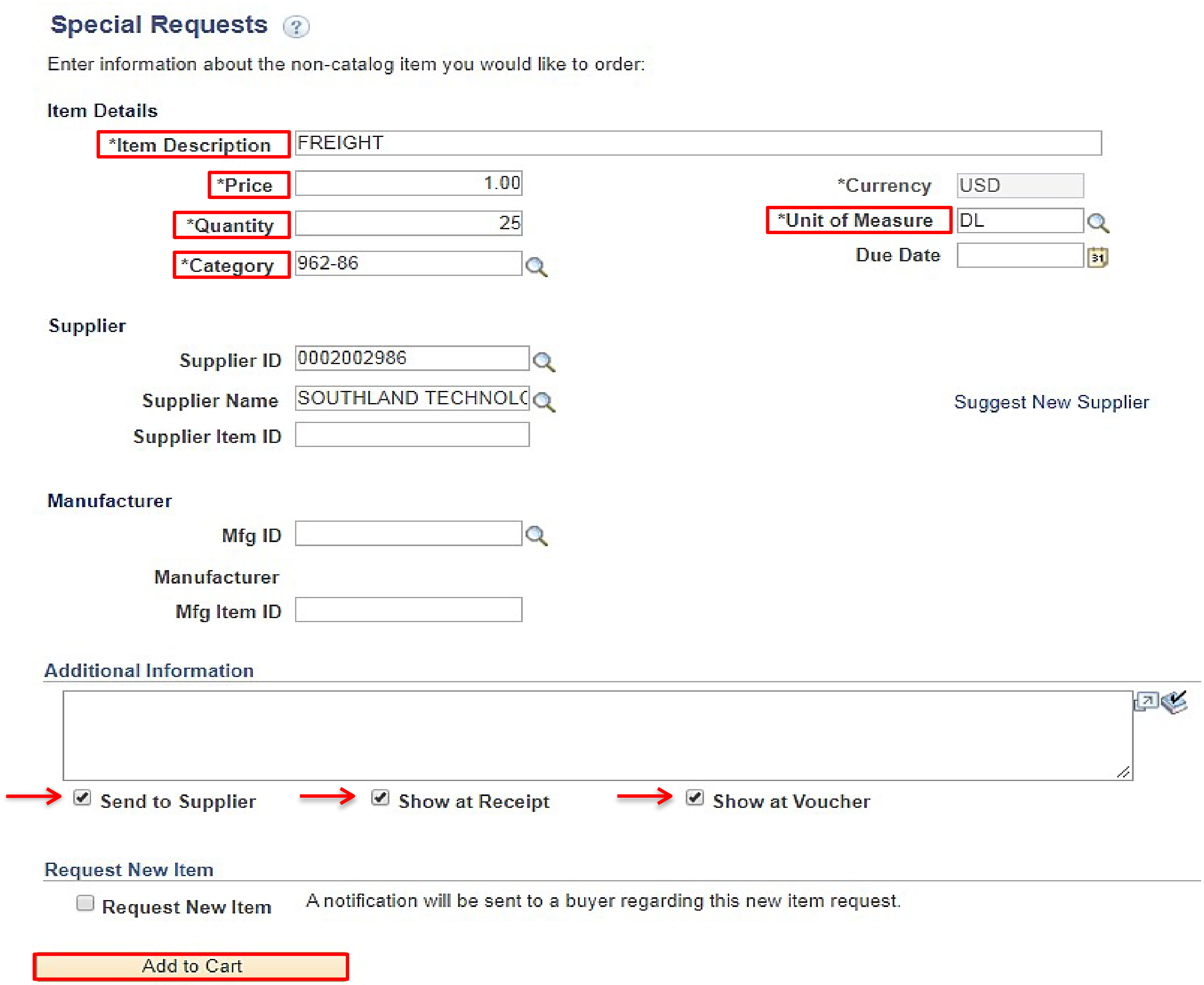
****NOTE: Freight** – See **page 38** for instructions on how to enter a separate line for freight.

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.**



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).



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.

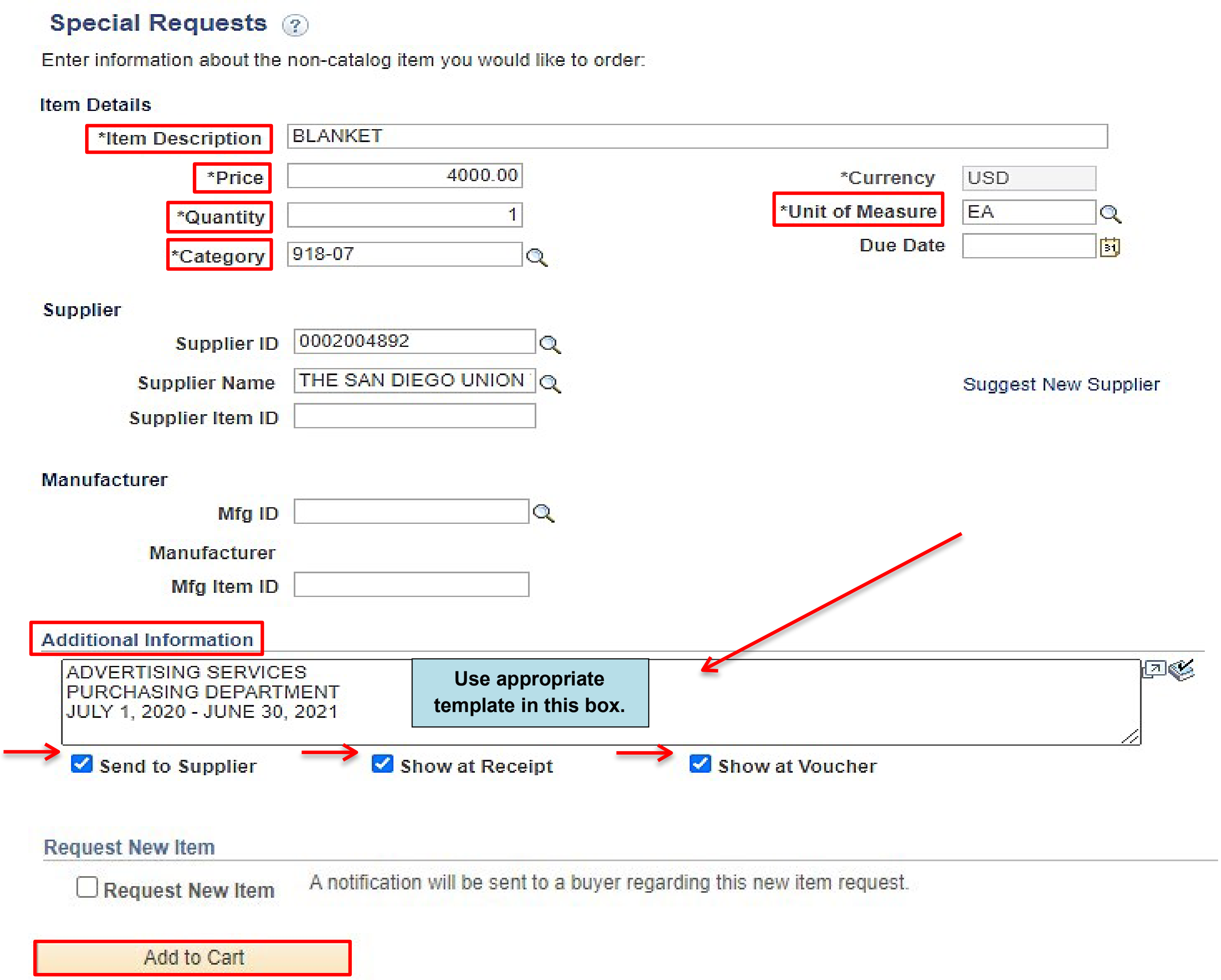
****NOTE: SKIP PAGES 39 & 40 UNLESS THIS IS A BLANKET REQUSITION**

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

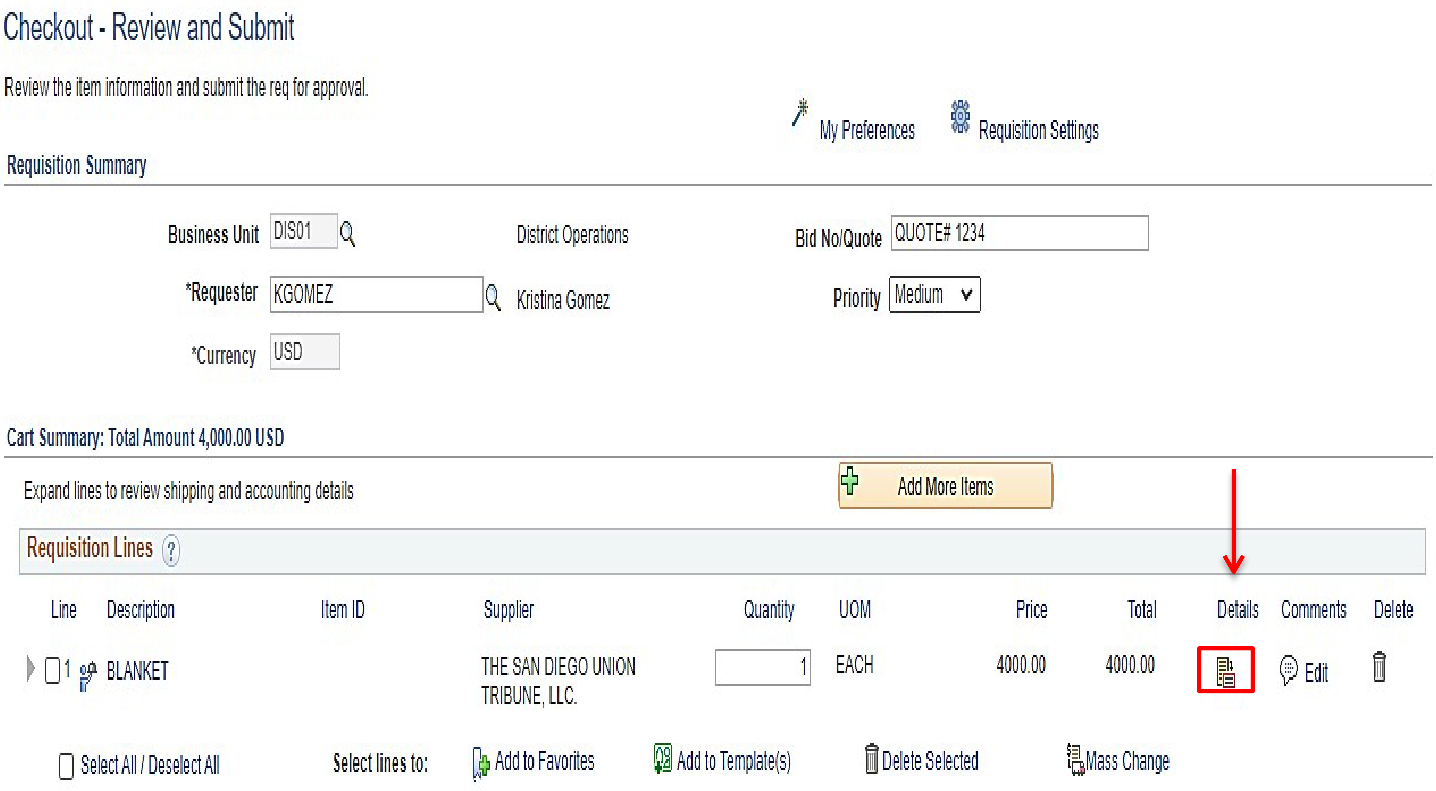
On the **Create Requisition** screen, appropriate information will need to be entered for the Blanket PO. All fields marked in RED below need to be completed:

- **Item Description** – Enter **BLANKET ORDER** only
  Include appropriate template and all remaining description details in the **Additional Information box.**
- **Price** – Enter the price. (Tax will now be added to Blanket Orders for **goods**.)
- **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

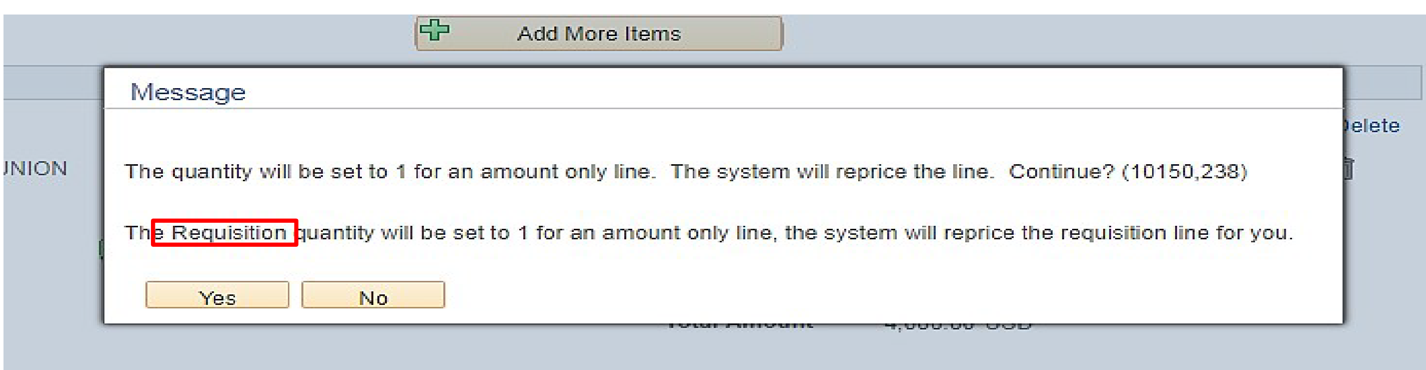


At the **Checkout - Review and Submit** screen, click on the line **Details** icon below **Details**.



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**.

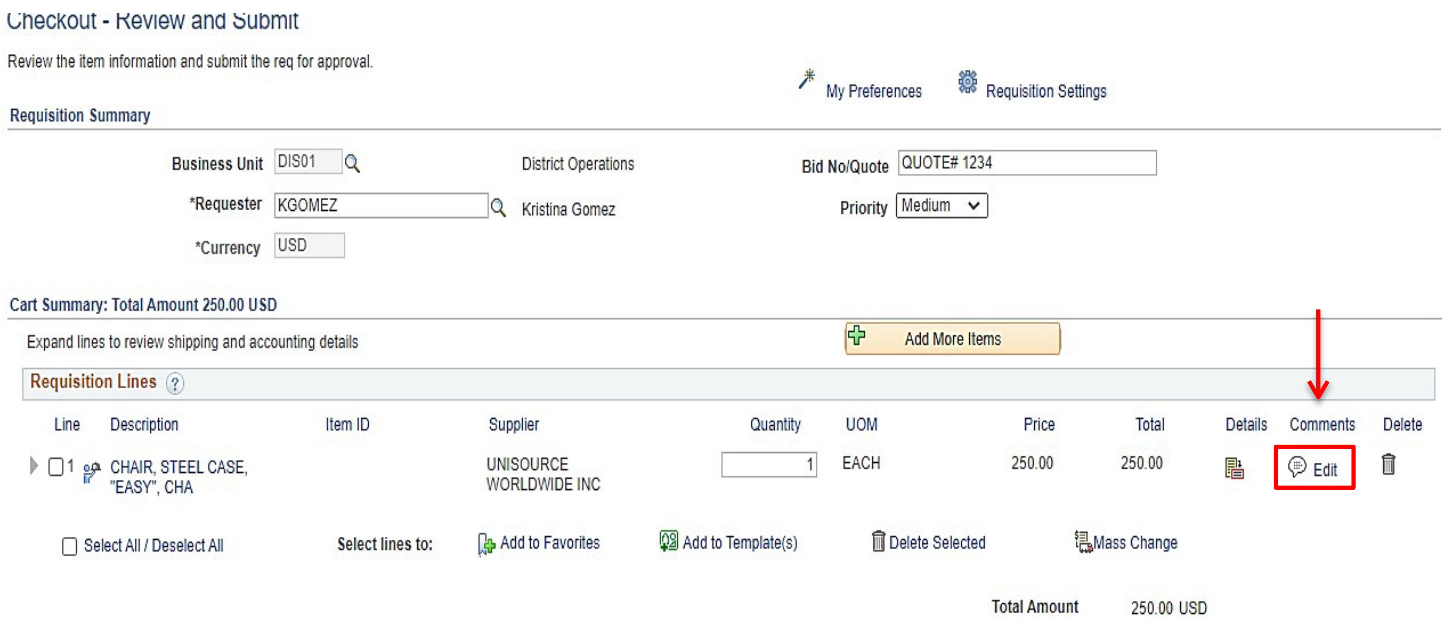
Click **Yes** on the next pop-up message that appears to be directed back to the **Checkout – Review and Submit** screen to continue the requisition.



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

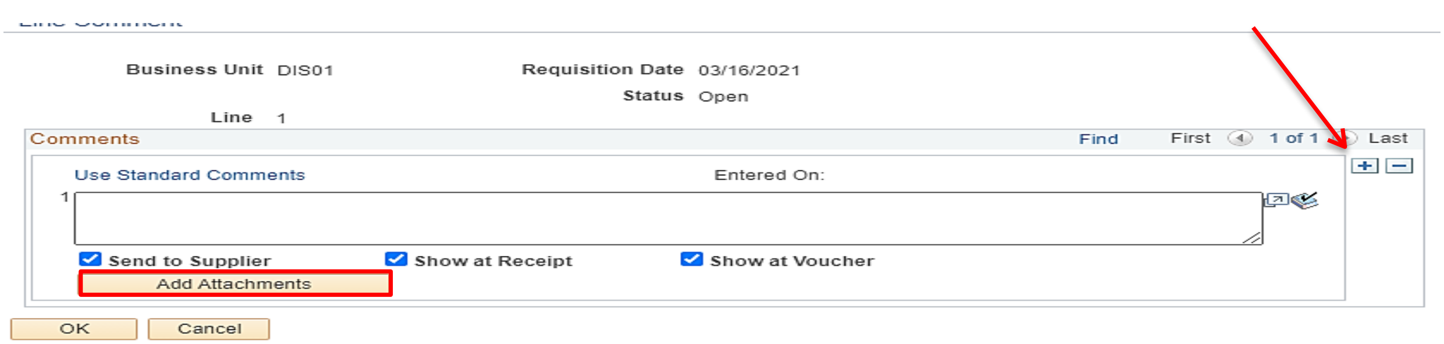
Next, add all supporting documents to the purchase requisition. This should be done on **Line one** of the purchase requisition under the **Comments** field. Click on the **Edit** icon to upload all attachments.

****NOTE:** If the purchase requisition exceeds **<u>$20,000,00</u>** three quotes are required. Each quote must be uploaded as a separate attachment on line one of the purchase requisition; see below.



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.



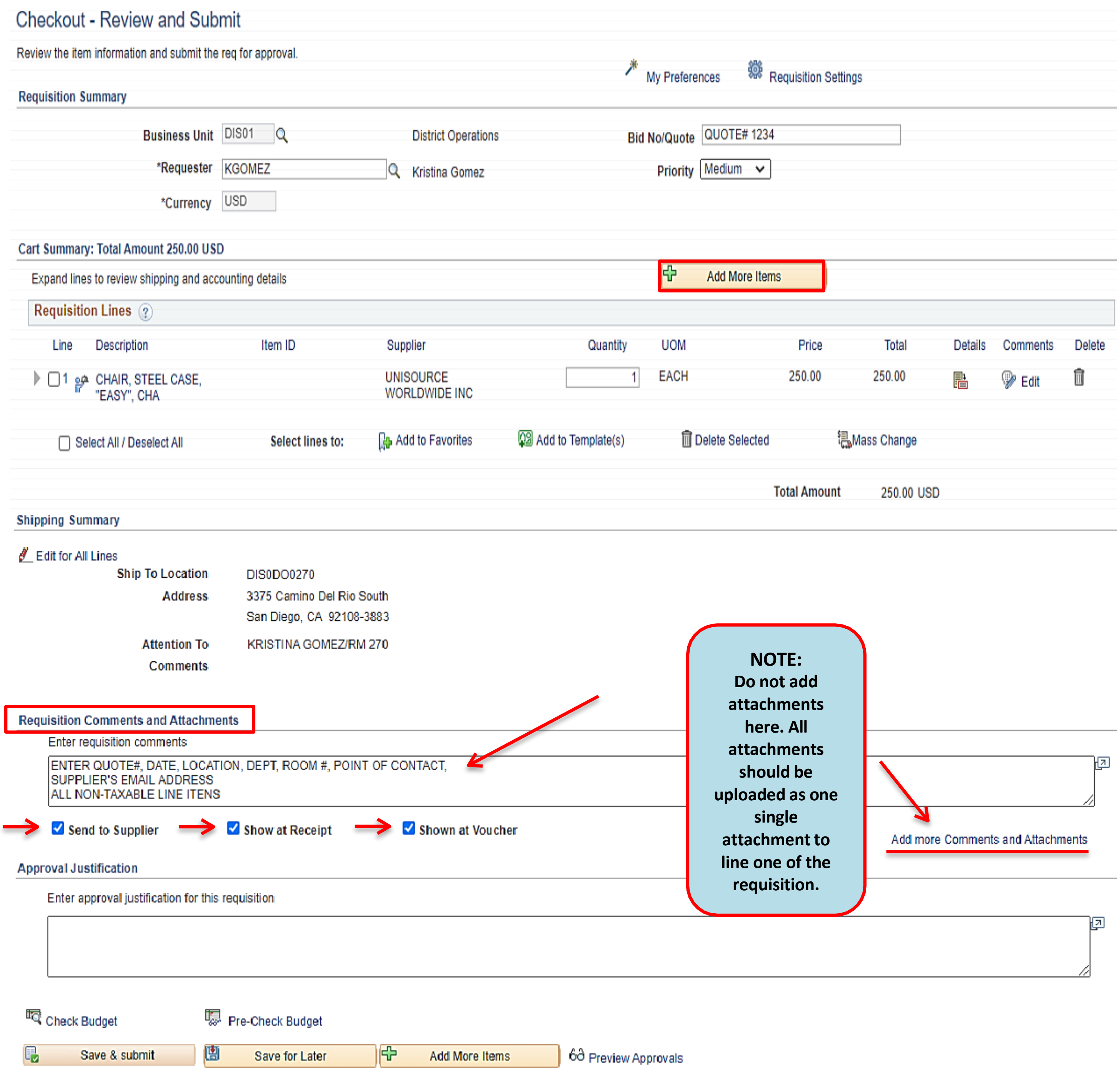
After verifying the attachments, check all three "**Send to**" and "**Show at**" boxes below. Check the **Send to Supplier** box and click **OK** to save and return to the checkout screen.

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

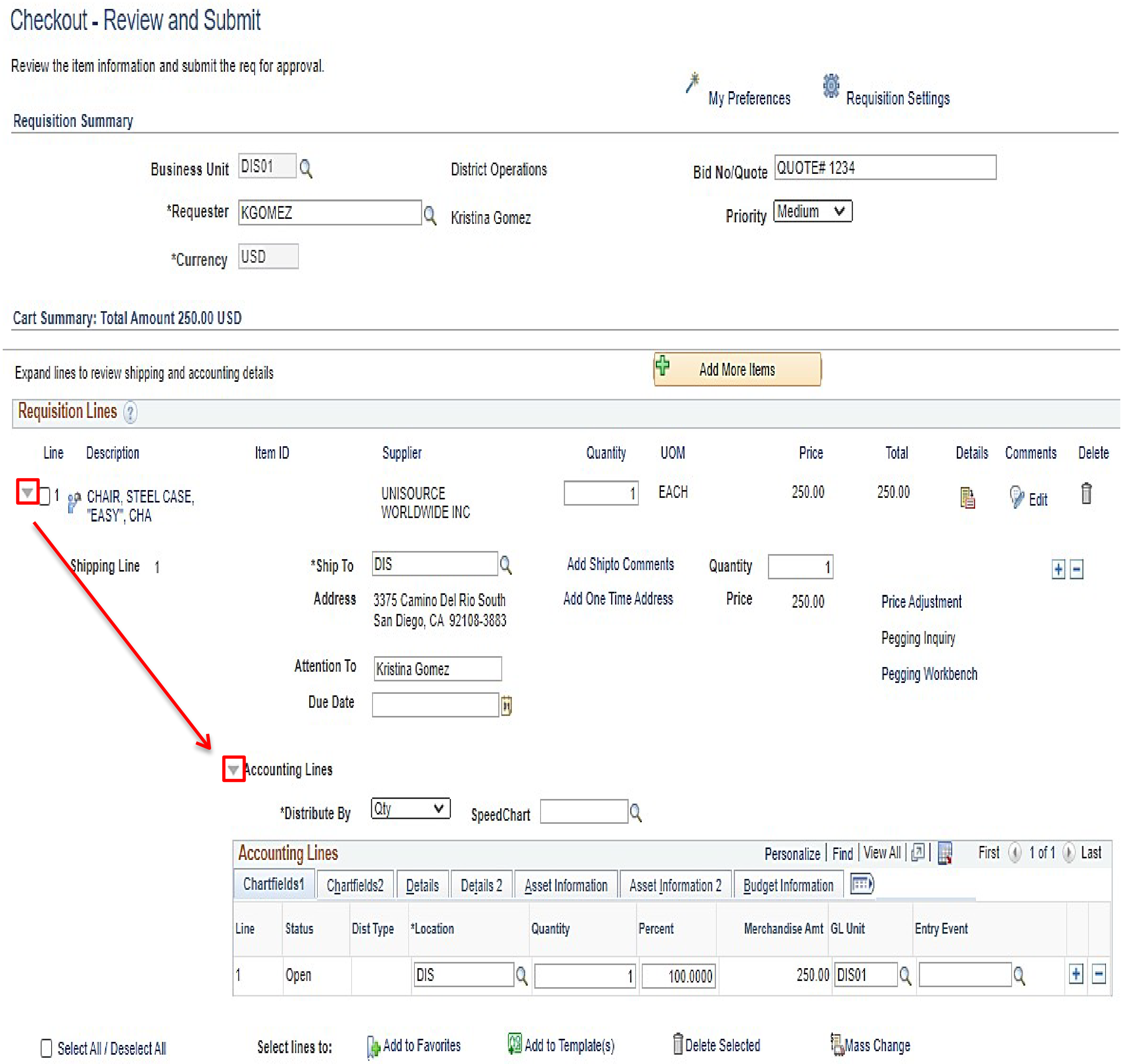
If additional lines need to be added, click on **Add More Items**, then follow the same process as above. There is a maximum of **50 line items** that can be entered per requisition.

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.

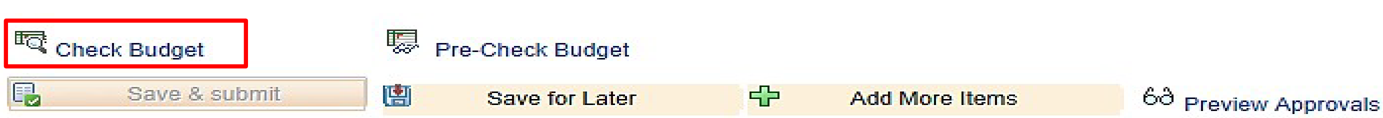


Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each **Line** item, and the corresponding **Accounting Lines** to expand and review the information within.

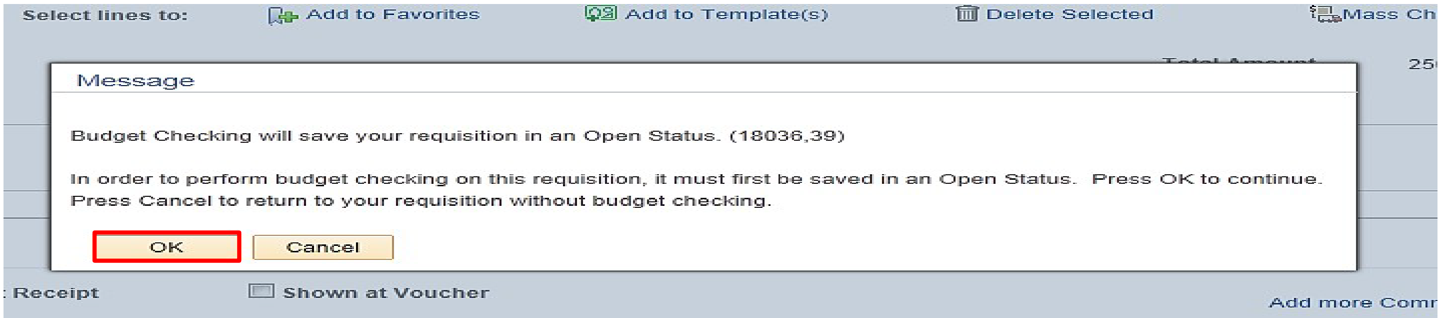


Once the requisition is complete, click on **Check Budget** at the bottom left of the page.

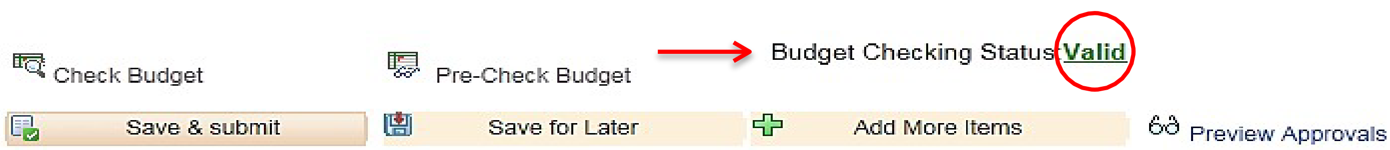
****NOTE: Purchase requisitions that contain budget errors will not be saved or submitted. Budget issues will need to be resolved with the appropriate person within your department.**



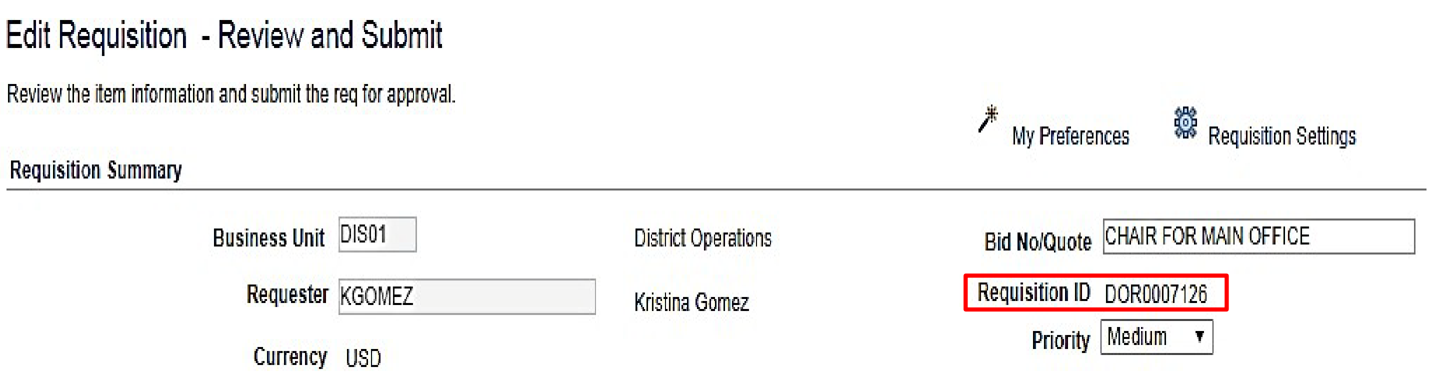
Click **OK** on the pop-up message that appears.



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.

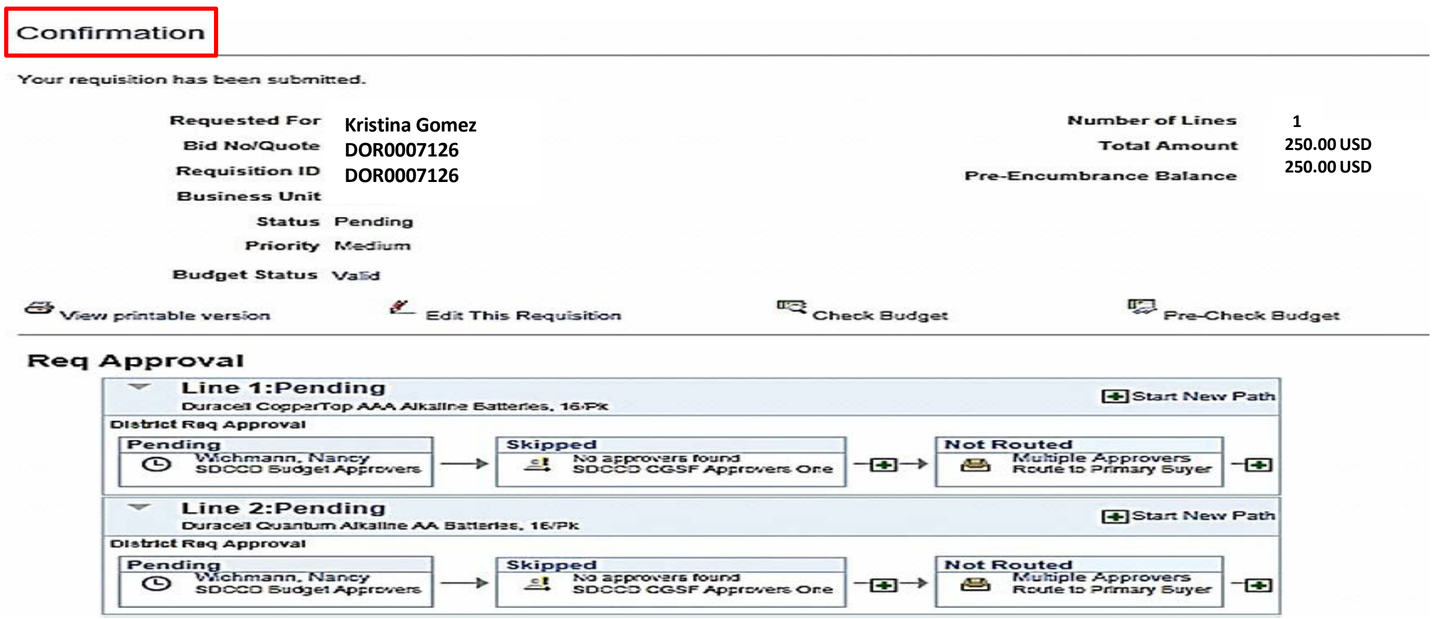


Once there is a valid **Budget Check** and a **Requisition ID** number is issued at the top of the page, scroll to the bottom of the page and click on **Save & Submit** to save the purchase requisition and submit it for approval, sourcing, and dispatching to the supplier. The purchase requisition remains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

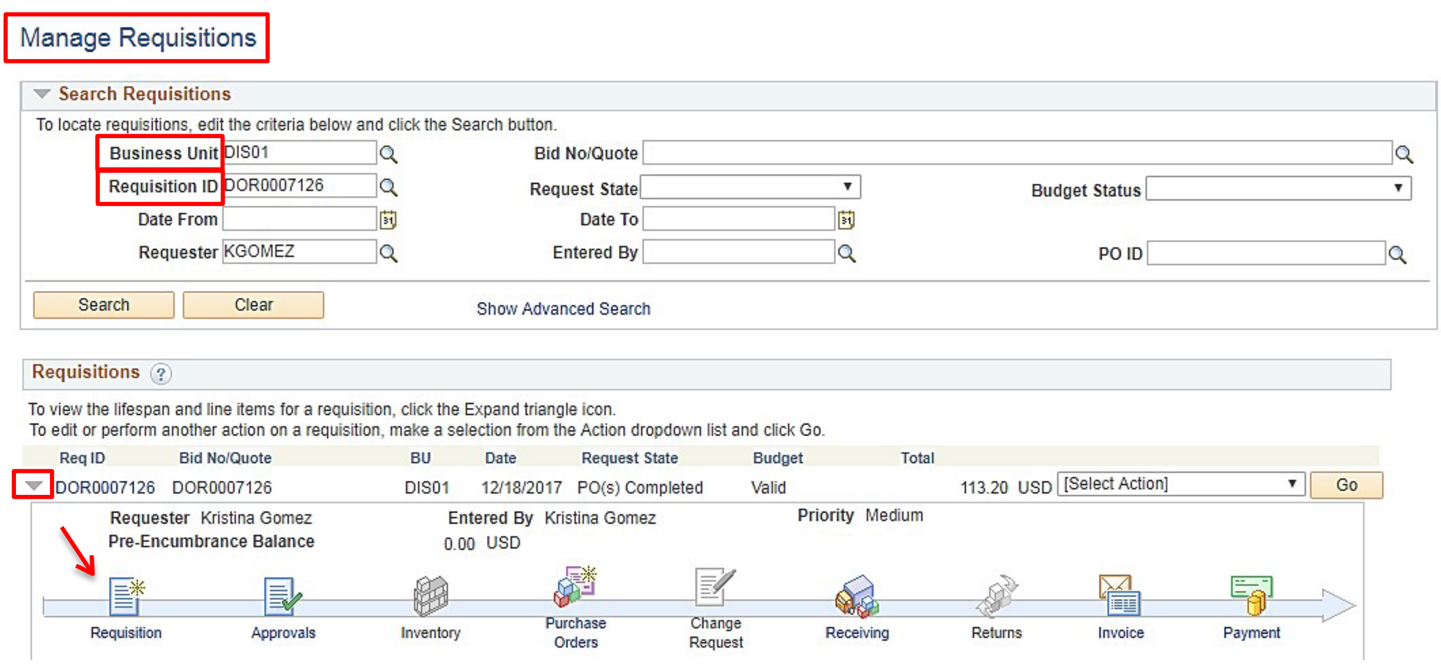


To check the status of the purchase requisition or to view the workflow in PeopleSoft, use the following navigation to access **Manage Requisitions:**

- **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.



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 a change is needed (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.

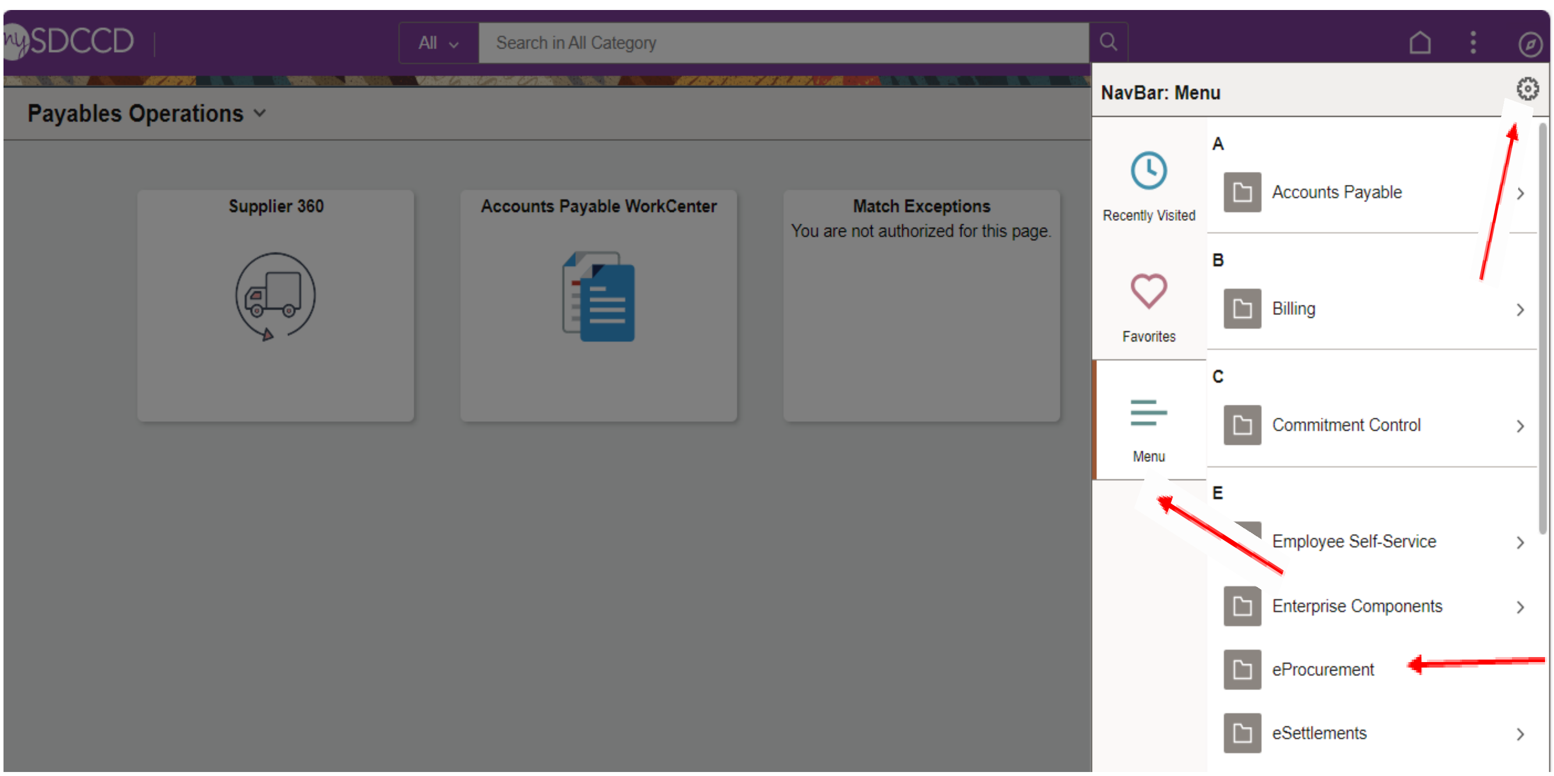
*NOTE: If the PO has been rolled, all change orders must be processed directly to the purchase order as the purchase requisition is no longer valid. Please connect with the assigned Procurement Specialist if you need assistance editing a rolled purchase order.

****NOTE: A change order cannot be processed if an active voucher is linked to the purchase order, the order has been received, or if the budget status is not valid. If these pertain to your order please connect with AP to have the voucher unlinked and/or the District Warehouse to remove the receiving, BEFORE proceeding with the change order.**

Below are the steps on PeopleSoft to process a change order for any purchase order that is ready to be processed.

Use the following navigation to process Change Orders:

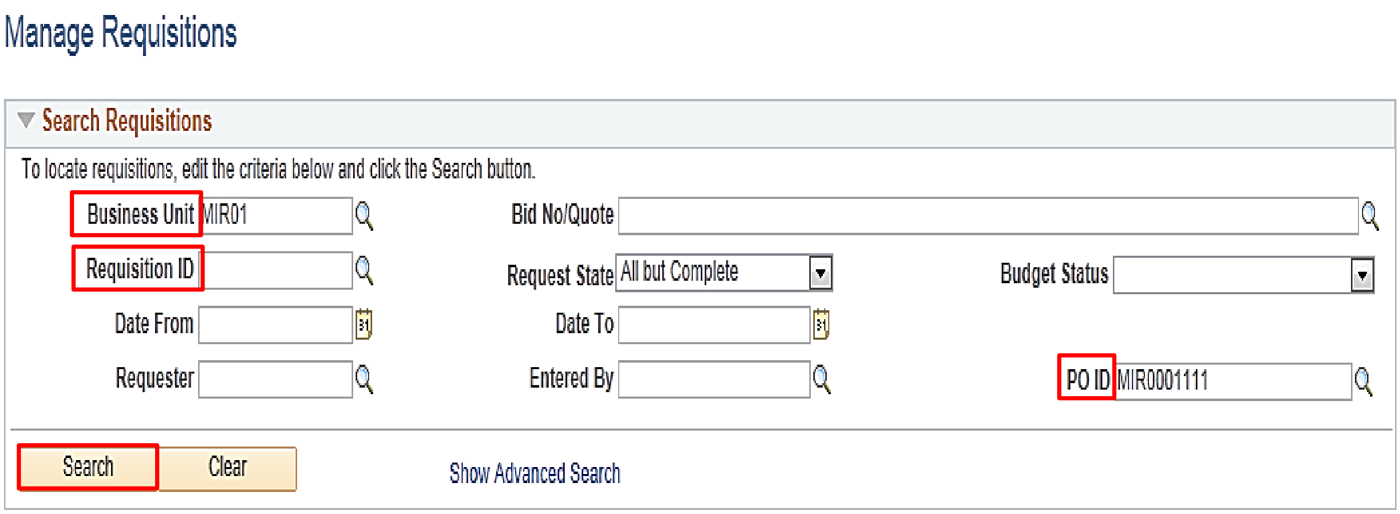
- Finance Dashboard > NavBar > Menu > eProcurement > Manage Requisitions



Then click Manage Requisitions

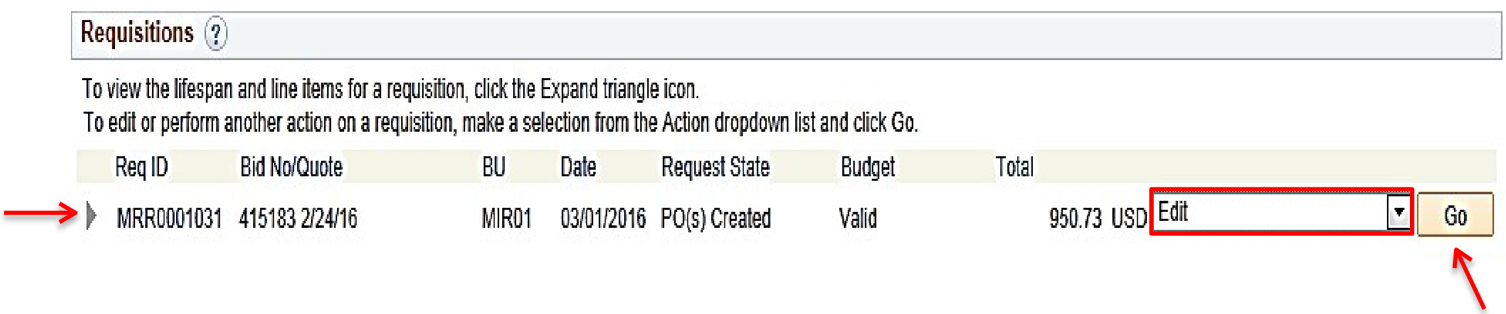
****NOTE: To search for a purchase order or purchase requisition that needs to be edited, the Business Unit and either the Requisition ID or the PO ID fields MUST be populated.**

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



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

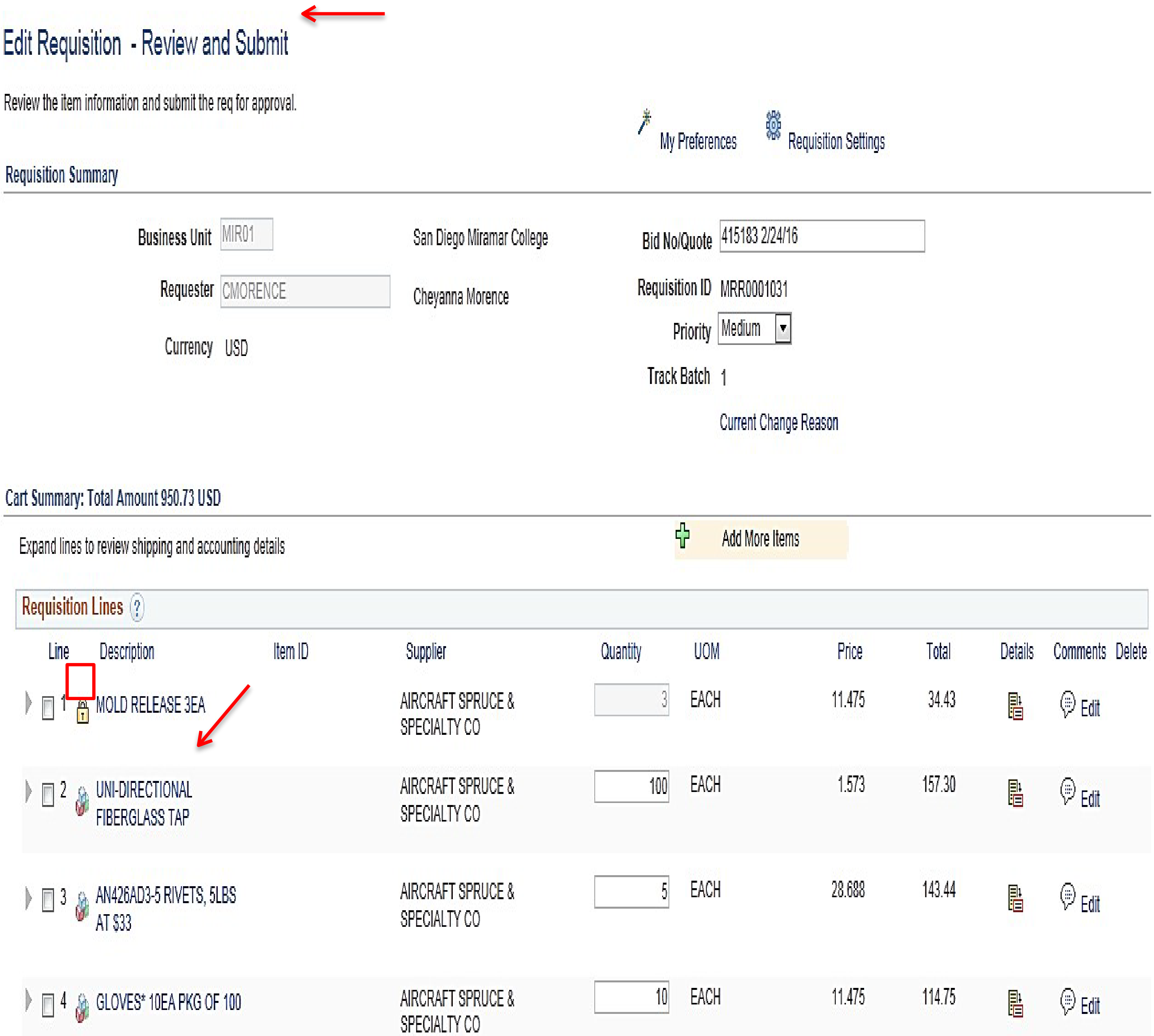
****NOTE: If you do not have the Edit option, notify your campus Business Services Office to obtain access. If you are at the District Office, contact the IT Help Desk to request access.**



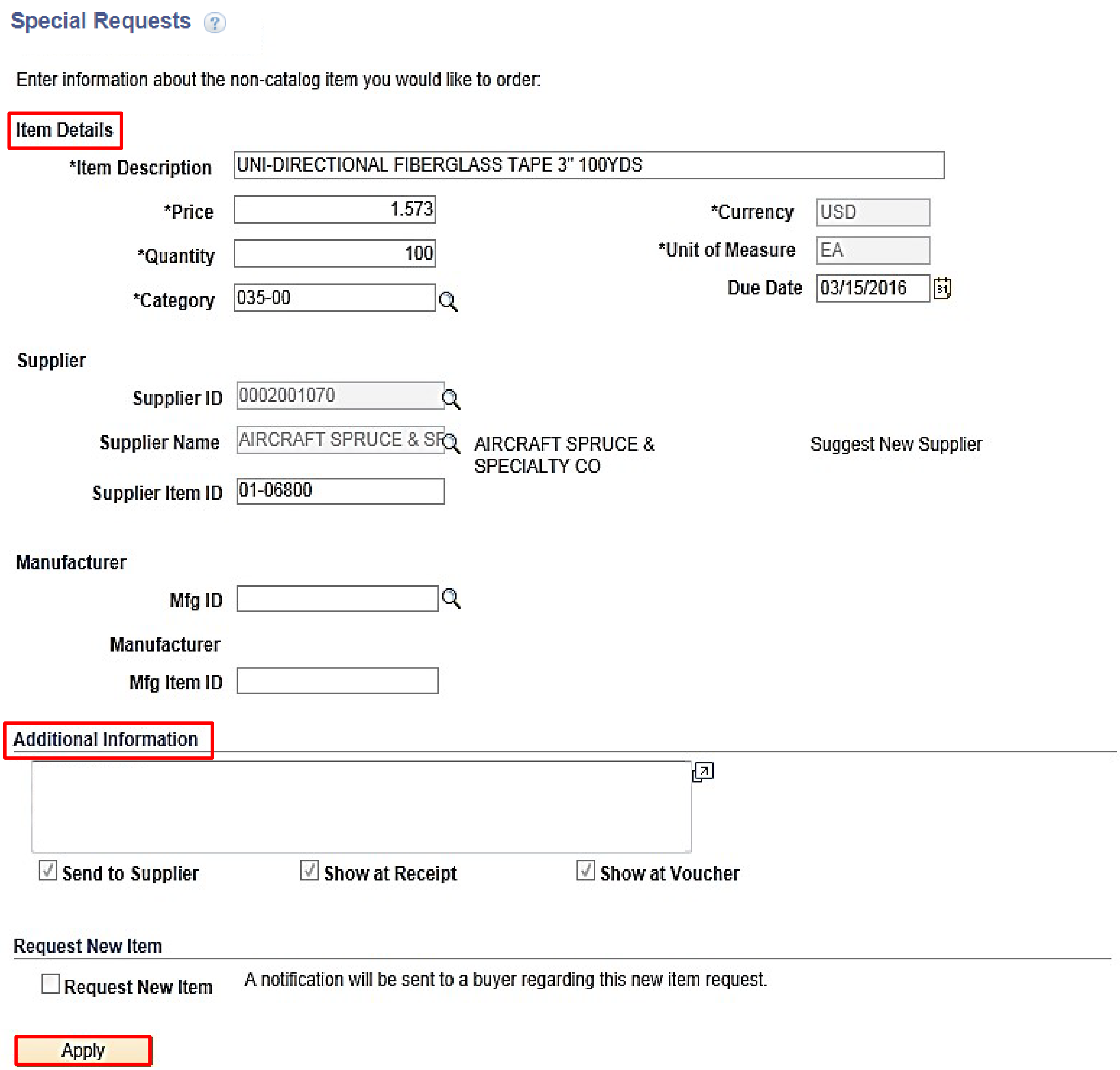
This pop-up message should appear stating, "The Requisition is approved". Click **OK** on that message to be directed to the **Edit Requisition – Review and Submit** screen below.

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**



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

Manufacturer

Mfg Item ID

Additional Information

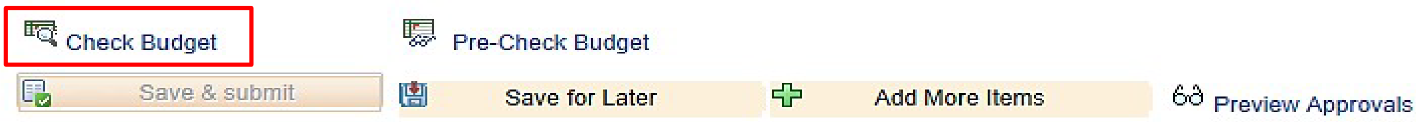
Send to Supplier
Show at Receipt
Show at Voucher

Request New Item

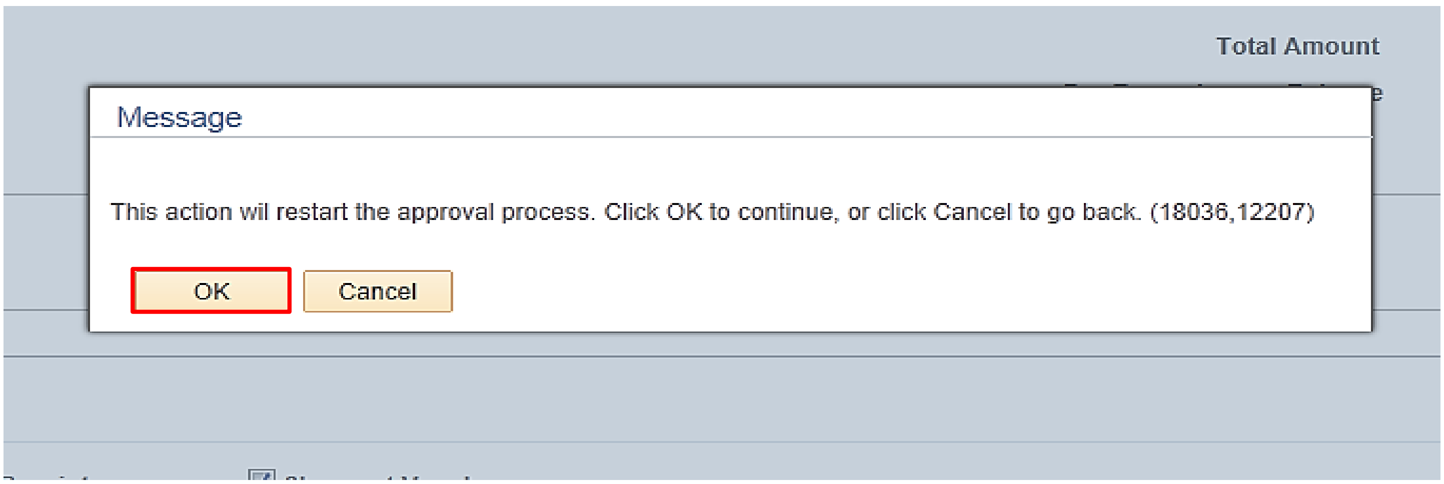
Request New Item
A notification will be sent to a buyer regarding this new item request.

Apply

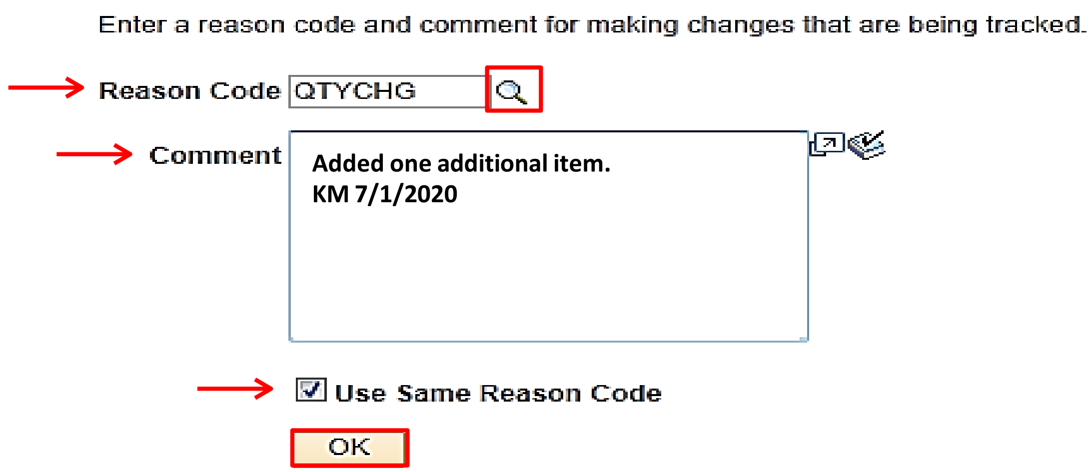
Once completed, you will be routed back to the **Review and Submit** page. Scroll to the bottom of the screen and click on **Check Budget.**



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

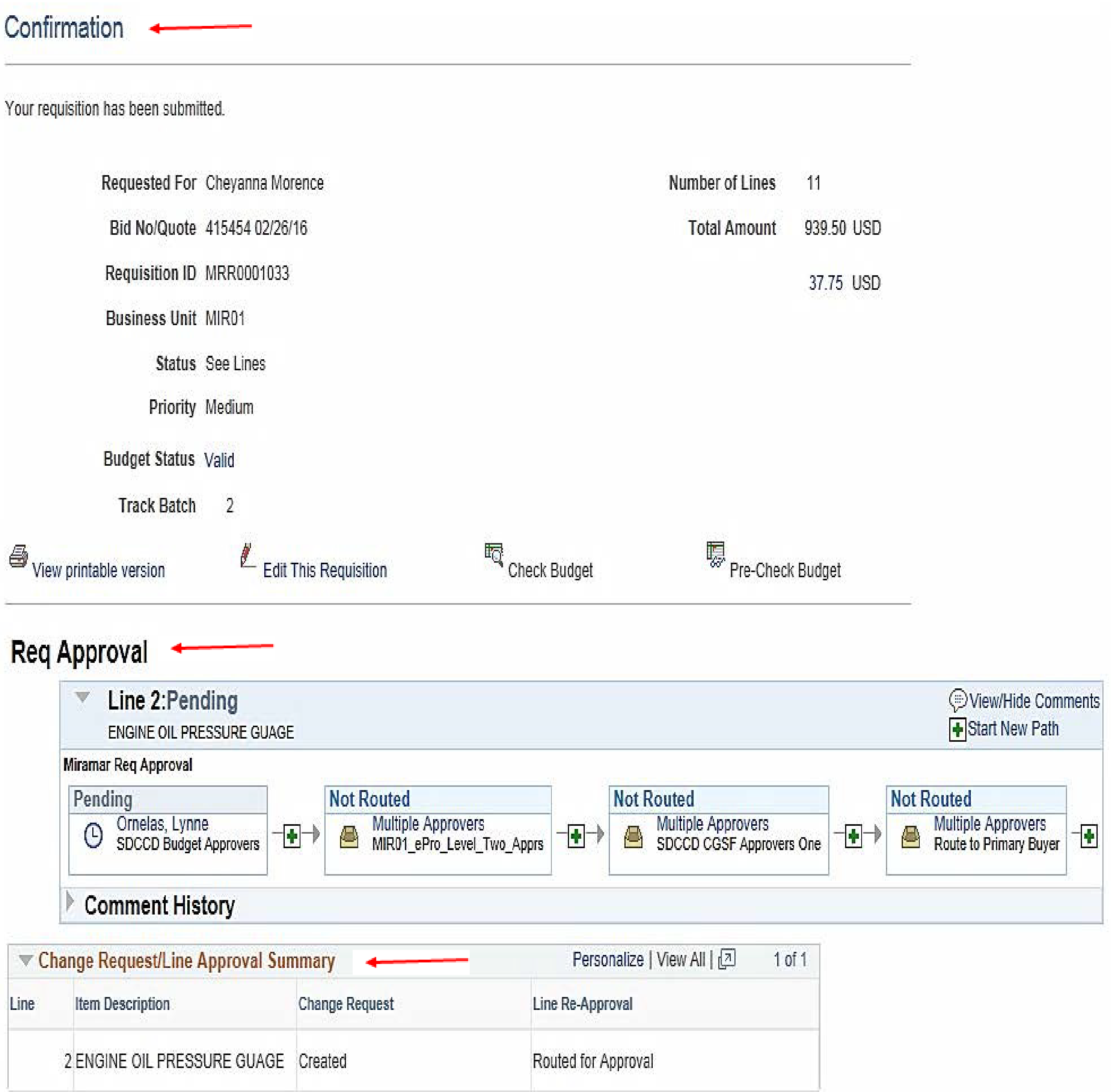


The **Change Order** box will appear. Please select a **Reason Code** (select the code that is most applicable). In the comment box, provide a description of the change(s). At the end, add the end user/initiator's initials and date of change (see example). Then Check the **Use Same Reason Code** box,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



The final page is the **Confirmation** page and here the **Change Request(s)** are 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
Bid No/Quote 415454 02/26/16
Requisition ID MRR0001033
Business Unit MIR01
Status See Lines
Priority Medium
Budget Status Valid
Track Batch 2

Number of Lines 11
Total Amount 939.50 USD
37.75 USD

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

Req Approval

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

Miramar Req Approval

Pending — Ornelas, 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 — Personalize | View All | 1 of 1

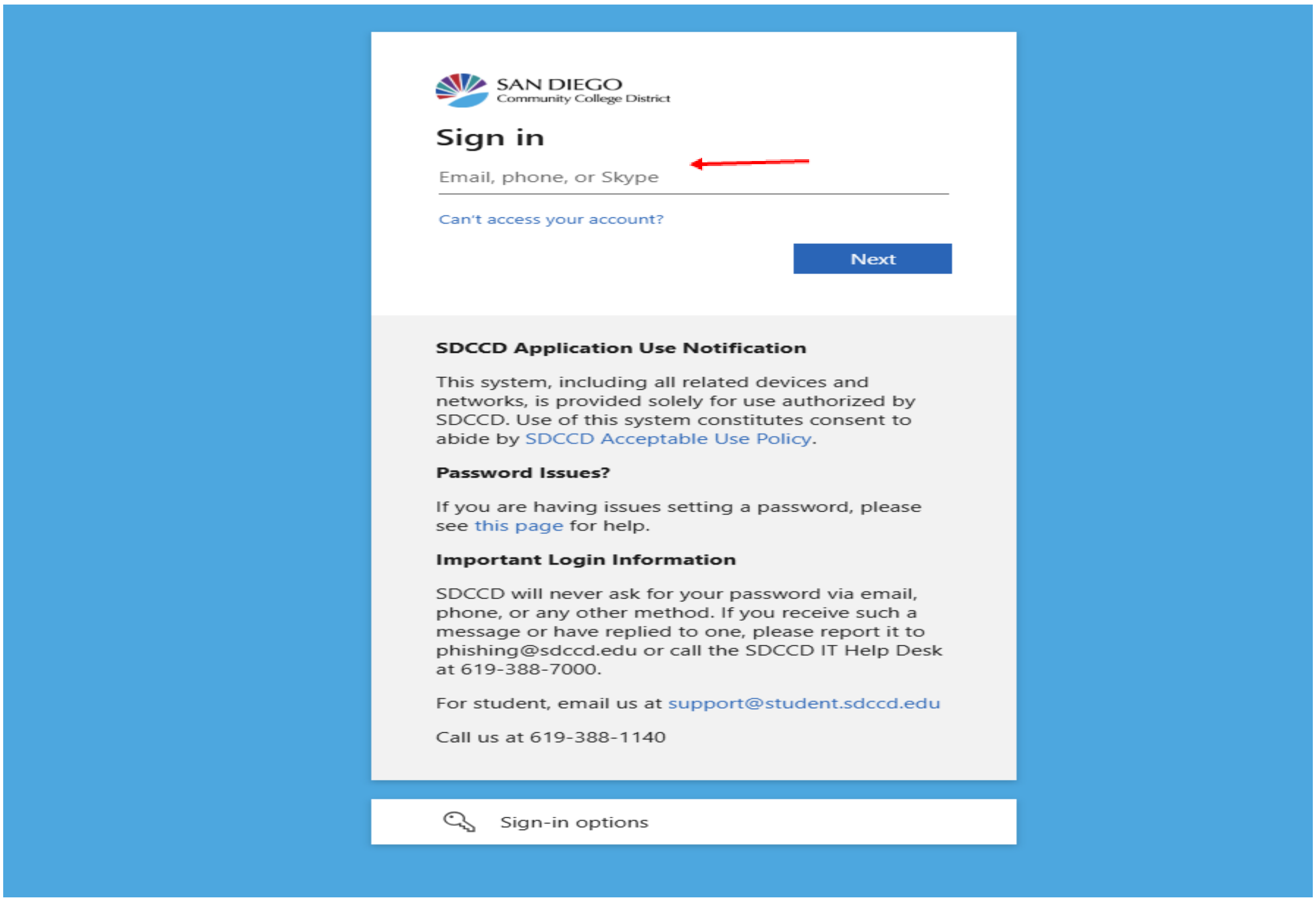
Line	Item Description	Change Request	Line Re-Approval
2	ENGINE OIL PRESSURE GUAGE	Created	Routed for Approval

DIRECT CONNECT ORDERS

You can **access PeopleSoft** through the District website by selecting the **Employees** 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/

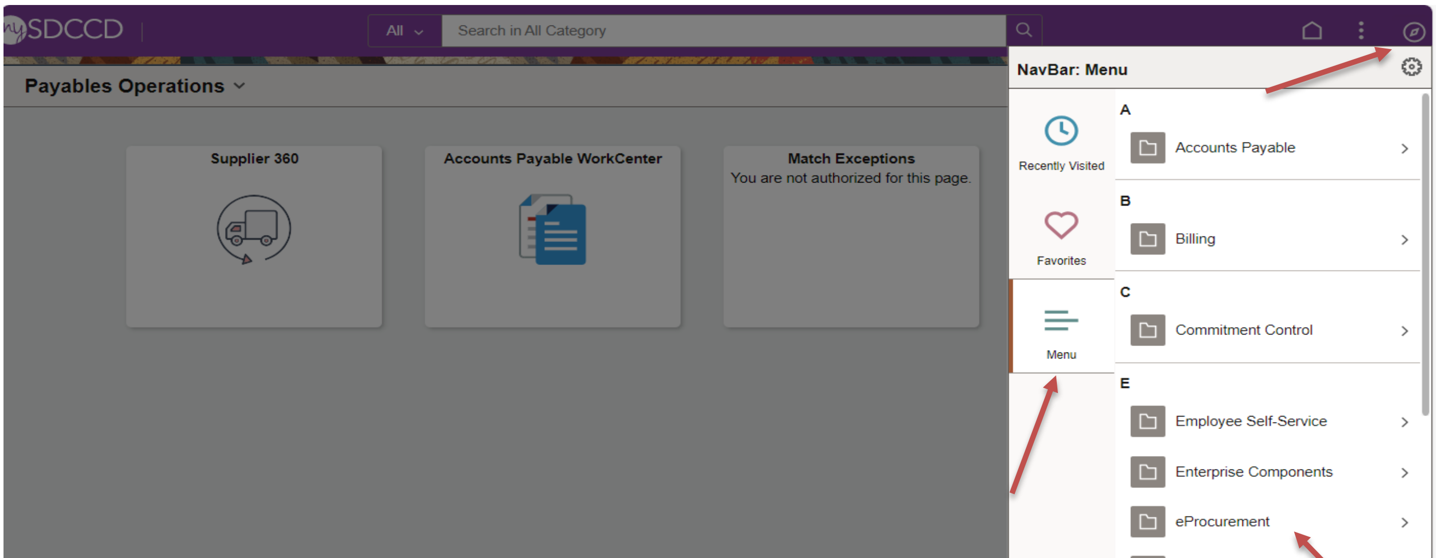
All orders MUST be placed through PeopleSoft using either Chrome or Firefox.



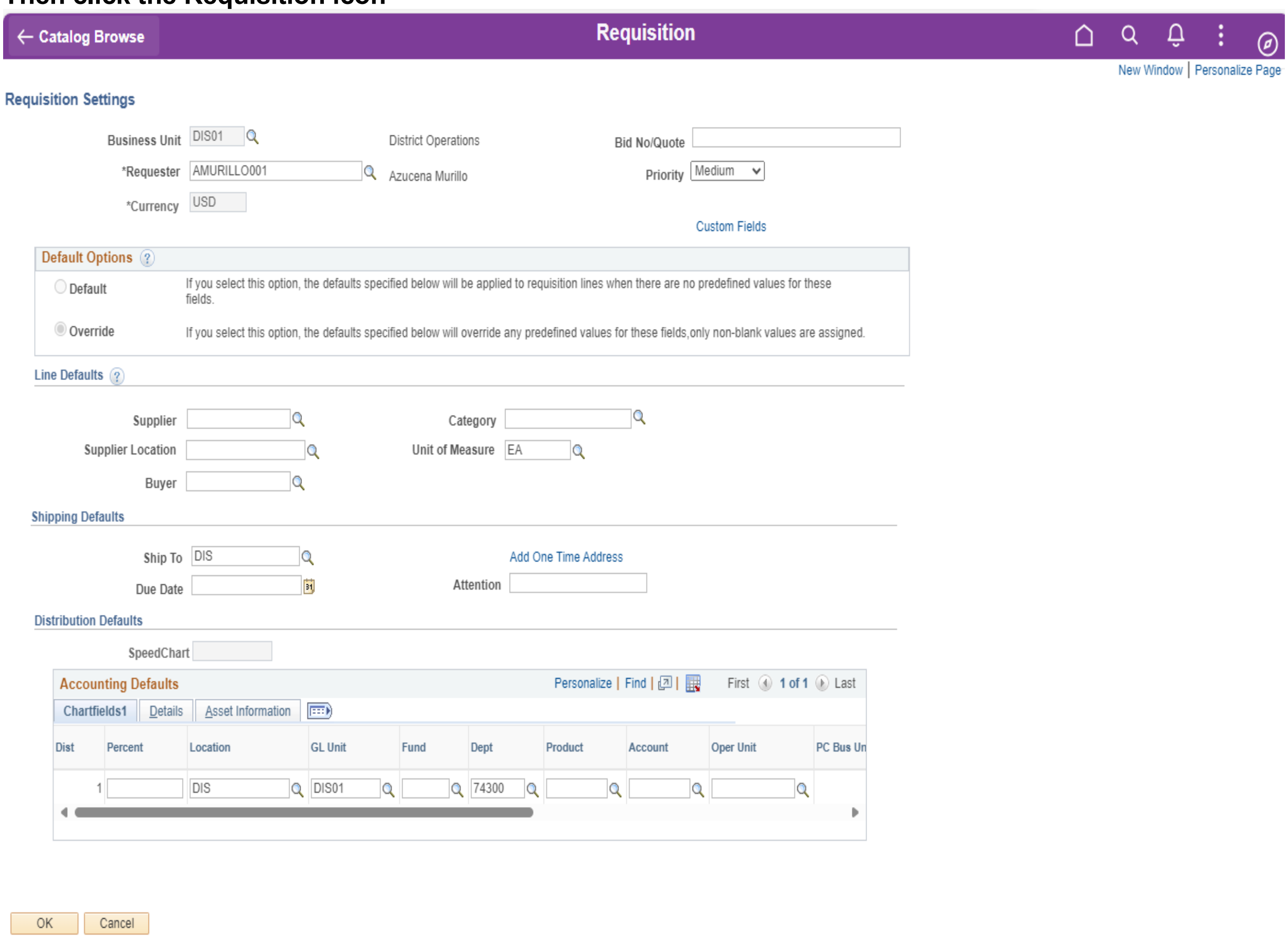
To access the **Create Requisition** screen, click on the **Finance Dashboard** icon.

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:

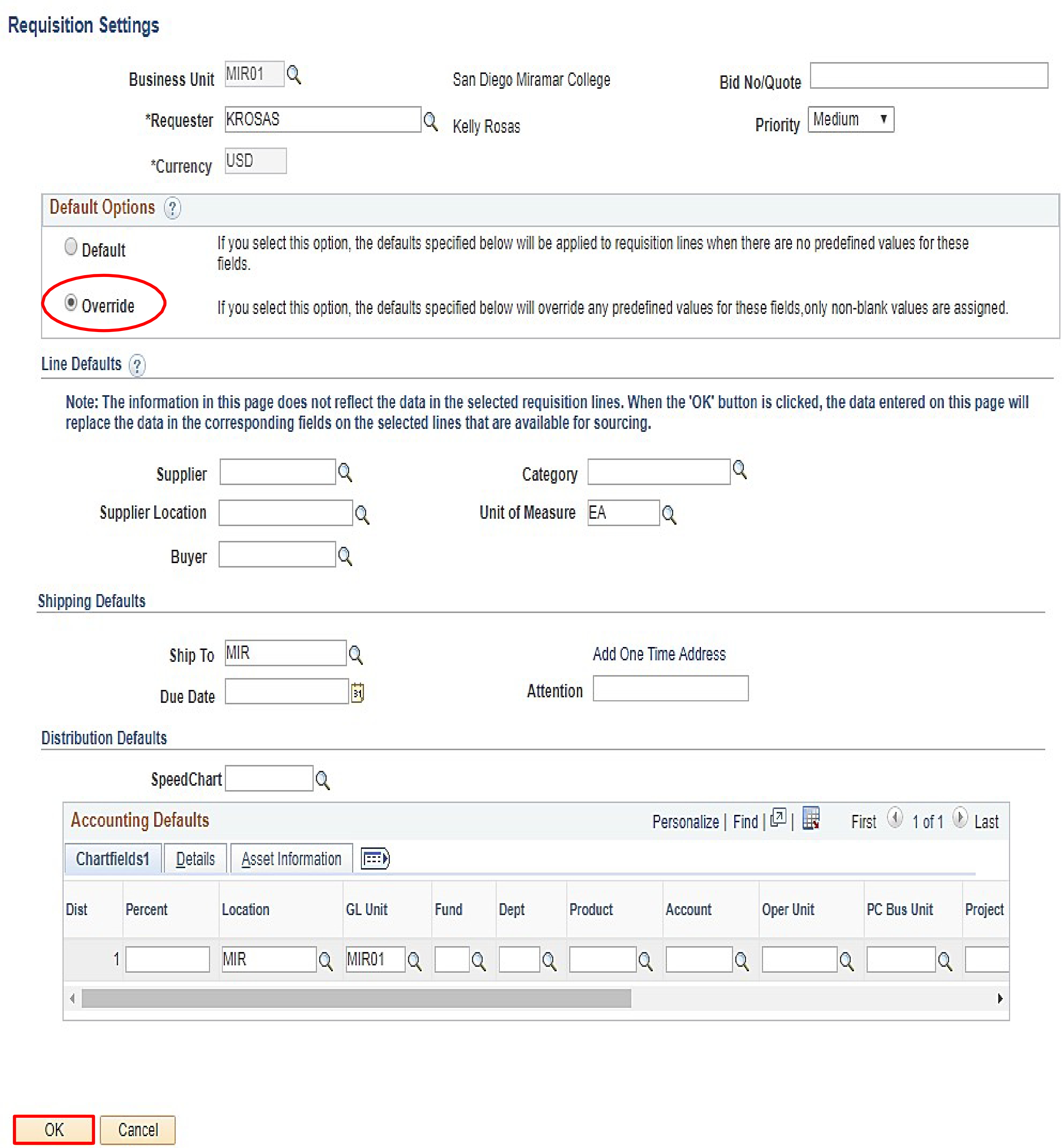
- **eProcurement > Requisition**



Then click the Requisition icon



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.



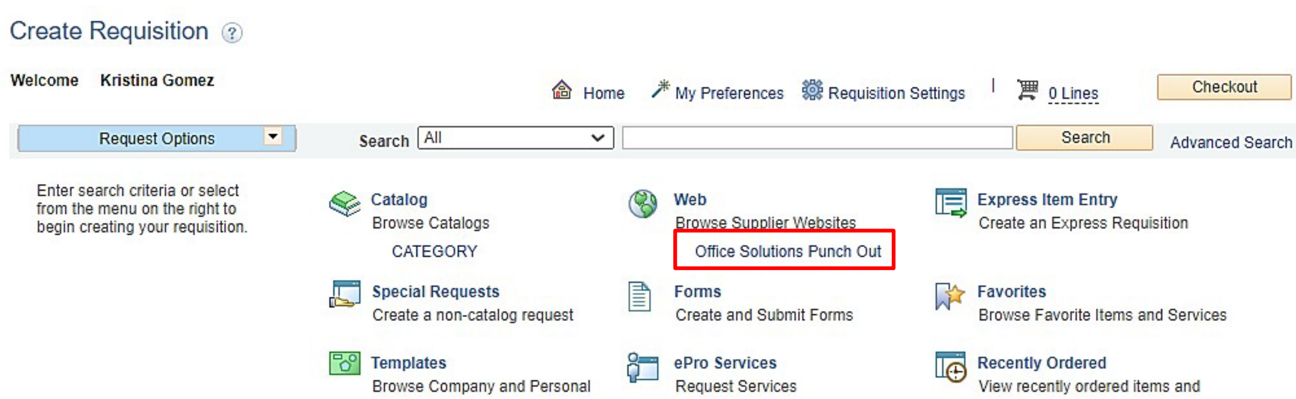
To access the Office Solutions website for product pricing and item numbers, visit Office Solutions and use the following login credentials:

- User: sdccdpc
- Pwd: sdccdpc@

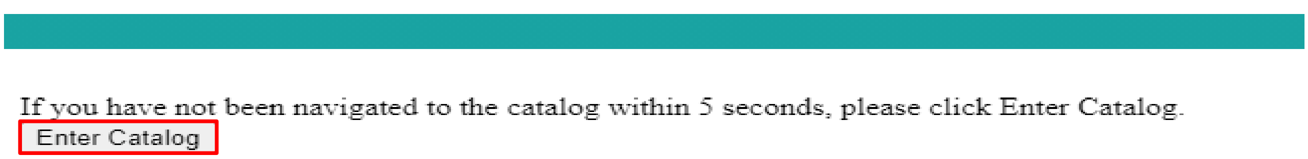
Important:
This website is for product searches, pricing, and item number reference only.
Do not add items to the cart and do not attempt to check out from this site, as the Check-Out feature is inactive.
Do not change the password or modify the account settings.
All orders must be processed through PeopleSoft using either Chrome or Firefox as your browser. To place an order, log into PeopleSoft and select the Office Solutions Punch-Out link, which will redirect you to the authorized ordering site.
If your user access is invalid or you are unable to log in, please complete the following troubleshooting steps before requesting assistance:
Ensure you are using either Chrome or Firefox.
Clear your browsing history and cache.

Check for and install any pending PC updates in your system settings to ensure all cloud syncing and authentication services are current.
Restart your computer and try logging in again.

If you are still unable to access the system after completing these steps, please contact the Procurement Department for further assistance.

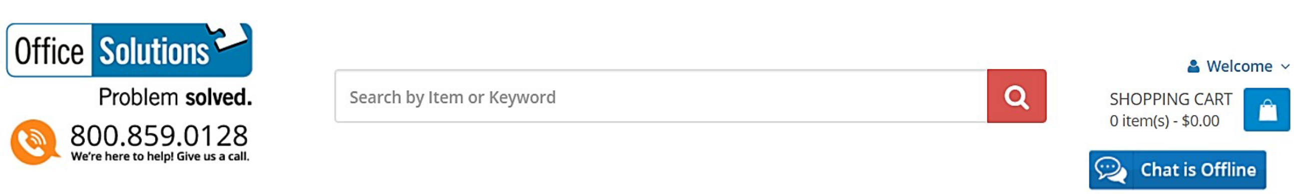


On the next screen, the following message will appear. It should automatically take you to the Office Solutions ordering page within 5 seconds; if not, click on **Enter Catalog**.



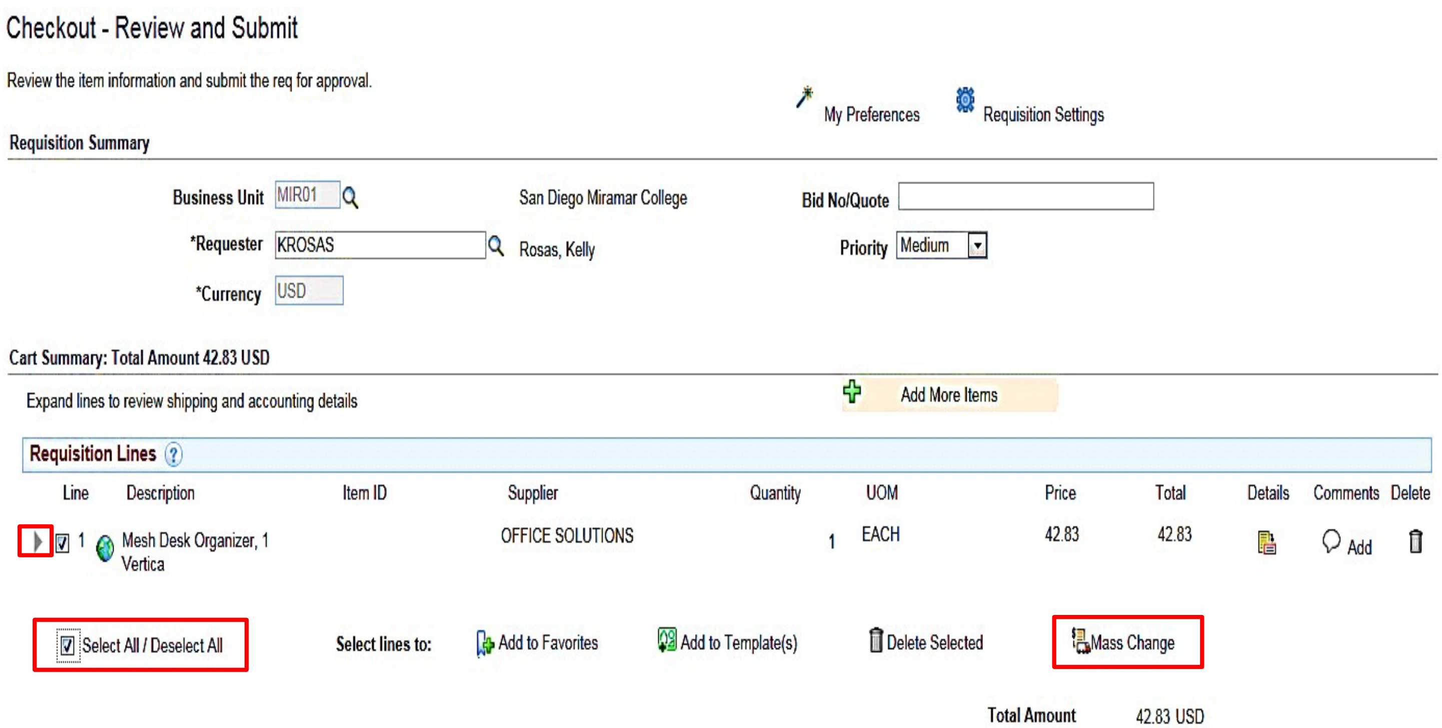
****NOTE: The minimum order amount is $35.00; before tax. A purchase order will not be dispatched to Office Solutions unless the total is $35.00.**

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.

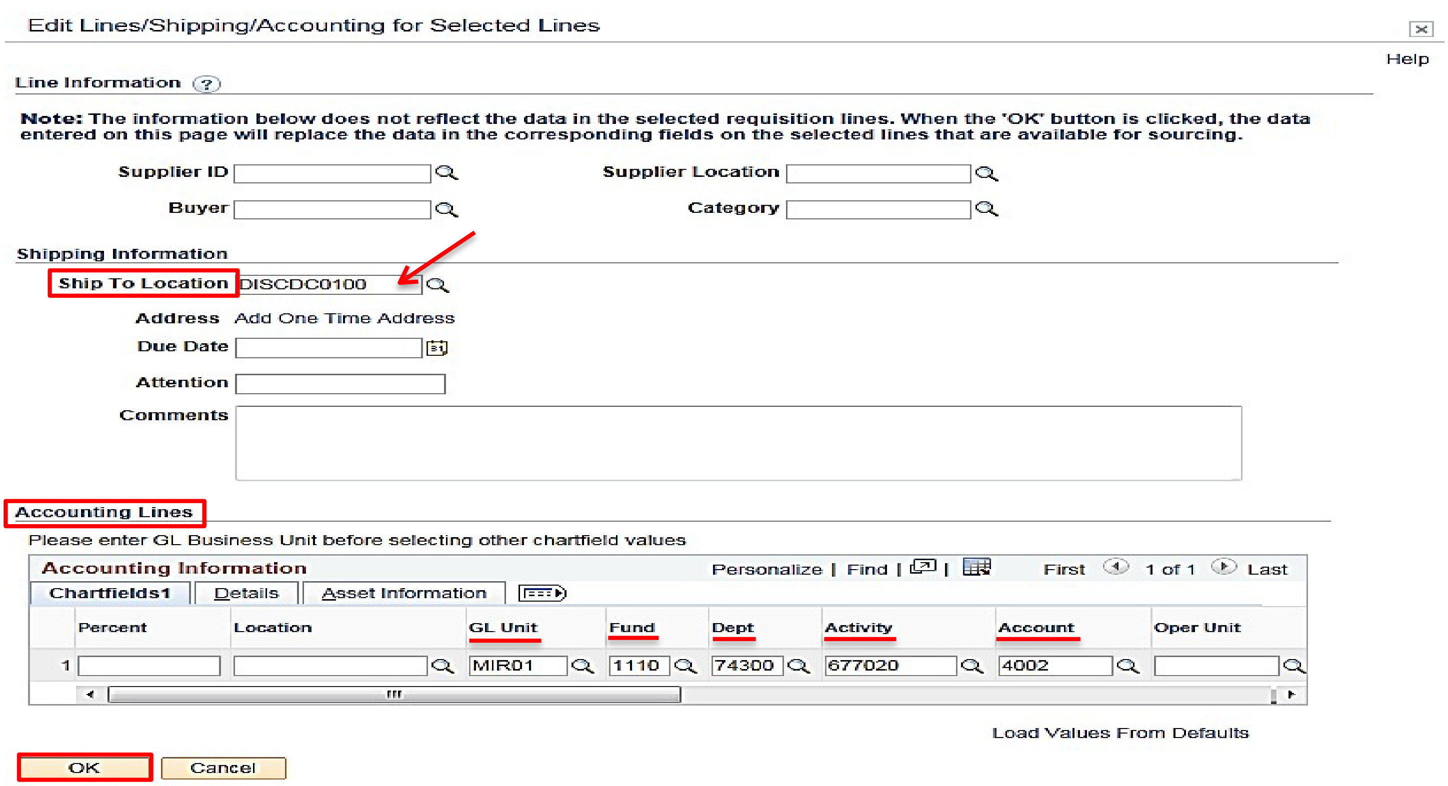


Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each line item to expand and review the information in the **Accounting Lines**.

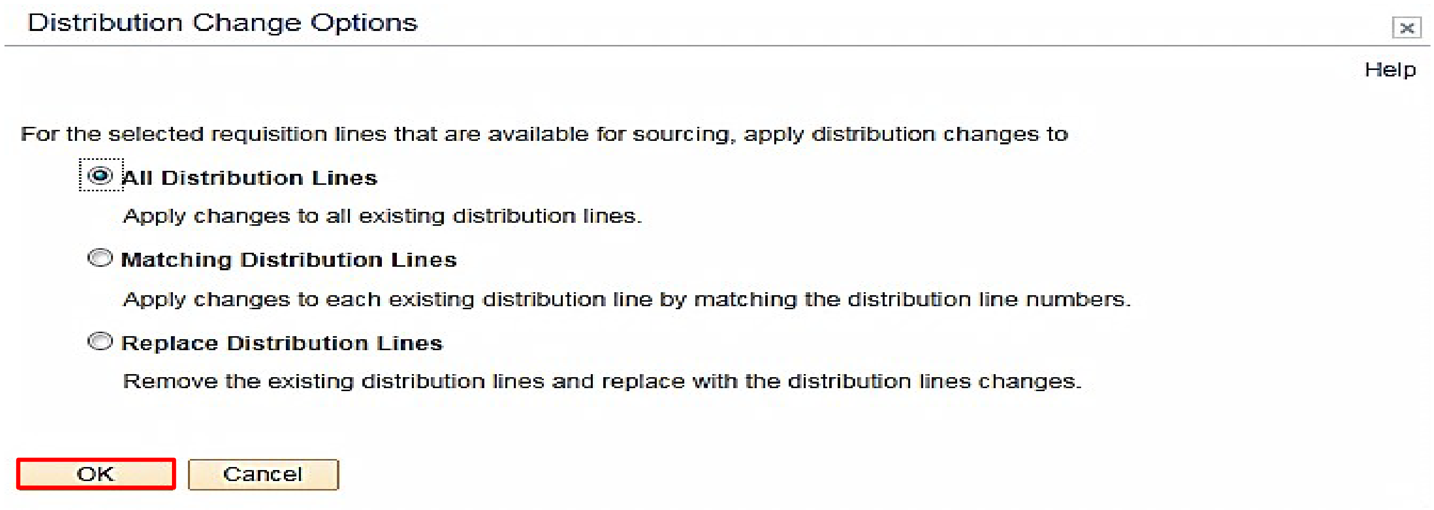
Click on **Select All/Deselect All** and then **Mass Change** to identify **Ship To** and **Accounting Information.**



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

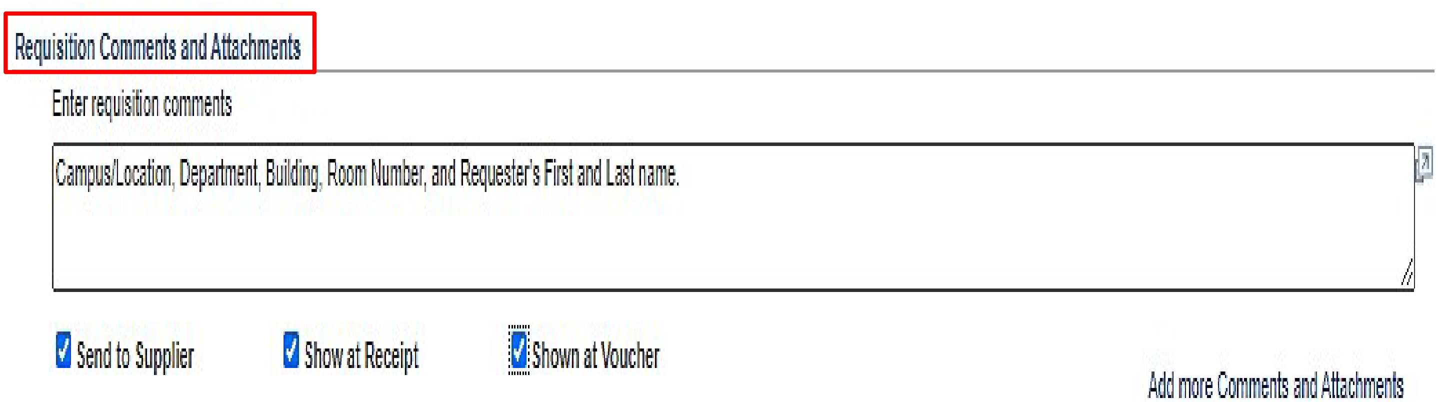


Click **OK** on the **Distribution Change Options** pop-up message that appears.



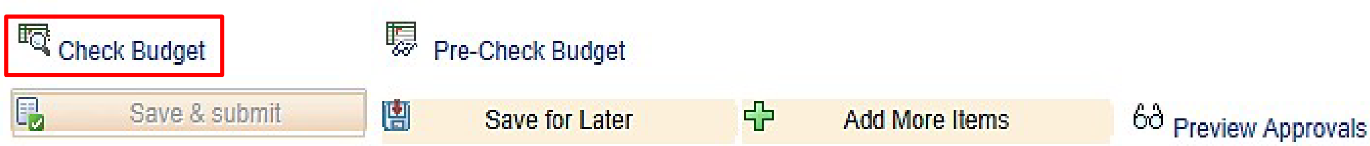
The **Requisition Comments and Attachments** field **MUST** include the following information:

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

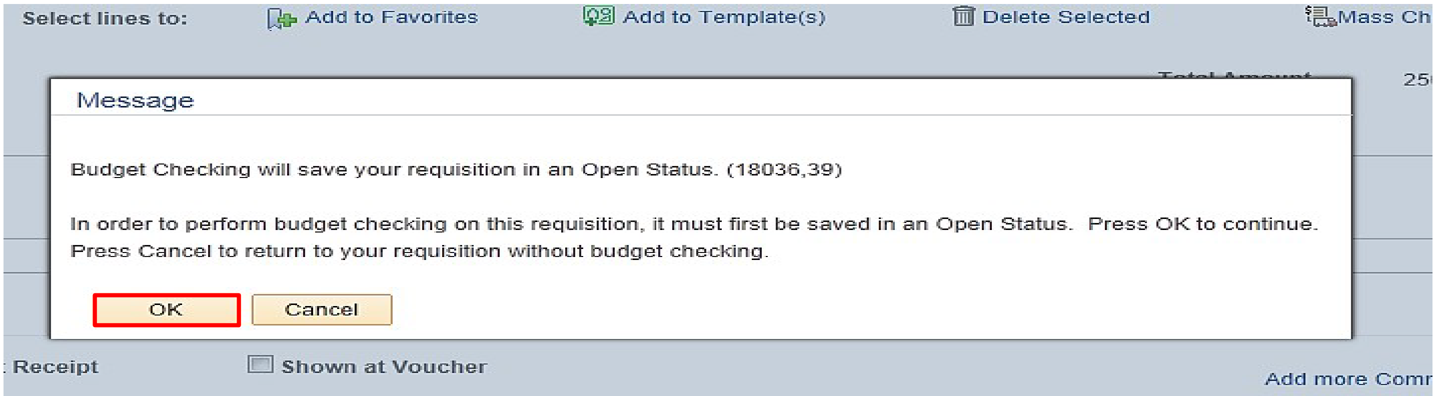


Once the purchase requisition is complete, click on **Check Budget** at the bottom left of the screen.

****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.**



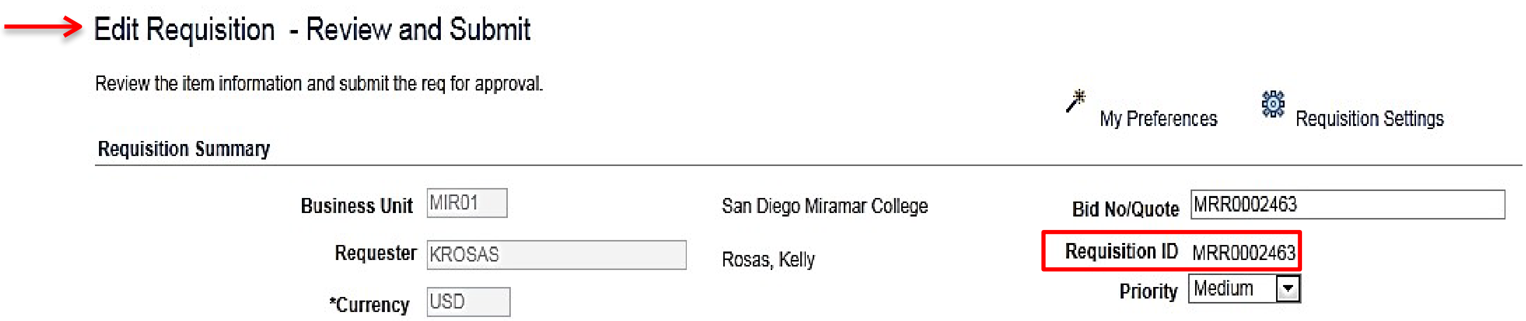
Click **OK** on the pop-up message that appears below.



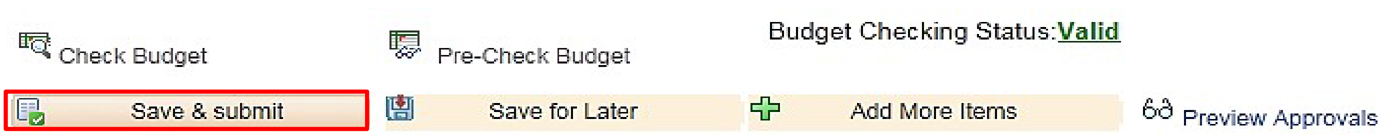
The **Budget Check Status** will show as **VALID** if the requisition has passed **Budget Check** and the system will automatically issue a **Requisiton ID** number.

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.**

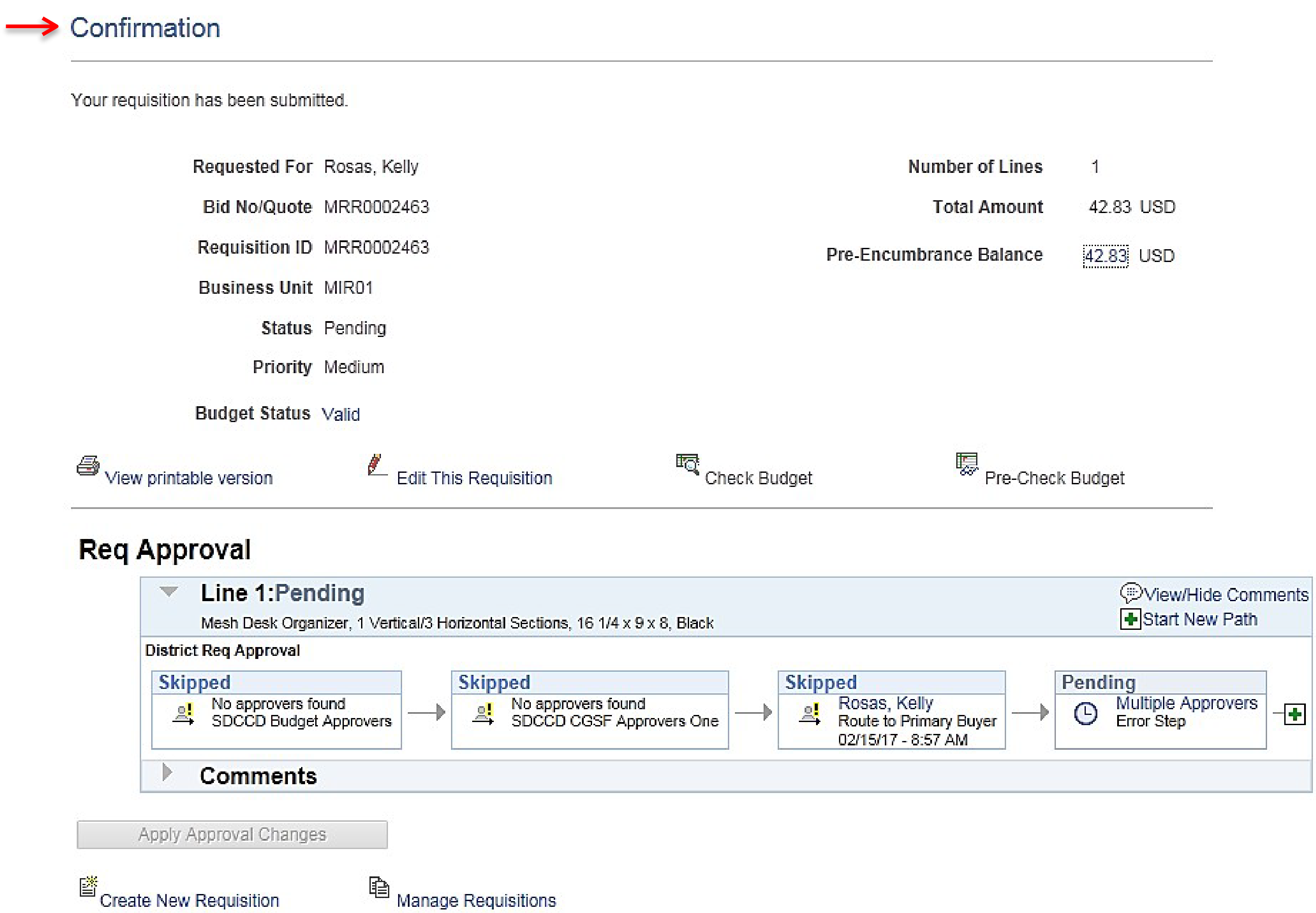


Once there is a valid **Budget Check** and a **Requisition ID** number is issued, scroll to the bottom of the screen and click on **Save & Submit**.



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



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**

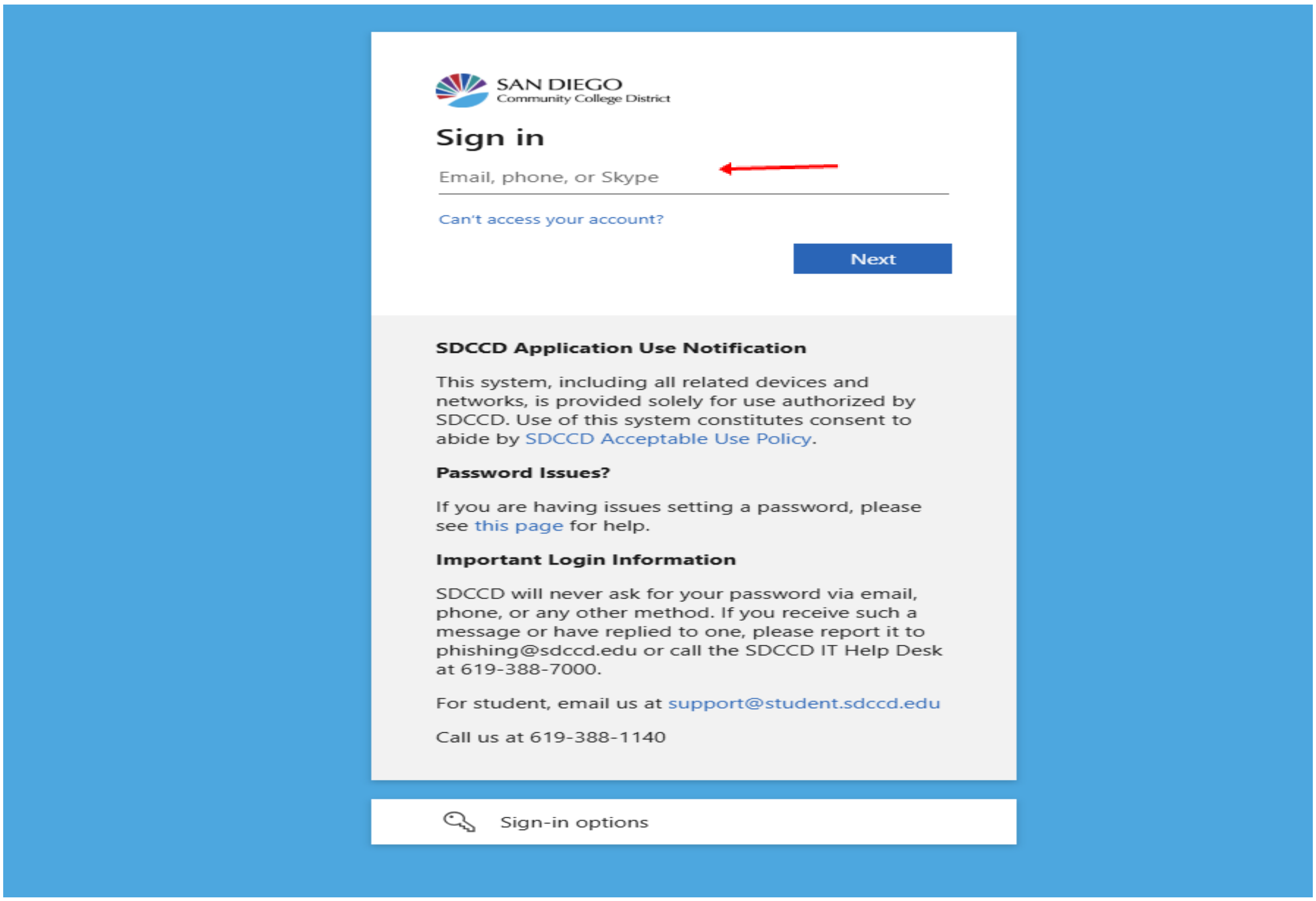
Enter the **Requisition ID** number and click search. Click on the grey arrow to the left under **Req ID** to expand the details of the purchase requisition. Here the status of the purchase requisition can be reviewed.

DIRECT CONNECT (GRAINGER) ORDERS

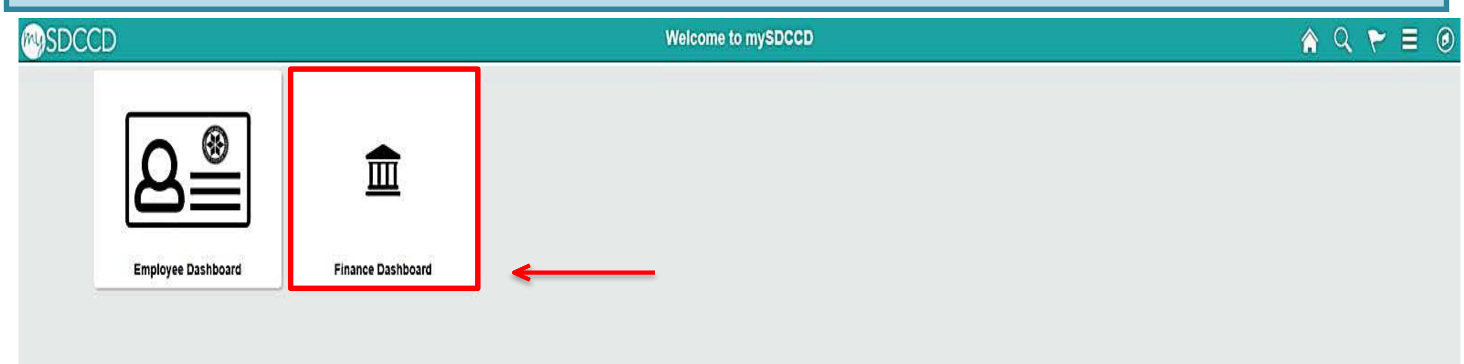
You can **access PeopleSoft** through the District website by selecting the **Employees** tab, and then navigating to the **PeopleSoft My Portal** link or go directly to the link below.

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

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

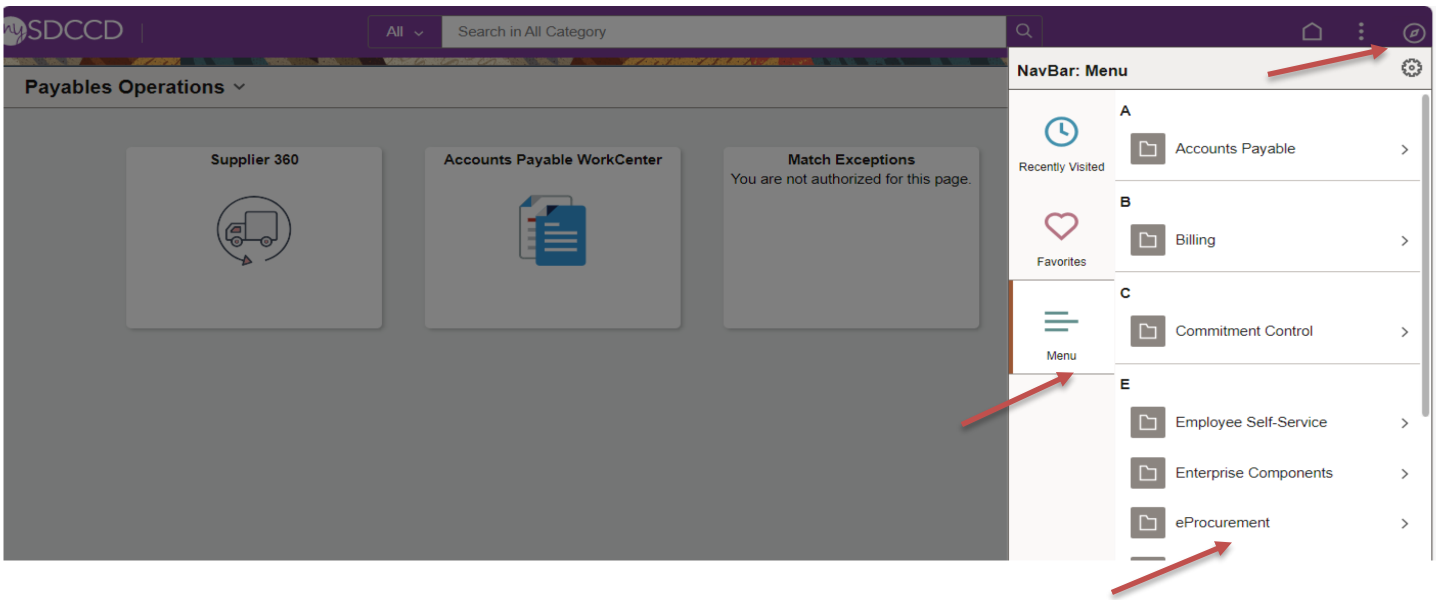


To access the **Create Requisition** screen, click on the **Finance Dashboard** icon.

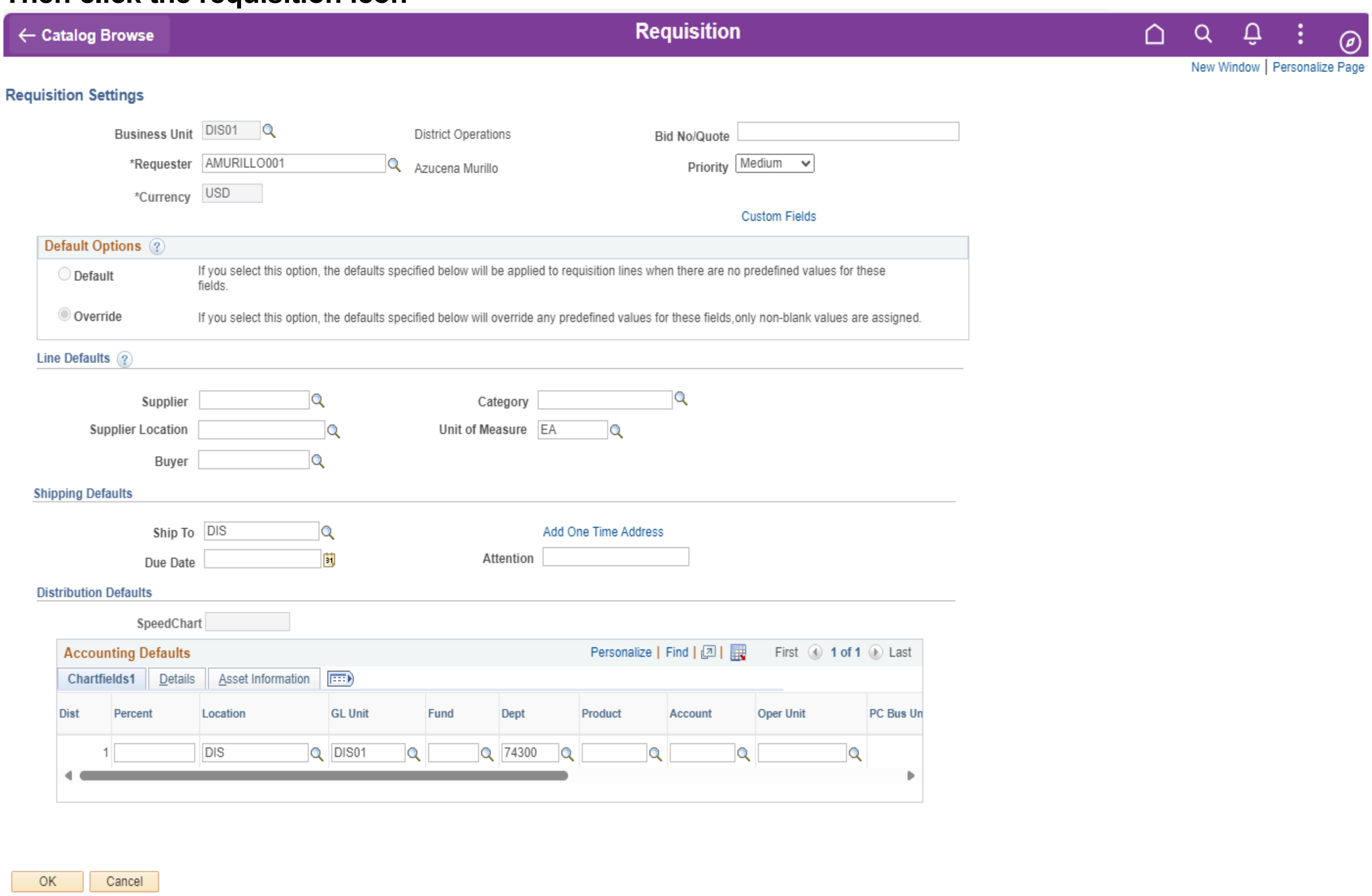


To access the **Create Requisition** screen, click on the **NavBar** icon in the top right of the screen. Then click the Menu icon and use the following navigation:

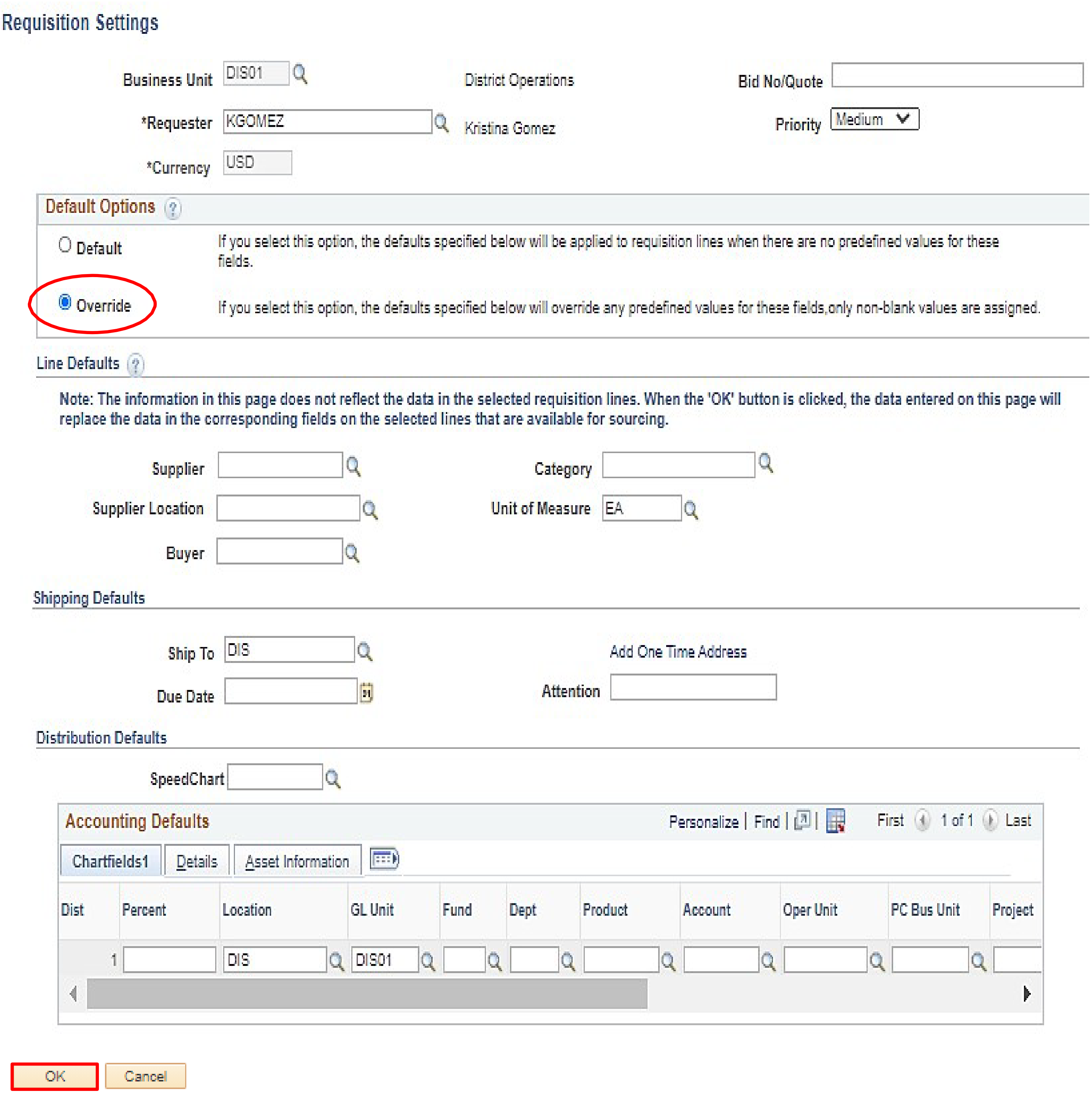
- **eProcurement>Requisition**



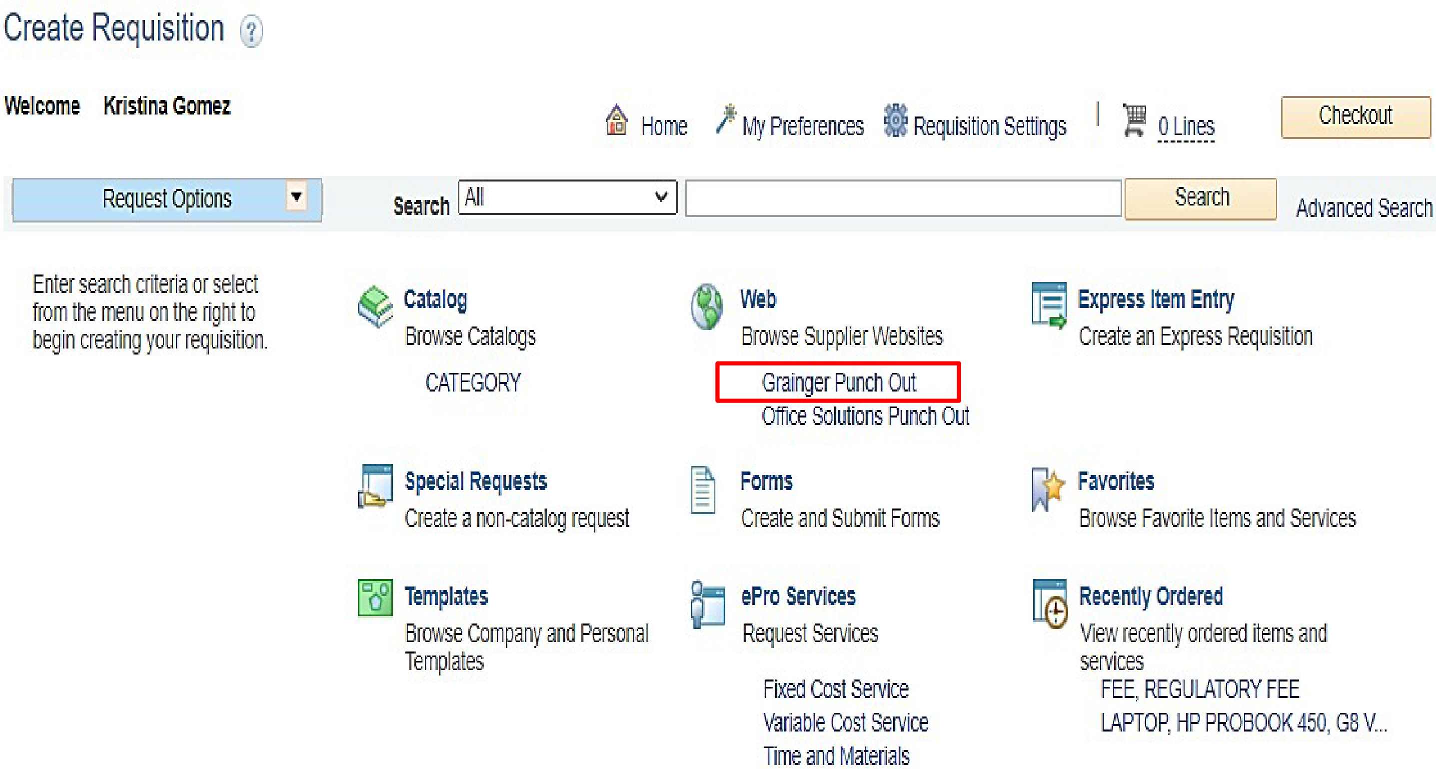
Then click the requisition icon



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.

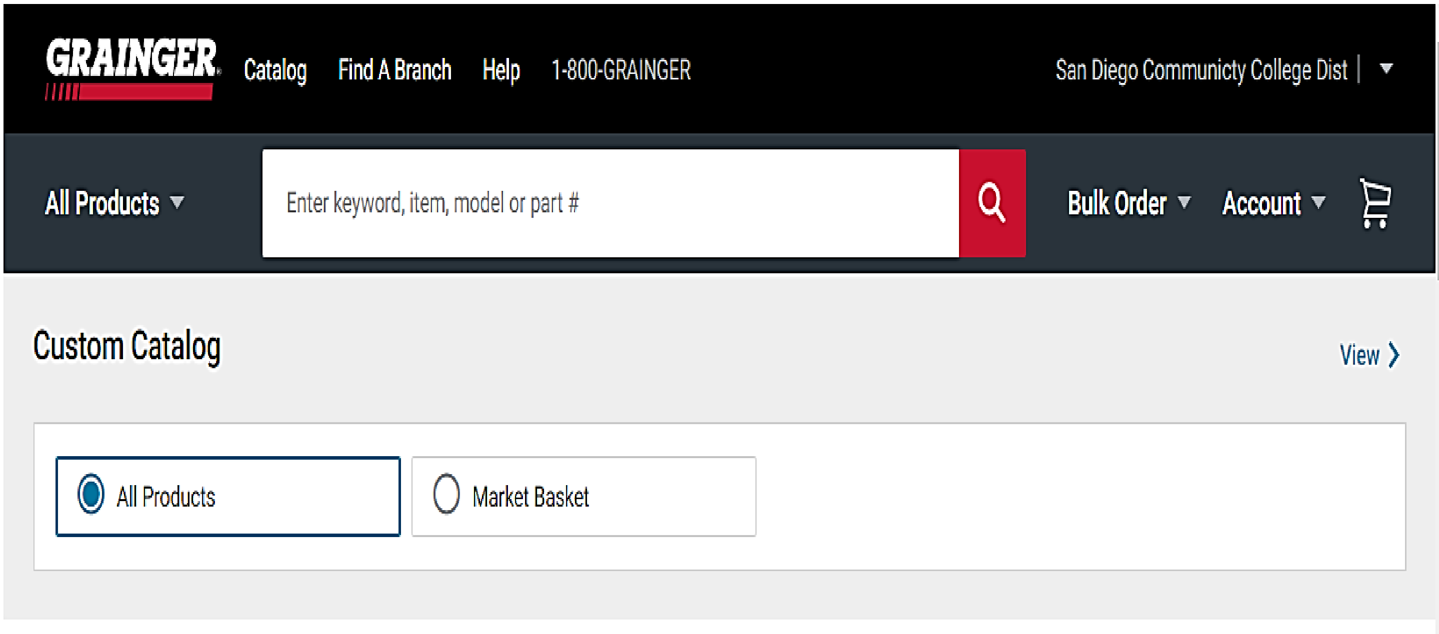


To process an order through PeopleSoft, click on the **Grainger Punch Out** link to be directed to the Grainger ordering website.

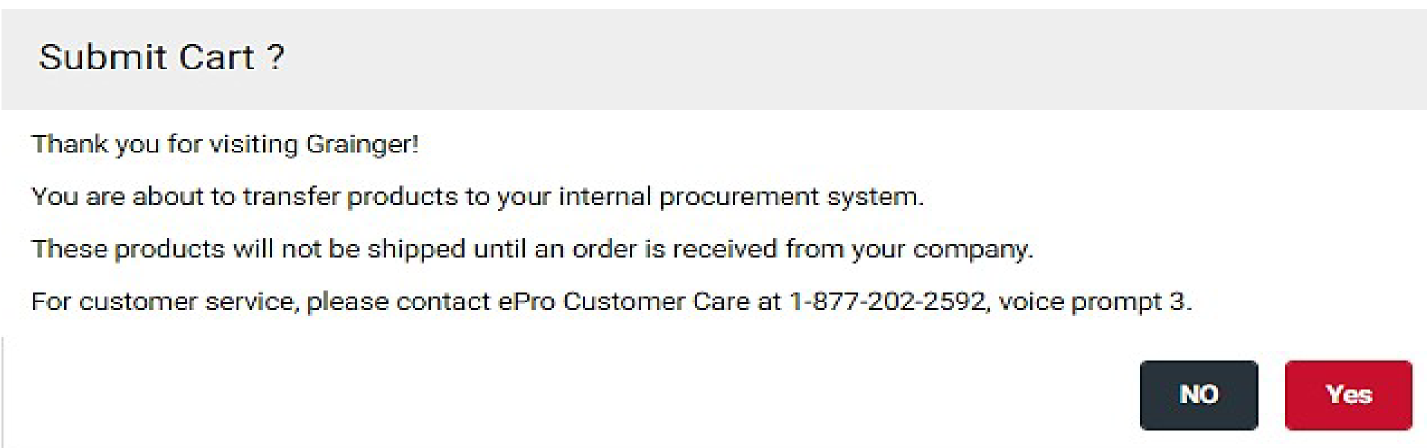


****NOTE: The minimum order amount is $35.00; before tax. A purchase order will not be dispatched to Grainger unless the total is $35.00.**

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.**

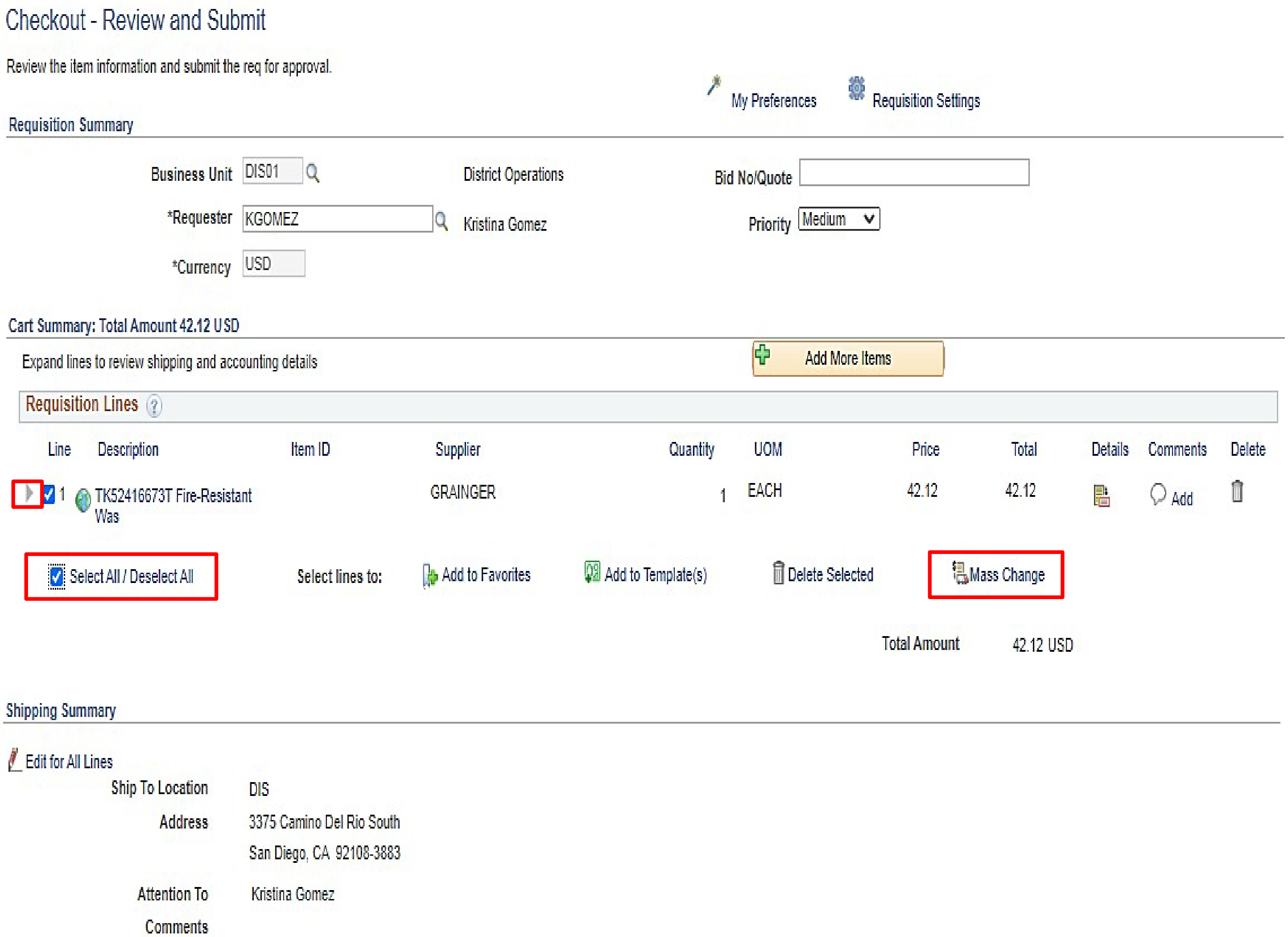


Click **Yes** on the pop-up message to be transferred to **PeopleSoft's Checkout - Review and Submit** page.

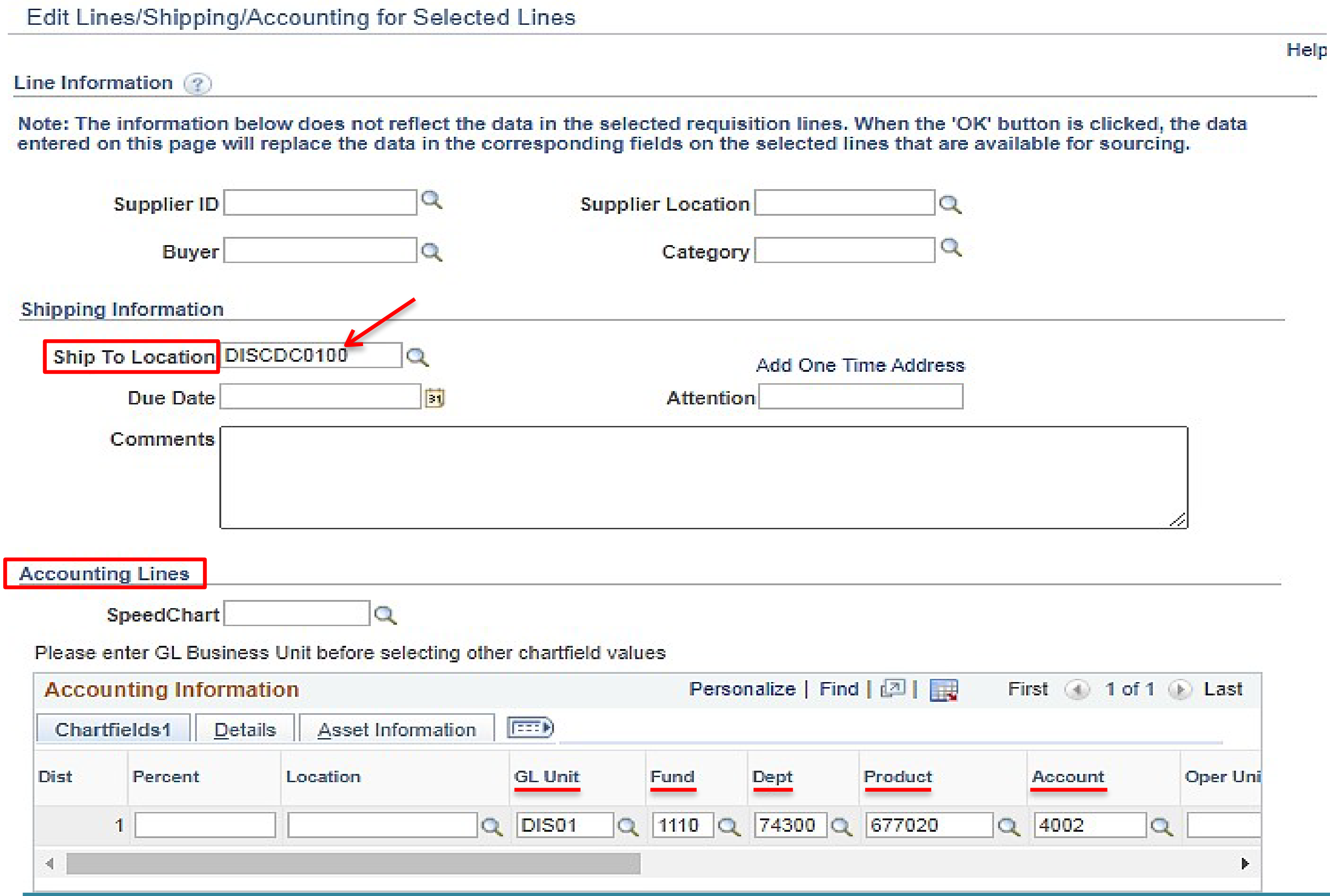


Use the **Checkout – Review and Submit** screen to review the order and make any necessary changes or corrections. Click on the arrows on the far left of each line item to expand and review the information in the **Accounting Lines**.

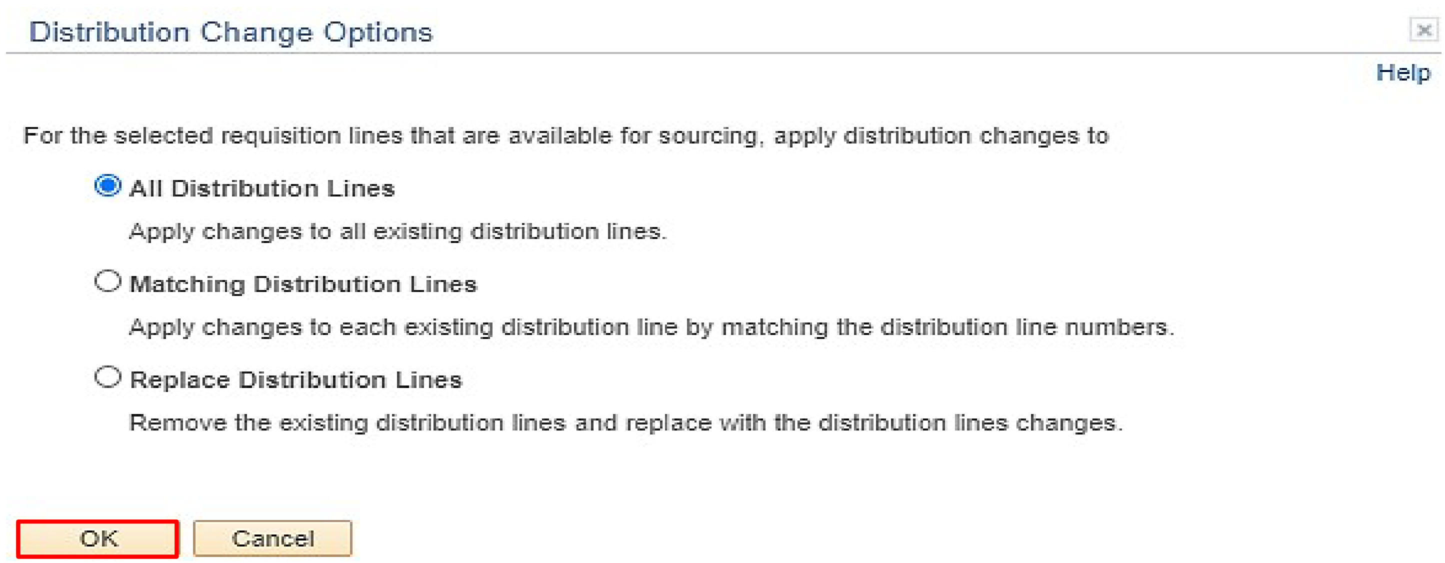
Click on **Select All/Deselect All** and then **Mass Change** to identify **Ship To** and **Accounting Information.**



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

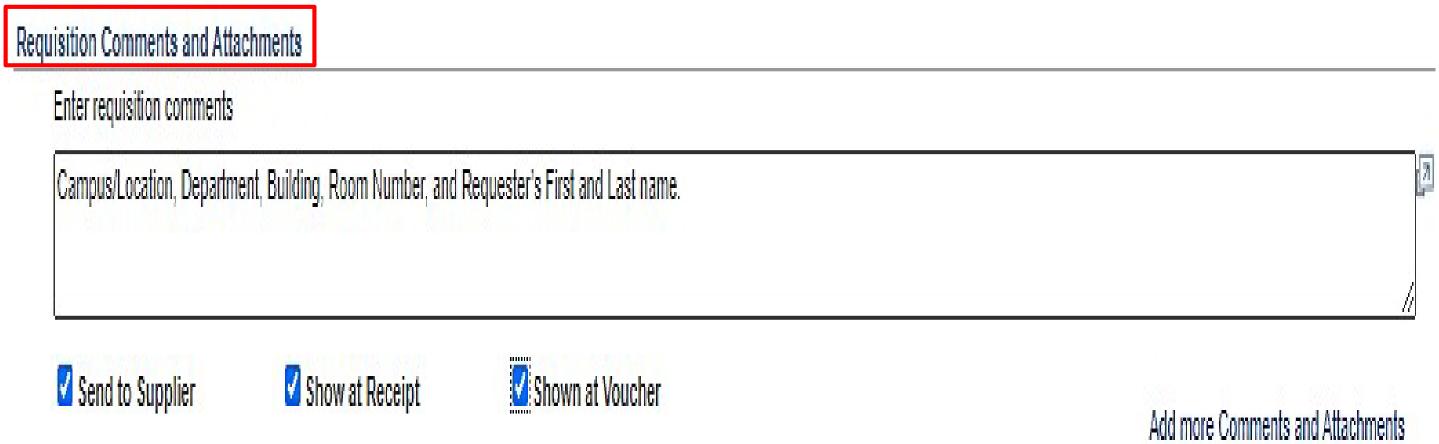


Click **OK** on the **Distribution Change Options** pop-up message that appears.



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

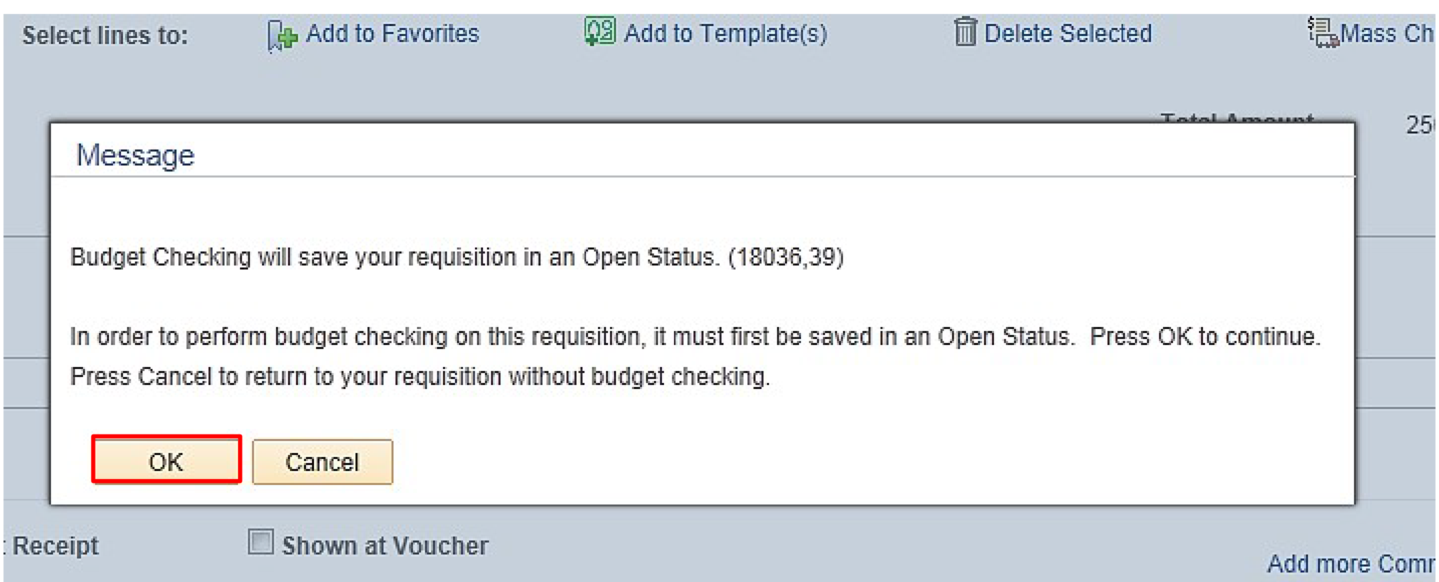
- **Campus/Location, Department, Building, Room Number, and Requester's First and Last name**.



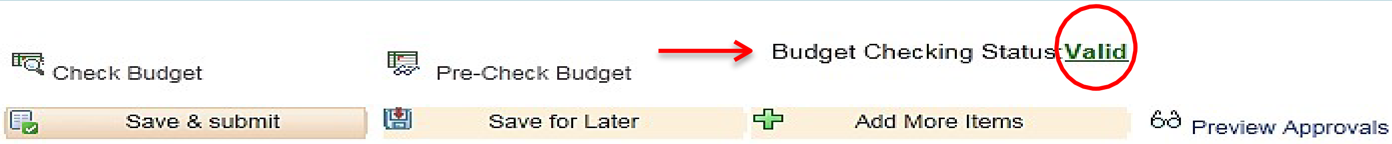
Once the purchase requisition is complete, click on **Check Budget** at the bottom left of the screen.

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

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



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



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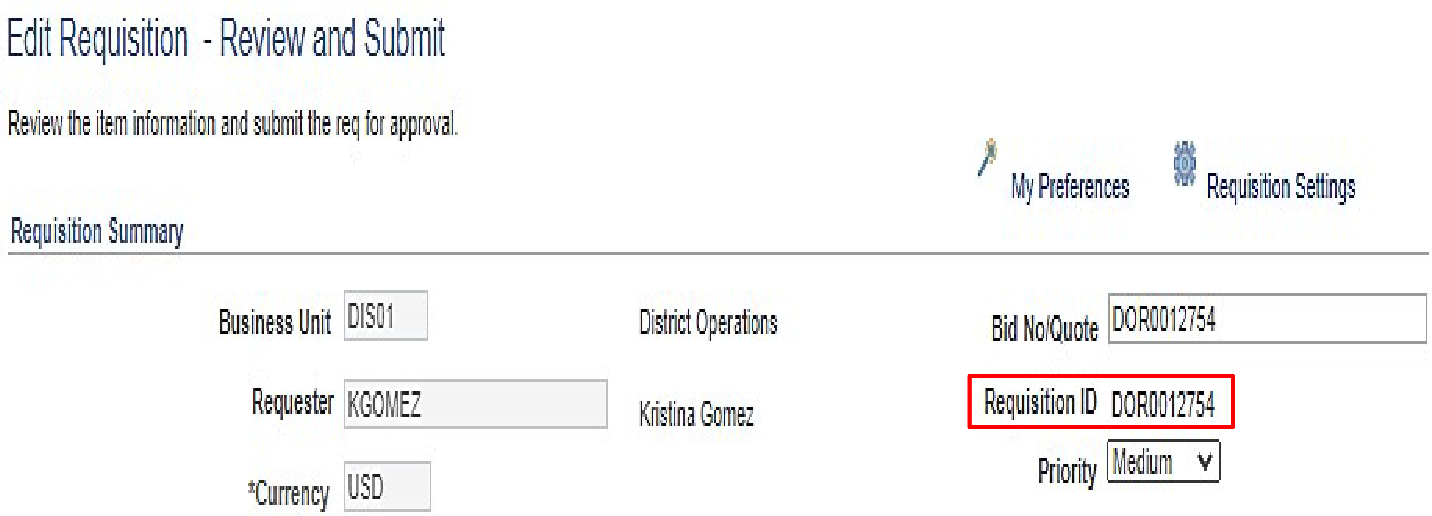
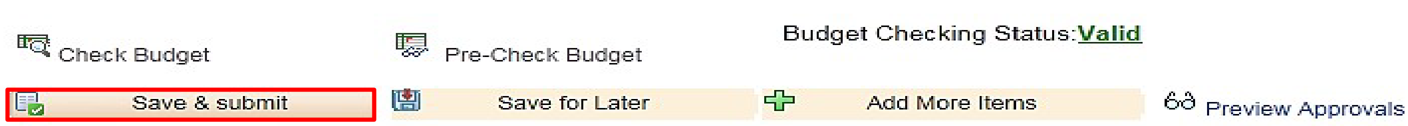
****Note the Requisition ID number for your records.**



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.

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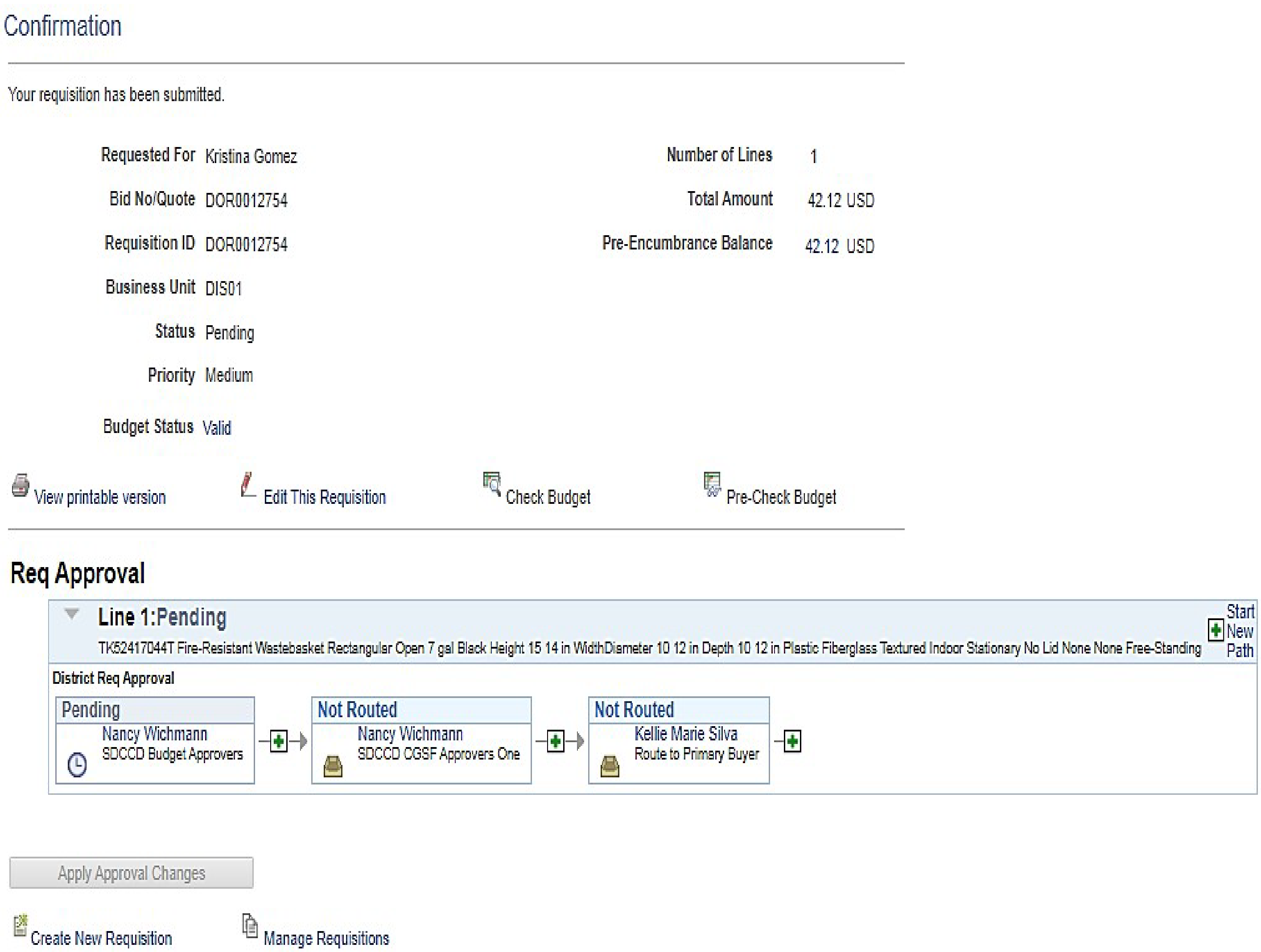

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- **Nav Bar Menu>eProcurement>Manage Requisitions**

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.

Amazon Punchout Guide

Creating an Amazon Punchout requisition through PeopleSoft

Purpose

This guide explains how to create an Amazon punchout requisition in PeopleSoft. Amazon orders must be started through the PeopleSoft punchout so purchases route through the District's approval workflow.

Quick Overview

Access	Shop	Submit
Log into PeopleSoft and open the Finance Dashboard.	Select the Amazon, add items to the Amazon cart, select 2-day shipping and proceed to checkout.	Return to PeopleSoft, complete required fields such as shipping, budget, budget check, and submit for approval. Reminder, all District, DSC, and 1450 Frazee orders must be delivered to the **Distribution Center (DISCDC0100).**

Important Reminders

- Orders placed with Amazon cannot be adjusted after the purchase order has been sent to Amazon for processing. Please review all orders carefully before a requisition is submitted.
- The purchase of only Prime items will be permitted. Purchasing from third party vendors is not authorized.
- Amazon will hold item pricing and availability for 14 calendar days from the date the cart is submitted for approval. This period includes the entire PeopleSoft workflow and dispatching of the purchase order to Amazon.
- If the order is not completed within the 14-day window, Amazon will automatically cancel the entire order. A new order and requisition must then be submitted, and pricing or availability may have changed.
- Requesters are responsible for monitoring their requisition and following up with the appropriate approvers to help ensure orders are completed within the 14-day window.
- Desktop delivery is not permitted with Amazon orders. All orders must be delivered to the Central Distribution Center **OR** Campus Stock room.

Do's and Don'ts

Do	Don't
• Use the Amazon Punchout through PeopleSoft. • Review cart before checking cart out to PeopleSoft. • Only purchase Prime items; non-Prime goods are not authorized. • Select only next day or two-day free shipping. • Complete all required fields in PeopleSoft before saving/submitting the purchase requisition.	• Do not place orders with Amazon outside of the PeopleSoft punchout process. • Do not purchase ongoing subscriptions (subscribe and save – not authorized) • Do not purchase from third party vendors.

How to Cancel an Amazon Order

- **Before Amazon receives the PO (still in requisition format)**: The order must be canceled directly through Amazon Customer Service. Log in to the Amazon website using your SDCCD email address and the password you provided Amazon when the account was merged, navigate to Recent Orders, locate your order, and select the option to cancel the order.
- **After Amazon receives the PO:** If an order is no longer needed after a PO is issued to Amazon, the order must be canceled through Amazon Customer Service directly by phone or online support. Once Amazon confirms the cancellation, a confirmation email will be sent to the end user. Forward the confirmation to the Purchasing Department/Procurement Specialist so the requisition and PO can be closed.
- **Returns after the item has been shipped/received:** If the goods have been received and delivered to SDCCD, request a return through Amazon Customer Service via the website. Log in to the Amazon website, navigate to Recent Orders, locate your order, and select the return option to process. Once the return is approved, Amazon will process the return/refund accordingly through Customer Service Support. ***It is the end user's responsibility to make sure all returns are processed accordingly through the campus stockrooms and/or the Central Distribution Center and that all issued credits are received and forwarded to District Accounts Payable.***

Support

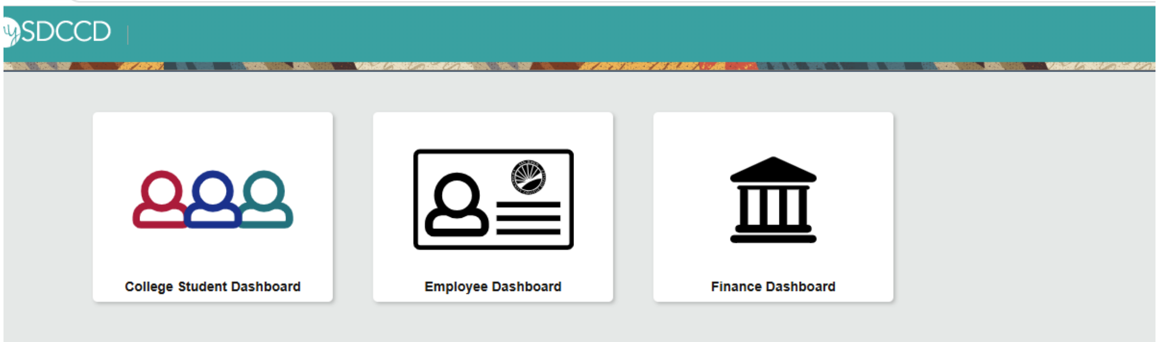
For questions related to requisition routing, approvals, or PeopleSoft workflow, contact Purchasing & Contracts Department at 619.388.6562.

For Amazon Business account access, order issues, refunds, or returns, contact Amazon Business Customer Support Service at 1-866-486-2360 or Contact Us – Amazon Business Customer Service

Step-by-Step Instructions

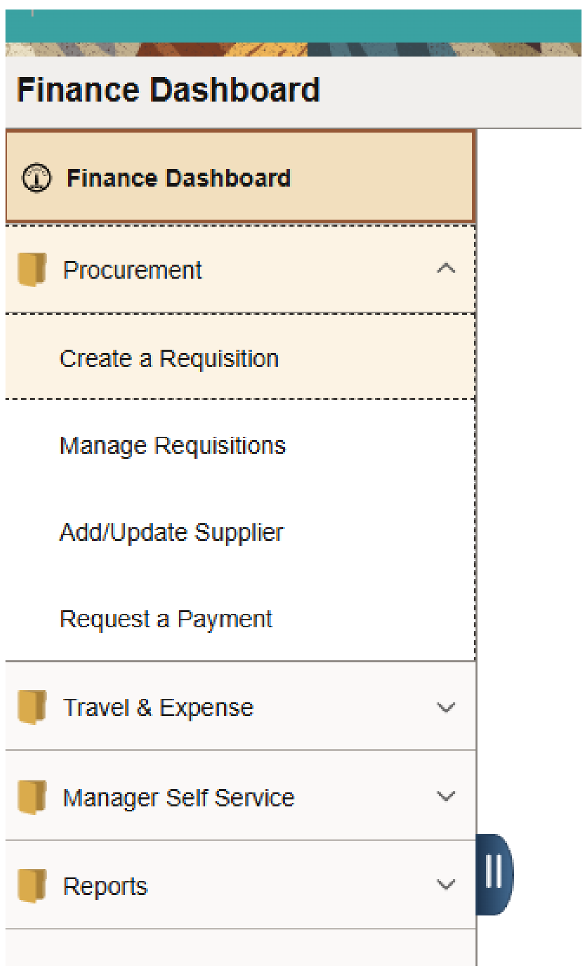
Step 1: Log into PeopleSoft and Select Finance Dashboard

Log into **PeopleSoft** using your District credentials. From the main dashboard, select **Finance Dashboard**.



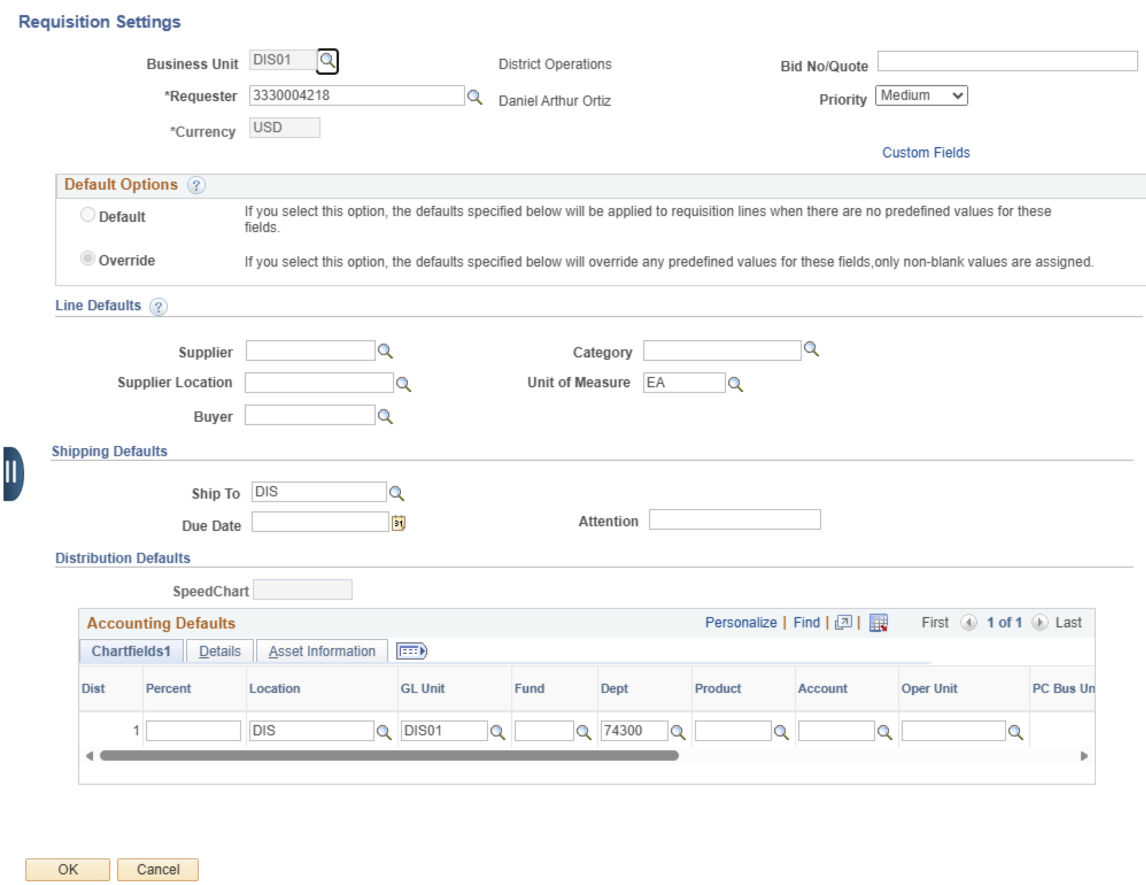
Step 2: Create a Requisition

From the **Finance Dashboard menu**, **select Procurement**, then click **Create a Requisition**.



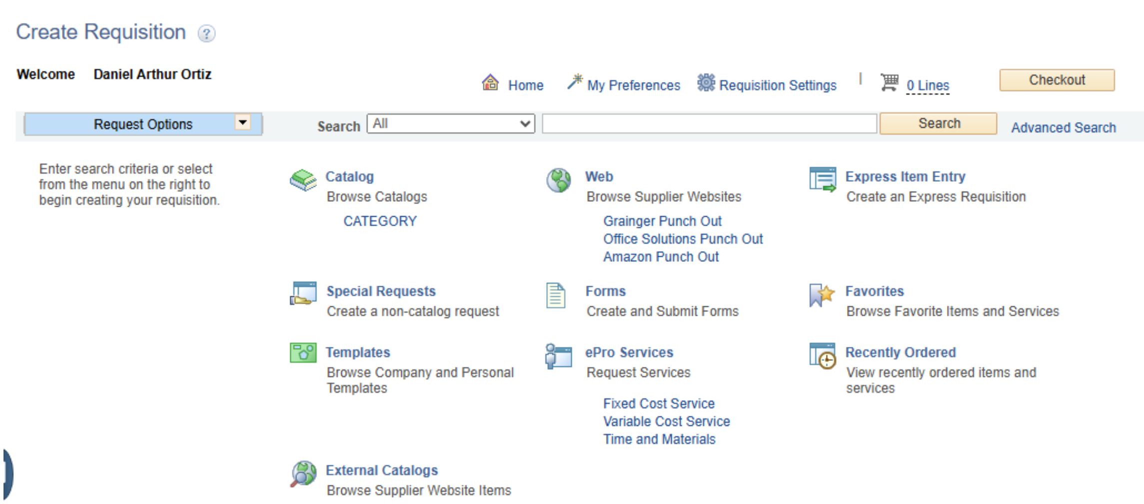
Step 3: Complete Requisition Settings

On the **Requisition Settings page**, enter the budget number you will be using and the shipping information; all other fields will populate from the punchout. Click OK to continue

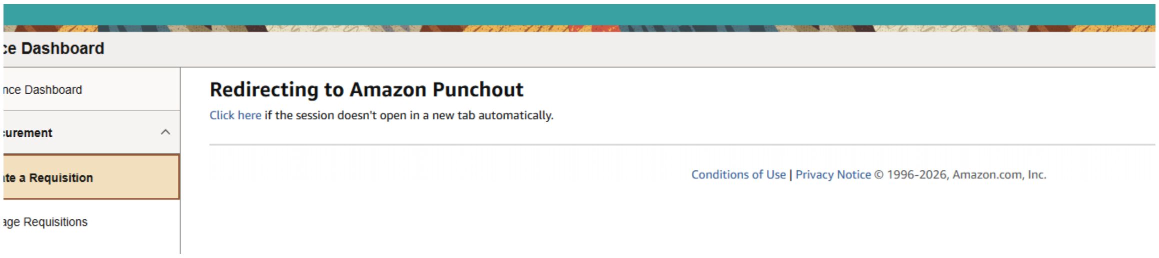


Step 4: Select Amazon Punch Out

On the **Create Requisition page**, locate the **Web section** and select **Amazon Punch Out**. This connects PeopleSoft to the Amazon punchout site.



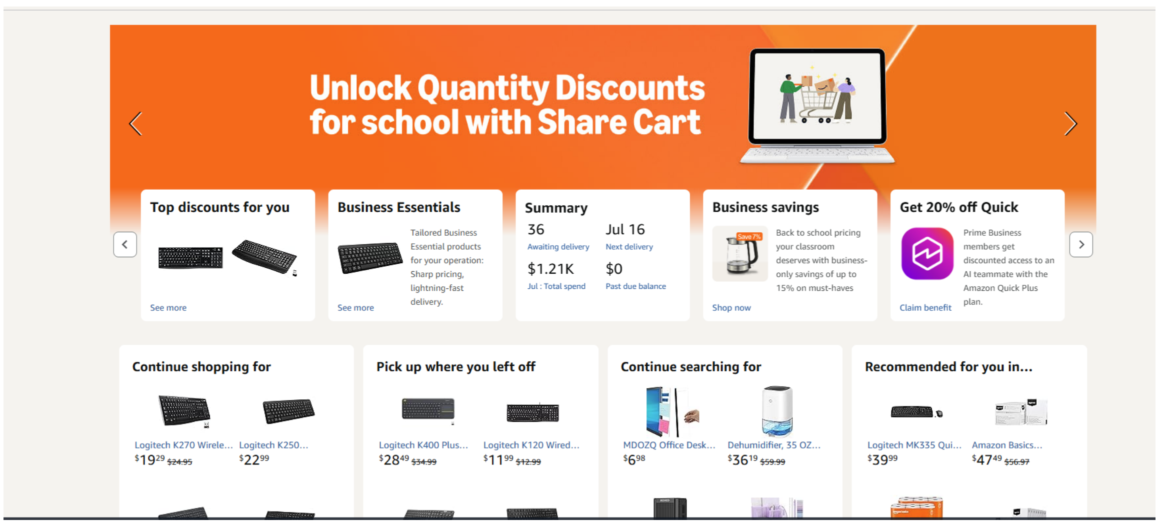
Note: In some cases, a redirect screen may appear. If you are not automatically redirected to Amazon, select **"Click here"** to continue.



Step 5: Select your items

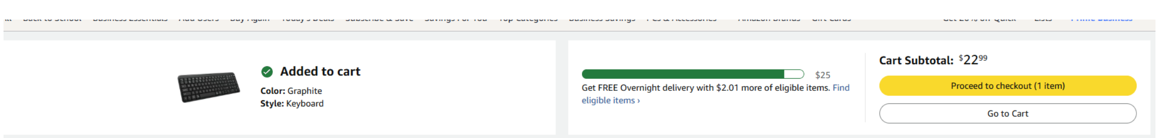
Search for the items and add them to your cart.

- Confirm the item description, quantity, and price before checking out.
- Select standard pricing on items, do not select subscription-based pricing.



Step 6: Proceed to Checkout

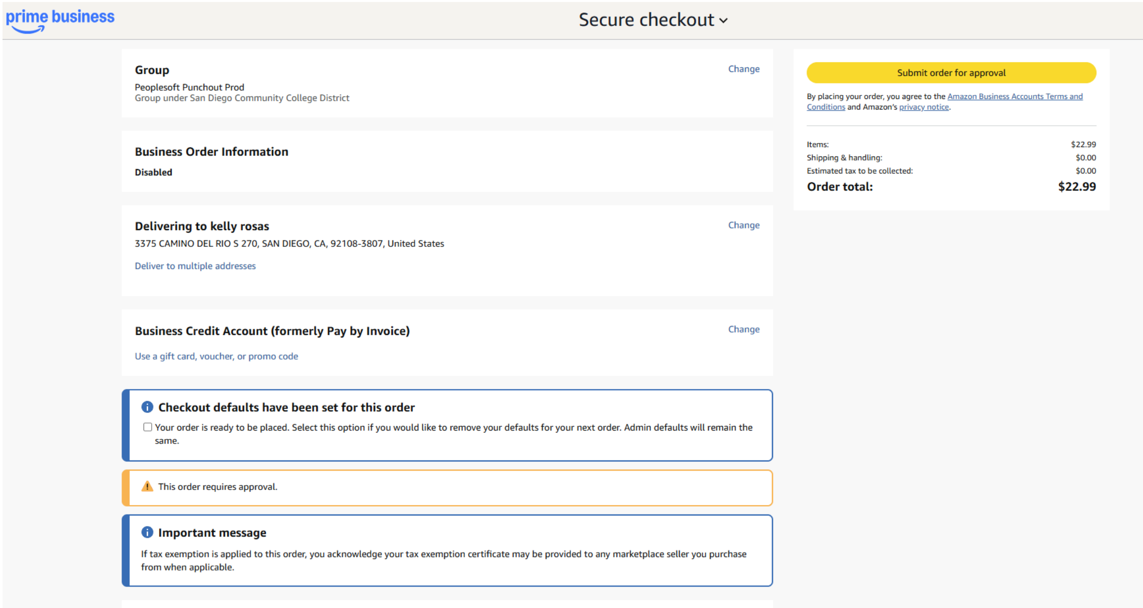
After reviewing your cart, click **Proceed to Checkout**.



Step 7: Review Checkout and Select Shipping

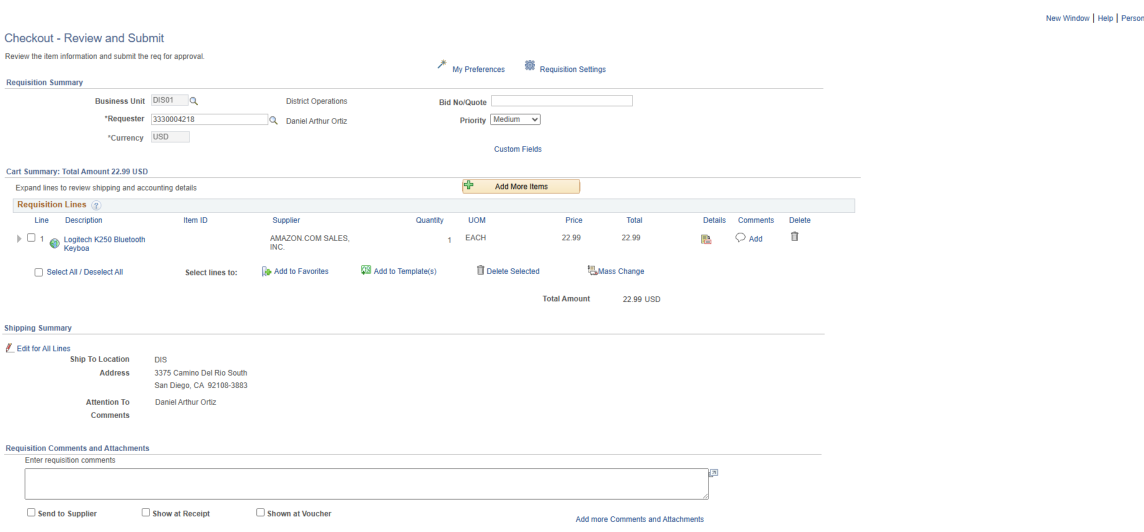
Select the Delivery date for the order.

- Select FREE next-day or two-day shipping.
- Do not select "subscribe pricing" on checkout.
- Do not Select same-day shipping.



Step 8: Submit Order for Approval

Once the shipping option has been selected, click **Submit Order for Approval**. The cart will be returned to PeopleSoft where the order can be reviewed, GLs can be finalized, and District "**ship to**" added, if it was not done at the start of the requisition. All orders must be delivered to a campus stockroom or to the Central Distribution Center.



Step 9: Save, Budget Check, and Submit

Once all required information has been entered, complete the final submission steps in PeopleSoft.

- Click on **Check Budget** to obtain a valid status.
- Click **Save & Submit**.

Step 10: Workflow Approval

After **Save & Submit** is selected, the requisition will route through the PeopleSoft workflow approval process.

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.

SUPERSEDES 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.

SUPERSEDES 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

ïò 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

îò When purchasing equipment, all options, components, and enhancements should be bundled with the equipment. However, separate operating pieces of equipment that 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 WESTERNDIGITAL 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 **<u>EACH</u>** AND NOT AS A **<u>LOT</u>**.

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 ADJUSTABLE 5EA $645.00

THE RULE IS THAT IF THE FURNITURE IS NOT BOLTED, GLUED, AND/OR WELDED 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.

ALL PURCHASING FORMS

Click any form title below to open the form.

Most recent Purchasing Specialist Category Code Assignment

Supplier Intake Form

W-9 - Request for Taxpayer Identification Number & Certification

Release of Liability and Assumption of Risk Agreement (Honorarium)

Purchase Orders to Roll Form

STATUS DEFINITIONS

Purchase Orders (PO)	
Initial	A PO has a status of *Initial* 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 *Open*. A Template PO may always have an *Open* 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 *Pending Approval* status. There is a checkmark that shows on *Open* POs that can be clicked to change the status to "*Pend Appr*."
Approved	When the workflow approval process is complete, the PO status changes from *Pending Approval* to *Approved*. After the PO is approved, any change in amount or ChartFields causes the system to return the PO status back to *Pending Approval*. *Approved* 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 *Approved* to *Dispatched*.
Canceled	Canceling an entire PO before it has been dispatched changes the status to *Canceled.* Canceling cannot be reversed.
Pending Cancel	Canceling a dispatched PO changes, the status to *Pending Cancel.* The PO must be re-dispatched and budget-checked to move the status from *Pending Cancel* to *Canceled.*
Complete	Running the Close Purchase Orders process changes the status to *Complete*.
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 *In Process* shows after the initial approval is saved.
Complete	The requisition or PO receives a *Complete* 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 *Open* 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 *Pending*. This may be done by pulling in the requester or clicking the "Open" checkmark to change the status to *Pending*.
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 *Complete*.
Receipts	
Open	Not all edits have passed. If any receipt lines have a status of *Open*, the receipt header has a status of *Open*.
Received	When all lines are in *Received* or *Canceled* status, the receipt header will have a status of *Received*.
Hold	Receipt is on *Hold* 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 *Closed*.
Canceled	The receipt has been *Canceled* on the header; the lines will go to a *Canceled* status as well. Canceling cannot be reversed.
Budget Status	
Not Chk"d	(*Not Checked*) – Either the document has not been budget checked or the budget checking process 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.