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September 14, 2022

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://www.sdccd.edu/about/departments-and-offices/business-technology-services-division/business-support-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, Supervisor
Purchasing and Contract 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.

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
- Travel Expenses

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.
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 report immediately any lost, stolen, or misplaced card immediately 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.

If you have any questions, contact Nancy Wichmann or Kelly Rosas.
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 9 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 requester/initiator must first send the blank SDCCD Supplier Intake 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: [http://bussrv.sdccd.edu/purchasing/forms.cfm](http://bussrv.sdccd.edu/purchasing/forms.cfm).

   Upon completion, the supplier shall return the two documents to the requester/initiator. The requester/initiator will review the documents for completeness, accuracy, and legibility. If incomplete, inaccurate or illegible, the requester/initiator will return the document(s) to the supplier for revision. If complete, the requester/initiator enters the supplier’s information (from completed documents) into the PeopleSoft supplier database.

   **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 Intake and W8 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 requester/initiator to enter the supplier’s information into PeopleSoft supplier database.

   After input by department, email notification is sent to Purchasing and Contract Services, who will review the data and approve or return (with comment). Be sure to email the completed Supplier Intake Form and W-9 to supplierintake@sdccd.edu.

   Once 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 9 of the PeopleSoft User Manual for Purchasing.

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 Buyer.

   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 licensing
   - Membership fees
   - Sponsorships/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 Buyer will upload the completely executed agreement in PeopleSoft. See Board Policy AP 6330. See pages 33 and 34 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 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 32 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?

Buyers 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 Buyer will receive the request in their PeopleSoft queue for review. An example of checks made during the review -- 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 Buyer 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 Buyer will move the purchase requisition
back to the requestor. The Buyer 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 Buyer 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 Buyer 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 20 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 with them directly, 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.

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 $10,000, three quotes are needed. Each quote must be
uploaded as a separate attachment on line one of the purchase requisition. Please refer to page 35 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 33 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 70 and 61 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 Buyer 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 Buyer 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.

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 Buyers 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 Buyer 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 41 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 Stockrooms/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 40 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 Buyers 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 complete and have 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 refer to page 79 of the PeopleSoft user Manual for Purchasing. See Board Policy 6330, AP 6330.14.

23. What is SAM.gov registration?

As of 10-14-22, debarment checks will be verified in SAM.gov for any order that is using Federal funds. At this time, SDCCD is not requiring vendors to register with SAM.gov. This process may change in the future.


Thank you for your contributions to this FAQ section! Please email us with questions at purchase@sdccd.edu.
PEOPLESOFT (PS) SUPPLIER INTAKE PROCESS

When a requester/initiator decides to engage a ‘new supplier’ to purchase future products or services the requester/initiator will;

Verify whether this anticipated supplier is currently entered and approved in the PeopleSoft system and if so, use that Supplier ID number when creating the purchase requisition.

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 requester/initiator must first send the blank SDCCD Supplier Intake 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: [http://bussrv.sdccd.edu/purchasing/forms.cfm](http://bussrv.sdccd.edu/purchasing/forms.cfm).

Upon completion, the supplier shall return the two documents to the requester/initiator. The requester/initiator will review the documents for completeness, accuracy, and legibility. If incomplete, inaccurate or illegible, the requester/initiator will return the document(s) to the supplier for revision. If complete, the requester/initiator will perform the data entry into PS from the completed documents. Thereafter, a Supplier ID is issued within PS. Enter that 10-digit Supplier ID number in the box (top right) of the Supplier Intake form. The data as entered will remain in an 'unapproved' status within PS until Purchasing is notified and reviews and approves the content.

All requests for supplier approval must be reviewed for completeness by the campus Business Office prior to submittal to purchasing for approval.

**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 Intake and W8 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 requester/initiator to enter the supplier into PeopleSoft’s supplier database.

The requester/initiator will then email the IRS W9 / W8 and Supplier Intake documents to supplierintake@sdccd.edu requesting approval by Purchasing. Enter ONLY the supplier name as entered into PeopleSoft and ID number in the subject line of the email.

Purchasing will review and notify the requester/initiator via email when the supplier is approved. Thereafter, the requester/initiator may obtain a quote and draft the requisition within PS, including the now approved supplier (ID).

Purchasing is responsible for reviewing the data entry performed by the requester/initiator and either approving in PS or sending the data back to the requester/initiator for revision.

The submitted W9 form is also (only) reviewed by Purchasing for completeness.

A cursory view is then performed by Purchasing as to the W9 content. The purpose of this task is to identify a possibility of the named supplier, individual or named partnership as potentially qualifying for Federal 1099 tax status.

No decision or recommendation is made by Purchasing as to the actual tax status of the named supplier.

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 department.

For assistance regarding entering a supplier, 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.
To access the Supplier database, click on the NavBar icon in the top right of the screen. Then click the blue Navigator icon and use the following navigation:

- Financials 9.2 > Suppliers > Supplier Information > Add/Update > Supplier
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 steps 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 PS with the exception of an employee or student. To add an Employee/Student, see the screen below.**

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.
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 that Employee or Students ID number and add three leading zero’s (000xxxxxxx) to the number. Ensure that there are 10-digits (numerical) and click ADD.

**NOTE: Employees with ID numbers that begin with 333 do not need 3 leading zeros added.**
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.

**NOTE: DO NOT ADD DASHES (-) to the ID number. Adding dashes will cause an error with the IRS.**
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.).
- **Address 1** – Re-enter the first line of the supplier address or if applicable, enter the C/O information or the legal name from line 1 of the W9 form. Enter the address on **Address 2** and then complete with City, State and Postal.
- **NOTE:** A Physical address is required for all new suppliers and the W9 form must be included a physical address. We cannot accept a PO BOX on the W9 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 16 for instructions on how to enter the additional Remit address.
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 **C/O** information from the Supplier Intake form and then add the first line of the supplier address onto the **Address 2 line**. If there is no C/O indicated on the intake form, 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.

![Image of the Supplier Address section](image-url)
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**.
- **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**.
After establishing the Supplier in People Soft, enter the 10-digit **Supplier ID** number in the box (top right) of the **Supplier Intake Form** and email that form along with the W-9 form to supplierintake@sdccd.edu.

**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 Buyers 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 complete and have 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 refer to page 79 of the PeopleSoft user Manual for Purchasing and 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.

- SHIPPIN/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 32 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 those below 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
  - Sponsorships/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 Buyer receives the purchase requisition in their queue, they will review the attached agreement. The Buyer will then forward the agreement to the Purchasing Supervisor for signature. Or, if revisions are needed, the Buyer 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 Buyer 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 Buyer 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 Buyer 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 suppliers will know what equipment is required, but 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 HILERY DRIVE
SAN DIEGO, CA 92126

THE BILL OF SALE AND CERTIFICATE OF ORIGIN 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.

A PURCHASE ORDER WILL BE ISSUED FOR THE VEHICLES REFLECTING NET-30 TERMS AND INVOICING INSTRUCTIONS.
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, Buyer, 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.

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

PeopleSoft through 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/](http://myportal.sdccd.edu/)

**NOTE: Add this website to your internet favorites for easy access.**
To access **Create Requisitions**, click on the **NavBar** icon in the top right of the screen, then click the blue **Navigator** icon and use the following navigation:

- **Financials 9.2>eProcurement>Requisition**

An alternative navigation to access the **Create a Requisition** screen is as follows:

- **Finance Dashboard>Procurement>Create a Requisition**
**NOTE: All fields MUST be completed in CAPITAL LETTERS; turn your keyboard Caps Lock on.

Below is the Requisition Settings page where all of the information contained in the requisition header is entered. Complete all fields marked in **RED**. See details for each field below.

---

**Requisition Settings**

**Business Unit**: DIS01

**Requestor**: KGOMEZ

**Currency**: USD

**Bid **NoQuote**

**Priority**: Medium

---

**Default Options**

- **Override**

  If you select this option, the defaults specified below will override any predefined values for these fields.

---

**Line Defaults**

Note: The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

**Supplier**

**Category**

**Supplier Location**

**Unit of Measure**: EA

**Buyer**

---

**Shipping Defaults**

**Ship To**: DIS

**Due Date**

**Add One Time Address**

**Attention**

---

**Distribution Defaults**

**SpeedChart**

---

**Accounting Defaults**

---

See details for **Account’s** entry on page 29.
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 name and click Find.

**Note:** As of 10-14-22, debarment checks will be verified in SAM.gov for any order that is using Federal funds. At this time, SDCCD is not requiring vendors to register with SAM.gov. This process may change in the future.
Next, indicate the **Category** which best defines the items that are being ordered. For a list of **Category Codes**, refer to pages 72-78.

- **Category** – Click the magnifying glass and enter a **Category** number or to search by description, click **Description** and enter a key word to search for the appropriate 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 32 for instructions.
Next, click on the magnifying glass next to the **Buyer** field to select the appropriate Buyer. All Buyers are assigned to a specific campus. If this field has defaulted to the correct Buyer, disregard this step.

**Buyer Assignment:**
- Kelly Rosas – Mesa College
- Kellie Silva – District Office and City College
- Maria Briney – Miramar College and Continuing Education

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.

**Note:** Ensure that Sales Tax is accounted for when splitting budgets.

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 singular item is over $1000, including shipping & tax
- Any line item contains Computer/AI/IT/Equipment with a value of $200 or greater
- Any line item contains a monitor
- Any line item contains 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.

---

**Create Requisition**

Welcome  Kristina Gomez

Enter search criteria or select from the menu on the right to begin creating your requisition.
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 70-71 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 32 for instruction 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 33 & 34, if not a BLANKET, skip pages 33 & 34.

### Special Requests

Enter information about the non-catalog item you would like to order:

**Item Details**

**Item Description**

| CHAIR, STEEL CASE, EASY CHAIR, BLUE, W/CASTERS, PN 1234ABC |

**Price**

| 250.00 |

**Currency**

| USD |

**Quantity**

| 1 |

**Unit of Measure**

| EA |

**Category**

| 425-48 |

**Supplier**

- **Supplier ID**: 0002004582
- **Supplier Name**: UNISOURCE WORLDWIDE INC
- **Supplier Item ID**: 

**Manufacturer**

- **Mfg 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.

**Add to Cart**
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.

**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).

### Special Requests

Enter information about the non-catalog item you would like to order:

**Item Details**

- **Item Description**: FREIGHT
- **Price**: 1.00
- **Quantity**: 25
- **Category**: 962-86
- **Currency**: USD
- **Unit of Measure**: DL
- **Due Date**:

**Supplier**

- **Supplier ID**: 0002002986
- **Supplier Name**: SOUTHLAND TECHNOLOGICAL
- **Supplier Item ID**

**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.

**Add to Cart**
Blanket requisitions are intended for renewals, maintenance service agreements, professional services, rentals, and subscriptions/memberships. Use the appropriate templates. See pages 66-69.

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.
- **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.

**Special Requests**

Enter information about the non-catalog item you would like to order:

**Item Details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Description</td>
<td>BLANKET</td>
</tr>
<tr>
<td>Price</td>
<td>4000.00</td>
</tr>
<tr>
<td>Quantity</td>
<td>1</td>
</tr>
</tbody>
</table>

**Supplier**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier ID</td>
<td>0002004362</td>
</tr>
<tr>
<td>Supplier Name</td>
<td>THE SAN DIEGO UNION</td>
</tr>
</tbody>
</table>

**Manufacturer**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mfg ID</td>
<td></td>
</tr>
</tbody>
</table>

**Additional Information**

Use appropriate template in this box.
At the **Checkout - Review and Submit** screen, click on the line **Details** icon below **Details**.

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

Requisition Summary

- **Business Unit**: DIS01
- **District Operations**: Kristina Gomez
- **Bid No/Quote**: QUOTE 1234
- **Priority**: Medium

Cart Summary: Total Amount 4,000.00 USD

Expand lines to review shipping and accounting details

**Requisition Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BLANKET</td>
<td></td>
<td>THE SAN DIEGO UNION TRIBUNE, LLC.</td>
<td>1</td>
<td>EACH</td>
<td>4000.00</td>
<td>4000.00</td>
</tr>
</tbody>
</table>

- **Select All / Deselect All**
- **Select lines to**:
  - Add to Favorites
  - Add to Template(s)
  - Delete Selected
  - Mass Change

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 BEUploaded 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 $10,000, three quote are required. Each quote must be uploaded as a separate attachment on line one of the purchase requisition; see below.

**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.

**Check Budget**

**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.

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

**Check Budget**

**Pre-Check Budget**

**Save & submit**

**Save for Later**

**Add More Items**

**Preview Approvals**
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.
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.

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 Buyer, a confirmation will be emailed to the requestor.
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 Buyer.

- **PURCHASE ORDERS:** The Buyer will review the requisition for accuracy. If all is correct, the Buyer 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 41 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:**

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>CONTACT</th>
<th>PHONE</th>
<th>EMAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Office / Continuing Ed</td>
<td>Gary Waldrop / Ernie Ueckert</td>
<td>619-388-1180</td>
<td><a href="mailto:distributioncenter@sdccd.edu">distributioncenter@sdccd.edu</a></td>
</tr>
<tr>
<td>Miramar College</td>
<td>Joshua Beall</td>
<td>619-388-7445</td>
<td><a href="mailto:jbeall@sdccd.edu">jbeall@sdccd.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>619-388-7819</td>
<td></td>
</tr>
<tr>
<td>Mesa College</td>
<td>Frank Fernandez</td>
<td>619-388-2761</td>
<td><a href="mailto:ffernandez@sdccd.edu">ffernandez@sdccd.edu</a></td>
</tr>
<tr>
<td>City College</td>
<td>Francisco Navallez</td>
<td>619-388-3292</td>
<td><a href="mailto:fnavallez@sdccd.edu">fnavallez@sdccd.edu</a></td>
</tr>
</tbody>
</table>

- **RETURNS:** See Return & Exchanges Board Policy AP 6330.16. If you need further assistance, contact the Stockroom/Distribution Center or contact the appropriate Buyer.

- **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 something changes (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:** A change order cannot be completed if an active voucher is linked to the purchase order, or if the budget status is not valid.

Below are the steps to process a change order for any purchase order that has not been received. If the purchase order has been received, the end user will need to request from their respective **Receiving Department** to have the purchase order “un-received” until the change has been processed. Once the change is complete, it is the end user’s responsibility to notify receivers to re-receive the purchase order in PeopleSoft.

Use the following navigation to process **Change Orders**:

- Finance Dashboard > Procurement > 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**.

---

**Manage Requisitions**

---

**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.

---

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

**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**.

---

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 Buyer for assistance.

---

**Edit Requisition - Review and Submit**

Review the item information and submit the req for approval.

---

**Requisition Summary**

- **Business Unit:** MRO1
- **San Diego Miramar College**
- **Requester:** CMORENCE
- **Cheyanna Moreno**
- **Currency:** USD
- **Bid NoQuote:** 415183-224-16
- **Requisition ID:** MRR001-0631
- **Priority:** Medium
- **Track Batch:** 1

---

**Cart Summary: Total Amount 950.73 USD**

Expand lines to review shipping and accounting details

---

**Requisition Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Item ID</th>
<th>Supplier</th>
<th>Quantity</th>
<th>UOM</th>
<th>Price</th>
<th>Total</th>
<th>Details</th>
<th>Comments</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MOLD RELEASE 3EA</td>
<td>3</td>
<td>AIRCRAFT SPRUCE &amp; SPECIALTY CO</td>
<td></td>
<td>EACH</td>
<td>11.475</td>
<td>34.43</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>2</td>
<td>UNIDIRECTIONAL FIBERGLASS TAP</td>
<td>100</td>
<td>AIRCRAFT SPRUCE &amp; SPECIALTY CO</td>
<td></td>
<td>EACH</td>
<td>1.573</td>
<td>157.30</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>3</td>
<td>ANG8AD3-5 RIVETS, 5LBS AT 333</td>
<td>5</td>
<td>AIRCRAFT SPRUCE &amp; SPECIALTY CO</td>
<td></td>
<td>EACH</td>
<td>29.580</td>
<td>143.44</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>4</td>
<td>GLOVES* 10EA/ PK6 OF 100</td>
<td>10</td>
<td>AIRCRAFT SPRUCE &amp; SPECIALTY CO</td>
<td></td>
<td>EACH</td>
<td>11.475</td>
<td>114.75</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
</tbody>
</table>
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

**Supplier**

Supplier ID: 0002001670

Supplier Name: AIRCRAFT SPRUCE & SPECIALTY CO

Supplier Item ID: 01-06600

**Additional Information**

[Additional Information field]

- 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 button]
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)** is 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 Buyer that there is a change to the purchase order.

---

**Confirmation**

Your requisition has been submitted.

- **Requested For**: Cheyanna Morena
- **Bid No/Quote**: 416464 02/28/16
- **Requisition ID**: MRR0001033
- **Business Unit**: MIR01
- **Status**: See Lines
- **Priority**: Medium
- **Budget Status**: Valid
- **Track Batch**: 2

---

**Req Approval**

**Line 2: Pending**

**ENGINE OIL PRESSURE GUAGE**

**Comment History**

**Change Request/Line Approval Summary**

<table>
<thead>
<tr>
<th>Line</th>
<th>Item Description</th>
<th>Change Request</th>
<th>Line Re-Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>ENGINE OIL PRESSURE GUAGE</td>
<td>Created</td>
<td>Routed for Approval</td>
</tr>
</tbody>
</table>
DIRECT CONNECT (OFFICE SOLUTIONS) ORDERS

You can access PeopleSoft through the District website by selecting the Employee 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 blue Navigator icon and use the following navigation:

- Financials 9.2>eProcurement>Requisition
An alternative navigation to access the Create a Requisition screen is as follows:

- Finance Dashboard>Procurement>Create a Requisition
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.

---

**Requisition Settings**

- **Business Unit**: MIR01
- **Requester**: KROSAS
- **Currency**: USD
- **Priority**: Medium
- **Bid No/Quote**: 

**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**

*Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.*

- **Supplier**
- **Supplier Location**
- **Category**
- **Unit of Measure**: EA
- **Buyer**

**Shipping Defaults**

- **Skip To**: MIR
- **Due Date**: 
- **Add One Time Address**
- **Attention**: 

**Distribution Defaults**

- **SpeedChart**: 

**Accounting Defaults**

- **Chartfields1**
- **Details**
- **Asset Information**
- **Project**

<table>
<thead>
<tr>
<th>Dist</th>
<th>Percent</th>
<th>Location</th>
<th>GL Unit</th>
<th>Fund</th>
<th>Dept</th>
<th>Product</th>
<th>Account</th>
<th>Oper Unit</th>
<th>PC Bus Unit</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>MIR</td>
<td>MIR01</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To access the Office Solutions unique website for pricing and item numbers, go to [www.officesol.com](http://www.officesol.com) and enter the following login information:

- User: sdccdpc
- Pwd: sdccdpc@

**NOTE:** This site can be utilized for product search and pricing only. The Check-Out feature is not active in this site. Orders must be placed through PeopleSoft using either Chrome or Firefox as your browser.

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

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.

If you have not been navigated to the catalog within 5 seconds, please click 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**.

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

<table>
<thead>
<tr>
<th>Requisition Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Business Unit</strong></td>
</tr>
<tr>
<td><strong>Requestor</strong></td>
</tr>
<tr>
<td><strong>Currency</strong></td>
</tr>
</tbody>
</table>

**Cart Summary: Total Amount 42.83 USD**

Expand lines to review shipping and accounting details

<table>
<thead>
<tr>
<th>Requisition Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Line</strong></td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

**Select All/Deselect All**

**Mass Change**

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

**Edit Lines/Shipping/Accounting for Selected Lines**

**Note:** The information below does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

<table>
<thead>
<tr>
<th><strong>Supplier ID</strong></th>
<th><strong>Supplier Location</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Buyer</td>
<td>Category</td>
</tr>
</tbody>
</table>

**Shipping Information**

**Ship To Location** DISCM00100

**Address** Add One Time Address

<table>
<thead>
<tr>
<th><strong>Due Date</strong></th>
<th><strong>Attention</strong></th>
<th><strong>Comments</strong></th>
</tr>
</thead>
</table>

**Accounting Lines**

Please enter GL Business Unit before selecting other chartfield values

<table>
<thead>
<tr>
<th><strong>Accounting Information</strong></th>
<th><strong>Personalize</strong></th>
<th><strong>Find</strong></th>
<th><strong>Find</strong></th>
<th><strong>First</strong></th>
<th><strong>Last</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>Percent</strong></th>
<th><strong>Location</strong></th>
<th><strong>GL Unit</strong></th>
<th><strong>Fund</strong></th>
<th><strong>Dept</strong></th>
<th><strong>Activity</strong></th>
<th><strong>Account</strong></th>
<th><strong>Oper Unit</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>MR01</td>
<td>1110</td>
<td>74300</td>
<td>677020</td>
<td>4002</td>
<td></td>
</tr>
</tbody>
</table>

**OK**  **Cancel**
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.

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 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.

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

The Budget Check Status will show as **VALID** if the requisition has passed Budget Check and the system will automatically issue a Requisition ID number.
To check the status of the purchase requisition in PeopleSoft, access the Manage Requisitions screen and use the following navigation:

- **Nav Bar** > Navigator > Financials 9.2 > 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 Employee 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 blue Navigator icon and use the following navigation:

- **Financials 9.2>eProcurement>Requisition**
An alternative navigation to access the **Create a Requisition** screen is as follows:

- Finance Dashboard > Procurement > Create a Requisition
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.

**Requisition Settings**

- **Business Unit**: DIBS01
- **District Operations**: [Search]
- **Bid No/Quote**: [Search]
- **Requester**: KGOMEZ
- **Kristina Gomez**: [Search]
- **Currency**: USD

**Default Options**

- **Default**: [Option]
- **Override**: [Option]

  - **If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.**

  - **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**

Note: The information in this page does not reflect the data in the selected requisition lines. When the 'OK' button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

- **Supplier**: [Search]
- **Category**: [Search]
- **Supplier Location**: [Search]
- **Unit of Measure**: EA
- **Buyer**: [Search]

**Shipping Defaults**

- **Ship To**: DIS
- **Add One Time Address**: [Search]
- **Due Date**: [Search]
- **Attention**: [Search]

**Distribution Defaults**

- **SpeedChart**: [Search]

**Accounting Defaults**

- **ChartField**: [Search]
- **Details**: [Search]
- **Asset Information**: [Search]

**Dist** | **Percent** | **Location** | **GL Unit** | **Fund** | **Dept** | **Product** | **Account** | **Oper Unit** | **PC Bus Unit** | **Project**
--- | --- | --- | --- | --- | --- | --- | --- | --- | --- | ---
1 | DIS | DIBS01 | | | | | | | |
**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.
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.

Click Yes on the pop-up message to be transferred to People Soft’s Checkout Review and Submit page.
In the pop-up, enter the **Ship To** location and the appropriate **Accounting Information** in fields below and click **OK**.

### Line Information

Note: The information below does not reflect the data in the selected requisition lines. When the ‘OK’ button is clicked, the data entered on this page will replace the data in the corresponding fields on the selected lines that are available for sourcing.

- **Supplier ID**: 
- **Supplier Location**: 
- **Buyer**: 
- **Category**: 

### Shipping Information

- **Ship To Location**: DISCDC0100
- **Due Date**: 
- **Attention**: 
- **Comments**: 

### Accounting Lines

- **SpeedChart**: 

Please enter GL Business Unit before selecting other chartfield values.

### Distribution Change Options

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

**Distribution Change Options**

For the selected requisition lines that are available for sourcing, apply distribution changes to:

- **All Distribution Lines**
  - Apply changes to all existing distribution lines.

- **Matching Distribution Lines**
  - Apply changes to each existing distribution line by matching the distribution line numbers.

- **Replace Distribution Lines**
  - Remove the existing distribution lines and replace with the distribution lines changes.

**OK**  **Cancel**
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.

**Requisition Comments and Attachments**

Enter requisition comments:

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

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

Budget Checking will save your requisition in an Open Status. (18036.39)

In order to perform budget checking on this requisition, it must first be saved in an Open Status. Press OK to continue. Press Cancel to return to your requisition without budget checking.
The **Budget Check Status** will show as **VALID** if the requisition has passed **Budget Check** and the system will automatically issue a **Requisition ID** number.

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 **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 Buyer, a confirmation will be emailed to the requester.

**Confirmation**

Your requisition has been submitted.

- **Requested For**: Kristina Gomez
- **Bid No/Quote**: DOR0012754
- **Requisition ID**: DOR0012754
- **Business Unit**: DIS01
  - **Status**: Pending
  - **Priority**: Medium
  - **Budget Status**: Valid

To view the details of the requisition, click the grey arrow under **Req ID** to expand the details. Here the status of the purchase requisition can be reviewed.

**Req Approval**

- **Line 1**: Pending
  - **Description**: TNS24110441 Fire Resistant Wastebasket Rectangular Open Top Black Height 10 x 14 x 11 Depth Diam x 10 x 12 in Plastic Fiberglass Textured Indoor Stationary No Lid None None Free-Standing

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 Buyer, a confirmation will be emailed to the requester.

**To check the status of the purchase requisition in PeopleSoft, access the Manage Requisitions screen and use the following navigation:**

- **Nav Bar** > **Navigator** > **Financials 9.2** > **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.
TEMPLATE LANGUAGE – BLANKET ORDER

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.

SUPERCEDES 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 DIEGTO 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.

SUPERCEDES 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 PURCHPO@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

1. 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 Equipment

2. When purchasing equipment, all options, components, and enhancements should be bundled with the equipment. However, separate operating pieces of equipment which 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
   #BX806461I54690
   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 EACH AND NOT AS A LOT.

   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

RULE IS THAT IF THE FURNITURE IS NOT BOLTED, GLUED, AND/OR WEILDED 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 SEPARATE OR AS ANOTHER LINE ITEM.
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204-33  Drives, Compact Disk CD ROM, DVR, etc.  Drives, Co
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<td>Description</td>
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<tr>
<td>-------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>838-00</td>
<td>Telecommunication Equipment, Accessories, and Supplies</td>
</tr>
<tr>
<td>840-00</td>
<td>Television Equipment and Accessories</td>
</tr>
<tr>
<td>855-00</td>
<td>Theatrical Equipment and Supplies</td>
</tr>
<tr>
<td>860-00</td>
<td>Tickets, Coupon Books, Sales Books, Strip Books, Etc.</td>
</tr>
<tr>
<td>863-00</td>
<td>Tires and Tubes, Supplies and Accessories</td>
</tr>
<tr>
<td>875-00</td>
<td>Veterinary Equipment and Supplies</td>
</tr>
<tr>
<td>880-00</td>
<td>Audio Visual Equipment and Supplies</td>
</tr>
<tr>
<td>880-43</td>
<td>Projection Screens</td>
</tr>
<tr>
<td>880-67</td>
<td>Projectors</td>
</tr>
<tr>
<td>895-00</td>
<td>Welding Equipment and Supplies</td>
</tr>
<tr>
<td>906-00</td>
<td>Architectural Services, Professional</td>
</tr>
<tr>
<td>908-00</td>
<td>Bookbinding, Rebinding, and Repair Services</td>
</tr>
<tr>
<td>909-00</td>
<td>Building Construction Services</td>
</tr>
<tr>
<td>915-00</td>
<td>Communications and Media Related Services</td>
</tr>
<tr>
<td>915-75</td>
<td>Telephone Services, Cellular</td>
</tr>
<tr>
<td>918-02</td>
<td>Audio/Visual Consulting Services</td>
</tr>
<tr>
<td>918-06</td>
<td>Administrative Consulting</td>
</tr>
<tr>
<td>918-07</td>
<td>Advertising Consulting</td>
</tr>
<tr>
<td>918-14</td>
<td>Appraisals Consulting</td>
</tr>
<tr>
<td>918-15</td>
<td>Architectural Consulting</td>
</tr>
<tr>
<td>918-19</td>
<td>Buildings, Structures and Components Consulting</td>
</tr>
<tr>
<td>918-25</td>
<td>Compliance Consulting, American Disabilities Act ADA</td>
</tr>
<tr>
<td>918-26</td>
<td>Communications: Public Relations Consulting</td>
</tr>
<tr>
<td>918-28</td>
<td>Computer Hardware/Software Consulting</td>
</tr>
<tr>
<td>918-31</td>
<td>Construction Consulting</td>
</tr>
<tr>
<td>918-32</td>
<td>Consulting Services Not Otherwise Classified</td>
</tr>
<tr>
<td>918-38</td>
<td>Education and Training Consulting</td>
</tr>
<tr>
<td>918-41</td>
<td>Energy Conservation Consulting</td>
</tr>
<tr>
<td>918-42</td>
<td>Engineering Consulting</td>
</tr>
<tr>
<td>918-43</td>
<td>Environmental Consulting</td>
</tr>
<tr>
<td>918-52</td>
<td>Food Service Consulting</td>
</tr>
<tr>
<td>918-66</td>
<td>Human Resources Consulting Services</td>
</tr>
<tr>
<td>918-71</td>
<td>IT Consulting</td>
</tr>
<tr>
<td>918-74</td>
<td>Legal Consulting</td>
</tr>
<tr>
<td>918-75</td>
<td>Management Consulting</td>
</tr>
<tr>
<td>918-76</td>
<td>Marketing Consulting</td>
</tr>
<tr>
<td>918-80</td>
<td>Moving/Relocation Consulting Service</td>
</tr>
<tr>
<td>918-91</td>
<td>Roofing Consultant</td>
</tr>
<tr>
<td>918-95</td>
<td>Telecommunications Consulting</td>
</tr>
<tr>
<td>918-97</td>
<td>Utilities: Gas, Water, Electric Consulting</td>
</tr>
<tr>
<td>925-00</td>
<td>Engineering Services, Professional</td>
</tr>
<tr>
<td>926-00</td>
<td>Environmental and Ecological Services</td>
</tr>
<tr>
<td>936-00</td>
<td>Equipment Maintenance and Repair Services for General Equip</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>954-00</td>
<td>Laundry and Dry Cleaning Services</td>
</tr>
<tr>
<td>961-00</td>
<td>Miscellaneous Services - Temp help, Catering, Chartering</td>
</tr>
<tr>
<td>962-16</td>
<td>Bus Transportation Services, School</td>
</tr>
<tr>
<td>962-19</td>
<td>Cafeteria and Restaurant Services</td>
</tr>
<tr>
<td>962-22</td>
<td>Chemical Laboratory Services</td>
</tr>
<tr>
<td>962-23</td>
<td>Chemical Treatment of Boiler and Tower Water</td>
</tr>
<tr>
<td>962-24</td>
<td>Courier/Delivery Services</td>
</tr>
<tr>
<td>962-27</td>
<td>Document Shredding Services</td>
</tr>
<tr>
<td>962-33</td>
<td>Engraving Services; Awards, Trophies, Etc.</td>
</tr>
<tr>
<td>962-46</td>
<td>Installation &amp; Removel Svcs.</td>
</tr>
<tr>
<td>962-48</td>
<td>Interior Design/Decorator Services</td>
</tr>
<tr>
<td>962-56</td>
<td>Moving Services</td>
</tr>
<tr>
<td>962-58</td>
<td>Professional Services Not Otherwise Classified</td>
</tr>
<tr>
<td>962-63</td>
<td>Piano Tuning Services</td>
</tr>
<tr>
<td>962-69</td>
<td>Personnel Services, Temporary</td>
</tr>
<tr>
<td>962-79</td>
<td>Sign Making Services</td>
</tr>
<tr>
<td>962-86</td>
<td>Freight, All Transportation of Goods</td>
</tr>
<tr>
<td>962-87</td>
<td>Travel, Local Provided by Third Party</td>
</tr>
<tr>
<td>962-89</td>
<td>Vehicle Transporting Services</td>
</tr>
<tr>
<td>962-93</td>
<td>Vehicle Registration Services</td>
</tr>
<tr>
<td>962-94</td>
<td>Water Service, Bottled</td>
</tr>
<tr>
<td>963-00</td>
<td>Non-Biddable Miscellaneous Items Associations, Fees, Dues</td>
</tr>
<tr>
<td>966-00</td>
<td>Printing and Typesetting Services</td>
</tr>
<tr>
<td>968-00</td>
<td>Public Works and Related Services</td>
</tr>
<tr>
<td>971-00</td>
<td>Real Property Rental or Lease</td>
</tr>
<tr>
<td>975-00</td>
<td>Rental or Lease of Automotive</td>
</tr>
<tr>
<td>981-00</td>
<td>Rental or Lease of General Equipment</td>
</tr>
<tr>
<td>990-00</td>
<td>Security, Fire, Safety, and Emergency Services</td>
</tr>
<tr>
<td>999-99</td>
<td>Staples Default Item Category</td>
</tr>
</tbody>
</table>
Please contact the Purchasing and Contract Services Department at 619-388-6562 to request a Confirmation Form.
### STATUS DEFINITIONS

#### Purchase Orders (PO)

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial</td>
<td>A PO has a status of <em>Initial</em> when it is first added to the system. This status may change once a buyer is selected in the PO, depending upon how the buyer is set up.</td>
</tr>
<tr>
<td>Open</td>
<td>If the buyer is set up with this Default PO Status, an initial PO will become <em>Open</em>. A Template PO may always have an <em>Open</em> status. A PO with this status cannot be budget checked.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>A PO cannot be budget checked or entered into the approval process until it is in <em>Pending Approval</em> status. There is a checkmark that shows on <em>Open</em> POs that can be clicked to change the status to “<em>Pend Appr.</em>”</td>
</tr>
<tr>
<td>Approved</td>
<td>When the workflow approval process is complete, the PO status changes from <em>Pending Approval</em> to <em>Approved</em>. After the PO is approved, any change in amount or ChartFields causes the system to return the PO status back to <em>Pending Approval</em>. <em>Approved</em> POs are available for the PO Dispatch/Print process.</td>
</tr>
<tr>
<td>Dispatched</td>
<td>If the PO has been approved and has a valid budget status, the PO status changes from <em>Approved</em> to <em>Dispatched</em>.</td>
</tr>
<tr>
<td>Canceled</td>
<td>Canceling an entire PO before it has been dispatched changes the status to <em>Canceled</em>. Canceling cannot be reversed.</td>
</tr>
<tr>
<td>Pending Cancel</td>
<td>Canceling a dispatched PO changes, the status to <em>Pending Cancel</em>. The PO must be re-dispatched and budget-checked to move the status from <em>Pending Cancel</em> to <em>Canceled</em>.</td>
</tr>
<tr>
<td>Complete</td>
<td>Running the Close Purchase Orders process changes the status to <em>Complete</em>.</td>
</tr>
</tbody>
</table>

#### Approval Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial</td>
<td>The status of any PO or requisition when first brought into the “Approve Amounts” process.</td>
</tr>
<tr>
<td>In Process</td>
<td>If the requester or buyer cannot give full approval of a requisition or PO, the status of <em>In Process</em> shows after the initial approval is saved.</td>
</tr>
<tr>
<td>Complete</td>
<td>The requisition or PO receives a <em>Complete</em> approval status after the final approval has been done. These three approval statuses will only show in the Approve Amounts screen.</td>
</tr>
<tr>
<td>Purchase Requisitions</td>
<td></td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td><strong>Open</strong></td>
<td>The <em>Open</em> status displays by default from the requester. This status may change once a requester is selected, depending upon how the requester is set up.</td>
</tr>
<tr>
<td><strong>Pending Approval</strong></td>
<td>The purchase requisition is not eligible for the approval process until an authorized user changes this status to <em>Pending</em>. This may be done by pulling in the requester or clicking the “Open” checkmark to change the status to <em>Pending</em>.</td>
</tr>
<tr>
<td><strong>Approved</strong></td>
<td>The purchase requisition has been fully approved.</td>
</tr>
<tr>
<td><strong>Line Approved</strong></td>
<td>This status means that one or more purchase requisition lines have been approved.</td>
</tr>
<tr>
<td><strong>Denied</strong></td>
<td>The purchase requisition has been denied by the Approver.</td>
</tr>
<tr>
<td><strong>Canceled</strong></td>
<td>The purchase requisition was canceled on the header.</td>
</tr>
<tr>
<td><strong>Complete</strong></td>
<td>Running the Close Requisitions process changes the status to <em>Complete</em>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Receipts</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open</strong></td>
<td>Not all edits have passed. If any receipt lines have a status of <em>Open</em>, the receipt header has a status of <em>Open</em>.</td>
</tr>
<tr>
<td><strong>Received</strong></td>
<td>When all lines are in <em>Received</em> or <em>Canceled</em> status, the receipt header will have a status of <em>Received</em>.</td>
</tr>
<tr>
<td><strong>Hold</strong></td>
<td>Receipt is on <em>Hold</em> until released by user. This status may be used when items are received damaged.</td>
</tr>
<tr>
<td><strong>Moved</strong></td>
<td>This status occurs when the receipt has been interfaced with Asset Management or Inventory in PeopleSoft.</td>
</tr>
<tr>
<td><strong>Closed</strong></td>
<td>All interface requirements have been fulfilled and no further processing is required. Running the Close Receipts process changes the status to <em>Closed</em>.</td>
</tr>
<tr>
<td><strong>Canceled</strong></td>
<td>The receipt has been <em>Canceled</em> on the header; the lines will go to a <em>Canceled</em> status as well. <em>Canceling</em> cannot be reversed.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Budget Status</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Not Chk’d</strong></td>
<td><em>(Not Checked)</em> – 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.</td>
</tr>
<tr>
<td><strong>Valid</strong></td>
<td>The purchase order or purchase requisition has been successfully budget checked.</td>
</tr>
<tr>
<td><strong>Error</strong></td>
<td>The document has failed to budget check because of an error in the distribution information.</td>
</tr>
</tbody>
</table>