eProcurement Class Description

Length of Class: 7 hours total, divided into two, 3.5-hour sessions over two days, 8:00 a.m. - 11:30 a.m. each day *(must attend both sessions)*

PLEASE NOTE: Attending *both* eProcurement Parts 1 and 2 is required to complete the training.

Intended Audience: All Clerks, Administrative Assistants, Secretaries, Custodial staff, and anyone else who orders goods or services for a school, department, or other site in the district.

Purpose: This class provides the comprehensive knowledge and skills necessary to use SDUSD's online PeopleSoft eProcurement software application to procure goods and services for a school, office, or any other site or department in the district.

Pre-requisites: Must be able to use the Internet on a PC with Windows operating system software. Ability to type minimum of 20 WPM is desired, but not required.

Methodology: Trainees will be guided through a series of hands-on training exercises using a PC with Windows. Hardcopies of all training materials will be provided.

Objectives: Trainees who successfully complete both class sessions will be able to:

- Describe a Chartfield String and run a Budget Inquiry *(see what funds are available in a given budget)*
- Create and submit an eProcurement requisition *(place an order)*
- Place the following types of eProcurement orders:
    - Catalog items *(inventory/stock items)*
    - Direct Connect items *(from popular common vendors)*
    - Special Request items *(goods not found in our Catalogs, and services from an outside contractor)*
    - Asset items *(expensive goods meant to last year to year)*
    - Lot orders *(41 or more related items that can be grouped)*
- Track, reopen, edit, resubmit, and/or cancel eProcurement requisitions
- Upload and attach a document to an ePro requisition
- Use shortcut methods to speed up lengthy orders
- Direct one or more items on an ePro requisition to be delivered to separate sites
- Run a simple Budget Report to view current balances of available funds in multiple site budgets
- Run the eProcurement Report to view details on all eProcurement requisitions within your office, school, department, or site

Register for this class in ERO