

Find Categories for Special Request Items


When you order Special Request goods or services, it's very important to select the correct Category each time. When you do, the correct budget (account) is automatically chosen to pay for that Special Request item. If you don't select the correct Category when creating the eProcurement requisition, then the wrong funds will be used to pay for the order. This typically results in your site losing money by spending incorrect funds on things, and can have a negative effect on your funding for the following year. In addition to that, if you select the wrong Category, *it could delay or even cancel your order.*

This Job Aid shows you methods to locate and choose the correct Category for a Special Request item.

1. Once you have a new, blank requisition form on your screen, click the **Special Request** hyper-link to bring it forward.

The screenshot shows the 'Create Requisition' web application interface. At the top, there is a navigation bar with 'Welcome Carlos Cernuda', 'Home', 'My Preferences', 'Requisition Settings', '0 Lines', and 'Checkout'. Below this is a search bar with 'Request Options' and 'Search All'. The main content area is divided into several sections: 'Catalog' (Browse Catalogs, Assets - Items over 500, Secondary Textbooks, Textbooks - Elementary, Textbooks - Secondary, Elementary Textbooks, More...), 'Web' (Browse Supplier Websites, Fisher Science Products, Frey Science, Grainger, Graybar, Lakeshore Learning, More...), 'Express Item Entry' (Create an Express Requisition), 'Forms' (Create and Submit Forms), 'Favorites' (Browse Favorite Items and Services), 'Templates' (Browse Company and Personal Templates, D.6.N.04.26.05 Contract Sch..., OCCUP. THERAPIST SVCS CAREER..., I21 YR4 (11 EA) NO CART, 8.B.17.06.13.06 EBS PSYCH, 8.B.7.03.28.06 STEIN/TRANSIT..., More...), 'ePro Services' (Request Services, Fixed Cost Service, Variable Cost Service, Time and Materials), 'Recently Ordered' (View recently ordered items and services, COMPUTER), and 'External Catalogs' (Browse Supplier Website Items). The 'Special Requests' link, which says 'Create a non-catalog request', is circled in red.

2. Click the **Category Lookup** icon, next to the Category field.

Special Requests 


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


Item Details


*Item Description


*Price

*Quantity


*Category 


*Currency 

*Unit of Measure 

Due Date 

Supplier

*Supplier ID 

Supplier Name 

[Suggest New Supplier](#)





3. Verify that Category is selected in the Search by dropdown.


Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Categories [Personalize](#) | [Find](#) | [View All](#)   First  1 of 1  Last

1	Catalog	Category	Description	Find in Tree 

Browse Category Tree

From here, there are several different methods of finding the right Category for your Special Request item. The following pages of this Job Aid show you these methods.

I. Find Category by Account Number

Considered by many to be the easiest way, you can use the account number from the budget (*Chartfield*) string to locate the correct Category for all items (*except for Asset items... they work a bit differently, as shown further on*).

1. Always make sure that the **Search By** is set to “**Category**”. In the textbox between “**Category**” and the Find button, type a **percent sign**, and the **account number** that will be used to pay for the item. Then, click the **Find** button.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Category %4305 Find

Categories Personalize | Find | View All | First 1 of 1 Last

Catalog	Category	Description	Find in Tree
1			

Browse Category Tree

Return

2. The Category that belongs to the account number is displayed below. It shows the **Catalog** (*on the left*), the **Category** (*in the middle*), and the **Description** (*on the right*) that are connected with that account number. Click anywhere on the linked line.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Category %4305 Find


Categories Personalize | Find | View All | First 1 of 1 Last

Catalog	Category	Description	Find in Tree
1 SD_GOODS	GDS_4305	Tests in classroom	

Browse Category Tree

Return

3. The correct Category is now in place, and you can continue to complete the order.

Special Requests 


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


Item Details


*Item Description


*Price

*Quantity


*Category 


*Currency 

*Unit of Measure 

Due Date 

Supplier

*Supplier ID 

Supplier Name 

[Suggest New Supplier](#)

II. Find Category by Group Text Criteria

This method works well if you want to view a list of related Categories to choose from. There are three basic groups of related Categories: Goods, Services, and Assets. You can type one of these Category group names into the look-up field, and display all Categories within that group.

1. Always make sure that the **Search By** is set to “**Category**”. In the text field, type the initials for the Category group you want:

GDS (to look up Goods Categories)

SVC (to look up Services Categories)

A (to look up Asset Categories)



Then, click the **Find** button.


Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Categories [Personalize](#) | [Find](#) | [View All](#) |  |  First Last

Catalog	Category	Description	Find in Tree
1			

Browse Category Tree

2. The list of individual **Categories** appears. You can scroll through the list and click to choose the Category you want. To make it easier, you can alphabetize the list by clicking **Description** at the top.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Categories Personalize | Find | View All | | First 1-22 of 22 Last

	Catalog	Category	Description ▲	Find in Tree
1	SD_GOODS	<u>GDS_4101</u>	Adopted Textbks & Adopted Matl	
2	SD_GOODS	GDS_4315	Bldg Maintenance Supplies	
3	SD_GOODS	GDS_4515	Bldg Maintenance Supplies	
4	SD_GOODS	GDS_4302	Custodial Supplies	
5	SD_GOODS	GDS_4400	Equip Non Cap Non Asset Mod	
6	SD_GOODS	GDS_4711	Food Services	
7	SD_GOODS	GDS_4791	Food Svcs Supplies/Cafe Acct	
8	SD_GOODS	GDS_4303	Furniture <\$500	
9	SD_GOODS	GDS_4320	Gasoline & Oil	
10	SD_GOODS	GDS_4304	Inservice Supplies	
11	SD_GOODS	GDS_4330	Inventory Adjustment	

To see an example of a clicked (chosen) Category in the Category field of a Special Request ordering screen, please turn to **Step 3** on **page 4**.

III. Find Category by Browsing Category Tree

This method is similar to the one shown on the previous page (using Group Text Criteria). It works well if you don't have the account number handy, and you just want to preliminarily browse through the Category lists.

1. Always make sure that the **Search By** is set to **"Category"**. Click the **Expand Section** icon button (shaped like a tiny arrow) to display the **Browse Category Tree** feature.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By

Catalog	Category	Description	Find in Tree
1			

2. In the **Select a catalog** drop-down menu, click to choose one of the five root **Catalogs**.

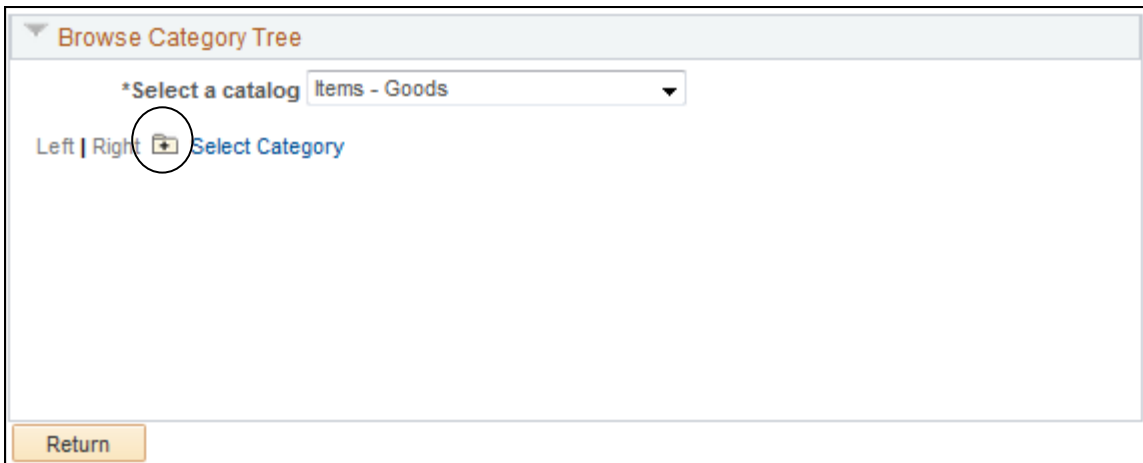
Browse Category Tree

*Select a catalog

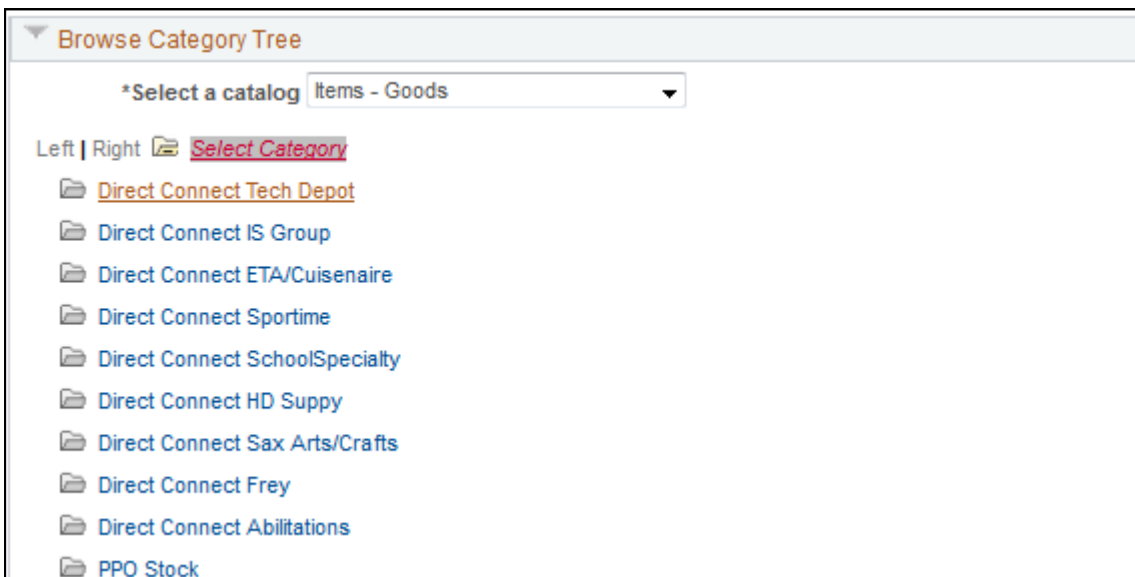
Left | Right

- All Items
- Assets - Items over 500
- Elementary Textbooks
- Items - Goods
- Items - Services
- No Charge Textbook Materials
- Secondary Textbooks
- Textbooks - Elementary
- Textbooks - Secondary

3. Ignore the **Select Category** link, and click the yellow folder with the plus sign on it.



4. The Category list is displayed for that root Catalog. Scroll down the list to find the Category you want. *(Unfortunately, you can't alphabetize this list).* Click to choose the desired Category.



*To see an example of a clicked (chosen) Category in the Category field of a Special Request ordering screen, please turn to **Step 3** on **page 4**.*

IV. Find an Asset Category

Asset Categories are the only Categories that cannot be located by account number. Their budgets are set up a little differently than other budgets. Probably the best way to find an Asset Category is the way shown below.

1. Always make sure that the **Search By** is set to “**Category**”. In the **Find** field, type the letter **A**, and then click the **Find** button.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Categories Personalize | Find | View All First 1 of 1 Last

Catalog	Category	Description	Find in Tree
1			

Browse Category Tree

2. Scroll to locate and click the Asset Category you want. Some have two that look the same, with G4640 and L4640 on the ends. **G4640** means a single unit of that item is worth **Greater Than \$4,640** before tax. **L4640** means a single unit is worth **Less Than \$4,640** before tax.

Look Up Category

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By:

Categories Personalize | Find | View 100 First 1-50 of 151 Last

Catalog	Category	Description	Find in Tree
1 Non Catalog	A_BLDG_CONST	Building - Constructed	
2 Non Catalog	A_BLDG_PURCH	Building - Purchase	
3 Non Catalog	A_BLDG_PORT_LSE	LEASE PORTABLE BUILDING	
4 SD_ASSETS	A_BLDG_IMPRV_PROGR	A_BLDG_IMPRV_PROGRESS_PMT	
5 SD_ASSETS	A_SITE_IMPROV_SITE	A_SITES_IMPROVEMENT_2_SITES	
6 SD_ASSETS	A_EQP_KITCH_G4640	Appliances and Food Svc G4640	
7 SD_ASSETS	A_EQP_KITCH_L4640	Appliances and Food Svc L4640	
8 SD_ASSETS	A_EQP_ATHL_G4640	Athletic Equipment G4640	
9 SD ASSETS	A EQP ATHL L4640	Athletic Equipment L4640	

To see an example of a clicked (chosen) Category in the Category field of a Special Request ordering screen, please turn to **Step 3** on **page 4**.

For more information about how to use the PeopleSoft software system in our school district, as well as to find training opportunities and support, go online to www.sandi.net and follow this clicking navigation:

Staff —> Technical Support & Resources —> PeopleSoft

The screenshot shows the San Diego Unified School District website. The header includes the district logo and name, a 'Contact Us' button, and a navigation bar with categories: DISTRICT, PARENTS, STUDENTS, STAFF, COMMUNITY, and BOARD OF EDUCATION. Below this is a secondary navigation bar with links: Home, About Us, Administration, Departments, Employment, News, Schools, and Student Life. The main content area is titled 'PeopleSoft Support & Resources' and includes a breadcrumb trail: Home > Departments > PeopleSoft. The page text states: 'This site has the latest handbooks, job aids, resources, and information about our PeopleSoft training applications for Finance and Human Resources (HCM)'. There are two links: '[New Training Materials for PeopleSoft 9.2](#)' and '[Training Videos](#)'. A left sidebar under the 'PeopleSoft' heading lists: Home (Overview), Training Opportunities, Training Materials & Resources, News & Announcements, and Contacts.