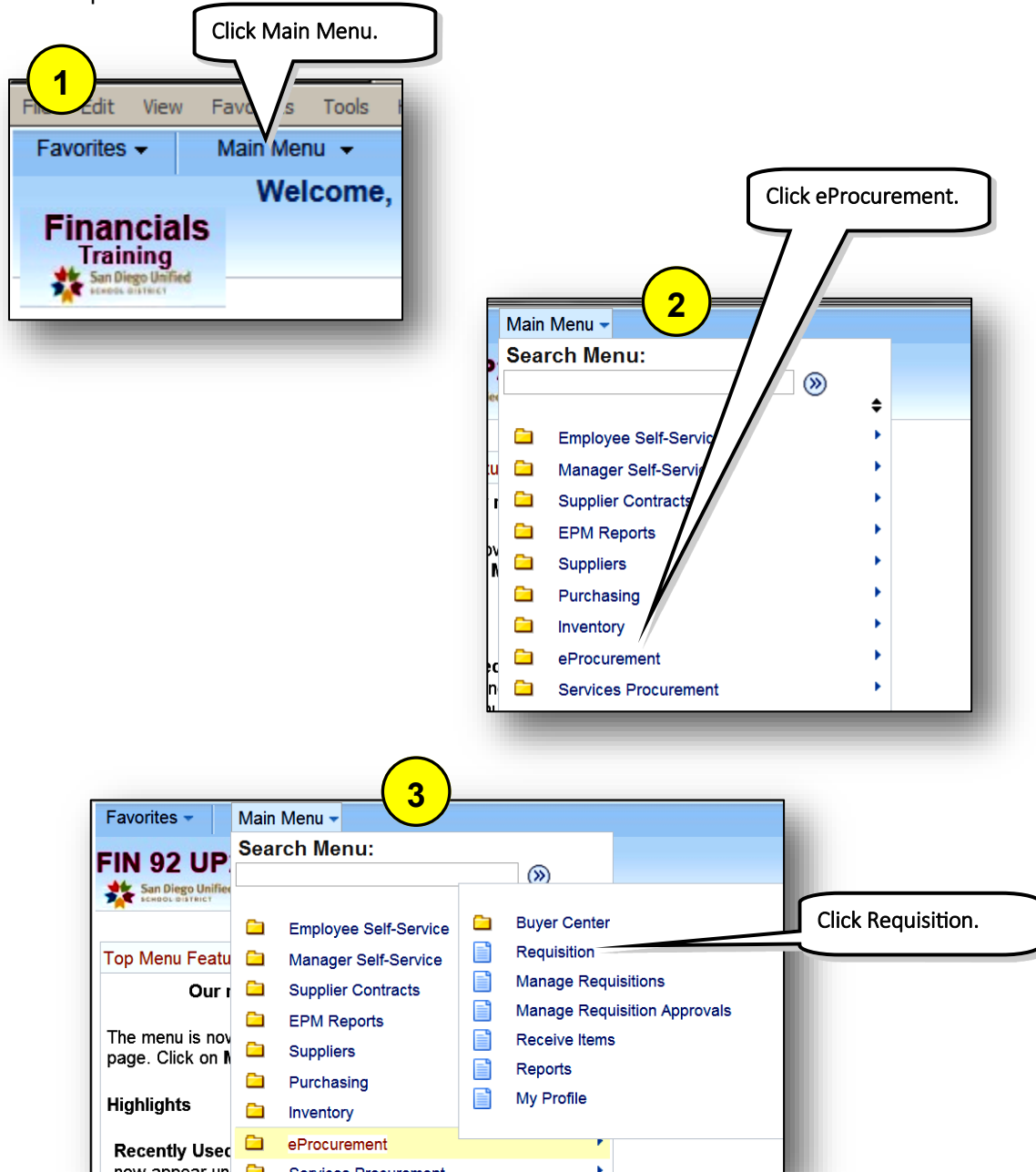


Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

This Job Aid shows how to use SDUSD's eProcurement software to order stock/inventory items typical for our school district. Please be sure your computer's browser meets the minimum requirements to use eProcurement (Internet Explorer 8 or higher is the usual browser).

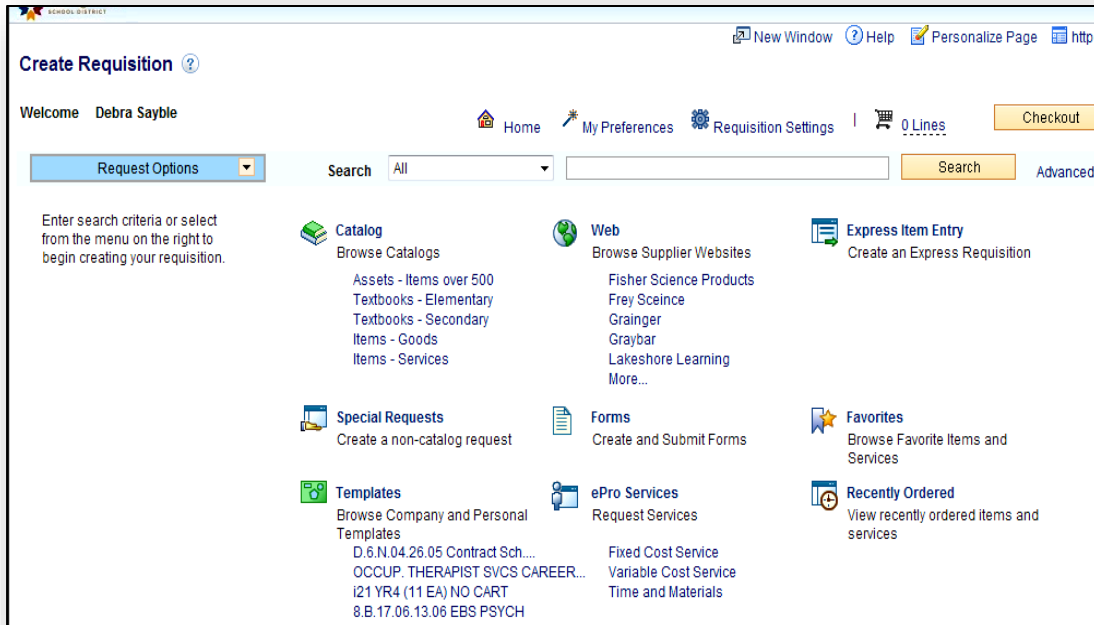
1. After logging in to the PeopleSoft Financials website, navigate to a new blank requisition by following these steps :



Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

2. The eProcurement home page looks like this:



IMPORTANT NOTE: Be sure to order items from the same vendor on a single ePro requisition. *Do not mix vendors.* Also, be sure to use the same budget string (account information) for all the items on a single requisition. Do not enter multiple budgets on one requisition, unless you need to split payment for one or more items between multiple budgets.

On the eProcurement home page, you can start placing items on your requisition. There are two methods available to locate SDUSD Catalog stock/inventory items:

I. Keyword Search

- ◇ Enter a single word from the **actual name** of the item.

II. Express Item Entry

- ◇ Search by specific filters.

Order SDUSD Catalog Items

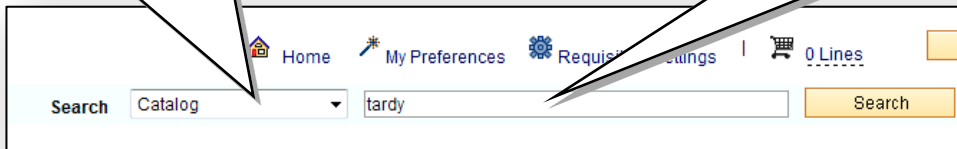
How to Order Our Stock/Inventory Items

I. Keyword Search

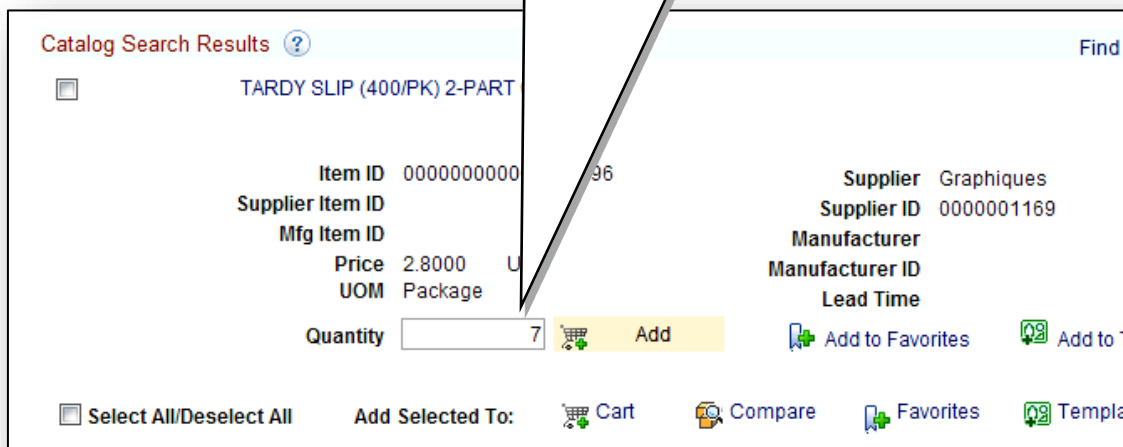
Follow the illustrated steps below to use keywords to locate any/all of the following items: Cheese, Tardy Slips, Paper (*for use in printers or copiers*):

To narrow your search, choose Catalog from the menu of search choices.

Type a single word taken from the name of the item, and then click Search.

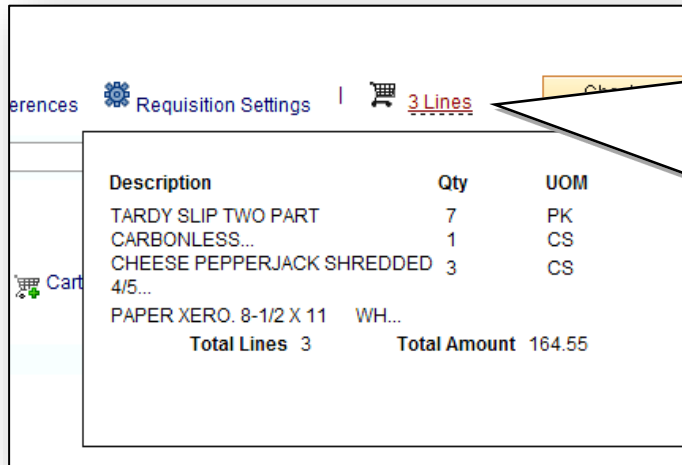


Enter the quantity you want to order, and then click the Add (shopping cart) button next to the Quantity field.



Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

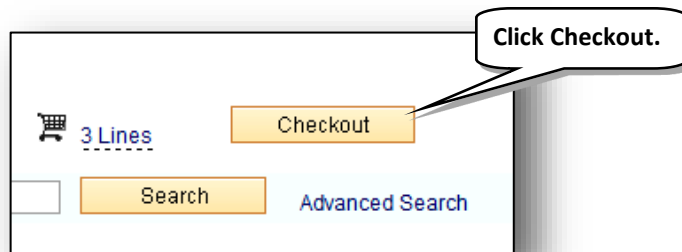


The screenshot shows a shopping cart interface. At the top, there are navigation links for 'References', 'Requisition Settings', and a shopping cart icon with '3 Lines'. Below this is a table of items in the cart:

Description	Qty	UOM
TARDY SLIP TWO PART	7	PK
CARBONLESS...	1	CS
CHEESE PEPPERJACK SHREDED	3	CS
4/5...		
PAPER XERO. 8-1/2 X 11 WH...		
Total Lines	3	Total Amount 164.55

In the upper right area of the screen, hover your mouse over the shopping cart where it tells you how many line items you currently have. Wait a moment until you see your requisition summary appear, displaying details about your order, so far.

You can add more Catalog items, or continue to the next step, illustrated below.



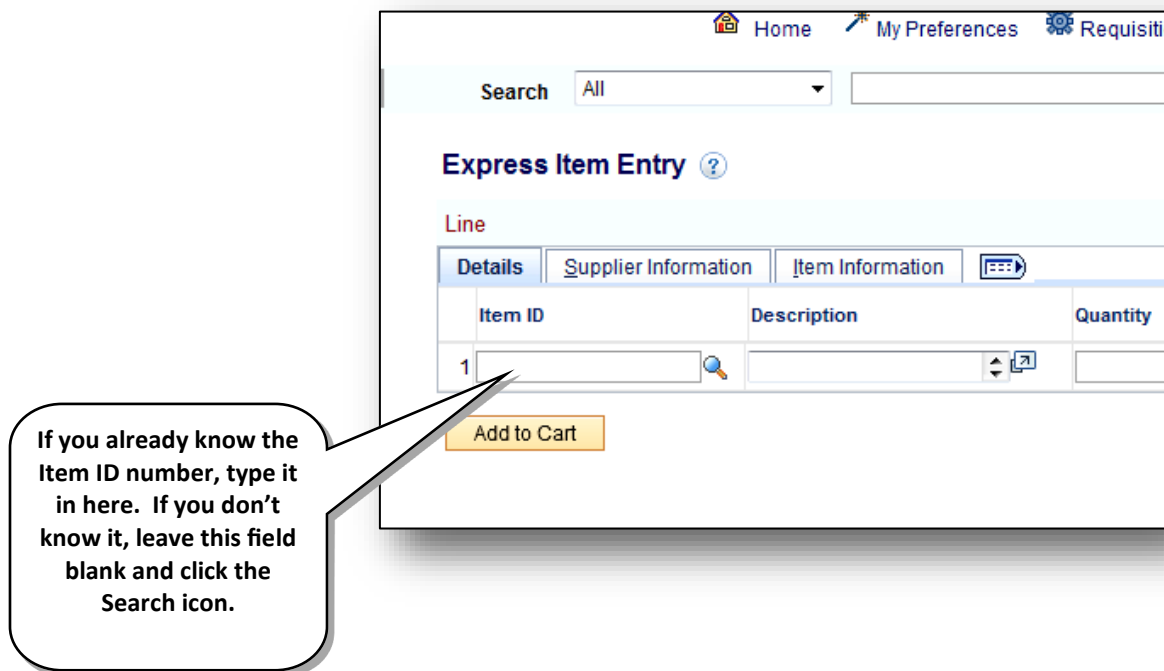
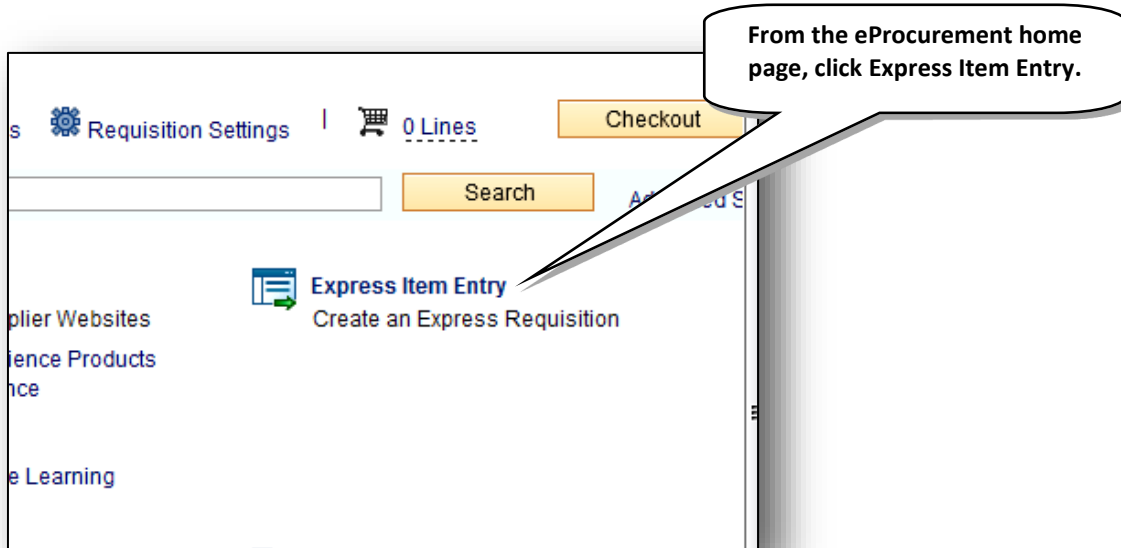
II. Express Item Entry

Follow the illustrated steps below to quickly locate a known item, and place it on your requisition. This is a fast way to place an item on your requisition when you already know its ID number.

Please Note: If you don't already know or cannot locate the item's *complete ID number*, the Express Item Entry method will only work if you can enter all the other details about the item (Description, UOM, Category, etc.)

Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items



Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

Look Up Item ID

SetID: SDUSD
 Requester: 130086

Item ID: begins with

Category: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results can be displayed.
 View 100 First 1-300 Last


Item ID	Category	Category ID	Description
00000000000000000006	ST_1413	00659	Learning Computer Applications
00000000000000000007	ST_1413	00659	Learning Comp Appl: Projects &
00000000000000000008	ST_1413	00659	Learning Comp Appl: Projects &
00000000000000000009	ST_1413	00659	Leaning Microsoft Frontpage 20
00000000000000000010	ST_1413	00659	Learning Microsoft Frontpage 2
00000000000000000012	ST_1413	00659	Learning Microsoft Office 2000
00000000000000000013	ST_1413	00659	Learning Microsoft Off 2000. A

Use this Look Up Item ID feature to locate the Item ID number for the Stock/Inventory item you want to order. Keep in mind you can alphabetize the list by clicking the word "Description". When you find the Item ID number you want, click it once.

The Item ID number populates the field. You can then type in the Quantity you want, and click the Add to Cart button to place this item on your requisition. If you want to see more details about this item, click the "Show all columns" icon.

Express Item Entry

Line

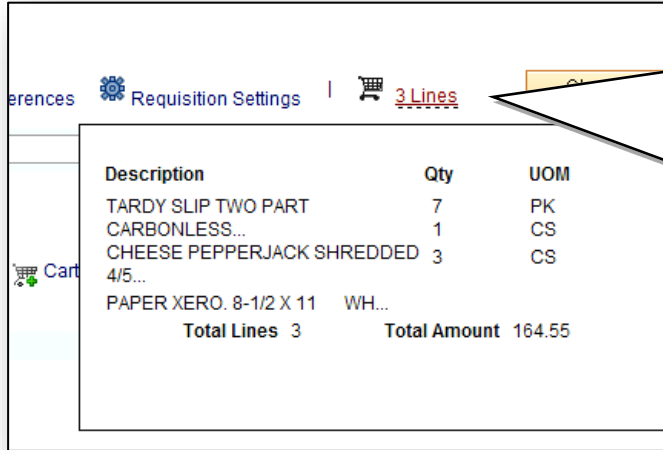
Details Supplier Information Information 

Item ID	Description	Quantity	UOM	Category
1 00000000000000000022	Language of Literature Grade 11 Reading Tool Kit, ISBN 0618173366 American Literature 1,2 (1583-84)	12	EA	ST_1

Add to Cart

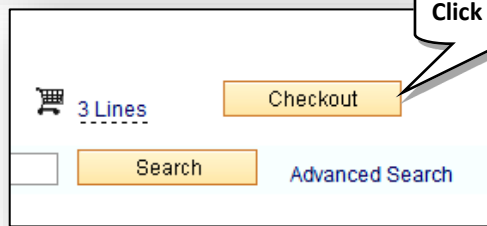
Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

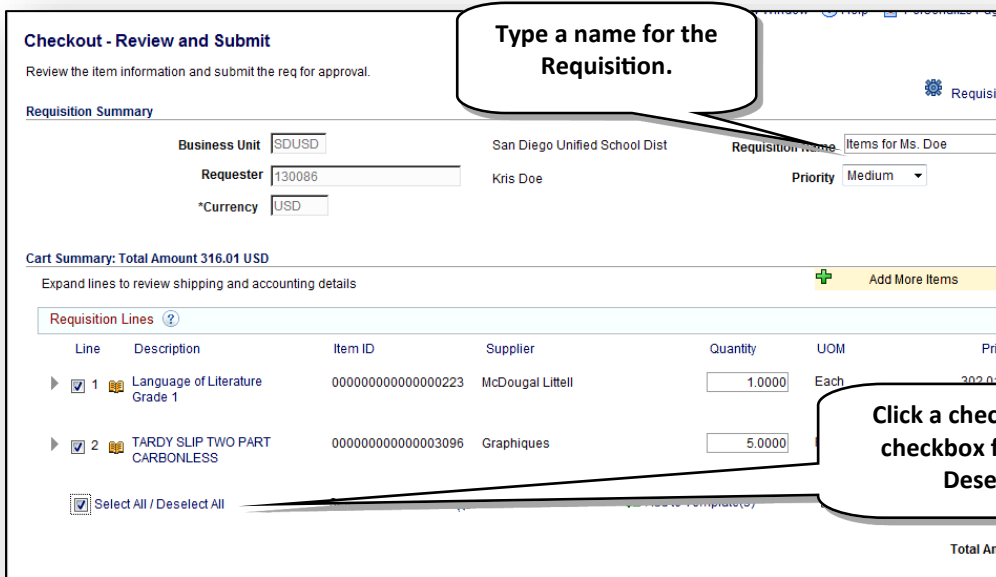


In the upper right area of the screen, hover your mouse over the shopping cart where it tells you how many line items you currently have. Wait a moment until you see your requisition summary appear, displaying details about your order, so far.

You can add more Catalog items, or continue to the next step, illustrated below.



What To Do After You Click "Checkout"



Type a name for the Requisition.

Click a checkmark into the checkbox for "Select All/ Deselect All".

Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

Distribution Change Options

For the selected requisition lines, 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
- Replace Distribution Lines**
Remove the existing distribution lines and replace with the

OK Cancel

Make sure "All Distribution Lines" is selected, and click OK. This applies that budget string to all the items on this requisition.

At the bottom of the screen, you can use the OPTIONAL "Pre-Check Budget" feature to see whether there's enough money to cover this order. Or, you can go straight to "Check Budget" to pre-encumber the funds immediately.

Check Budget Pre-Check Budget

Save & submit Save for Later Add More Items

Pre-Check Budget Budget Checking Status: Provisionally Valid

Save for Later Add More Items Preview Appro

If you ran the Pre-Check Budget and it passed, it'll show "Provisionally Valid". Then you can run the "Check Budget".

Check Budget Pre-Check Budget Budget Checking Status: Valid

Save & submit Save for Later

After running "Check Budget", if it now says "Budget Checking Status Valid", you can click "Save & submit" to process the order.

Order SDUSD Catalog Items

How to Order Our Stock/Inventory Items

Confirmation

Your requisition has been submitted.

Requested For Kris Doe

Requisition Name Items for Ms. Doe

Requisition ID REQ250091

Business Unit SDUSD

Status Pending

Priority Medium

Budget Status Valid



[View printable version](#)

The Confirmation screen displays, indicating your requisition has been submitted for approval and processing.

Requisition Approval

Line 2: Pending

TARDY SLIP TWO PART CARBONLESS FORM WHITE/CANARY 4 1/4 X 2

Department Approval - Single

Pending

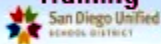


Kris Doe

Single Approver for Dept

[Favorites](#) > [Main Menu](#) > [eProcurement](#) > [Requisition](#)

**Financials
Training**



Confirmation

Use the Breadcrumbs at the top left of the screen to navigate elsewhere.

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.sandiegounified.org and follow this clicking navigation:

Staff Login —> Technical Support —> PeopleSoft