

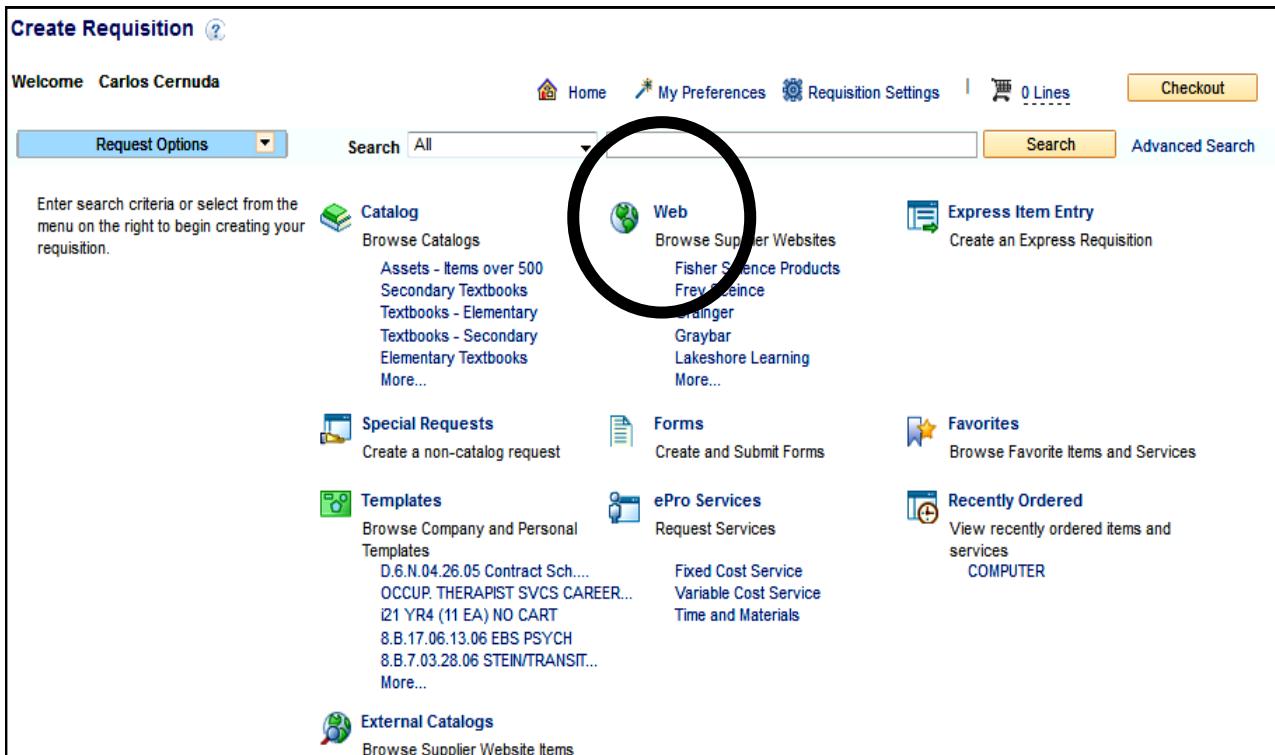
Order from Web Suppliers

Office Supplies, Custodial Supplies, etc...

Please follow the steps in this Job Aid when you want to order items from our Web (a.k.a. Direct Connect) suppliers, such as Office Depot, or Waxie, for example.

1. Be sure you create a separate eProcurement requisition. Do not add any other items to the requisition. First, login to PeopleSoft-Financials and navigate to the eProcurement home page: **Main Menu** —> **eProcurement** —> **Requisition**

Always begin with a new, blank requisition form.



The screenshot shows the 'Create Requisition' page in PeopleSoft. At the top, there is a navigation bar with 'Home', 'My Preferences', 'Requisition Settings', '0 Lines', and 'Checkout'. Below this is a search bar with 'All' selected and a 'Search' button. The main content area is divided into several sections: 'Catalog' (Browse Catalogs), 'Special Requests' (Create a non-catalog request), 'Templates' (Browse Company and Personal Templates), 'External Catalogs' (Browse Supplier Website Items), 'Web' (Browse Supplier Websites), 'Forms' (Create and Submit Forms), 'ePro Services' (Request Services), 'Express Item Entry' (Create an Express Requisition), 'Favorites' (Browse Favorite Items and Services), and 'Recently Ordered' (View recently ordered items and services). The 'Web' link is circled in black.

2. Click the **Web** link.



3. Scroll down the list of suppliers until you find the one you want to order from, and then single-click its link (to the right of its name). That will open a window to that supplier's ordering website, which has special pricing for our school district.

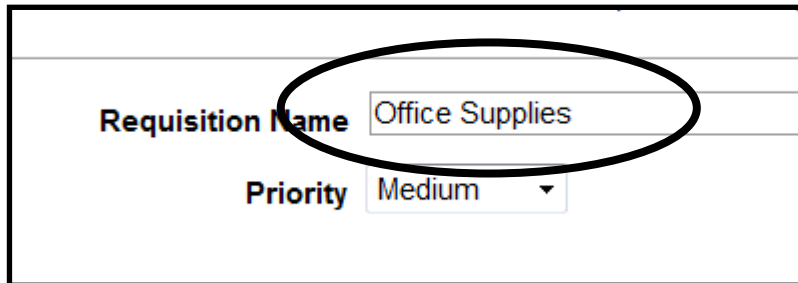
The screenshot displays a list of suppliers with their logos and names. From top to bottom: Lakeshore Learning (with tagline 'products designed with learning in mind™'), Office Depot, School Specialty (with sub-logos for EducationEssentials, SEX, CHILDCRAFT, and CDC), Waxie Sanitary Supply, and Wesco (with a logo of a person running). To the right of each logo, the supplier name and a partial description of their products are visible.

4. When finished choosing items to purchase and placing those items in the shopping cart, look for a button or link that indicates you can “Check Out” from that supplier’s website. Follow the website’s instructions to checkout, which should automatically return you to the eProcurement requisition.

The screenshot shows a shopping cart summary with a red shopping cart icon, the text '1 item(s): \$24.00', and a blue 'View Cart' link. A 'Check Out >' button is circled in black, with a hand cursor icon pointing to it. Below the cart summary, there is a 'Logout' link and a partially visible 'Furniture' category.

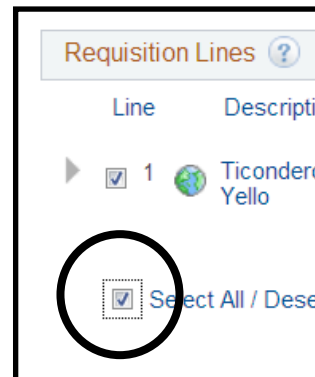
5. **DO NOT** add any other items to this requisition. Use a separate requisition for each order placed with a single supplier.

Give the Requisition a name so you can track it easily later on.



Requisition Name Office Supplies
Priority Medium

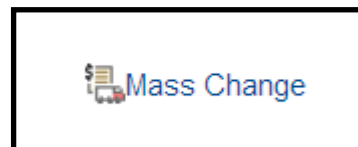
6. Place a checkmark into the **Select All/Deselect All** checkbox, at the lower left corner just below the last item.



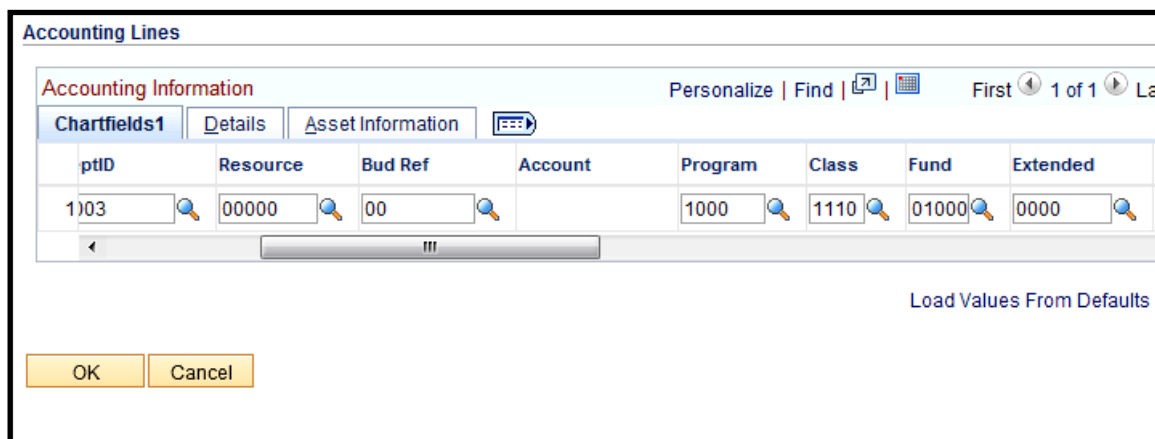
Requisition Lines ?

Line	Description
1	Ticonderoga Yellow
<input checked="" type="checkbox"/> Select All / Deselect All	

7. Towards the right side of the page, click **Mass Change**.



8. Ignore all the textboxes along the top half of the page, and go directly to the bottom, where you need to fill in the budget Chartfield string. Do this, and then click **OK**.



Accounting Lines

Accounting Information Personalize | Find | First 1 of 1 Last

Chartfields1 Details Asset Information

ptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended
1103	00000	00		1000	1110	01000	0000

Load Values From Defaults

OK Cancel

9. Leave the default choice as **All Distribution Lines**, and then click **OK**,

Distribution Change Options

For the selected requisition lines, apply dis

All Distribution Lines
Apply changes to all existing distr

Matching Distribution Lines
Apply changes to each existing di

Replace Distribution Lines
Remove the existing distribution l

OK Cancel

10. Complete the rest of the requisition normally: Run a successful **Check Budget** ; and then **Save & submit** the requisition. Remember that the “Pre-Check Budget” feature is optional, and only tells you whether there are enough funds to cover this order by saying “Provisionally Valid”.

Check Budget Pre-Check Budget

Save & submit Save for Later Add More Items Preview Approvals

Important Things to Remember When Ordering

- Never mix Web items (*such as Office Depot or Waxie*) with Catalog stock/inventory items (*ePro Catalog items*) on the same requisition.
- Order from only one supplier per requisition.

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