A Guide to Faster, Correct Ordering

This Job Aid illustrates the ways to fill in the necessary text fields for a Special Request item on an online eProcurement requisition form.

It's very important to complete these fields correctly, otherwise your orders will be delayed or possibly canceled. This is especially true for Special Request orders, because they take longer to fill.

The steps in this Job Aid begin from a blank ePro requisition form. If you don't know how to log into PeopleSoft eProcurement and arrive at a blank ePro requisition, then please refer to the Job Aid entitled *How to Log Into PeopleSoft Financials*.

NOTE: You should *only* use the Special Request page if you cannot order your item through the preset ePro catalogs, or through a Direct Connect vendor such as Office Depot or Waxie.

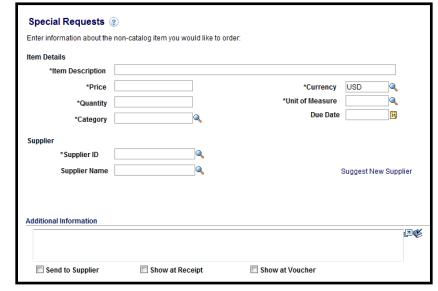
Important General Information about the Special Request Fields

- **Item Description:** Always type as much detail as you can about the item you're ordering. Always begin with the noun for the item:
 - Type the noun for the item (Examples: Chair or Book or Lamp)
 - Then type the item's Make (Examples: Acme or Safco or IBM)
 - Then type the item's **Model** (Examples: **Sec'y. Chair** or **A2B3C4** or **Deluxe**)
 - Then type the item's Color, Size, etc. (Examples: Gray 24" aluminum base)
- **Price:** Price per unit without shipping or tax.
- Quantity: Numeral indicating how many you want for each Unit Of Measure (UOM).
- Category: Very important! Please refer to the Job Aid: How to Find Categories for Special Request Orders
- Unit of Measure (UOM): Abbreviation indicating how the item comes packaged.
 - Example UOMs: EA (each) or SET (set) or GL (gallons)
- Due Date: Depends on what you're ordering.
 - For Goods: Leave blank. It will be processed as soon as possible, by default.
 - For Services: Type in the date service is to be completed by.
- **Supplier:** Name of business (vendor) you are buying that item from.
- Additional Information: First always type your own name, phone, and site location. Include any
 additional details about the item you're ordering that you could not fit into the Item Description

field.

Start from the Special Request screen of a new, blank requisition.





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II. Goods

You'll know you're ordering Goods items if the following is true:

- The item is physical...that is, you can touch it with your hand; it's not a service.
- The item is worth less than \$500 per unit.
- The item is not related in any way to an order for an Asset item on the same requisition.

NOTE: If you aren't sure whether or not the item you're ordering is a Good, always ask!

Below is an illustration of the correct way to complete the Special Request fields for Goods that are not Assets. Please keep in mind this illustration is only an example, and does not represent information to use on any specific order.

Example: How to Order an Office Chair

Special Requests ②							
Enter information about the non-catalog item you would like to order:							
Item Details							
*Item Description	Chair Model A8B359WQ Secretary Chair Gray						
*Price	75.00 *Currency	USD	Q				
*Quantity	1 *Unit of Measure	EA					
*Category	GDS_4303 Q Due Date		31				
Supplier							
*Supplier ID	0000001851						
Supplier Name	Office Furniture Warehous	Suggest New	Sup				
Additional Information							
Mary Doe 619/555-5555 ABC School. Need new chair for new hire.							
Send to Supplier	✓ Show at Receipt ☐ Show at Voucher						

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I. Asset Items

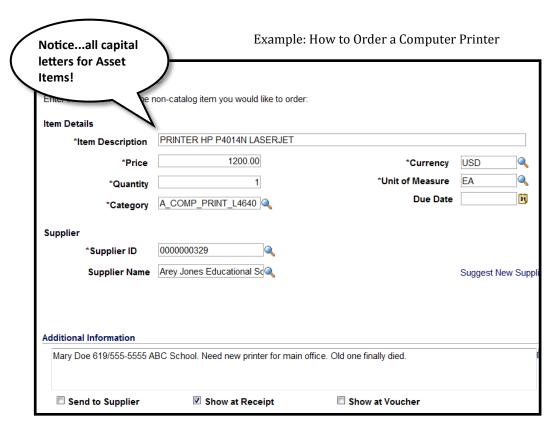
IMPORTANT NOTE: The Item Description must be in ALL CAPITAL LETTERS for Asset Items.

You'll know you're ordering an Asset item if the following is true:

- The item is worth \$500 or more per unit.
- The item is a Good (a physical item, not a service).
- The item is non-consumable (it can't be eaten or used up).
- The item is cheaper to repair than to replace.
- The item, while not an Asset by itself, is related to an obvious Asset item. For example, if you order a \$650 bookcase and it costs \$75 to ship it, then the \$75 shipping fee is considered an Asset item and should be entered as such on the requisition. (Shipping fees must be entered as separate line items).

NOTE: If you aren't sure whether or not the item you're ordering is an Asset, always ask!

Below is an example of the correct way to complete the Special Request fields for an Asset item. Please keep in mind this illustration is only an example, and does not represent information to use on any specific order.



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III. Services

You'll know you're ordering a Service item if the following is true:

- The item is non-tangible; that is, you can't actually touch it with your hand.
- The item is a task or series of tasks being performed by a non-district employee, such as an outside contractor. An example would be if you were hiring a landscaper to come trim the trees on your campus site.
- The item is not related in any way to an order for an Asset item on the same requisition.

NOTE: If you aren't sure whether or not the item you're ordering is a Service, always ask!

Below is an illustration of the correct way to complete the Special Request fields for Services. In this example we are suggesting a new vendor instead of inputting the Vendor ID number for one already established with the school district. Please keep in mind this illustration is only an example, and does not represent information to use on any specific order.

Example: How to Order Payment to an Outside Contractor

Notice... completion date must be entered.

Special Requests	?			\
Enter information about the r	non-catalog item you would	like to order:		\
Item Details				\
*Item Description	Service Tree Trimming			
*Price	475.00	*Curi	rency	USD
*Quantity	1	*Unit of Mea	asure	EA
*Category	SVC_5853	Q Due	e Date	04/10/2014
Supplier				
*Supplier ID	0000015493	_		
Supplier Name	New Way Landscape & T	r Q		Suggest New Sup
Additional Information				
Mary Doe 619/555-5555 A being April 5, and finish by		o trim all trees and shrubs on campus, plus	remove	all debris. To

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ASSISTANCE

Anytime you'd like assistance with **GENERAL SPECIAL REQUEST ORDERS**, please don't hesitate to contact Robin Hoffpauir, the eProcurement SME (Subject Matter Expert).

Robin (858) 522-5805 rhoffpauir@sandi.net

Anytime you'd like assistance with **ASSET ORDERS**, please don't hesitate to contact one of the experts listed below. Our goal is to support you and help you be successful.

Tammi (858) 522-5857 tmoffett@sandi.net

Maggie (858) 522-5855 mclifton@sandi.net

Rose (858) 522-5850 rgustafson@sandi.net

If you need additional assistance with any kind of eProcurement topic, please go online to: **www.sandi.net**. Then click the green **Staff** tab at the top; then click the **Technical Support and Resources** link on the left; and finally click the **PeopleSoft** link in the middle.

