

Financial 2000 Manual

Financial 2000 is the County's Budget and Purchasing system.

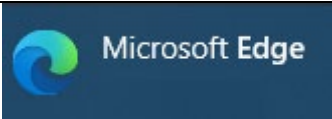
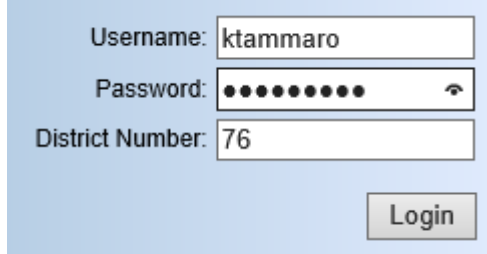
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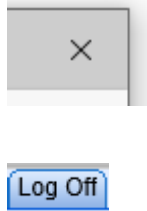
Support

<p>IT Department Trainers (909) 386-2550 techtraining@sbcusd.k12.ca.us</p>	<ul style="list-style-type: none"> • Financial 2000 Training
<p>Fiscal Services (909) 381-1154</p>	<ul style="list-style-type: none"> • Logins, Username & Password • Authorizations/Permissions • Site Codes • Approval Path • Budget Assistance • Report Assistance (Specialty EduReports) • Travel/Conference Policy & Audit • Purchase Requisition & Purchasing Questions
<p>Purchasing Department (909) 381-1126</p>	<ul style="list-style-type: none"> • Purchase Requisition & Purchasing Questions • Site Codes • CAL-Cards Issuance & Credit Levels • Office Depot for Office Supplies • SouthWest Office and Custodial Supplies
<p>Purchasing Department Website www.sbcusd.com/intranet/purchasing</p>	<ul style="list-style-type: none"> • Purchase Requisition & Purchasing Questions • Commodity Listings • Manuals/Handbooks • Cal Card Forms • Contracts • Facilities Use • District's Tech Standards • Canon Options/Pricing • Warehouse Stock (MSDS)
<p>Categorical Department (909) 473-2064</p>	<ul style="list-style-type: none"> • Assistance with Charging Goods to the 419 and 501 Management Codes

Log In

Open the Microsoft Edge browser (must be latest version).	
Go to the following web address.	https://f2kmt.prod.sbcss.k12.ca.us/Financial2000/AspNetSecurityLogin.aspx?ReturnUrl=%2fFinancial2000
Input your Username and Password and click the Login button.	

Log Out

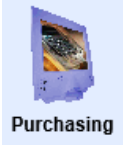
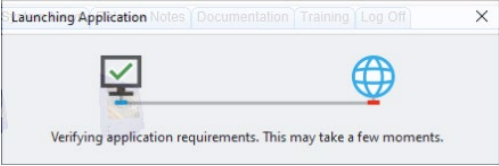

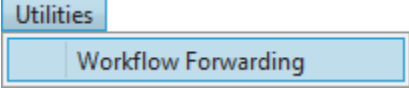
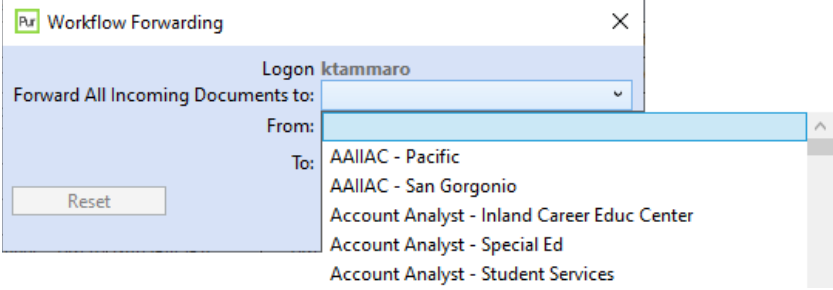
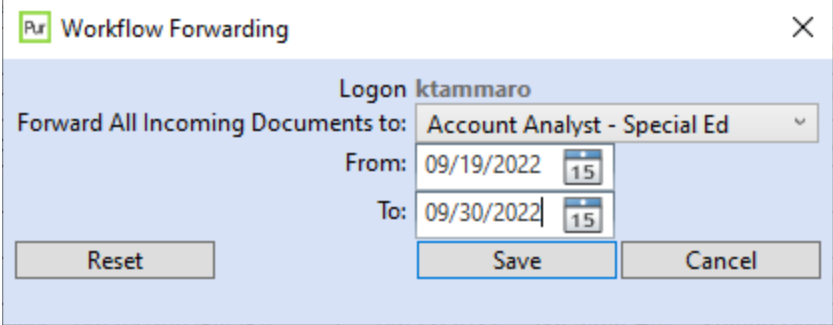
Close the Financial 2000 browser windows -or- Click the Log Off tab.	
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Common Financial 2000 Issue

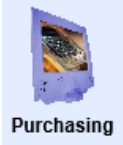
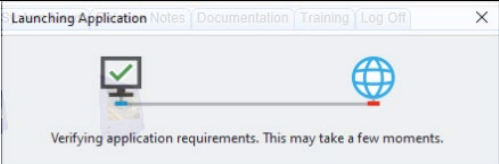

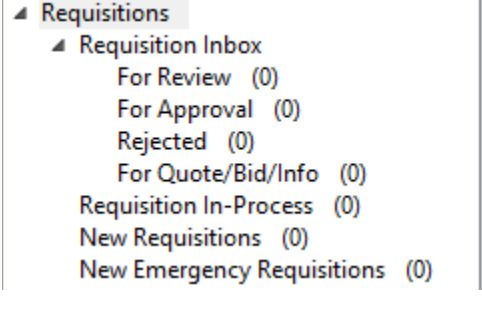
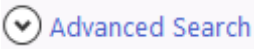

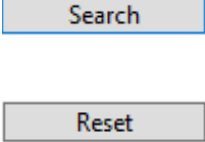
If the program does not work correctly, logout of Financial 2000 and then log back in.

Temporarily Delegate Approval Duties to another Financial 2000 User

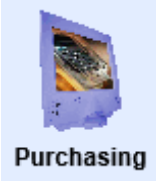
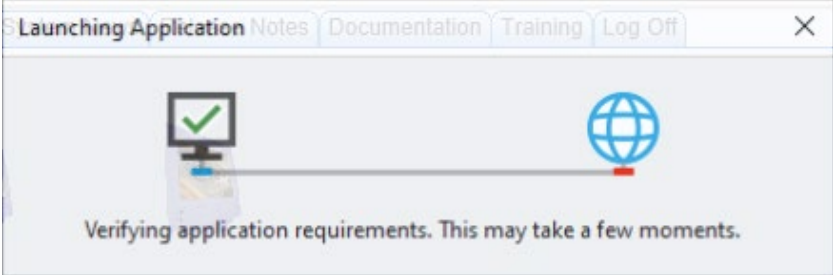
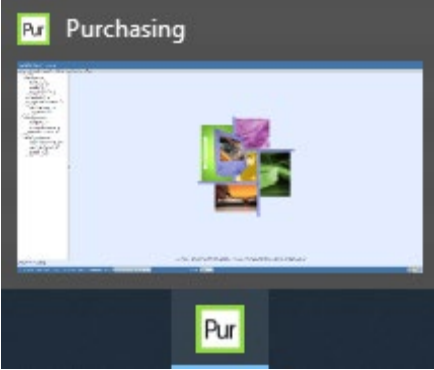
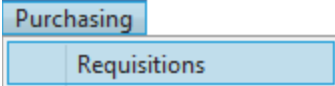
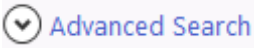

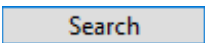
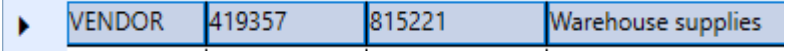
Workflow Forwarding enables a Financial 2000 user to delegate approval duties to another user during an absence. This enables another person to approve without the sharing of user passwords.

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>
<p>The Launching Application will display.</p>	
<p>The Purchasing screen will display.</p>	
<p>Click on Utilities and choose Workflow Forwarding.</p>	
<p>Choose the user you wish to delegate to.</p>	
<p>Choose the date range and click the Save button.</p>	

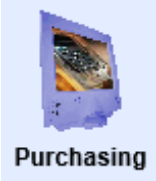
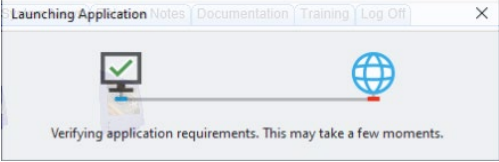

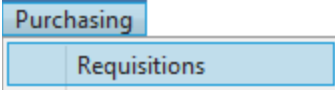
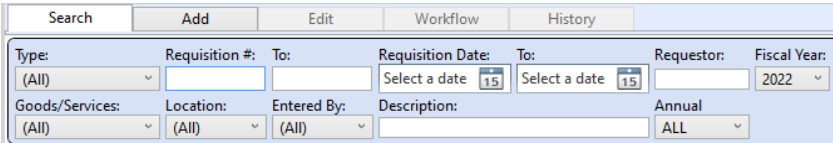
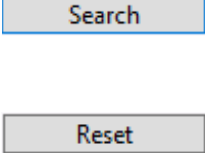
View Requisitions or Purchase Orders (PO) Using the Workflow Tree

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>
<p>The Launching Application will display.</p>	
<p>The Purchasing screen will display.</p>	
<p>The numbers in parentheses () show how many requisitions you have in a certain status.</p>	
<p>Click on the item or sub-item, e.g. For Approval.</p>	<p>For Approval (2)</p>
<p>Click the Advanced Search button.</p>	
<ul style="list-style-type: none"> Enter your School Site or Department number to view all at your site (and uncheck My). -or- Checkmark My to see all you have created. 	
<p>Click the Search button.</p> <p>NOTE: To clear a search, click the Reset button.</p>	


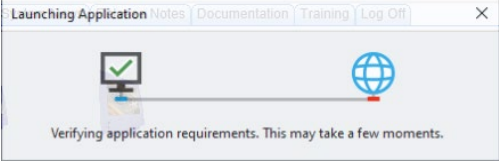

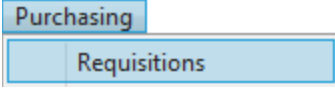
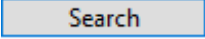
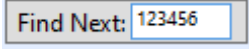
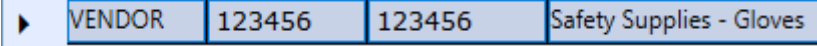
Search for a Requisition or Purchase Order (PO) You Have Created

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>				
<p>The Launching Application will display.</p>	 <p>Launching Application Notes Documentation Training Log Off</p> <p>Verifying application requirements. This may take a few moments.</p>				
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	 <p>Purchasing</p>				
<p>Click on Purchasing and choose Requisitions.</p>	 <p>Purchasing</p> <p>Requisitions</p>				
<p>Click the Advanced Search button.</p>	 <p>Advanced Search</p>				
<p>Checkmark My.</p>	 <p><input checked="" type="checkbox"/> My</p>				
<p>Click the Search button.</p>	 <p>Search</p>				
<p>Requisitions and Purchase Orders that you have created will display.</p>	 <table border="1"> <tr> <td>VENDOR</td> <td>419357</td> <td>815221</td> <td>Warehouse supplies</td> </tr> </table>	VENDOR	419357	815221	Warehouse supplies
VENDOR	419357	815221	Warehouse supplies		

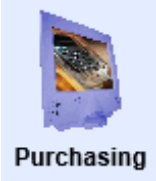
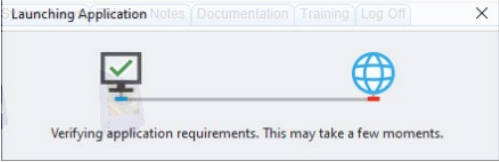

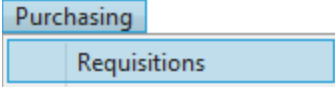
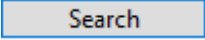
Search for a Requisition or Purchase Order (PO) Others Have Created

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	
<p>The Launching Application will display.</p>	
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	
<p>Click on Purchasing and choose Requisitions.</p>	
<p>You can narrow down your search by filling in any of the following:</p> <ul style="list-style-type: none"> Type Requisition # Requisition Date Fiscal Year Goods/Services Location Entered By Description 	
<p>Click the Search button.</p> <p>NOTE: To clear a search, click the Reset button.</p>	

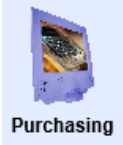
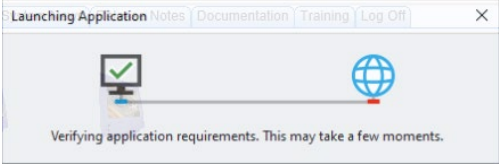

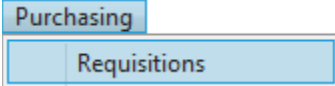
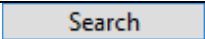
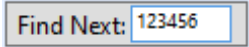
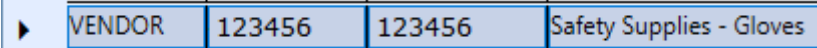


Search for a Requisition or Purchase Order (PO) by Number

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>The icon shows a computer monitor with a colorful abstract image, and the word "Purchasing" is written below it.</p>
<p>The Launching Application will display.</p>	 <p>The dialog box has a title bar with "Launching Application Notes Documentation Training Log Off" and a close button. It contains a green checkmark icon, a globe icon, and the text "Verifying application requirements. This may take a few moments."</p>
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	 <p>The icon is a dark square with a green square containing the letters "Pur" in white.</p>
<p>Click on Purchasing and choose Requisitions.</p>	 <p>The menu shows "Purchasing" as the selected item, with "Requisitions" listed below it.</p>
<p>Click the Search button.</p>	 <p>A rectangular button with the word "Search" in the center.</p>
<p>Input the Requisition number or the Purchase Order number into Find Next and click the Enter key.</p>	 <p>The input field is labeled "Find Next:" and contains the number "123456".</p>
<p>The Requisition or Purchase Order will highlight.</p>	 <p>A table row with four columns: "VENDOR", "123456", "123456", and "Safety Supplies - Gloves". The entire row is highlighted in blue.</p>

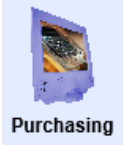
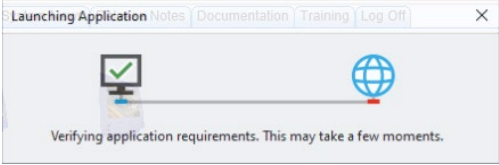

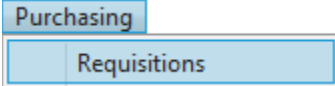
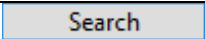
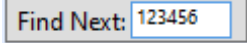
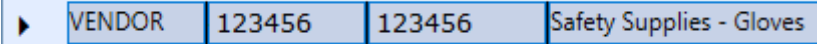

Search for Data (Keyword) in a Requisition or Purchase Order (PO)

<p>Login to Financial 2000 and click on the Purchasing icon.</p>											
<p>The Launching Application will display.</p>											
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>											
<p>Click on Purchasing and choose Requisitions.</p>											
<p>Click the Search button.</p>											
<p>Input the keyword into Find Next and click the Enter key.</p> <p>NOTE: You can also use Find Next to search for any data in any of the columns.</p>	<table border="1"> <thead> <tr> <th>Vendor</th> <th>Total Amount</th> </tr> </thead> <tbody> <tr> <td>TIMELESS PLAQUES & AWARDS</td> <td>2,147.82</td> </tr> <tr> <td>KAY-TWELVE LLC</td> <td>8,817.86</td> </tr> <tr> <td>AMAZON BUSINESS</td> <td>206.61</td> </tr> <tr> <td>B & H PHOTO-VIDEO INC</td> <td>4,475.47</td> </tr> </tbody> </table> <p style="text-align: right;"> <input type="button" value="Next Error"/> <input type="text" value="Find Next: B&H"/> </p>	Vendor	Total Amount	TIMELESS PLAQUES & AWARDS	2,147.82	KAY-TWELVE LLC	8,817.86	AMAZON BUSINESS	206.61	B & H PHOTO-VIDEO INC	4,475.47
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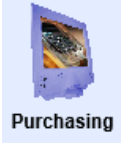
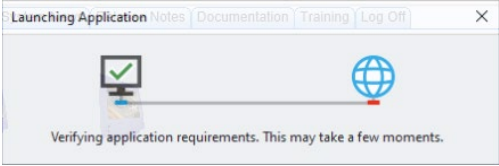

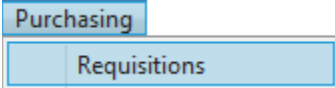
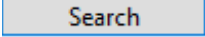
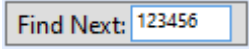
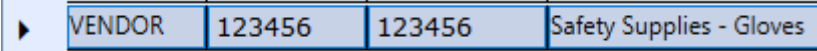

Download a Requisition or Purchase Order (PO)

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>
<p>The Launching Application will display.</p>	
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	
<p>Click on Purchasing and choose Requisitions.</p>	
<p>Click the Search button.</p>	
<p>Input the Requisition number or the Purchase Order number into Find Next and click the Enter key.</p>	
<p>The Requisition or Purchase Order will highlight.</p>	
<p>Click the Print Reports icon (bottom right of screen).</p>	
<p>Click the Run button to generate the report.</p>	

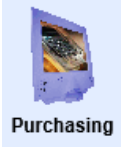
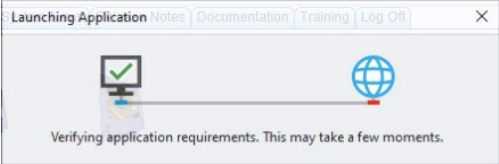

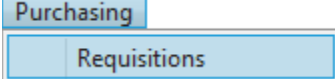
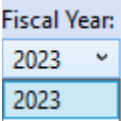
Print a Requisition or Purchase Order (PO)

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	
<p>The Launching Application will display.</p>	
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	
<p>Click on Purchasing and choose Requisitions.</p>	
<p>Click the Search button.</p>	
<p>Input the Requisition number or the Purchase Order number into Find Next and click the Enter key.</p>	
<p>The Requisition or Purchase Order will highlight.</p>	
<p>Click the Print Page icon (bottom right of screen).</p>	

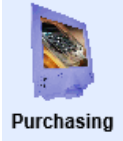
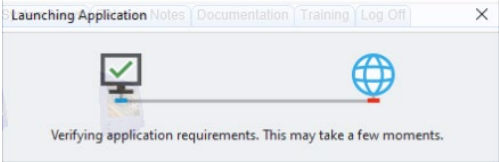

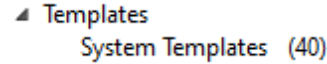
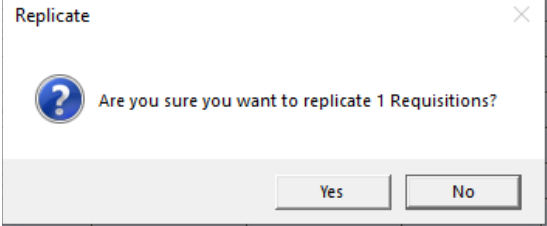
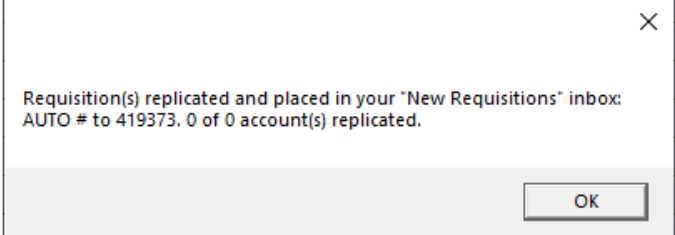
Export a List of Requisitions or Purchase Orders (PO) to Excel

<p>Login to Financial 2000 and click on the Purchasing icon.</p>																																														
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<p>Click the Export to Excel icon (bottom right of screen).</p>																																														
<p>The report will generate.</p>	<table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Type</td> <td>Req#</td> <td>PO/Issue#</td> <td>Description</td> </tr> <tr> <td>2</td> <td>VENDOR</td> <td>419376</td> <td></td> <td>Copy of Blanket-Service for T</td> </tr> <tr> <td>3</td> <td>VENDOR</td> <td>419375</td> <td></td> <td>Copy of Non-Classified Exper</td> </tr> <tr> <td>4</td> <td>VENDOR</td> <td>419374</td> <td></td> <td>ESGI 12 Month License</td> </tr> <tr> <td>5</td> <td>VENDOR</td> <td>419373</td> <td></td> <td>Adobe for 2022-2023 school y</td> </tr> <tr> <td>6</td> <td>VENDOR</td> <td>419372</td> <td>815227</td> <td>Books ENVSCI21 SE G8/12</td> </tr> <tr> <td>7</td> <td>VENDOR</td> <td>419371</td> <td></td> <td>PPE Replenish PPE # And Des</td> </tr> <tr> <td>8</td> <td>VENDOR</td> <td>419370</td> <td></td> <td>Roof Replacement AOP #1</td> </tr> </tbody> </table>		A	B	C	D	1	Type	Req#	PO/Issue#	Description	2	VENDOR	419376		Copy of Blanket-Service for T	3	VENDOR	419375		Copy of Non-Classified Exper	4	VENDOR	419374		ESGI 12 Month License	5	VENDOR	419373		Adobe for 2022-2023 school y	6	VENDOR	419372	815227	Books ENVSCI21 SE G8/12	7	VENDOR	419371		PPE Replenish PPE # And Des	8	VENDOR	419370		Roof Replacement AOP #1
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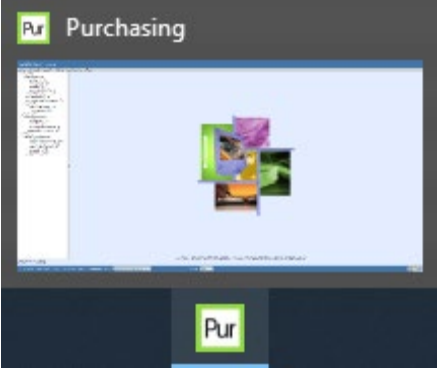
Change Fiscal Year

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>
<p>The Launching Application will display.</p>	 <p>Launching Application Notes Documentation Training Log Off X</p> <p>Verifying application requirements. This may take a few moments.</p>
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	
<p>Click on Purchasing and choose Requisitions.</p>	
<p>Select the Fiscal Year that you want to view.</p>	 <p>Fiscal Year:</p> <p>2023 ▾</p> <p>2023</p>

Use the Templates

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>														
<p>The Launching Application will display.</p>															
<p>The Purchasing screen will display.</p>															
<p>Click on System Templates.</p>															
<p>Right-click on the template that you want to use and choose Replicate.</p>	<table border="1"> <thead> <tr> <th>Template Name</th> <th>Type</th> <th>Description</th> <th>Entered By</th> </tr> </thead> <tbody> <tr> <td>2019-2020 ADOBE- ANNUAL RENEW</td> <td>VENDOR</td> <td>Adobe for 2022-2023 school year.</td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> Create Emergency PO Create Issue Create PO Create Requisition Create System Template Create Template Delete Template Insert Approver Quick Approval Reject Replicate 	Template Name	Type	Description	Entered By	2019-2020 ADOBE- ANNUAL RENEW	VENDOR	Adobe for 2022-2023 school year.							
Template Name	Type	Description	Entered By												
2019-2020 ADOBE- ANNUAL RENEW	VENDOR	Adobe for 2022-2023 school year.													
<p>Click the Yes button.</p>															
<p>Click the OK button.</p>															
<p>Modify the requisition as needed.</p>	<table border="1"> <thead> <tr> <th>Type</th> <th>Req#</th> <th>PO/Issue#</th> <th>Description</th> <th>Entered By</th> <th>Requisition Date</th> <th>Currently With</th> </tr> </thead> <tbody> <tr> <td>VENDOR</td> <td>419373</td> <td></td> <td>Adobe for 2022-2023 school year.</td> <td>76KTAMMARO</td> <td>06/29/2022</td> <td>Training Specialist</td> </tr> </tbody> </table>	Type	Req#	PO/Issue#	Description	Entered By	Requisition Date	Currently With	VENDOR	419373		Adobe for 2022-2023 school year.	76KTAMMARO	06/29/2022	Training Specialist
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VENDOR	419373		Adobe for 2022-2023 school year.	76KTAMMARO	06/29/2022	Training Specialist									

Duplicate a Purchase Requisition (Including from a Prior Year)

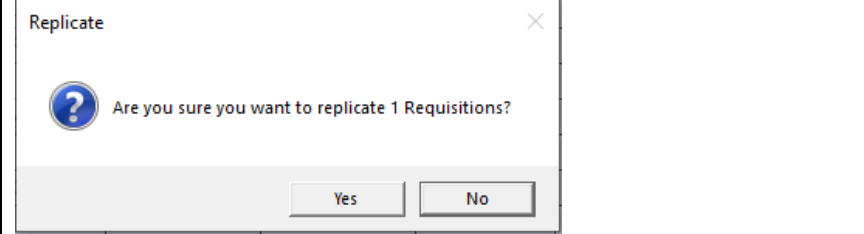
<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>					
<p>The Purchasing screen will display.</p>						
<p>If applicable, select the Fiscal Year of the purchase requisition you want to duplicate.</p>	<p>Fiscal Year:</p> <ul style="list-style-type: none"> 2023 2023 2022 2021 2020 2019 2018 2017 2016 2015 					
<p>Click the Search button.</p>	<p>Search</p>					
<p>Input the Requisition number or the Purchase Order number into Find Next and click the Enter key.</p>	<p>Find Next: 123456</p>					
<p>The Requisition or Purchase Order will highlight.</p>	<table border="1"> <tr> <td>▶</td> <td>VENDOR</td> <td>123456</td> <td>123456</td> <td>Safety Supplies - Gloves</td> </tr> </table>	▶	VENDOR	123456	123456	Safety Supplies - Gloves
▶	VENDOR	123456	123456	Safety Supplies - Gloves		

Right-click on the Purchase Order that you want to duplicate and choose **Replicate**.

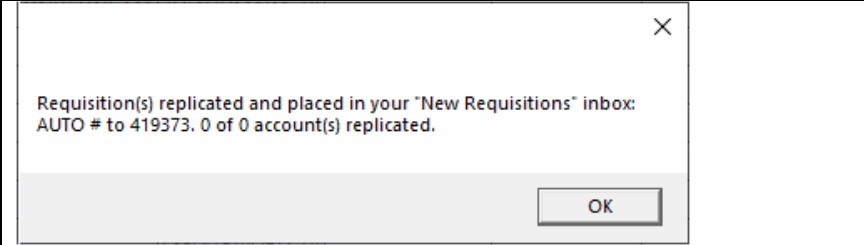
Template Name	Type	Description	Entered By
2019-2020 ADOBE- ANNUAL RENEW	VENDOR	Adobe for 2022-2023 school year.	

- Create Emergency PO
- Create Issue
- Create PO
- Create Requisition**
- Create System Template
- Create Template
- Delete Template
- Insert Approver
- Quick Approval
- Reject
- Replicate**

Click the **Yes** button.



Click the **OK** button.


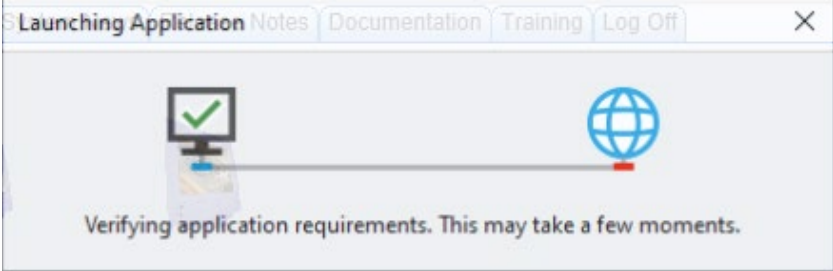

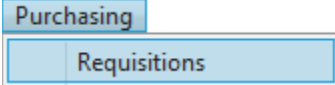
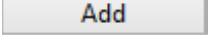


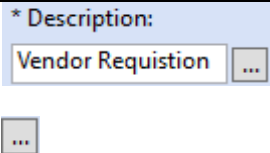
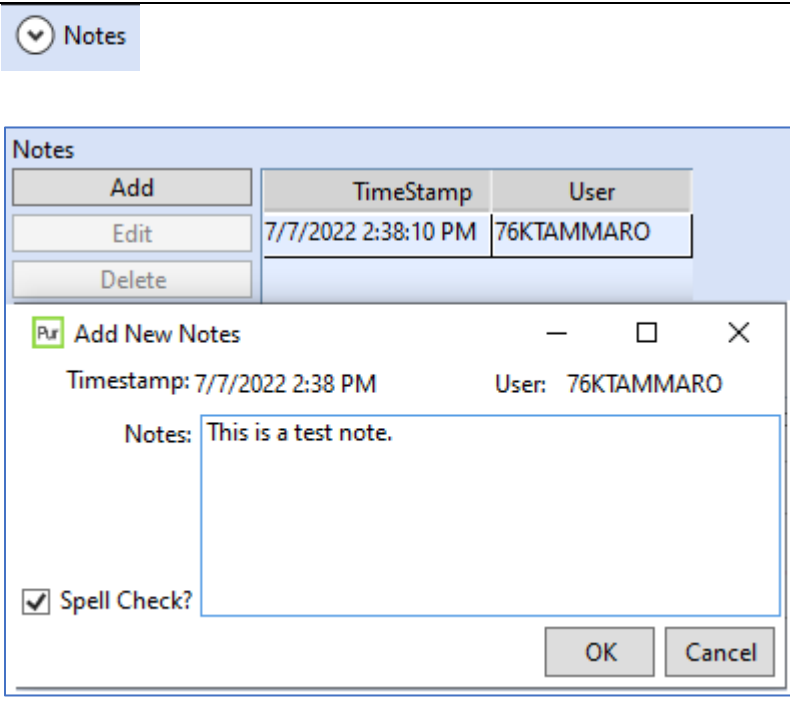
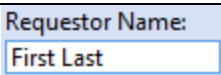
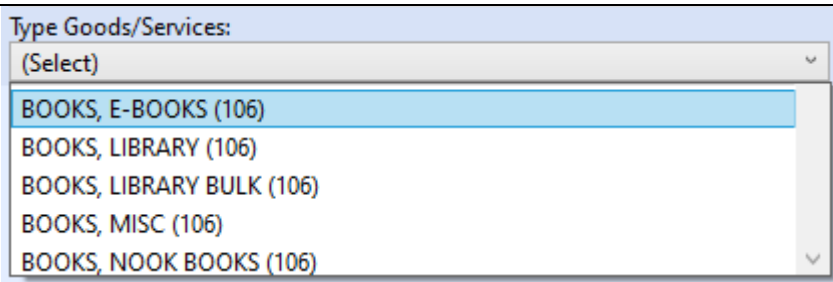
Modify the requisition as needed.

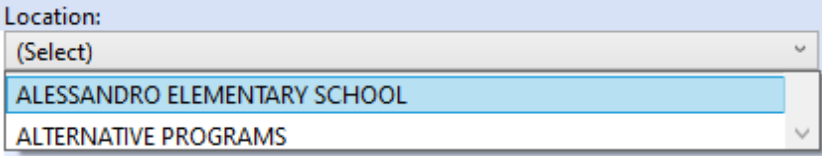

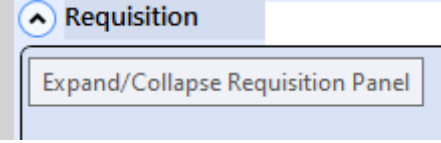

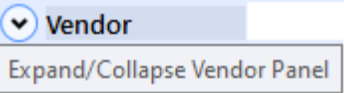

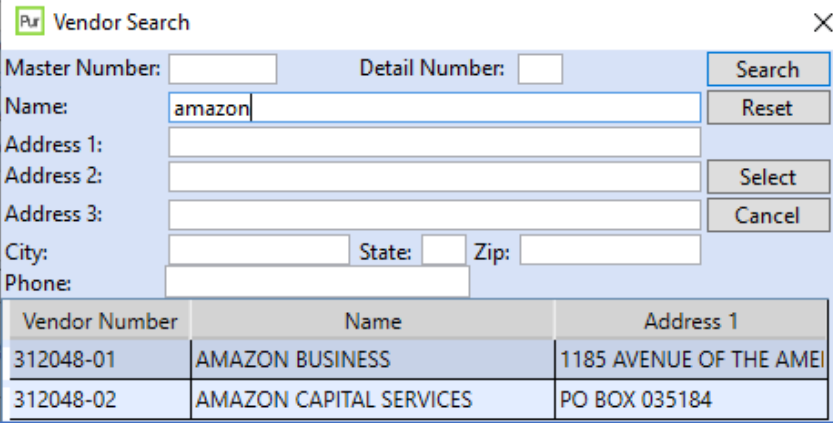
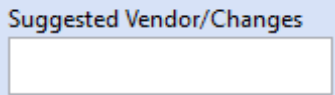
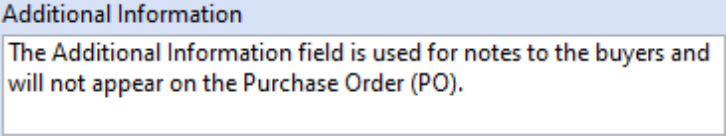
Type	Req#	PO/Issue#	Description	Entered By	Requisition Date	Currently With
VENDOR	419373		Adobe for 2022-2023 school year.	76KTAMMARO	06/29/2022	Training Specialist

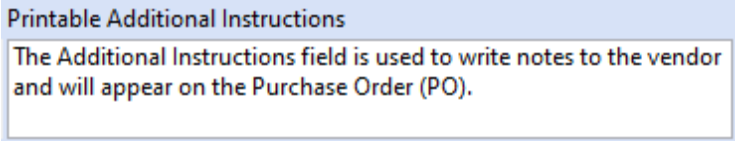
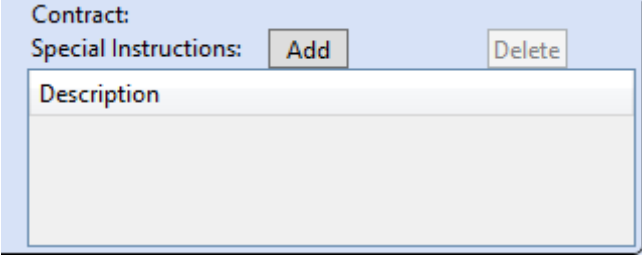

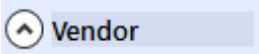

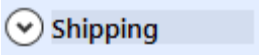
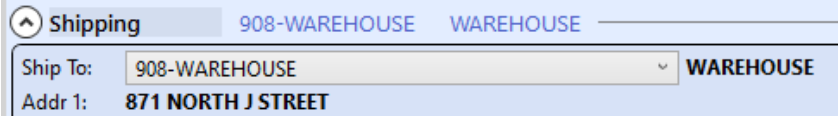
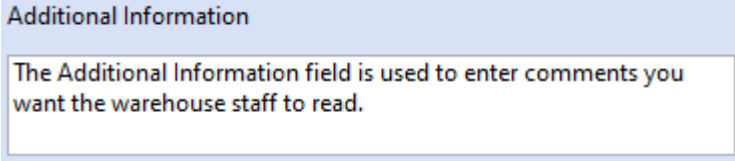
Create a Vendor Requisition Using One Budget





Create one requisition per vendor, per commodity. There is no limit on how many items are on a requisition. There is no limit to the number of items you can order from one vendor. There is a limit of 44 budgets on one requisition.

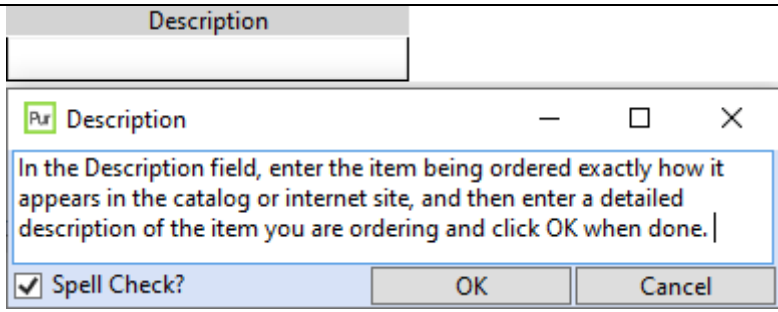
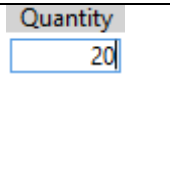
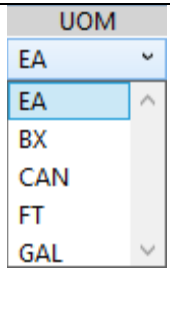
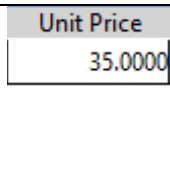
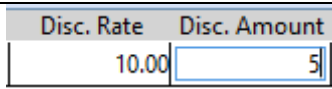

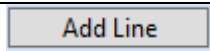
<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>
<p>The Launching Application will display.</p>	 <p>Launching Application Notes Documentation Training Log Off X</p> <p>Verifying application requirements. This may take a few moments.</p>
<p>The Purchasing screen will display.</p>	 <p>Purchasing</p>
<p>Click on Purchasing and choose Requisitions.</p>	 <p>Purchasing</p> <p>Requisitions</p>
<p>Click on the Add tab.</p>	 <p>Add</p>
<p>Optional: Checkmark the Annual box if you will be renewing the requisition every year, e.g. maintenance agreement.</p>	<p>Annual:</p> <p><input checked="" type="checkbox"/></p> <p>The requisition will automatically replicate itself in the next year's database. You would then open the replicated requisition and modify it.</p>

<p>Enter a Description.</p> <p>Optional: Click on the ellipsis to input more data into the description.</p>	
<p>Optional: Click on Notes to add time stamped notes to the requisition. The Purchasing Department will see them, but vendors will not.</p>	
<p>Input your first and last name.</p>	
<p>In the Type Goods/Services field, select the correct commodity from the drop-down list.</p> <p>IMPORTANT: Do not guess! For assistance, call the Purchasing Department. If you choose incorrectly, it will route to the wrong Buyer and cause a delay in processing.</p>	

<p>In the Location field, choose your site from the drop-down menu.</p>										
<p>Click on the up-arrow icon  to collapse the Requisition Panel.</p>										
<p>Vendor: Click on the down-arrow icon  to open the Vendor Panel.</p>										
<p>Click on the ellipsis.</p>										
<ul style="list-style-type: none"> • Enter the vendor name into the Name field. • Double-click on the first vendor name that appears. • If the desired vendor does not appear, type the vendor's name, address, telephone and fax number, and contact name in the Suggested Vendor/Changes field. 	 <table border="1" data-bbox="690 1113 1518 1234"> <thead> <tr> <th>Vendor Number</th> <th>Name</th> <th>Address 1</th> </tr> </thead> <tbody> <tr> <td>312048-01</td> <td>AMAZON BUSINESS</td> <td>1185 AVENUE OF THE AME</td> </tr> <tr> <td>312048-02</td> <td>AMAZON CAPITAL SERVICES</td> <td>PO BOX 035184</td> </tr> </tbody> </table> 	Vendor Number	Name	Address 1	312048-01	AMAZON BUSINESS	1185 AVENUE OF THE AME	312048-02	AMAZON CAPITAL SERVICES	PO BOX 035184
Vendor Number	Name	Address 1								
312048-01	AMAZON BUSINESS	1185 AVENUE OF THE AME								
312048-02	AMAZON CAPITAL SERVICES	PO BOX 035184								
<p>The Additional Information field is used for notes to the buyers and will not appear on the Purchase Order (PO).</p>										

<p>The Printable Additional Instructions field is used to write notes to the vendor and will appear on the Purchase Order (PO).</p>	
<p>Special Instructions contains read-only instructions/notes from Purchasing and Fiscal Services.</p>	
<p>Click on the up-arrow icon  to collapse the Vendor Panel.</p>	
<p>Shipping: Click on the down-arrow icon  to open the Shipping Panel.</p>	
<p>If you select your site here rather than the Warehouse, you will have to do a Goods Receipt in order for the PO to close.</p>	
<p>The Additional Information field is used to enter comments you want the warehouse staff to read.</p>	

<p>If more delivery instructions are necessary, use the Printable Additional Instructions field.</p>	<p>Printable Additional Instructions</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>If more delivery instructions are necessary, use the Printable Additional Instructions field.</p> </div>
<p>NOTE: If you need to finish the requisition another day while you gather information or wait for money to transfer into the correct budget, click the Save button. Your requisition will be stored in the New Requisition folder until you are ready to complete it.</p>	<p style="text-align: center;"><input type="button" value="Save"/></p>
<p>Click on the up-arrow icon  to collapse the Shipping Panel.</p>	<p> Shipping</p>
<p>Add Items to the Requisition: Click on the down-arrow icon  to open the Item Details Panel.</p>	<p> Item Details</p>
<p>Optional: The Overall Discount area is used if the vendor has given a percentage or dollar amount discount for the full order (not by item).</p>	<p>Overall Discount: <input type="text" value="10.00"/> % <input type="text" value="100"/></p> <p>Examples:</p> <ul style="list-style-type: none"> • Enter 10 for a 10% discount • Enter 100 for a \$100 discount
<p>Click the Add Line button.</p>	<p style="text-align: center;"><input type="button" value="Add Line"/></p>
<p>If applicable, enter the Item #.</p>	<p>Item #</p> <p><input type="text" value="123456"/> +</p>

<p>Enter a Description of the item being ordered and click OK when done.</p>	
<p>Input the number of items you are ordering.</p>	
<p>Choose the appropriate UOM (unit of measure).</p>	
<p>In the Unit Price field, enter the dollar amount for a single item.</p>	
<p>The Discount Rate and Discount Amount areas are used if the vendor has given a percentage or dollar amount discount for an item.</p>	 <p>Examples:</p> <ul style="list-style-type: none"> • Enter 10 for a 10% discount • Enter 5 for a \$5 discount
<p>If the price per item is over \$500, checkmark FA.</p>	
<p>Continue using Add Line to add items as needed. There is no limit on the number of items that can be ordered.</p>	

To delete an item, highlight it and then click the **Delete Line** button.

#	Item #	Description
▶ 1	123456	Electronic Books

Shipping:

- If you don't know what the shipping and handling will be, enter a 10.0 in the **Percentage %** column of the **Non Taxable S&H field**. If 10% was too much, the remainder will be refunded.
- If you know the shipping amount, enter it into the **Dollar \$** field of the **Non Taxable S&H** field.

	Percentage %	Dollar \$
Non Taxable S & H:	<input type="text" value="10.00"/>	<input type="text" value="25"/>

Optional: The **Additional Charges** field is used to enter extra charges.

Examples: Special colors, fuel, hazmat, engraving, special binding, a rush order charge, etc.

	Percentage %	Dollar \$
Additional Charges:	<input type="text" value="0.00"/>	<input type="text" value="50.00"/>

Add Budget:
Click on the **Account Search** button and enter the budget.

Click the **Search** button.

The budget will display. Double-click on the budget number to enter it into the requisition.

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
1	01	0000	0	0000	2494	2990	824	172

Optional: Display all Budgets:

- Input your school or site number and click the **Search** button.
- Double-click on the budget number to enter it into the requisition.

Account Search ✕

Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt	Search
						824		Clear

Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt	^
01	0000	0	0000	2494	2990	824	172	
01	0000	0	0000	2494	3332	824	172	
01	0000	0	0000	2494	3352	824	172	

Select
Cancel

Optional: Check Balance:

- Click to the left of the budget, so that it is highlighted.
- Click the **Check Balance** button.

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
▶ 1	01	0000	0	0000	2494	2990	824	172

Check Balance

Optional: Delete Budget:

- Click to the left of the budget, so that it is highlighted.
- Click the **Delete Line** button.

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
▶ 1	01	0000	0	0000	2494	2990	824	172

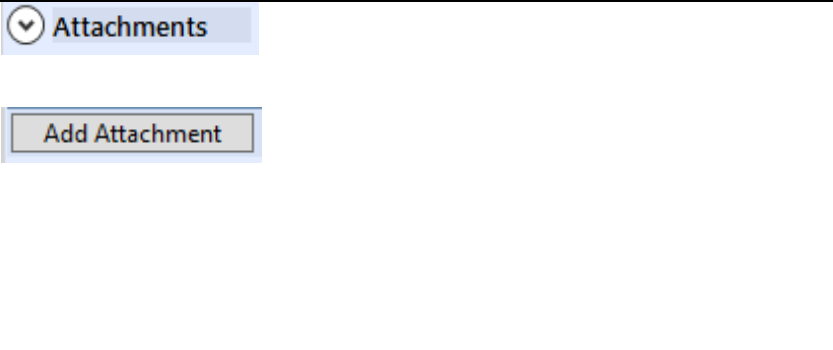


Delete Line

Click the **Distribute Evenly** button.

Distribute Evenly


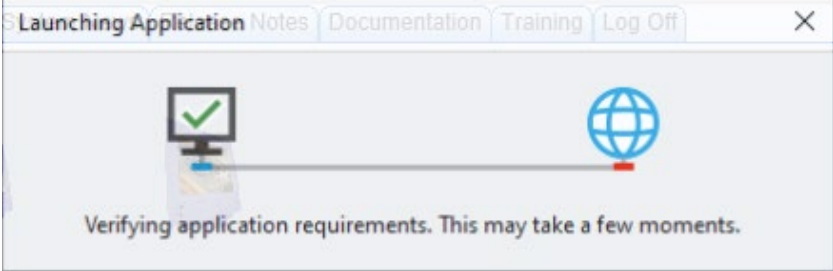

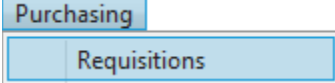
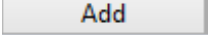
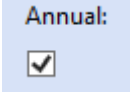
To clear the budget, click the **Reset Accounts** button.

Reset Accounts

<p>Attachments:</p> <p>If you have an attachment to add to the requisition, click Attachments and then click the Add Attachment button.</p>	
<p>Click the Save button.</p>	
<p>Click the Send for Approval button.</p>	

Create a Vendor Requisition Using Two or More Budgets

Create one requisition per vendor, per commodity. There is no limit on how many items are on a requisition. There is no limit to the number of items you can order from one vendor. There is a limit of 44 budgets on one requisition.

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	 <p>Purchasing</p>
<p>The Launching Application will display.</p>	 <p>Launching Application Notes Documentation Training Log Off</p> <p>Verifying application requirements. This may take a few moments.</p>
<p>The Purchasing screen will display. (You may have to click on it on the Task Bar to make it viewable.)</p>	 <p>Purchasing</p>
<p>Click on Purchasing and choose Requisitions.</p>	 <p>Purchasing</p> <p>Requisitions</p>
<p>Click on the Add tab.</p>	 <p>Add</p>
<p>Checkmark the Annual box if you will be renewing the requisition every year, e.g. maintenance agreement.</p>	 <p>Annual:</p> <p><input checked="" type="checkbox"/></p> <p>The requisition will automatically replicate itself in the next year's database. You would then open the replicated requisition and modify it.</p>

Enter a **Description**.

Optional: Click on the ellipsis to input more data into the description.

* Description:

Vendor Requisition ...

...

Optional: Click on **Notes** to add time stamped notes to the requisition. The Purchasing Department will see them, but vendors will not.

Notes

Add	TimeStamp	User
Edit	7/7/2022 2:38:10 PM	76KTAMMARO
Delete		

Add New Notes

Timestamp: 7/7/2022 2:38 PM User: 76KTAMMARO

Notes: This is a test note.

Spell Check?

OK Cancel

Input your first and last name.

Requestor Name:

First Last

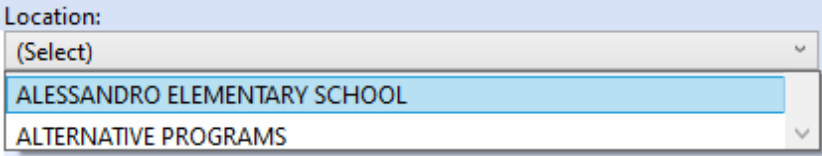

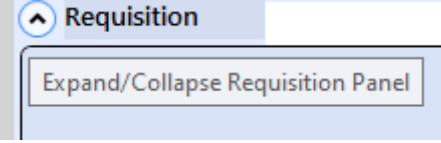

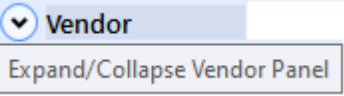

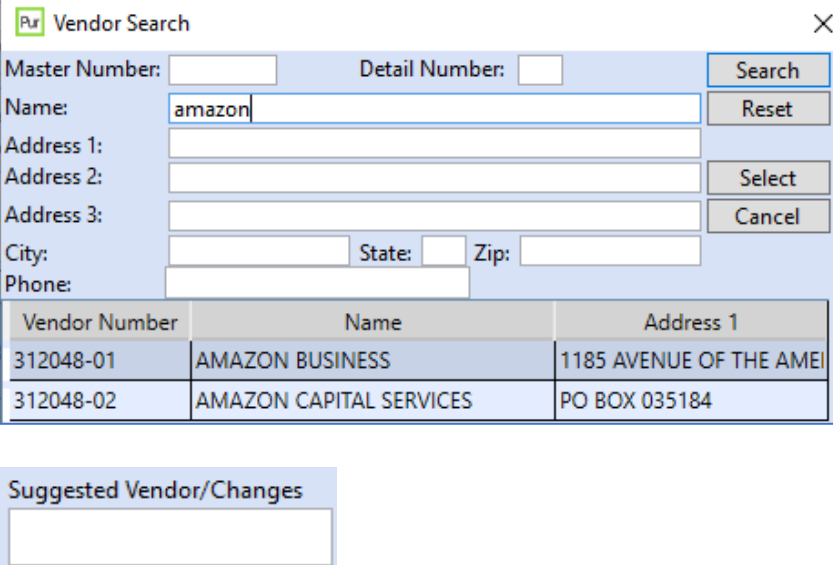
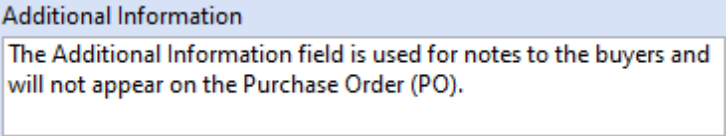
In the **Type Goods/Services** field, select the correct commodity from the drop-down list.

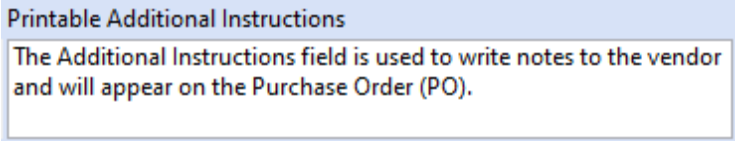
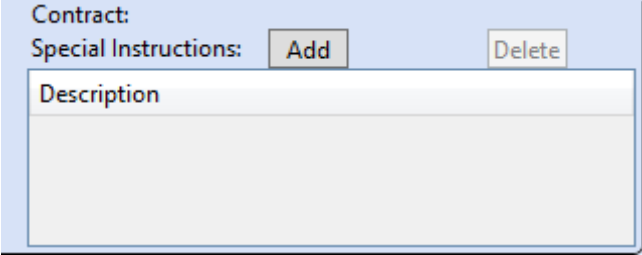

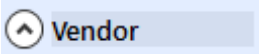


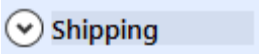

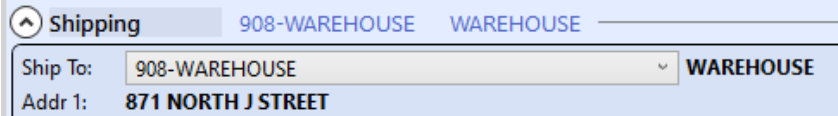

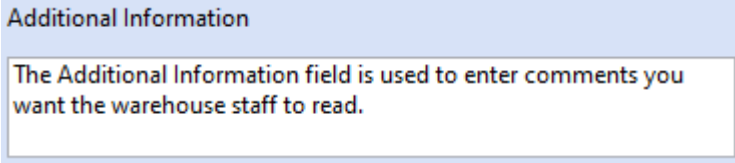
IMPORTANT: Do not guess! For assistance, call the Purchasing Department. If you choose incorrectly, it will route to the wrong Buyer and cause a delay in processing.





Type Goods/Services:

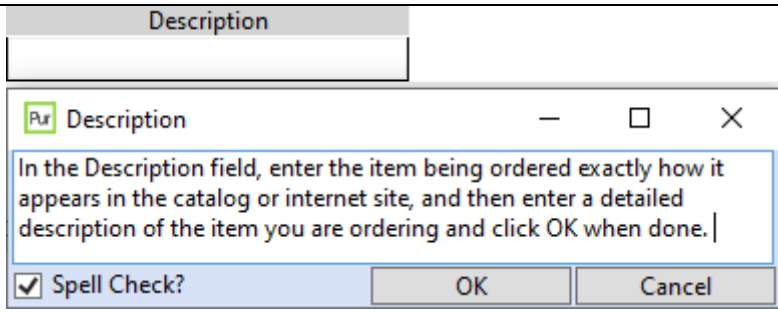
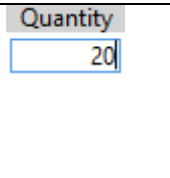
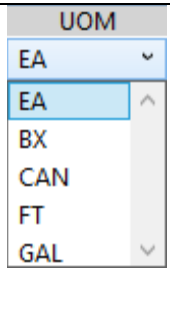
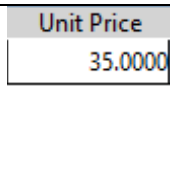
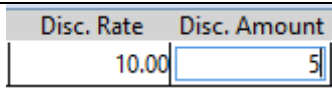

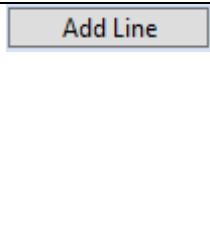
(Select)

- BOOKS, E-BOOKS (106)
- BOOKS, LIBRARY (106)
- BOOKS, LIBRARY BULK (106)
- BOOKS, MISC (106)
- BOOKS, NOOK BOOKS (106)

<p>In the Location field, choose your site from the drop-down menu.</p>										
<p>Click on the up-arrow icon  to collapse the Requisition Panel.</p>										
<p>Vendor: Click on the down-arrow icon  to open the Vendor Panel.</p>										
<p>Click on the ellipsis.</p>										
<ul style="list-style-type: none"> • Enter the vendor name into the Name field. • Double-click on the first vendor name that appears. • If the desired vendor does not appear, type the vendor's name, address, telephone and fax number, and contact name in the Suggested Vendor/Changes field. 	 <table border="1" data-bbox="690 1071 1518 1186"> <thead> <tr> <th>Vendor Number</th> <th>Name</th> <th>Address 1</th> </tr> </thead> <tbody> <tr> <td>312048-01</td> <td>AMAZON BUSINESS</td> <td>1185 AVENUE OF THE AME</td> </tr> <tr> <td>312048-02</td> <td>AMAZON CAPITAL SERVICES</td> <td>PO BOX 035184</td> </tr> </tbody> </table>	Vendor Number	Name	Address 1	312048-01	AMAZON BUSINESS	1185 AVENUE OF THE AME	312048-02	AMAZON CAPITAL SERVICES	PO BOX 035184
Vendor Number	Name	Address 1								
312048-01	AMAZON BUSINESS	1185 AVENUE OF THE AME								
312048-02	AMAZON CAPITAL SERVICES	PO BOX 035184								
<p>The Additional Information field is used for notes to the buyers and will not appear on the Purchase Order (PO).</p>										

<p>The Printable Additional Instructions field is used to write notes to the vendor and will appear on the Purchase Order (PO).</p>	 <p>Printable Additional Instructions</p> <p>The Additional Instructions field is used to write notes to the vendor and will appear on the Purchase Order (PO).</p>
<p>Special Instructions contains read-only instructions/notes from Purchasing and Fiscal Services.</p>	 <p>Contract: Special Instructions: <input type="button" value="Add"/> <input type="button" value="Delete"/></p> <p>Description</p>
<p>Click on the up-arrow icon  to collapse the Vendor Panel.</p>	 <p> Vendor</p>
<p>Shipping: Click on the down-arrow icon  to open the Shipping Panel.</p>	 <p> Shipping</p>
<p>If you select your site here rather than the Warehouse, you will have to do a Goods Receipt in order for the PO to close.</p>	 <p> Shipping 908-WAREHOUSE WAREHOUSE</p> <p>Ship To: 908-WAREHOUSE WAREHOUSE Addr 1: 871 NORTH J STREET</p>
<p>The Additional Information field is used to enter comments you want the warehouse staff to read.</p>	 <p>Additional Information</p> <p>The Additional Information field is used to enter comments you want the warehouse staff to read.</p>

<p>If more delivery instructions are necessary, use the Printable Additional Instructions field.</p>	<p>Printable Additional Instructions</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>If more delivery instructions are necessary, use the Printable Additional Instructions field.</p> </div>
<p>NOTE: If you need to finish the requisition another day while you gather information or wait for money to transfer into the correct budget, click the Save button. Your requisition will be stored in the New Requisition folder until you are ready to complete it.</p>	<p style="text-align: center;"><input type="button" value="Save"/></p>
<p>Click on the up-arrow icon  to collapse the Shipping Panel.</p>	<p> Shipping</p>
<p>Add Items to the Requisition: Click on the down-arrow icon  to open the Item Details Panel.</p>	<p> Item Details</p>
<p>Optional: The Overall Discount area is used if the vendor has given a percentage or dollar amount discount for the full order (not by item).</p>	<p>Overall Discount: <input type="text" value="10.00"/> % <input type="text" value="100"/></p> <p>Examples:</p> <ul style="list-style-type: none"> • Enter 10 for a 10% discount • Enter 100 for a \$100 discount
<p>Click the Add Line button.</p>	<p style="text-align: center;"><input type="button" value="Add Line"/></p>
<p>If applicable, enter the Item #.</p>	<p>Item #</p> <p><input type="text" value="123456"/> +</p>

<p>Enter a Description of the item being ordered and click OK when done.</p>	
<p>Input the number of items you are ordering.</p>	
<p>Choose the appropriate UOM (unit of measure).</p>	
<p>In the Unit Price field, enter the dollar amount for a single item.</p>	
<p>The Discount Rate and Discount Amount areas are used if the vendor has given a percentage or dollar amount discount for an item.</p>	 <p>Examples:</p> <ul style="list-style-type: none"> • Enter 10 for a 10% discount • Enter 5 for a \$5 discount
<p>If the price per item is over \$500, checkmark FA.</p>	
<p>Continue using Add Line to add items as needed. There is no limit on items that can be ordered.</p>	

Optional: To delete an item, highlight it and then click the **Delete Line** button.

#	Item #	Description
▶ 1	123456	Electronic Books

Shipping:

- If you don't know what the shipping and handling will be, enter a 10.0 in the **Percentage %** column of the **Non Taxable S&H field**. If 10% was too much, the remainder will be refunded.
- or-
- If you know the shipping amount, enter it into the **Dollar \$** field of the **Non Taxable S&H** field.

	Percentage %	Dollar \$
Non Taxable S & H:	<input type="text" value="10.00"/>	<input type="text" value="25"/>

Optional: The **Additional Charges** field is used to enter extra charges.

Examples: Special colors, fuel, hazmat, engraving, special binding, a rush order charge, etc.

	Percentage %	Dollar \$
Additional Charges:	<input type="text" value="0.00"/>	<input type="text" value="50.00"/>

Add Budgets (up to 44):
Click on the **Account Search** button and enter the budget.

Click the **Search** button.

The budget will display. Double-click on the budget to enter it into the requisition.

Add additional budgets you want to use (up to 44).

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
1	01	0000	0	0000	2494	2990	824	172

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt	Perc %	Dollar \$
1	01	0000	0	0000	2494	2990	824	172	0.00	0.00
2	01	0000	0	0000	7700	4340	824	032	0.00	0.00

Optional: Display all Budgets:

- Input your school or site number and click the **Search** button.
- Double-click on the budget to enter it into the requisition.

Pr Account Search ✕

Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	824	<input type="text"/>

Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
01	0000	0	0000	2494	2990	824	172
01	0000	0	0000	2494	3332	824	172
01	0000	0	0000	2494	3352	824	172

Optional: Check Balance:

- Click to the left of the budget, so that it is highlighted.
- Click the **Check Balance** button.

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
▶ 1	01	0000	0	0000	2494	2990	824	172

Optional: Delete Budget:

- Click to the left of the budget, so that it is highlighted.
- Click the **Delete Line** button.

#	Fu	Rs	Y	Goal	Func	Obj	Sch	Mgmt
▶ 1	01	0000	0	0000	2494	2990	824	172

Balance displays the total amount of what you ordered.

Total Accounts: 2 Balance: \$543.75

Pull money from your budgets either by percentages or by dollar amount:

Percentage:

In the **Perc %** column, enter the percentage you want taken out of each budget. (It must add up to 100%.)

Perc %
75.00
25.00

-or-

Dollar Amount:

In the **Dollar \$** column, enter the dollar amount you want taken out of each budget. (It must add up to the total requisition amount.)

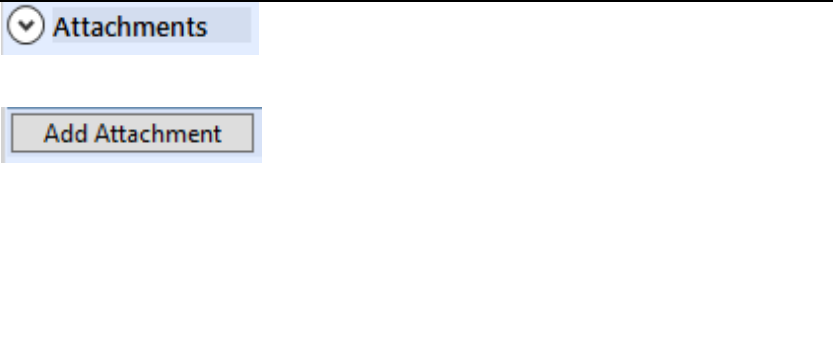


Dollar \$
220.00
323.75

Once the **Balance** amount is zero, you have taken out the correct amount of money from the budgets.

Total Accounts: 2 Balance: \$0.00

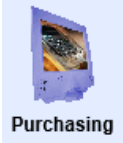


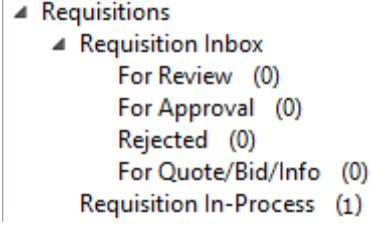
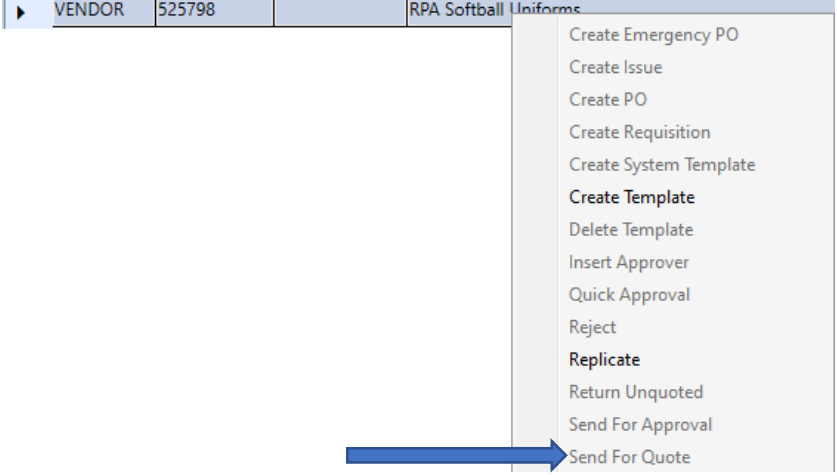
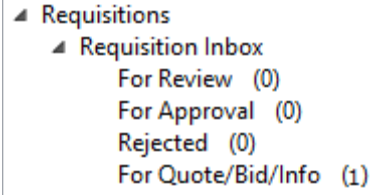
Optional: To clear the budget, click the **Reset Accounts** button.

Reset Accounts

<p>Attachments:</p> <p>If you have an attachment to add to the requisition, click Attachments and then click the Add Attachment button.</p>	 <p>The screenshot shows a dropdown menu labeled 'Attachments' with a downward arrow icon. Below the menu is a button labeled 'Add Attachment'.</p>
<p>Click the Save button.</p>	 <p>The screenshot shows a button labeled 'Save'.</p>
<p>Click the Send for Approval button.</p>	 <p>The screenshot shows a button labeled 'Send for Approval'.</p>



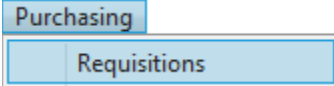
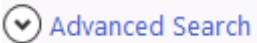

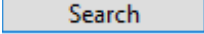
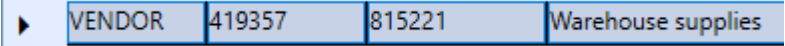
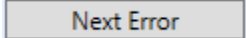

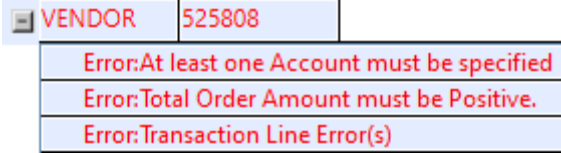
Send a Purchase Requisition for a Quote

Before sending the Requisition for approval, you can send it for a quote.

<p>Login to Financial 2000 and click on the Purchasing icon.</p>	
<p>The Launching Application will display.</p>	
<p>The Purchasing screen will display.</p>	
<p>Click on Requisitions In-Process.</p>	
<p>Right-click on the requisition and choose Send For Quote.</p> <p>NOTE: This will not be available if the requisition was already sent for approval.</p>	
<p>When completed, you should see a number next to For Quote/Bid/Info.</p>	

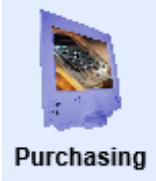

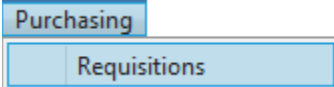
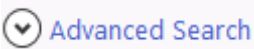

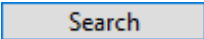
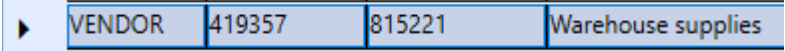
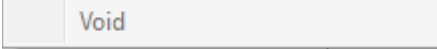
Errors

Blue errors indicate warnings and red errors require editing before they can be sent for approval.

<p>Login to Financial 2000 and click on the Purchasing icon.</p>									
<p>The Purchasing screen will display.</p>									
<p>Click on Purchasing and choose Requisitions.</p>									
<p>Click the Advanced Search button.</p>									
<p>Checkmark My.</p>									
<p>Click the Search button.</p>									
<p>Requisitions and Purchase Orders that you have created will display.</p>	 <table border="1"> <tr> <td>VENDOR</td> <td>419357</td> <td>815221</td> <td>Warehouse supplies</td> </tr> </table>	VENDOR	419357	815221	Warehouse supplies				
VENDOR	419357	815221	Warehouse supplies						
<p>Click on the Next Error button.</p>									
<p>Click on the + to see the error(s).</p>									
<p>Modify the requisition as needed.</p>	 <table border="1"> <tr> <td>VENDOR</td> <td>525808</td> </tr> <tr> <td colspan="2">Error:At least one Account must be specified</td> </tr> <tr> <td colspan="2">Error:Total Order Amount must be Positive.</td> </tr> <tr> <td colspan="2">Error:Transaction Line Error(s)</td> </tr> </table>	VENDOR	525808	Error:At least one Account must be specified		Error:Total Order Amount must be Positive.		Error:Transaction Line Error(s)	
VENDOR	525808								
Error:At least one Account must be specified									
Error:Total Order Amount must be Positive.									
Error:Transaction Line Error(s)									



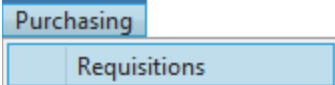
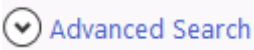

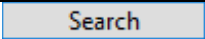
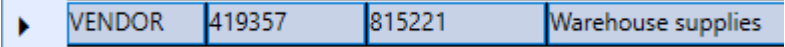
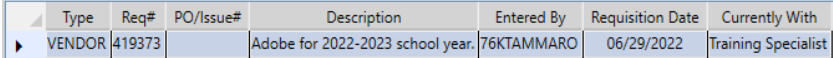
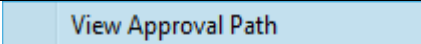
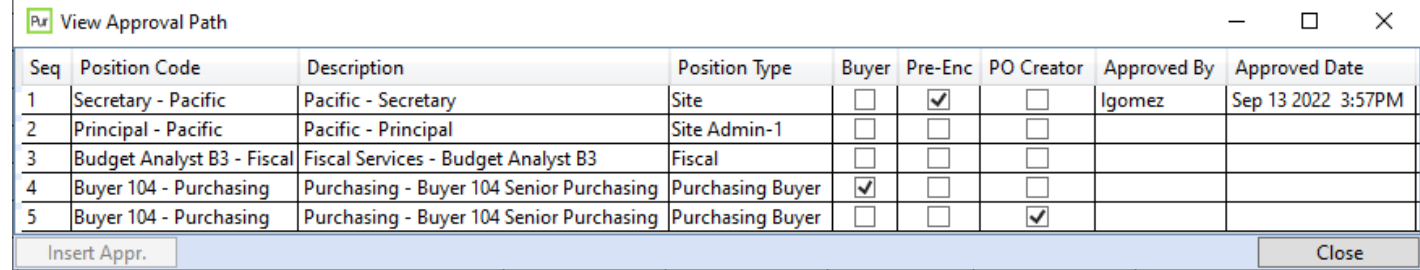
Void a Requisition

A requisition can be voided until you send the requisition for approval.

<p>Login to Financial 2000 and click on the Purchasing icon.</p>					
<p>The Purchasing screen will display.</p>					
<p>Click on Purchasing and choose Requisitions.</p>					
<p>Click the Advanced Search button.</p>					
<p>Checkmark My.</p>					
<p>Click the Search button.</p>					
<p>Requisitions and Purchase Orders that you have created will display.</p>	 <table border="1"> <tr> <td>VENDOR</td> <td>419357</td> <td>815221</td> <td>Warehouse supplies</td> </tr> </table>	VENDOR	419357	815221	Warehouse supplies
VENDOR	419357	815221	Warehouse supplies		
<p>Right-click on the requisition and choose Void.</p>					


View Approval Path of a Requisition

The approval path allows you to see who needs to approve the requisition and who is next in line.

Login to Financial 2000 and click on the Purchasing icon.																																																							
The Purchasing screen will display.																																																							
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Reports

Financial 2000 offers the EduReports module for analyzing your budgets. It is designed to allow administrators to retrieve District specific financial information. For training, contact your Budget Analyst in Fiscal Services.

<p>Login to Financial 2000 and click on the EduReports 3.0 icon.</p> <p>NOTE: If you do not see the EduReports 3.0 icon, call Fiscal Services at (909) 381-1154.</p>	 <p>EduReports 3.0</p>			
<p>Click on the General Ledger Reports tab.</p>	<p>General Ledger Reports</p>			
<p>Click on the Financial Balances Report to view a summary of expenditures.</p> <p>-or-</p> <p>Click on the Financial Activity Report to view detailed expenditures.</p>	<p>Financial Balances Report</p> <p>Financial Activity Report</p>			
<p>Input your School or Department Site Number.</p>	<p>• School 102</p>			
<p>Click the Go button.</p>	<p>Go</p>			
<p>Click on the links in the report for more information.</p>	<p>Expenditure Balances</p> <table border="1"> <tr> <td>2130</td> <td>INSTRUCTIONAL ADDL</td> <td>5,700.00</td> </tr> </table> <p>NOTE: For assistance with interpreting the report, consult your Budget Analyst in Fiscal Services.</p>	2130	INSTRUCTIONAL ADDL	5,700.00
2130	INSTRUCTIONAL ADDL	5,700.00		

Track Requisitions and Purchase Orders that are Delivered to the Warehouse

If the items ordered go to the Warehouse, this report allows you to track the items.

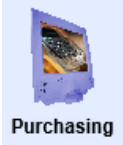
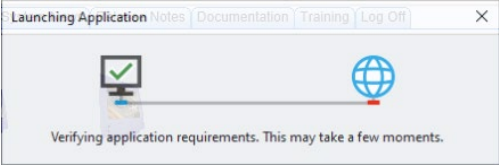

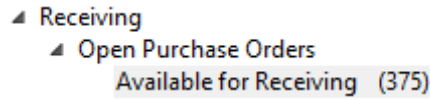
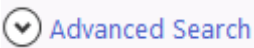

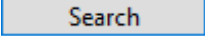
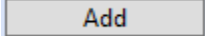
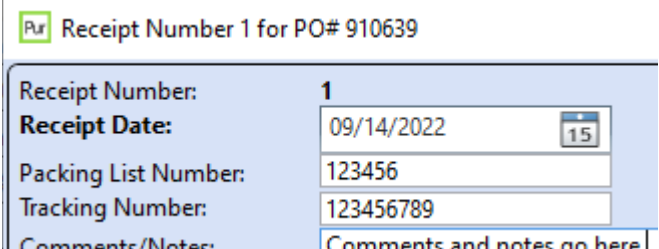
Go to the following web address.	https://sbcusdapps.sbcusd.com/PWHT/ Username: firstlastname Password: District email password
Input your school or department site code number.	 <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">Purchase/Warehouse Tracking Report</p> <p>Site / Location * <input style="width: 100px;" type="text" value="824"/></p> </div>
Change the date range as needed.	Requisition Dates * <input style="width: 100px;" type="text" value="07/01/2021"/> <input style="width: 20px;" type="button" value="📅"/> <input style="width: 100px;" type="text" value="09/30/2022"/> <input style="width: 20px;" type="button" value="📅"/>
To limit the report results, enter the Requisition Number and/or PO Number .	Requisition Number <input style="width: 100px;" type="text" value="123456"/> P O Number <input style="width: 100px;" type="text" value="678910"/>
Click the Submit button.	<input style="width: 100px; height: 30px;" type="button" value="Submit"/>

The report will display.

Loc	ReqNum	Req.Date	Requisition Description	Requestor	PO Num	St	Requisition Status	Byr	Buyer Name	Vendor Name
824	526213	09/29/2022	Office Supplies-Magnetic Board	Emilie Ortiz		06	Approved, to N.			AMAZON BUSINESS
824	525850	09/23/2022	Overage Coverage - Software Ad	Emilie Ortiz		06	Approved, to N.	103	Lenore McCall	SOFTCHOICE CORPORA...
824	525785	09/22/2022	Electric duster	Emilie Ortiz		06	Approved, to N.	107	Eva Ramirez	CDWG GOVERNMENT INC.
824	525771	09/22/2022	Aruba ClearPass Initial Order	Emilie Ortiz		07	Rejected, Sent			VECTOR RESOURCES INC.
824	525765	09/22/2022	Panduit network termination to	Emilie Ortiz		06	Approved, to N.	107	Eva Ramirez	CDWG GOVERNMENT INC.
824	525763	09/22/2022	Blanket - Additional 500GB Sof	Emilie Ortiz		06	Approved, to N.	103	Lenore McCall	ECS IMAGING INC.
824	524986	09/07/2022	Project - Erate - Aruba Switch	Emilie Ortiz	913880	14	PO Created	107	Eva Ramirez	GOLDEN STAR TECHNOL...

Create a Goods Receipt (Mandatory if Goods Delivered Directly to Site)

If the items ordered go directly to your site (not via the Warehouse), you will need to enter the amount received in the Receiving Workflow window.

<p>Login to Financial 2000 and click on the Purchasing icon.</p>																	
<p>The Launching Application will display.</p>																	
<p>The Purchasing screen will display.</p>																	
<p>Click on Available for Receiving in the Workflow Tree.</p>																	
<p>Click the Advanced Search button.</p>																	
<p>Enter your School Site or Department number.</p>																	
<p>Click the Search button.</p>																	
<p>Double-click on the Purchase Order.</p>																	
<table border="1"> <thead> <tr> <th>Type</th> <th>PO #</th> <th>Description</th> <th>PO Date</th> <th>Requestor</th> <th>Buyer</th> <th>Vendor #</th> <th>Vendor</th> </tr> </thead> <tbody> <tr> <td>VENDOR</td> <td>910639</td> <td>Servers</td> <td>07/01/2022</td> <td>Emilie Ortiz</td> <td>Evangelina Ramirez</td> <td>315482-01</td> <td>SEHI COMPUTER PRODUCTS INC</td> </tr> </tbody> </table>		Type	PO #	Description	PO Date	Requestor	Buyer	Vendor #	Vendor	VENDOR	910639	Servers	07/01/2022	Emilie Ortiz	Evangelina Ramirez	315482-01	SEHI COMPUTER PRODUCTS INC
Type	PO #	Description	PO Date	Requestor	Buyer	Vendor #	Vendor										
VENDOR	910639	Servers	07/01/2022	Emilie Ortiz	Evangelina Ramirez	315482-01	SEHI COMPUTER PRODUCTS INC										
<p>Click on the Add button.</p>																	
<p>Type in the Packing List Number, Tracking Number, and Comments/Notes (if applicable).</p>																	

To receive all items on the PO, click the **Receive All** button.

Receive All

-or-

To receive a partial order:

- Click the **Qty Rcvd** column.
- Enter the amount received in the row pertaining to the items you are receiving.
- If applicable, continue entering the amount received in additional rows.
- Click the **Receive Selected** button.

Qty Rcvd

1

Receive Selected

Click the **Save** button.

Save

Display Detailed Workflow Information on Requisitions and Purchase Orders

The Workflow area allows staff to view detailed information about requisitions and purchase orders.

Highlight the Requisition or Purchase Order.

Type	PO #	Description	PO Date	Requestor	Buyer	Vendor #	Vendor
VENDOR	910639	Servers	07/01/2022	Emilie Ortiz	Evangelina Ramirez	315482-01	SEHI COMPUTER PRODUCTS INC

Click on the **Workflow** tab.

Workflow

The following information will display:

Search	Add	Edit	Workflow	History			
Document #: 524976	Description: Macbook Repair Parts	Date Created: 09/07/2022	Entered By: 76EORTIZ				
Type: VENDOR	Workflow: COMPLETED	FY: 2023	<input type="checkbox"/> Detail:				
Seq	Pos	Description	Buyer	Pre-Enc	PO Creator	Approve Date	Approve User
1	Secre	Information Technology - Secretary	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	09/07/2022 11:06:00	eortiz
2	Budg	Fiscal Services - Budget Analyst B6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09/08/2022 07:41:00	eku
3	Direc	Information Technology - Director	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09/09/2022 09:28:00	mtu
4	Buyer	Purchasing - Buyer 107	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09/22/2022 09:04:00	eramirez
5	Buyer	Purchasing - Buyer 107	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09/22/2022 09:04:00	eramirez

Checkmark **Detail** to view even more information.

Search	Add	Edit	Workflow	History
Document #: 524976	Description: Macbook Repair Parts	Date Created: 09/07/2022	Entered By: 76EORTIZ	
Type: VENDOR	Workflow: COMPLETED	FY: 2023	<input checked="" type="checkbox"/> Detail:	
TimeStamp	User	Action	Comment	
09/07/2022 10:49:25	EORTIZ	Duplicated from Requisition #522202		
09/07/2022 10:52:46	EORTIZ	Added Attachment 20221108103048_Macbook Parts 81122 - Amazon.com.pdf		
09/07/2022 11:06:28	EORTIZ	REQUISITION SENT FOR APPROVAL		
09/08/2022 07:41:15	EKU	REQUISITION APPROVED - SENT TO NEXT APPROVER (Director - Information Technology)		
09/09/2022 09:28:55	MTU	REQUISITION APPROVED - SENT TO NEXT APPROVER (Buyer 107 - Purchasing)		
09/22/2022 09:04:24	ERAMIREZ	REQUISITION APPROVED (Buyer 107 - Purchasing)		
09/22/2022 09:04:33	ERAMIREZ	Requisition Created into Purchase Order #913809	Create PO Override.	
09/23/2022 09:12:03	ERAMIREZ	Official Purchase Order Printed by ERAMIREZ		

Display Detailed History Information on Purchase Requisitions and Purchase Orders

The History area allows staff to view detailed information about requisitions and purchase orders.

Highlight the Requisition or Purchase Order.

Type	PO #	Description	PO Date	Requestor	Buyer	Vendor #	Vendor
VENDOR	910639	Servers	07/01/2022	Emilie Ortiz	Evangelina Ramirez	315482-01	SEHI COMPUTER PRODUCTS INC

Click on the **History** tab.

History

The following information will display:

Search	Add	Edit	Workflow	History
Document #: 525765	Description: Panduit network termination tool	Date Created: 09/22/2022	Entered By: 76EORTIZ	<input type="checkbox"/> Expand All
Type: VENDOR	Workflow: FOR APPROVAL	FY: 2023		
Description	Find Next:	Change Date	Modified By	
Updated		09/22/2022 11:41:54	eku	
Updated		09/22/2022 10:10:22	eortiz	
Updated		09/22/2022 10:10:22	eortiz	
Updated Line Item: 372343 Panduit network term		09/22/2022 10:09:30	eortiz	
Inserted Transaction Line: 01-9003-0-0000-7700-4340-824-152		09/22/2022 10:09:30	eortiz	
Updated		09/22/2022 10:09:30	eortiz	
Inserted Line Item: 372343 Panduit network term		09/22/2022 10:08:14	eortiz	
Inserted Line Item: 4929328 Panduit network term		09/22/2022 10:08:14	eortiz	
Inserted		09/22/2022 10:08:14	eortiz	

Checkmark **Expand All** to view even more information.

Search	Add	Edit	Workflow	History
Document #:	Description:	Date Created:	Entered By:	
525765	Panduit network termination tool	09/22/2022	76EORTIZ	
Type:	Workflow:	FY:	<input checked="" type="checkbox"/> Expand All	
VENDOR	FOR APPROVAL	2023		
Description	Find Next:	Change Date	Modified By	
Updated		09/22/2022 11:41:54	eku	
Assigned User Group	Budget Analyst B6 - Fiscal Services		Director - Information Technology	
Currently With	Fiscal Services - Budget Analyst B6		Information Technology - Director	
Updated		09/22/2022 10:10:22	eortiz	
Assigned User Group	Secretary - Information Technology		Budget Analyst B6 - Fiscal Services	
Reason for Last Change	Requisition Sent for Approval (12440)		Requisition Approved - Sent to Next Approver (12441)	
(Pre)Encumbered	0		1	
Currently With	Emilie Ortiz		Fiscal Services - Budget Analyst B6	
Updated		09/22/2022 10:10:22	eortiz	
Workflow Status	OPEN (1)		FOR APPROVAL (2)	
GL Status	(3)		PREENCUMBERED (229)	
Assigned User Group			Secretary - Information Technology	
Reason for Last Change	Requisition Created (12436)		Requisition Sent for Approval (12440)	
Buyer			Evangalina Ramirez (909) 381-1131	
Currently With	Information Technology - Secretary		Emilie Ortiz	
Updated Line Item: 372343	Panduit network term	09/22/2022 10:09:30	eortiz	
Unit Price	0.0000		6.3400	
Unit Cost	0.0000		6.3400	
Tax Amount	0.0000		3.8800	
Total Amount	0.0000		48.2600	
Inserted Transaction Line: 01-9003-0-0000-7700-4340-824-		09/22/2022 10:09:30	eortiz	
Detail ID			23070251	
GLDocumentID			10900813	
Debit			82.74	

Southwest Office and Janitorial and Office Depot Supplies Information

- The Southwest School & Office Supply company is used to buy janitorial and office supplies.
- The Office Depot company is used to buy office supplies.
- If you need assistance or a login, please contact Purchasing at (909) 381-1128.

Southwest Web Address	https://www.southwestordering.com
Office Depot Web Address	http://business.officedepot.com