

# How to Order Asset Items with ePro

Since Assets are expensive items that are meant to last a long time, we usually only order them when we absolutely need them. Things like computers, refrigerators, or trucks, are examples of Asset items. When we do order an Asset item, we must follow a specific procedure.

Asset items are goods (physical items) that must meet several criteria:

- Cost \$500 or more per single unit.
- Are non-consumable (do not diminish with use).
- Are cheaper to repair than to replace.
- Are meant to last several years, at least.

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 eProcurement* or *How to Find Categories for Special Request Items*.

The screenshot shows the 'Create Requisition' interface. At the top, there are two tabs: '1. Define Requisition' and '2. Add Items and Services'. Below the tabs, there is a search bar and a navigation menu with options: 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. The 'Special Request' tab is highlighted with a red circle and a yellow box containing the number '1'. Below the navigation menu, there are several input fields: '\*Item Description:', '\*Price:', '\*Quantity:', '\*Currency:', and '\*Unit of Measure:'.

1. In this example, we will order a refrigerator for our cafeteria. We begin by clicking the blue tab labeled **Special Request**.

The screenshot shows the 'Special Item' form with the following fields filled out: '\*Item Description:' is 'REFRIGERATOR WHIRLPOOL ET8WMTMXKQ 18.2 CU.FT. TOP MOUNT WHITE'; '\*Price:' is '949.00000'; '\*Quantity:' is '1.0000'; '\*Category:' is 'A\_EQP\_KITCH\_L4'; 'Vendor ID:' is '0000000194' with 'Ace Hardware' listed below it. Other fields include '\*Currency:' set to 'USD', '\*Unit of Measure:' set to 'EA', and 'Due Date:' set to '02/18/2009'. A yellow box with the number '2' is placed over the '\*Price:' field.

2. On the Special Request ordering screen, we fill in the fields shown here with details about the order.

### **IMPORTANT NOTES:**

- Be sure to type the **Description** in **ALL CAPITAL LETTERS** with no punctuation, in this order:

- Noun for item being ordered.
- Manufacturer's name.
- Manufacturer's model ID #.
- Model name, & color if applicable.

- Choose the correct **Asset Category** in the **Category** field. (If you don't know how to do that, please refer to the Job Aid entitled "*How to Find Categories for Special Request Items*").

- Complete the rest of the required fields in this section, as you would for any other Special Request order.

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Original Item ID: [ ]

**Additional Information** 3

Alex Doe (619) 555-5555, Wilshire Crest Elementary.  
We need a new refrigerator because our old cafeteria refrigerator died after 15 years.

Send to Vendor     Show at Receipt     Show at Voucher

3. We must enter our name, phone number, and name of our location into the **Additional Information** text box. Include any additional details that explain or justify this purchase. You are also encouraged to add any other information that can assist in making this purchase (details about the item, how you want it delivered, etc.).

st Elementary.  
or old cafeteria

Receipt     Show at Voucher

Add Item 4

4. Click the **Add Item** button. This places the Asset item, as we just typed it out, onto the ePro requisition form itself.

Services    3. Review and Submit 5

in item or service.    Search

USD

5. Don't be alarmed when the fields and text boxes go blank. This just means that the item information was taken from this page and placed onto the requisition form's page. The requisition form can be viewed now.

To do this, we must click the **Review and Submit** link in the top right corner.

Business Unit: SDUSD San Diego Unified School D

Requester: 120080 6

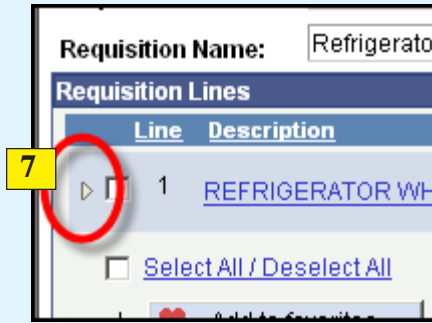
Requisition Name: Refrigerator for Cafeteria

Requisition Lines

Line	Description	Vendor
1	REFRIGERATOR WHIRLPOOL #ET8	Ace H

6. We type an appropriate (but brief) name for our requisition in the **Requisition Name** text box.

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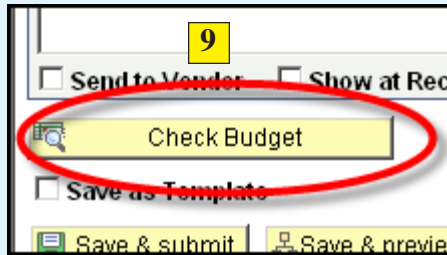


7. Click the **Expand Section** button (shaped like a small triangle). This enables us to access the Chartfield area so we can enter the budget numbers to pay for this refrigerator.

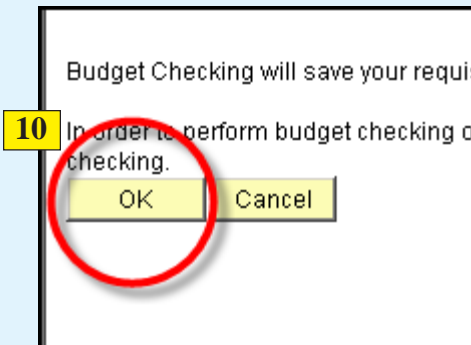
8

DeptID	Resource	Bud Ref	Account	Program	Class	Fund	Extended
1234	12345	12	4491	1234	1234	12345	1234

8. Scroll to view the lower-right area of the screen. We must now enter our school's budget numbers into these **Chartfields**. We must take care to enter the correct numbers to indicate the appropriate budget to pay for this Asset item. *(The numbers shown here are for illustration only, and cannot be used).*

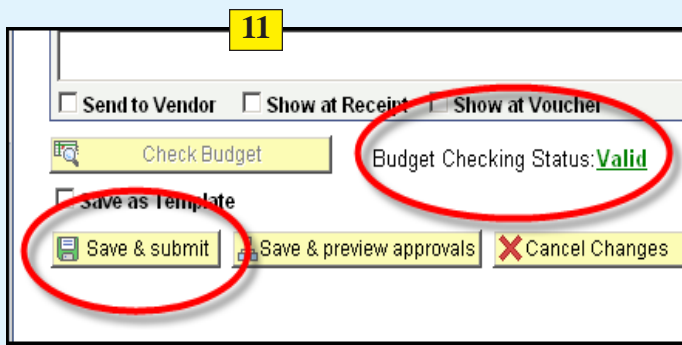


9. Scroll over to the lower-left area of the screen. Click the **Check Budget** button.

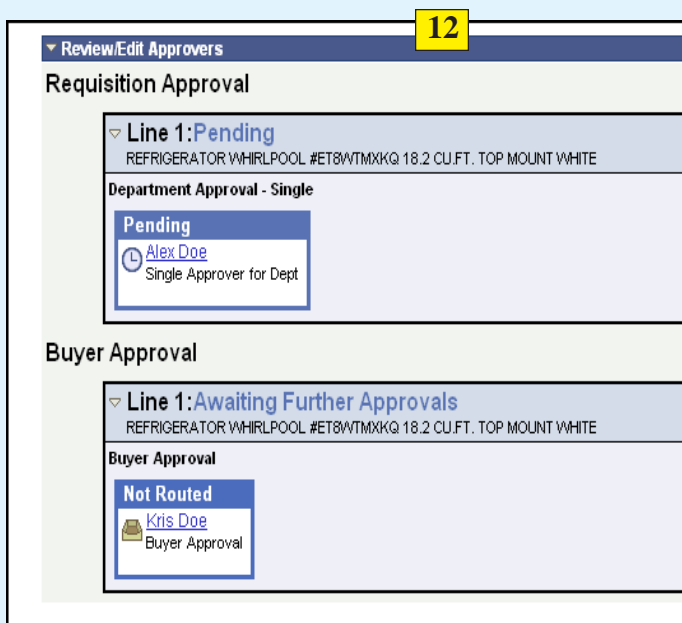


10. Click the **OK** button to initiate the Budget-Checking process. This will pre-encumber the funds to pay for the order.

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11. Verify that we received a **Valid Budget Checking Status**. Now we can click the **Save and Submit** button to send the requisition to our Department Approver for processing.



12. On the Save/Submit Confirmation page, we can observe which Approver(s) this requisition was sent to. From here, we can navigate to another page or log out of the system.

## IMPORTANT NOTE:

For further assistance with ordering Asset items, please contact:

**Rose Gustafson, Procurement & Distribution**

**RGUSTAFSON@sandi.net**

**(858) 522-5850**