

# How to Order Special Request Items with Asset Management in eProcurement 8.4

In our school district, Asset Management means managing and tracking the purchase and retention of physical goods (items) that are non-consumable (and will hopefully last a long time). Assets are goods we buy and keep, such as computers, furniture, appliances, buildings, or land. Other things like notebooks, pencils, or food are consumable and therefore are not assets. Asset Management is important so that the district can keep its costs down, and keep better track of what it owns.

**Beginning July 1, 2007 all district personnel who place any Special Request item orders through eProcurement are required to use a slightly different procedure of creating such orders.** This new procedure helps us manage our assets better than before. Specifically, you will have to choose the correct Category that should be used for a given item or service. Categories are locked in with corresponding Account budget codes, and they're easier to find, now.

This Job Aid walks you through the simple new procedure.

Requisition for: Debra Sayble

Requisition Title:

Search Catalogs | Favorite Items | Item Templates | **Special Request** | Edit Defaults

Requisition Summary

Cancel Requisition

To add an item to this Requisition, click one of the options on the menu above.

eProcurement Home | Manage Requisitions

1. This Job Aid assumes you already know how to log into SDUSD's PeopleSoft eProcurement (if you don't know how to do this, please refer to the eProcurement User Manual, which can be found at [www.sandi.net/peoplesoft/readandlearn](http://www.sandi.net/peoplesoft/readandlearn)).

We begin from the Create Requisition screen. Click **Special Request**. **1**

Special Request

Select the type of item you would like to order below:

Type of item

**Good** |  Service

Cancel | Next

2. If you want to order a physical item, click **Good**. If you want to order a service, click **Service**. In this Job Aid, we show an example of ordering a **Good**.

Click the **Good** option button, and then click the **Next** button. **2**

Special Request - Goods

Description:  | Category:

Qty:  | Unit of Measure:  | Price:  | Currency:  | Due Date:

Vendor ID: [Vendor Lookup](#)

Comment Text:

Cancel | Add Item

3. On the next screen, type the description of the item in the **Description** box. Be sure to include the noun, the item ID # or catalog # if there is one, and the actual name or title of the item as described by its vendor. In this example, we are ordering a computer printer. This example description reads: **Computer Printer, Item #123ABC, HP LaserJet 4800**. (Even though you can't see the whole description when finished, you can type up to 200 characters in the Description box). **3**

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4. Next you need to choose the right Category. This is **VERY IMPORTANT**. You can no longer choose the All Items Category 000 or the Miscellaneous Category 578. Those two Categories have been removed as of July 1, 2007, and can no longer be used. You must choose the correct Category for the Special Request item you're ordering, whether it's a Good or a Service.

The best way to find the right Category (if you don't happen to know it) is to look it up.

Click the **Look Up Category** icon. (It looks like a little magnifying glass). **4**

Category	Description
<a href="#">A BKS MMEDIA G4640</a>	Books and Multi-Media G4640
<a href="#">A BKS MMEDIA L4640</a>	Books and Multi-Media L4640
<a href="#">A BLDG CONST</a>	Building - Constructed
<a href="#">A BLDG IMPRV</a>	Building Improvements
<a href="#">A BLDG IM CARPET</a>	Bldg Imprv Carpet ReplaceG4640
<a href="#">A BLDG IM ELEC PLB</a>	Bldg Imprv Elec or Plumb G4640
<a href="#">A BLDG IM HVAC</a>	Bldg Imprvmnt - HVAC G4640
<a href="#">A BLDG IM ROOFING</a>	Bldg Imprvmnt - Roofing G4640
<a href="#">A BLDG PORT</a>	Portable Buildings
<a href="#">A BLDG PURCH</a>	Building - Purchase
<a href="#">A BUS MACH G4640</a>	Business Machines G4640
<a href="#">A BUS MACH L4640</a>	Business Machines L4640
<a href="#">A COMPUTER G4640</a>	Personal Computers G4640
<a href="#">A COMPUTER L4640</a>	Personal Computers L4640
<a href="#">A COMP EQUIP G4640</a>	Computer Equipment G4640
<a href="#">A COMP EQUIP L4640</a>	Computer Equipment L4640
<a href="#">A COMP PRINT G4640</a>	Printers G4640
<a href="#">A COMP PRINT L4640</a>	Printers L4640
<a href="#">A COMP SFTWR G4640</a>	Computer Software G4640

5. When the Category List first appears it displays in alphabetical order by the Category name (not by Description).

You need to know whether the item you're ordering is an Asset item, in order to choose the right Category. (All Asset Categories are Goods, however, not all Goods are Assets). You can tell whether the item you want is an Asset by finding a description that matches it closely from a document called the "**ePro Category List for Special Request Items.**" This list can be viewed and printed out from our district website: [www.sandi.net/peoplesoft/readandlearn/jobaids](http://www.sandi.net/peoplesoft/readandlearn/jobaids).

A computer printer (our example here) is an Asset, since it is a Good that is worth more than \$500 and is non-consumable.

On the **Look Up Category** screen, you can look up all the Asset item Categories by doing this:

Type the letter **A** into the **begins with** box, and click the yellow **Look Up** button. You'll see only those items that are Assets (about 50 or so items). All asset categories begin with the letter A. You should be able to choose the right Category from that list. This is shown here in this example. **5**

## Other Ways to Look Up Categories by Goods or Services

You can find other Categories easily. Type the letters **GDS** or **SVC** into the **begins with** box (GDS stands for Goods, and SVC stands for Services), and click the **Look Up** button. You'll see only Goods or only Services Categories.

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**Look Up Category**

Search by:  begins with

[Advanced Lookup](#)

**Search Results**

View All First 1 of 1 Last

Category	Description
<a href="#">GDS 4301</a>	Instructional Supplies

## Another Way to Look Up Categories by Account Code

You can also find the right Category for an item if you know which Account number you're supposed to use to pay for the item.

In the **begins with** box, type a percent sign, %, and then the Account code number. In the example shown here, we used Account 4301, commonly used for instructional materials. Then, click the **Look Up** button. It will display only those Categories that are acceptable to use with that Account number.

If the Categories displayed are not compatible (accurate) for the item you're trying to order, then you must use a different Account number to pay for it. Categories and Account code numbers are permanently connected now; you cannot mix them around or choose the wrong Category to use with the wrong Account number.

<a href="#">A BLDG IMPROVING</a>	Buildg Imprvmt - Flooring G4640
<a href="#">A BLDG PORT</a>	Portable Buildings
<a href="#">A BLDG PURCH</a>	Building - Purchase
<a href="#">A BUS MACH G4640</a>	Business Machines G4640
<a href="#">A BUS MACH L4640</a>	Business Machines L4640
<a href="#">A COMPUTER G4640</a>	Personal Computers G4640
<a href="#">A COMPUTER L4640</a>	Personal Computers L4640
<a href="#">A COMP EQUIP G4640</a>	Computer Equipment G4640
<a href="#">A COMP EQUIP L4640</a>	Computer Equipment L4640
<a href="#">A COMP PRINT G4640</a>	Printers G4640
<a href="#">A COMP PRINT L4640</a>	Printers L4640
<a href="#">A COMP SFTWR G4640</a>	Computer Software G4640
<a href="#">A COMP SFTWR L4640</a>	Computer Software L4640
<a href="#">A COPIER G4640</a>	Copiers G4640
<a href="#">A EQP ATHL G4640</a>	Athletic Equipment G4640
<a href="#">A EQP ATHL L4640</a>	Athletic Equipment L4640

6. Picking up from Step 5 on the previous page of this Job Aid, we are looking at a list of Asset Categories. There are two Computer Printer Categories; one for printers that cost Greater Than \$4,640 and one for printers that cost Less Than \$4,640 (but more than \$500). The computer printer we are ordering in this example costs less than \$4,640. So, we must choose this Category:

**A\_COMP\_PRINT\_L4640**

(The "L" means Less Than, and the "G" in the other Category means Greater Than).

Go ahead and click on the **A\_COMP\_PRINT\_L4640** Category. **6**

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**Special Request - Goods** 7

**Description:** Computer Printer, Item #123ABC, H

**Category:** A\_COMP\_PRINT\_L4640

**Qty:** 1

**Unit of Measure:** ea

**Price:** 1200.00

**Currency:** USD

**Due Date:** 07/20/2007

## Inputting the Details 7

7. Complete the rest of these field boxes as shown in this example:

- A) **Qty: 1** (you only want one printer)
- B) **Unit of Measure: ea** (the printers come one at a time)
- C) **Price: 1200.00** (never type a \$ or a comma)
- D) **Currency:** Always skip this field box. Leave it at **USD**
- E) **Due Date:** Choose a future date, and allow about four weeks. This is the date you can expect to receive the item under normal circumstances (if it isn't on backorder, etc.)

**Qty:** 1

**Unit of Measure:** ea

**Vendor ID:** [Vendor Lookup](#) 8

**Comment Text:**

8. You must choose a Vendor (the business from whom you are buying the item). If you submit this kind of order without selecting a Vendor, your order will be delayed or canceled.

Click the **Vendor Lookup** link. 8

**Vendor Search** 9

**Name:** fry's

**City:**

**Country:** USA

**State:**

**Postal Code:**

9. In the **Name** box type the name of the vendor you want to use. In this example, we want to buy the printer from Fry's Electronics. Then click the **Find** button.

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# How to Order Special Request Items with Asset Management in eProcurement 8.4

**Vendor Search**

Name:    
 City:    
 Country:  State:  [Suggest Vendor](#)  
 Postal Code:

Your Search returned the list of items below:  
 Select Vendor

Name	Location	Address	City	State
Fry's Electronics, Inc.	PRIMARY	9825 Stonecrest Bl	San Diego	CA

[Return to Special Request](#)

10. When you see the vendor you want appear in the list below Vendor Search, choose it by clicking its black checkmark to the right. **10**

**Special Request - Goods**

Description:  Category:

Qty:  Unit of Measure:  Price:  Currency:  Due Date:

Vendor ID: [Vendor Lookup](#)  
 Fry's Electronics, Inc.

Comment Text:

11. The Comments textbox is important, too. You need to be sure to type your name, phone number, and the name of your site, first. Then include any other pertinent details or directions concerning your order. These comments are sent with the order to the Purchasing Dept. and are read by the Buyers and Contract Specialists. The purpose of these comments is to provide information to Purchasing to help them place your order.

When finished typing, click the **Add Item** button. **11**

Requisition Title:

[Search Catalog](#) [Favorite Items](#) [Item Templates](#) [Special Request](#)

**Requisition Summary** [Customize](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Description	Qty	Use PCard	Price	Unit
1 <a href="#">Computer Printer, Item #123ABC, HP LaserJet 4800</a>	1.00	<input type="checkbox"/>	1,200.00 USD	Each

Justification / Summary **Total Amt:** 1,200.00 USD

Mark As Template

**12**

[eProcurement Home](#) [Manage Requisitions](#) [Create New Requisition](#)

12. Back on the Summary page of the requisition, click the **Shipping** icon to move to the Shipping page.

**12**


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## Shipping Information

Override Suggested Vendor  
 Consolidate with other Reqs

Line	Description	Quantity	Unit	Price	Lead Time
1	Computer Printer, Item #123ABC, HP LaserJet 4800	1.0000	Each	1,200.00000 USD	

Shipping Information Customize | Find | First 1 of 1 Last

Ship To Location	Attention	Quantity	Due Date	Total	
0000A	Debra Sayble	1.0000	07/20/2007	1,200.00	

[Return to Requisition Summary](#)

**13**

13. On the Shipping page, verify the shipping details (be sure the item, quantity, and date is correct). When you're satisfied, click the **Distribution Info.** icon, a.k.a. the Paper Dollar Sign. **13**

## Distribution Information

Line	Description	Quantity	Unit	Price
1	Computer Printer, Item #123ABC, HP LaserJet 4800	1.0000	Each	1,200.00000 USD

Line	Sched Num	Ship To	Quantity	Due Date	Total
1	1	All Locati	1.0000	07/20/2007	1,200.00 USD

\*Distribute by: Distributed Quantity: Speedchart  
Qty: 1.0000

Details More Details More Details 2 More Details 3

Line Status	Location	Req Qty	Percent	GL Unit	DeptID	Resource	Bud Ref	Account	Program Code	Class	Fund	Extended Project
1	Open	0003A	1.0000	100.00	SDUSD	0003	000000	4491	1000	1110	01000	0000

[Return to Shipping Information](#) [Return to Requisition Summary](#)

**14**

14. On the Distribution Information page you must type in the Chartfield string (budget code numbers) for the account that will be used to pay for the item. Notice that the Account code number piece of the string has already been filled in for you. It was filled in based upon the Category you chose earlier. You cannot alter the Account code number.

Once you've filled in the rest of the Chartfields, click the **Return to Requisition Summary** link. **14**

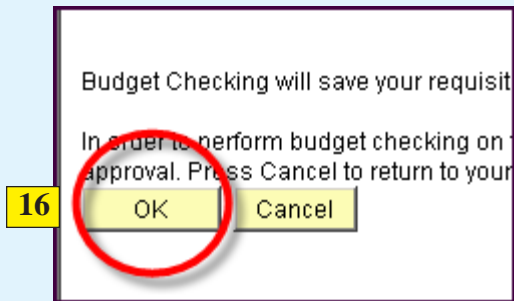
Edit Defaults



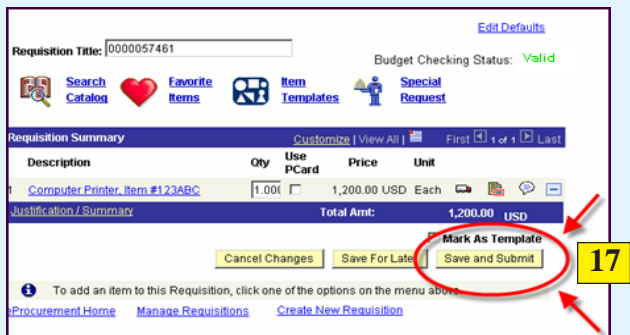
**15**

15. Back on the requisition summary page, you can now click the **Budget Check** icon **15** (a.k.a. the Commitment Control icon) to begin the Budget Check process. This will pre-encumber the funds to pay for the item.

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16. Click the **OK** button to run the Budget Check process. **16**



17. Once you receive a **Valid** budget status, you can submit the requisition. Click the **Save and Submit** button. **17**

The requisition is then sent automatically to your Approver (usually that's your Principal or Department Head).

## If You Have Questions...

Please do one of the following to get answers to your questions:

1) Run the **PeopleSoft Online Tutorial** that's been especially designed to walk you through this whole thing. Tutorials are short, animated, narrated video clips you can run on your computer from work or home (as long as you're using a PC and not a Macintosh). You just need an Internet connection. This Tutorial is entitled "**How to Create a Special Request Order with ePro Asset Management in 8.4**" (8.4 is the current version of the software...in Fall '07 we'll be upgrading to version 8.9). This Tutorial not only shows you exactly what to do in a simulated screen, it lets you choose whether to just sit back and watch, or interactively click along with it to learn the process better. It's easy and fun! To learn how to find and use this and other Tutorials, please go online to: [www.sandi.net/peoplesoft/readandlearn/elearning](http://www.sandi.net/peoplesoft/readandlearn/elearning).

2) Search the online **Knowledgebase** for short articles that offer answers to questions about Asset Management and this new way to order Special Request items. Find the Knowledgebase at [www.sandi.net/peoplesoft](http://www.sandi.net/peoplesoft) in the upper right corner of the web page.

3) If the Tutorial and Knowledgebase don't address all your questions, please contact **Robin Hoffpauir** in the Purchasing Dept. Robin's phone number is (858) 522-5805.

