Secretary Purchase Request Instructions

(This is required for all School Specialty orders)

Web Access:

1. Go to the District Portal
2. Click on the ISD Apps icon then click on the *My Benefits* icon
3. Mouse over Financials, click on Enter Request then Purchase Requisition

Enter a Requisition:

1. Enter a portion of a vendor name in the *LookUp Vendor* field and click the LookUp Vendor button
2. Select the vendor desired from the pop-up list and verify the address
    a. It will only list Purchase Order (PO) vendors
    b. Other schools are listed under their District name. Individual schools are in the dropdown list of addresses in the *Vendor Address* field.
    c. Some vendors have multiple locations. If the contact information indicates "Pick an Address", then select the desired address from the dropdown list of addresses in the *Vendor Address* field.
3. If you are ordering for the next year, usually starting in early March, select Next Year otherwise select Current Year for your requisition. This is located above the LookUp Vendor button. Never change the date in the Date Needed field, always use the default date. If choosing Next Year it will default to 07/01/XX (XX being the year).
4. Tab to Click to Lookup Account (you may click to review accounts or you may simply enter the account number. (This is required field and you would not be able to proceed with this information.)
5. If you are entering a Next Year PO please enter the date you would like the items to be delivered, which would be after you summer break.
6. *Requestor* will default to your user ID. Do not change.
7. *Department* will default to your building. This will usually be okay. If a different department will actually review your requisition for approval, select the new department from the dropdown list. Note: Always select department 104-Technology when ordering technology items.
8. *Ship To* will default to your building. This will usually be okay. If the items will be shipped to another location, select the new ship to location from the dropdown list.
9. *Instruction to print on PO and/or to Purchasing* is a text field for you to include any special instructions to the vendor or Purchasing for handling of the PO. These notes will print on the PO.
    a. Vendor: delivery instructions, quote by…, confirmation of order, etc.
    b. Purchasing: fax order to xxx-xxx-xxxx, attachment to follow, send copy to…, etc. For any attachments, be sure to give them to the reviewer for attachment to the final requisition that will be sent to Purchasing. Orders to be faxed must include a fax number.
    c. Defaults:
        i. Mail PO except for those that are automatically sent to the originating building for hand carry of "Not to Exceed" POs such as discount stores, grocery stores and restaurants.
        ii. A copy will automatically be printed to both Department and Ship To.
10. *Justifications for Approver and/or Explanation* is a text field for you to include a description of *which account you wish the cost to be coded*. You can also explain the purchase or maintain notes for future reference regarding the purchase. These notes will not print on the PO but will be available for the Reviewer and Approver.

11. You are now ready to list the items you wish to purchase. If the *Go To Shopping Cart* button is available, you can click on the button and shop online with that vendor. Currently School Specialty and its sister companies are the only vendors participating in our online program. All other vendors, click on the *Go To Detail Entry* button.
12. Enter the following for each item ordered:
    a. *Catalog#* - enter the vendor's catalog number
    b. *Description* – enter a description of the item being ordered including the size, color, and options desired. If it is a "Not to Exceed" PO, then enter a brief description of the type of items that will be purchased, for what purpose and "Not to Exceed $xxx.xx"
    c. *Unit* – select from the dropdown the appropriate unit of measure such as Each, Box, Dozen, Pkg, etc.
    d. *Quantity* – Enter the desired quantity
    e. *Unit Cost* – Enter the cost per unit of measure previously selected.
    f. Click on *Update/Remove* button under detail to calculate the line item cost and running total cost of the requisition.
    g. If you need to delete an item, select the line to be removed by clicking the checkbox in Line# next to it then click the *Update/Remove* button.
13. After all items are entered, click the *Finish Requisition* button and it will be assigned a requisition number.
14. If you need to finish it later, click the *Complete Later* button. You can add a reminder note then click *Submit* to save it. When you return, click *Finish a Saved Request* in the top right corner of the entry screen followed by the *Reference#* on the next screen and you will be back where you left off entering detail lines.
15. You may click the *Cancel* button at anytime to abandon the requisition.
16. The assigned Reviewer (typically a secretary) will review the web requisition, enter the account code based on what is described in the Justifications, and finalize it ready for the Approver (typically a principal).

View My Requisitions (and option to print):

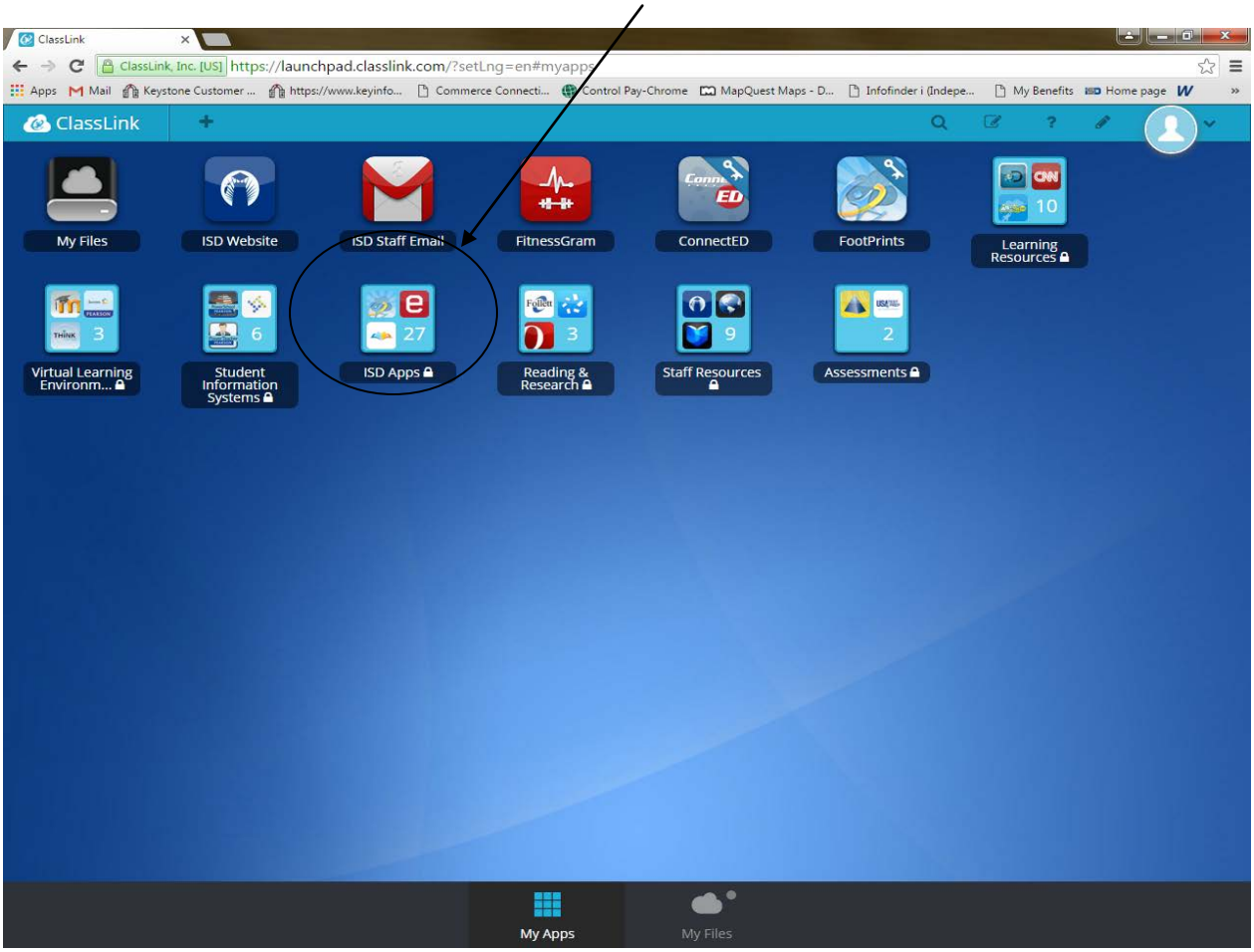
1. Mouse over Financials on the top menu, click on *View My Requisition* to see a list of your requisitions.
2. The Total is for the entire requisition but only the first description line shows on the summary list. Various search options are available to filter your requisitions.
3. To see each line of the requisition, click on the Req# field.
4. If you want a paper copy, click the printer icon next to the catalog #.

Payment on Invoice:

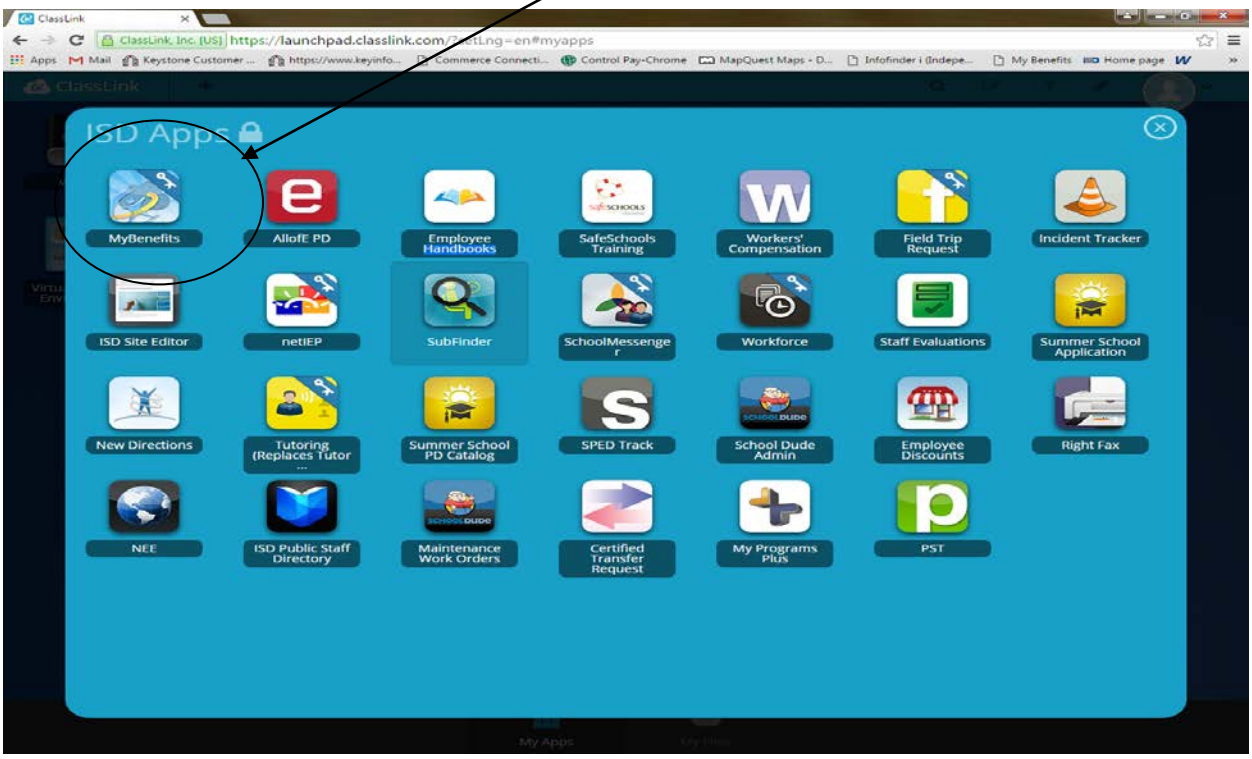
1. Purchase orders are required for all purchases of services, supplies and equipment. The PO must be created through the accounting software system prior to the order being placed. Keep in mind it is a District initiative to use In-District vendors whenever possible.
2. If a vendor tells you they do not accept POs and you would really like to use them in the future, contact our Accounts Payable department. They will try to work with the vendor to see what it takes to get them to accept our POs. In the meantime, you must find another vendor that does accept POs.
3. An itemized detail receipt/invoice is required for all purchases.
4. Submit the receipt/invoice to your building secretary as soon as the items are received so payment can be made as quickly as possible. Include the PO# on the receipt/invoice and your full signature that everything was received in good order. We cannot prepay for items.

5. Reimbursements to individuals are done only for travel.
6. Our purchases are tax exempt and sales tax will not be paid nor reimbursed.

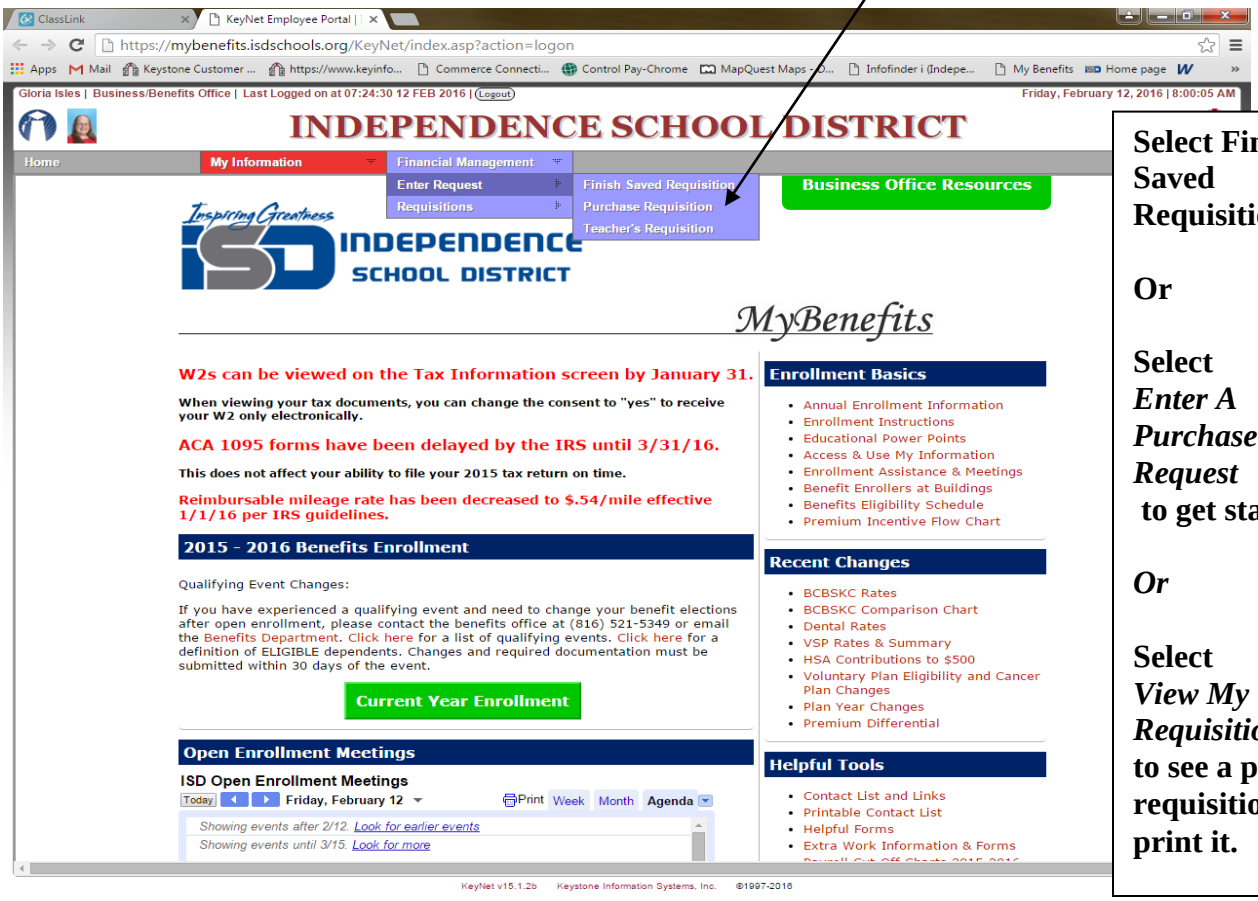
Click on the ISD Apps icon



Click on the My Benefits icon



Mouse over Financials then click on Enter A Purchase Request



Select Finish Saved Requisition

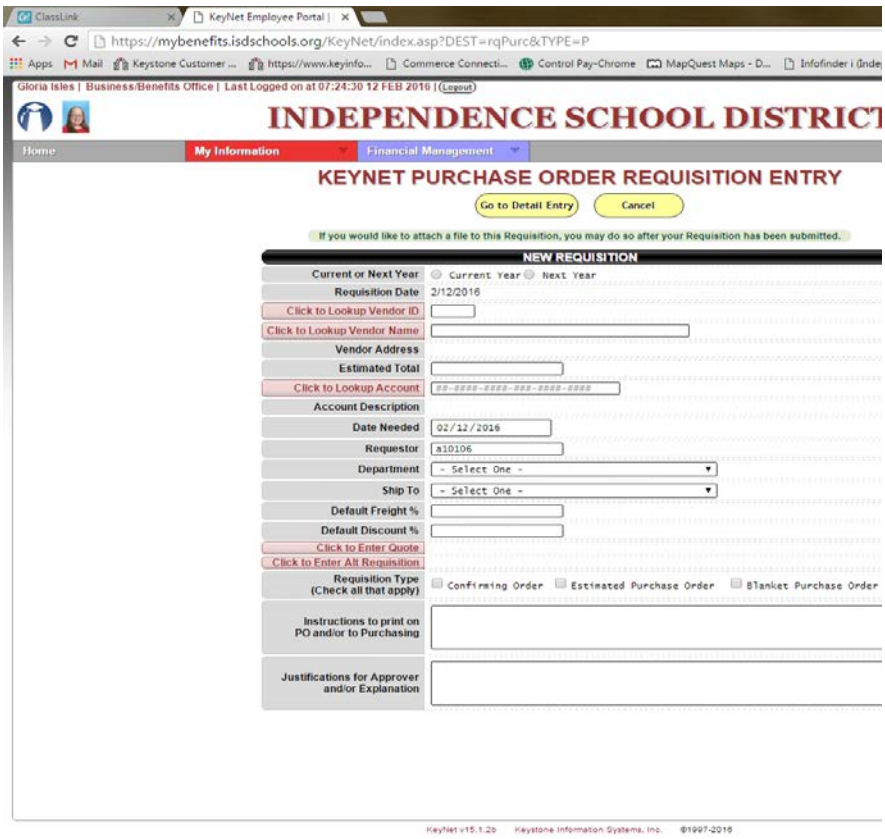
Or

Select *Enter A Purchase Request* to get started.

Or

Select *View My Requisitions* to see a past requisition or print it.

Enter general requisition information



Year: displays when Next Year budgeting is turned on. Choose Next Year only if your order will be for next year's budget.

Lookup Vendor: enter part of vendor name, click Lookup Vendor, verify results shown in Vendor Name & Address. Note: only PO vendors return.

Date Needed: defaults to current date or July 1 if Next Year was selected in Year. Do not change the date.

Click to Lookup Account: account code goes here..

Requestor: defaults to your user ID

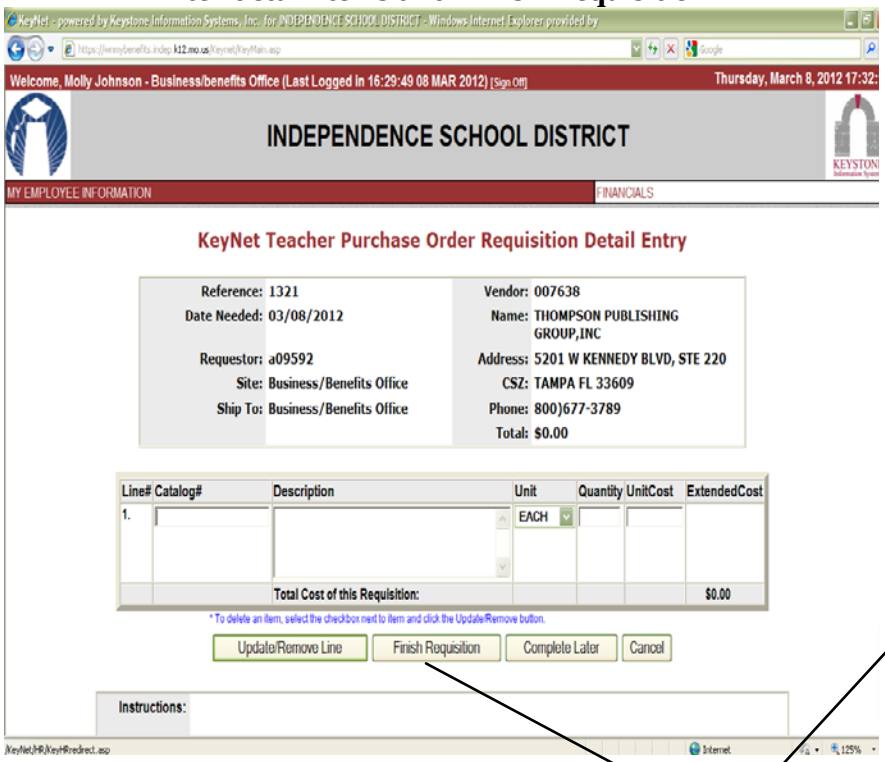
Department and Ship To: if needed, options are available in drop down list.

Instructions: enter special instructions to vendor. Also, include any special method of delivery for PO to vendor with contact information (fax, email, etc.).

Justifications: give information about the account you wish to use

Go to: shows Detail Entry or Shopping Cart option based on vendor setup

Enter detail items and Finish Requisition



Catalog: enter vendor's catalog number

Description: enter description of item being ordered. (If creating a "not to exceed" PO, enter general description of items to be selected, purpose of purchase, and "not to exceed amount shown on PO")

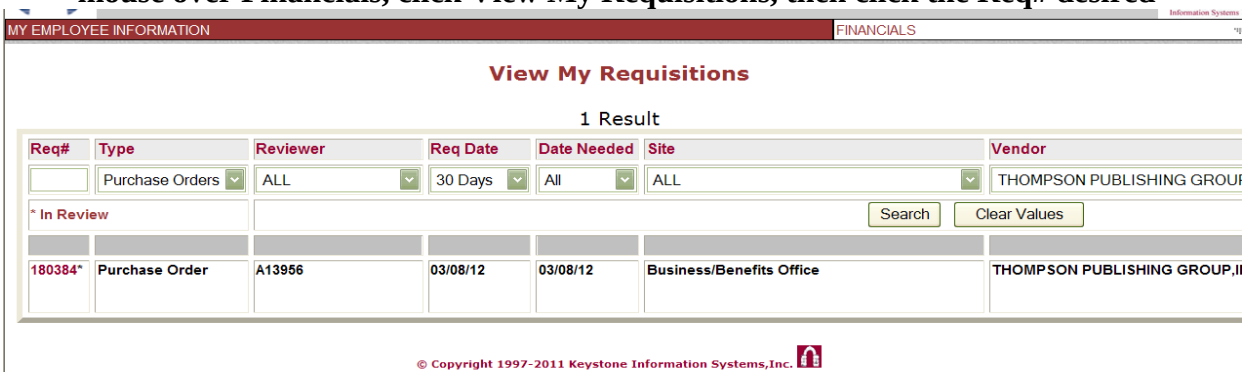
Unit / Qty / UnitCost: select unit of measure in drop down list, enter quantity being ordered and price per unit shown.

Update/Remove Line: click to calculate ExtendedCost for line and Total Cost for this Requisition or to remove lines check marked for removal.

Finish Requisition: click to submit requisition, receive a requisition number and click printer icon to print (if desired).

Complete Later: click to save data and finish later by clicking "Finish a Saved Request" on the Teacher Purchase Request page and the "Reference#" on the My Saved Requests page

To see prior requisitions,
mouse over Financials, click View My Requisitions, then click the Req# desired



Choose A Vendor

Enter **"School Specialty"** in the "Lookup Vendor" box and click "Lookup Vendor". "School Specialty Supply Co" will be returned. This can be used for other vendors, please use PO vendors only.

Date Needed: If this is a next year purchase order, click the "Next Year Requisition Checkbox". Always use the default date. If you had selected the incorrect date back out and start over.

IMPORTANT: Select your school secretary as the "Reviewer" in the drop-down to ensure your order will be processed

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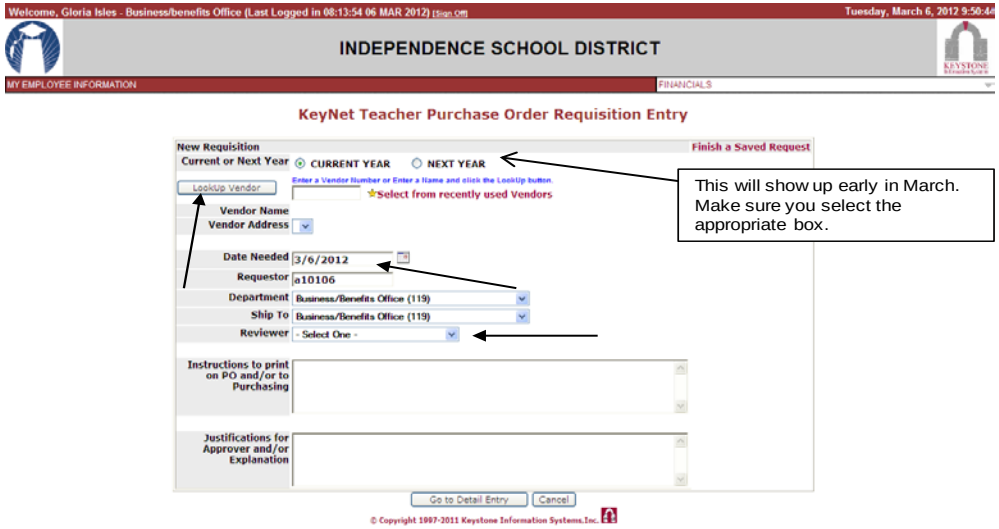
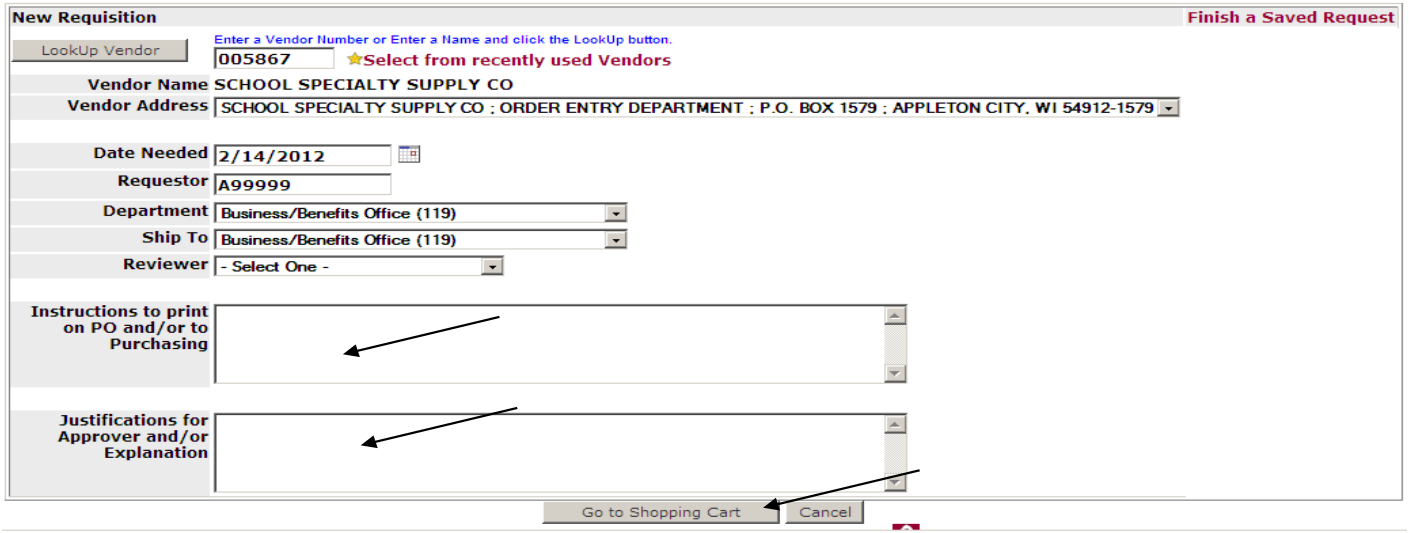


Enter Details

Instructions Field: Enter a quote and number if authorized. (this comes back from Keystone)

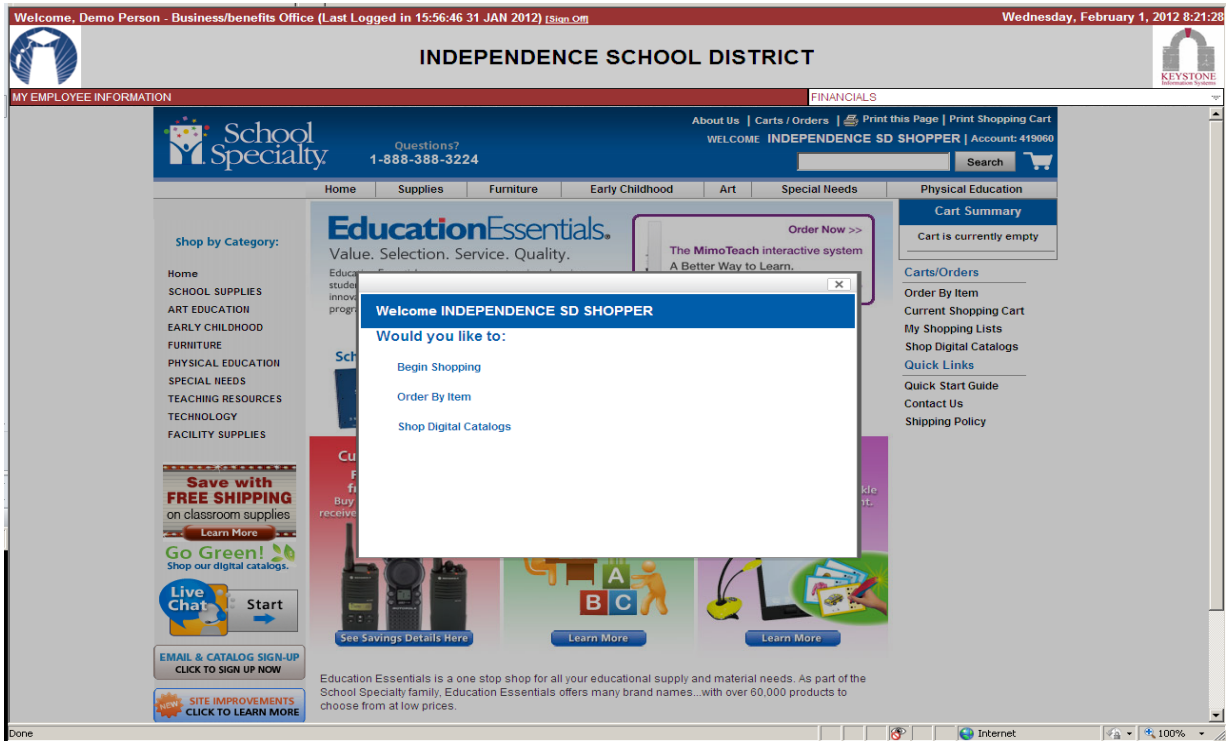
Justification Field: Describe the account(s) to be charged. Example: Budget, Activity, Department, etc

Click "Go to Shopping Cart" to start your online shopping requisition



Create Your Request

You will be launched into our Homepage and have a welcome menu to begin. Choose the desired menu option.

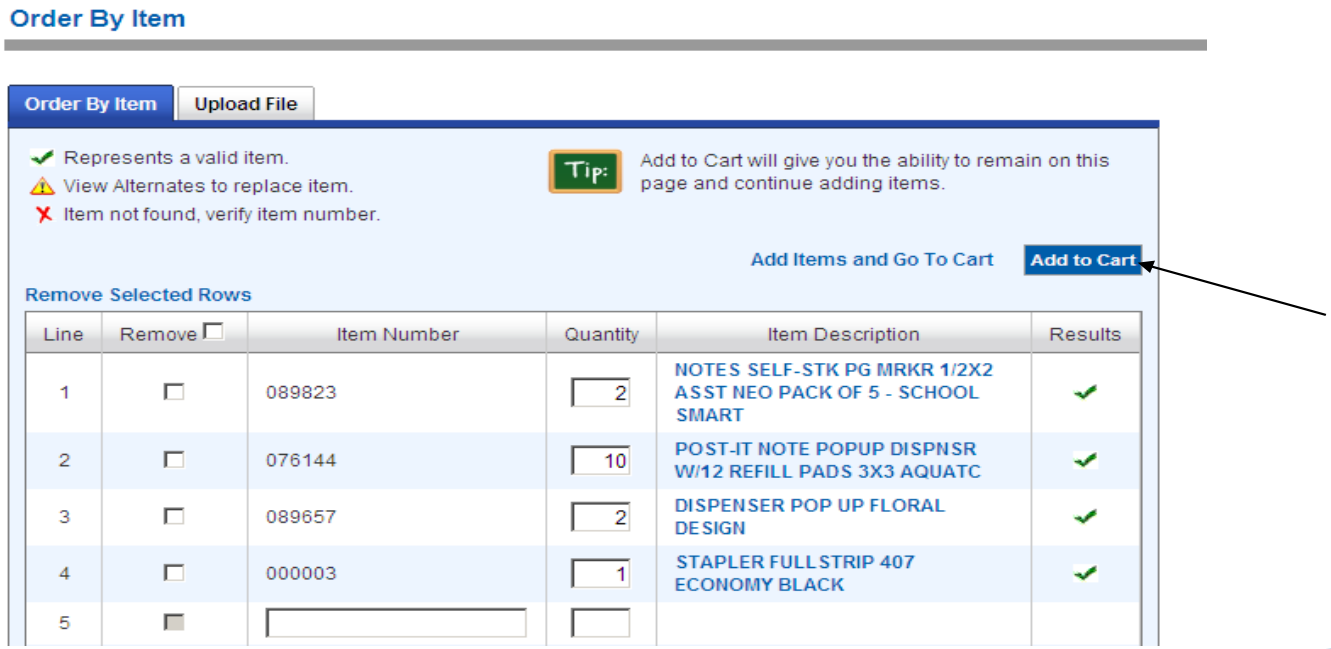


Order By Item

Allows you to key catalog item numbers for quick order entry.

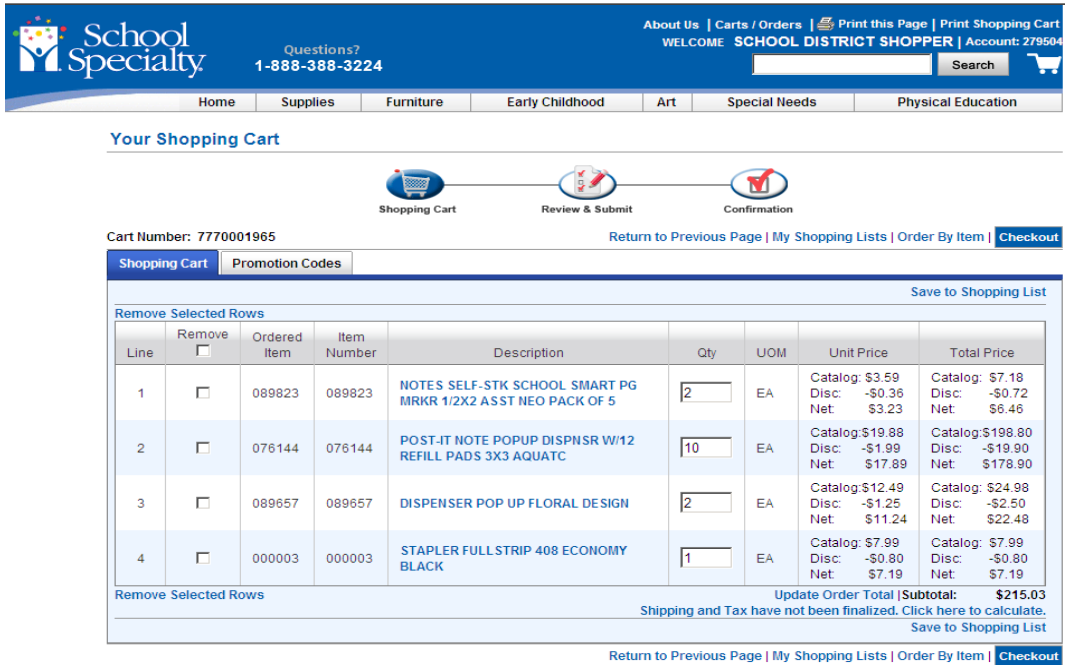
Key your Catalog Numbers and Quantity. Verify your items. Click ***ADD TO CART.***

Note: if items have changed, a ***View Alternates*** will appear in your results offering more information. Discontinued items will be indicated with a red **X**.



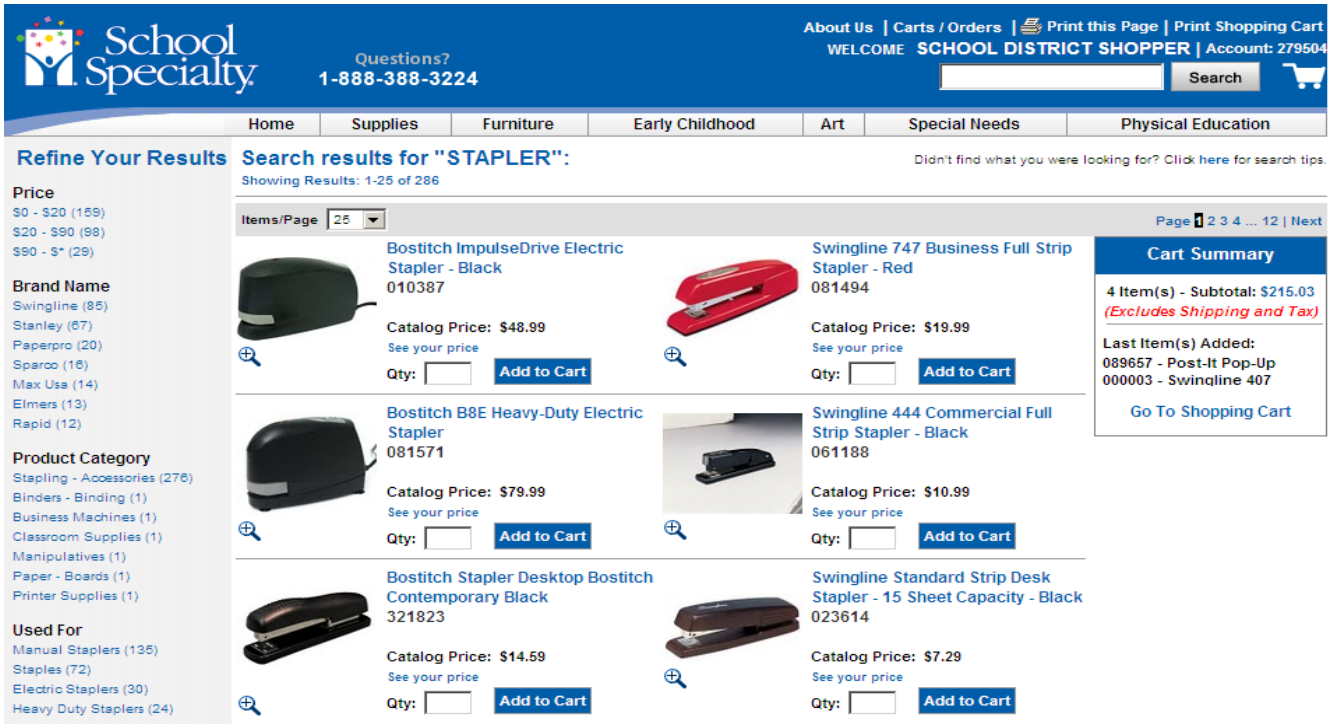
Your item will be added to your shopping cart.

You will be able to see the item product and pricing details. Click ***Order By Item*** to add more items to your cart. Click ***Home*** to return to your home page.



Keyword Search

Your search results will display. Click the item name for more information, ***See Price in Cart*** to see your discount price or ***Add to Cart***.



Category Browse

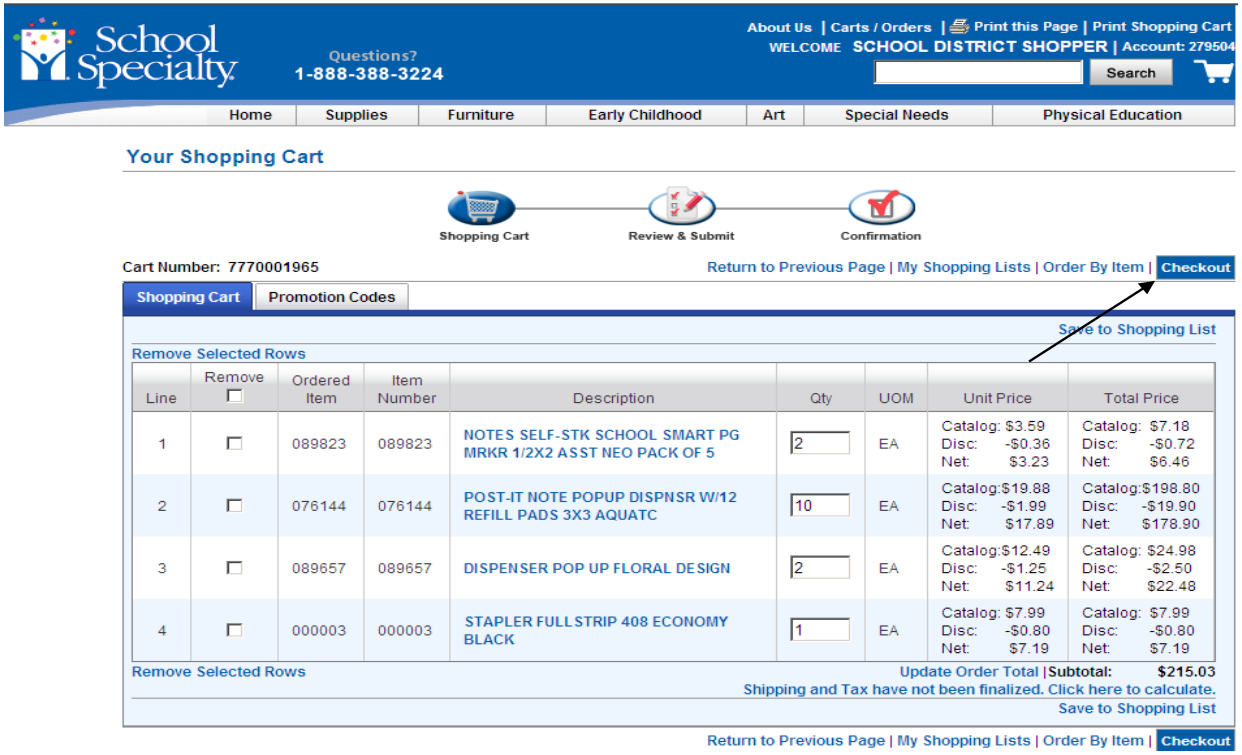
Click your desired category to browse available products.

Category Browse

Each category will further break into sub-categories for a specified product search.

Check Out

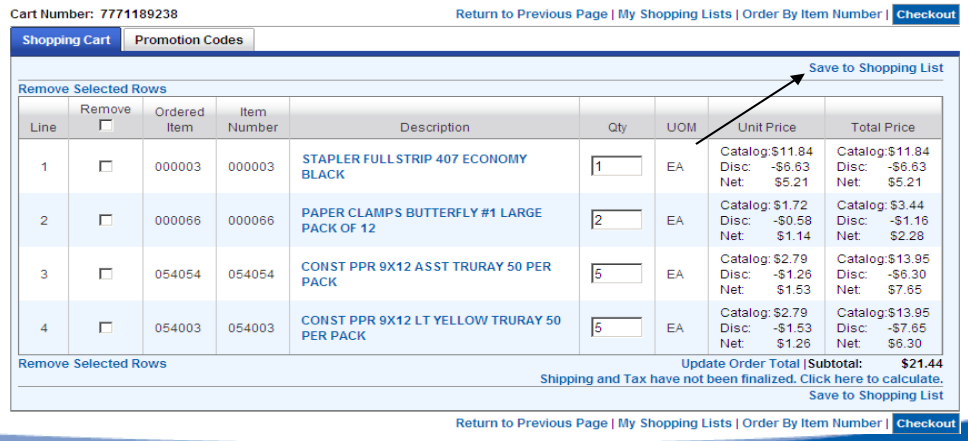
Click ***Checkout*** to review your cart and shipping charges



Save a Shopping List (Optional)

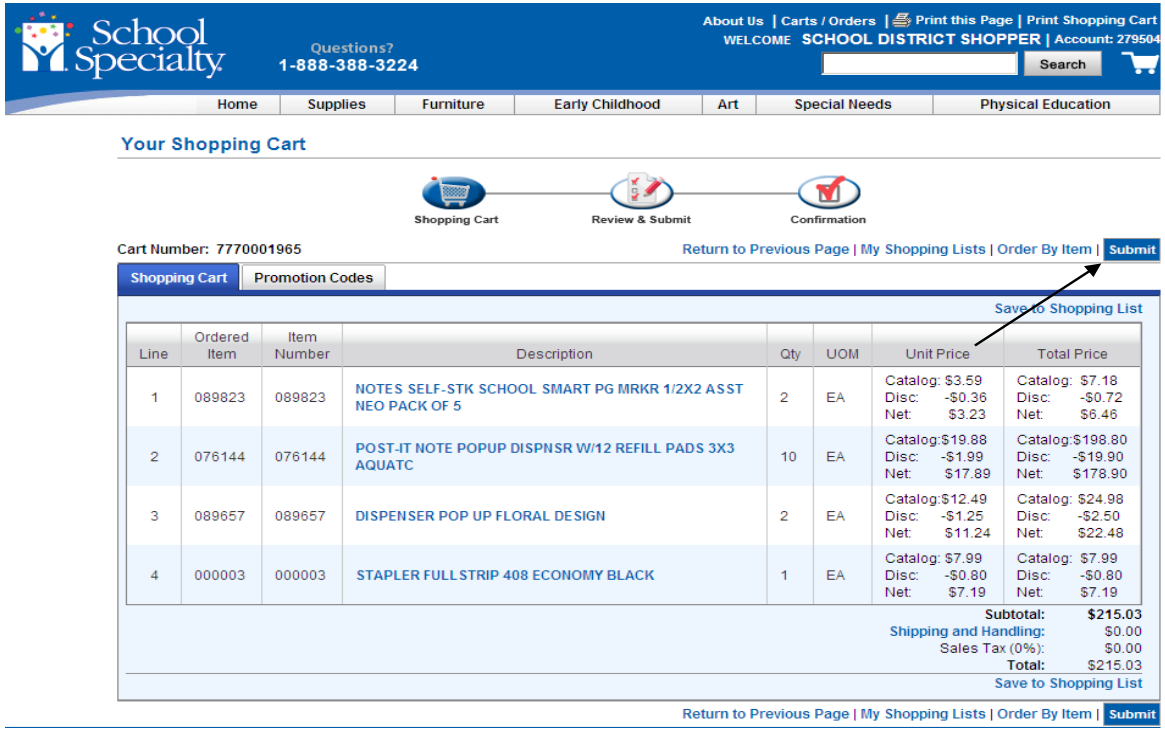
If you would like to save your cart to continue later. Or, if you think you might order these items again, you can create a "Shopping List" with your name on it. Then, you can revisit your items at any time.

1. From the shopping cart, Click "Save to Shopping List", Create a New List, Name it: building number + First Initial & Last Name Example: 460TJones
2. To access this list in the future click "My Shopping Lists", find your name, select your items, click "Add to Cart"
3. Note: Please do not access other user's lists
4. If you are only using your list temporarily, delete it when complete.



Review and Submit

Check your shopping cart carefully!
Click **Submit** to move to the final step



Submit to Procurement System

Choose **Click Here** to send your cart's information to Keystone

School Specialty

Thank You for Shopping With School Specialty!

Your requisition is ready. Press the "Submit" button below to logout and transfer your requisition information to complete your order.

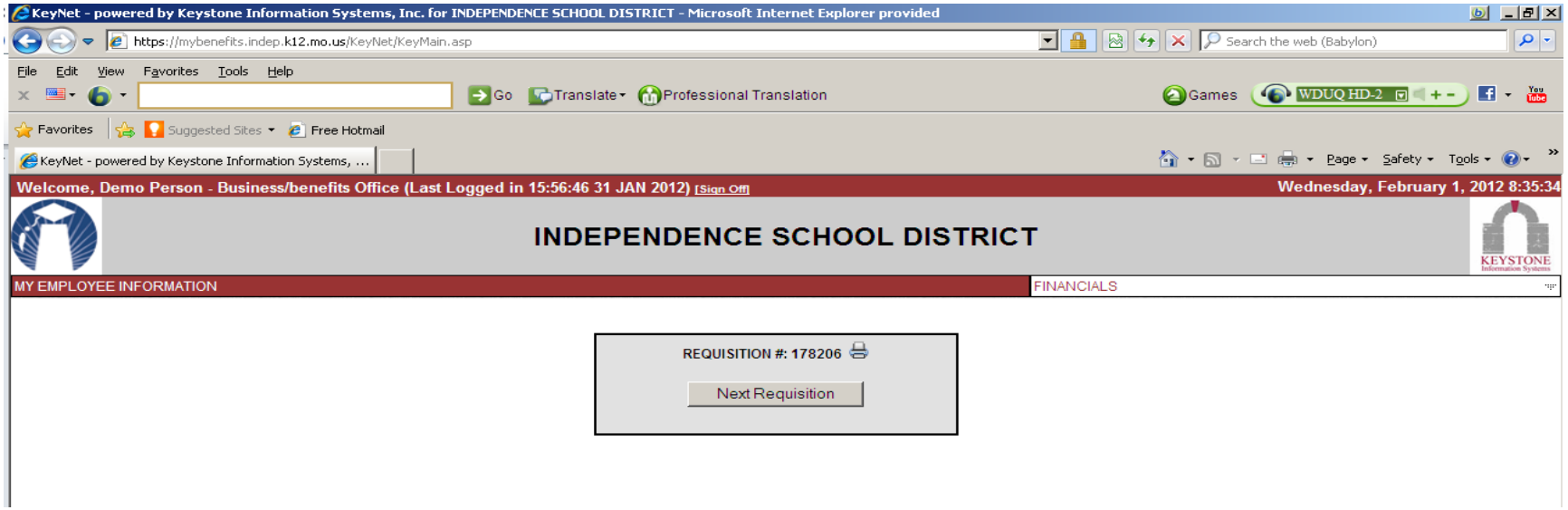
Click Here

School Specialty

Request Complete

You will receive a requisition number, please write the number down in case you lose your connection. You will have the option to create another req if you wish.

IMPORTANT: Click the "printer" icon to print a hard copy of your order.



Thank you!

Online Support

(800) 513-2465

onlinehelp@schoolspecialty.com

REVIEWER CREATES REQUISITION