



## Checklist of Items to include when submitting Purchasing Requisitions

When creating a Purchase Order, first check the Warehouse Catalog, then search our eProcurement Marketplace (EqualLevel), then our Products and Price Guide. If you can't find what you need through any of these avenues please call the Purchasing Department for direction. Please provide complete, accurate, thorough information on each requisition. To assist us in expediting orders and ensuring order accuracy, please include the following detail in your requisitions:

1. In iVisions, go to Purchasing & Payables > Purchasing > Control Panel. Click the green + sign to create your requisition. Each type of requisition follows the same format, with slight differences (examples attached).
2. **Vendor:** Please select the vendor from the drop-down menu. If the vendor is new and you have been in contact with them, please request a W-9 form and electronically attach to your requisition. In this case, use "ADD NEW VENDOR" in the vendor field. If you don't have any specific vendor in mind, select "BEST SOURCE" from the drop-down.
3. **Ship To and DAC:** Your site / location the items will be delivered to.
4. **Requester:** Should be who the items are for.
5. **Project Field:** This field should indicate the type of Purchase Order you are submitting. The most frequently used will be: eProcurement (please see eProcurement documentation for this type of requisition), Cal Card, Confirming, Field Trip, Furniture, Independent Contractor, Reimbursement, Shopping PO, Software, Subscription, Textbooks, Test Materials, etc. If you are unsure, you may select Undesignated.
6. **Account Number:** Use the correct account code for the item you are purchasing. These account numbers determine which approver the order is routed to. If the wrong object code is used, the req will need to be re-routed for additional approvals, causing delays. If you need help determining the correct account, or need any new account numbers added, please contact the Accounting Department.
7. **Qty Field:** Specify the quantity you need. This should be the # each, # of cases, etc., depending on the unit of issue.
8. **Part Number Field:** Provide the manufacturer and model number, ISBN #, Website or Catalog item, as applicable.
9. **Description Field:** Do not leave the default description, populated from the account code description. Delete the default and provide a detailed description of the item using all CAPITAL LETTERS. Include the item name, size, color, etc. Provide as much detail as possible. The description should start out with a general idea of what the item is, followed by additional detail.
10. **Unit Price Field:** Enter the unit price (cost per each, per set, etc., depending on the unit of issue).
  - a. If price of item is unknown, indicate an estimated amount. If limited funds are available, please indicate in the internal notes section of the requisition. Please do not submit requisitions for zero dollars or one penny. Funding approval is required prior to placing an order. If "zero" is approved, it must be re-routed for approvals, resulting in further delays.
11. **Tax Field:** The system will enter the current El Cajon sales tax rate of 8.25%, by default. If it is a non-taxable item, you can delete it. Otherwise, leave the default tax as-is.
12. **Freight Field:** The system will enter the default rate of 10%, by default. If the order qualifies for free shipping, or you have information on the actual freight cost, you can adjust it. Otherwise, leave the default as-is and Purchasing will adjust if needed.

13. **Notes Tab:** Append Internal Notes Field: Include any special instructions in the internal notes. Copy and paste in a website link to the product, if you have one. Please include vendor contact information (i.e. name, phone number or e-mail address) if you have it, especially for new vendors. If ordering furniture or equipment, include teacher name and room number or location for inventory purposes. If replacing an item, specify the District I.D. # that is being replaced. When ordering ink/toner cartridges or copier staples, include District I.D. # of printer or copier.

14. **Requisition Attachments:** (Found in the Actions tab under manage documents) Opens a new content manager screen where you can electronically attach any applicable information to your requisition (i.e., catalog page, printout from website, quote, copy of order form, picture, etc.) Click on the upward arrow icon to upload an attachment or drag and drop it into the center of the page; name it in the description field on the right; click the floppy disk icon to save and then exit this window.

**Once back in the View Requisition Screen, check the box to Submit for Approval and Click Save.**

To check the status of your requisition in the approval workflow, go to the Purchasing Control Panel screen and enter your requisition number in the Req. No. field and click apply. Scroll to the right until you see the 'Next Approver' and 'Next Approver Name' fields. If your order is urgent and you see it is with your principal or other approver, contact them to request approval in iVisions.

### **SOFTWARE NON-MEDIA ORDERS**

For software non-media orders (website subscriptions), the receiving copy of the purchase order will be sent to the school site. Please make sure to include the email address of the user requiring log-in information in the internal notes. Check with the end user within a couple of weeks to see if they have received their log-in information, then sign and return the receiving copy of the purchase order to the Purchasing Department. Payment cannot be made until the receiving copy is returned.

### **ORDERS SHIPPED DIRECTLY TO SCHOOL SITE**

For orders that are shipping directly from the vendor to your school site, please verify the order is complete and post the receiving in iVisions. Refer to the Electronic Receiving Instructions for more detailed directions.

### **REIMBURSEMENT REQUISITIONS**

1. Under the project field, indicate reimbursement.
2. Electronically attach all SIGNED receipts to requisition.
3. Original receipts must be kept until payment has been made.

### **CONFIRMING REQUISITIONS**

1. In order to submit a confirming requisition, items must be received by site.
2. Under the project field, indicate confirming.
3. Electronically attach APPROVED/SIGNED invoice(s) to requisition.
4. Please keep invoices until payment has been made.



**PURCHASING**  
*You got it, We bought it!*

## ATTACHING BACKUP DOCUMENTATION REQUIRED FOR PURCHASING REQUISITIONS

Please electronically attach all backup documentation to your requisitions including quotes, signed receipts, signed invoices, order forms, pictures and any miscellaneous information that will assist us in processing your order. Having the documentation attached in the system will help expedite order processing and will allow all approvers to view the detailed information relevant to your order.

There are two options to attach documents.

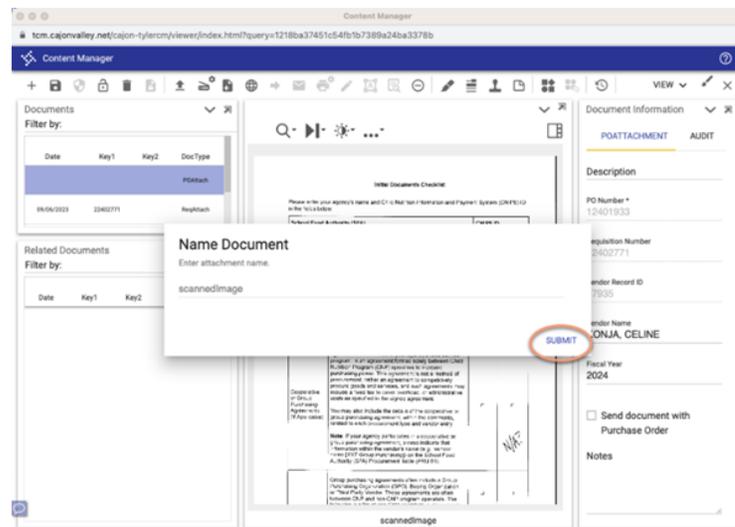
### OPTION A

#### Instructions for attaching documents with the Fujitsu Desktop Scanner

- Bring up your requisition in the Purchasing Control Panel Grid. Do not open the requisition; just highlight it in the grid.
- Click on the “**Actions**” menu and choose “**Manage Documents**”. It will open a content manager window.
- Make sure the scanner is turned ON. Place document face down in the scanner. Press the scanner icon button at the top of the screen.



- The document should feed through the scanner.
- Name the document. Click “**Submit**”



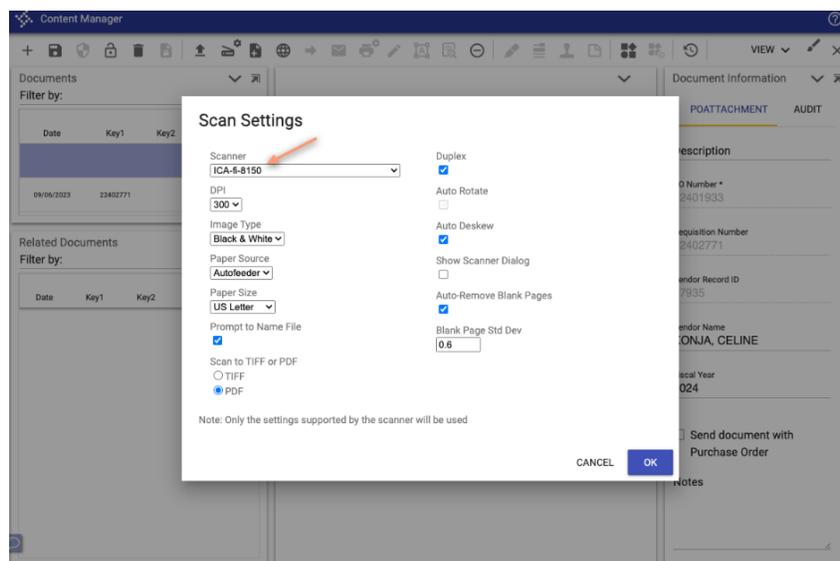
- Complete the **Description Field** on the right-hand side of the screen

- On the top left, click the floppy disk icon to save. 
- Press the “+” button to add a new document. 
- Repeat this process if you have additional files to add, then exit out of this screen.

**NOTE:** If you are having trouble with your scanner, you may need to go into the settings. Click on the gear box.



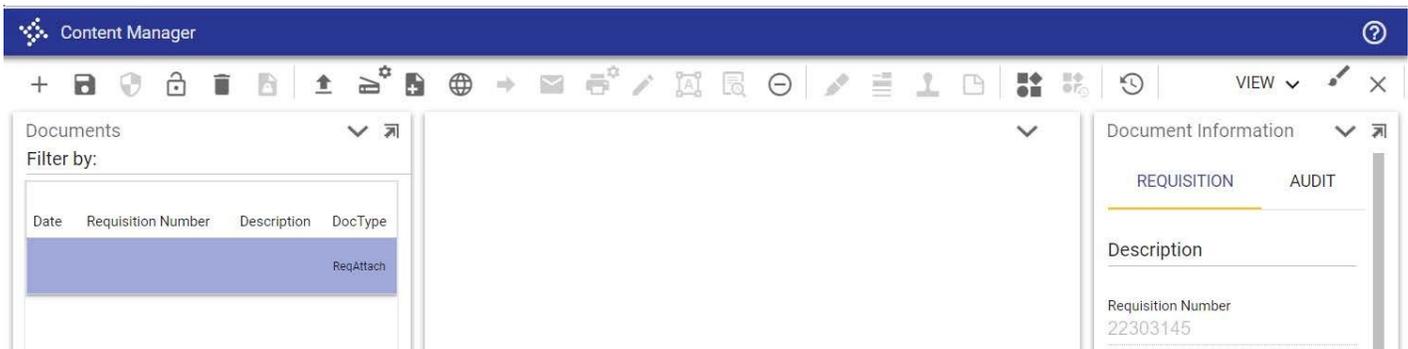
Make sure the scanner is selected.



## OPTION B

### Instructions for attaching documents to a requisition from a file

- It is recommended you create an “iVisions” folder on your “C” drive to save all of your requisition attachments in.
- Scan your documents to your computer. Save the documents as a pdf file in your “iVisions” folder. You may want to use the requisition number in the file name so the files will be easy to locate when attaching to the requisition.
- Bring up your requisition in the Purchasing Control Panel Grid (these instructions are for the Web Portal Version of iVisions, not the desktop version). Do not open the requisition; just highlight it in the grid.
- Click on the “Actions” menu and choose “Manage Documents”. It will open a content manager window as pictured below.

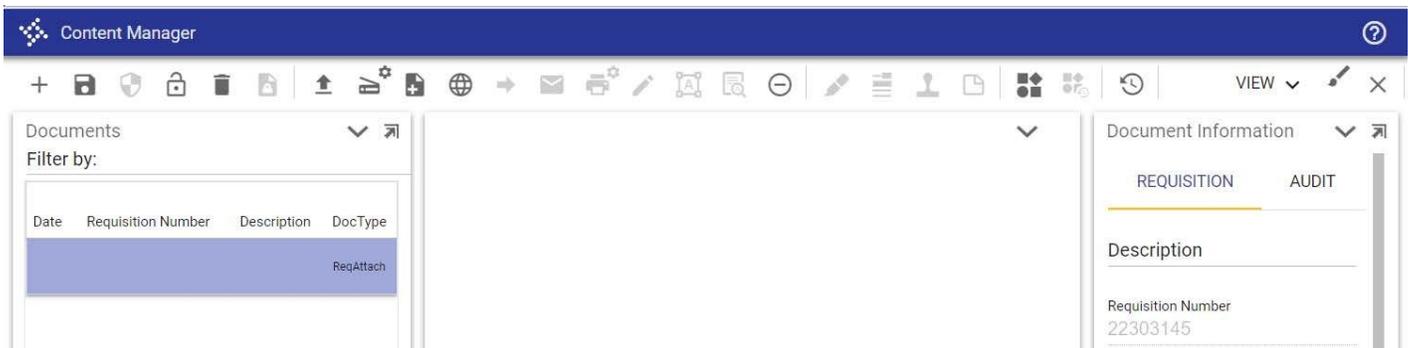


- Press the “+” button to add a new document.
- Click the upward facing arrow to upload the document that is saved on your computer **OR** drag and drop your document into the middle of the screen
- Name the document in the Description field on the right-hand side of the screen
- Click the floppy disk icon to save it
- Repeat this process if you have additional files to add, then exit out of this screen.

## OPTION B

### Instructions for attaching documents to a requisition from a file

- It is recommended you create an “iVisions” folder on your “C” drive to save all of your requisition attachments in.
- Scan your documents to your computer. Save the documents as a pdf file in your “iVisions” folder. You may want to use the requisition number in the file name so the files will be easy to locate when attaching to the requisition.
- Bring up your requisition in the Purchasing Control Panel Grid (these instructions are for the Web Portal Version of iVisions, not the desktop version). Do not open the requisition; just highlight it in the grid.
- Click on the “Actions” menu and choose “Manage Documents”. It will open a content manager window as pictured below.



- Press the “+” button to add a new document.
- Click the upward facing arrow to upload the document that is saved on your computer **OR** drag and drop your document into the middle of the screen
- Name the document in the Description field on the right-hand side of the screen
- Click the floppy disk icon to save it
- Repeat this process if you have additional files to add, then exit out of this screen.

## Sample Confirming Requisition:

Actions Help

Requisition Detail Addresses Notes PO Board Report

Requisition Information		Order Information		PO Information	
Req. Number	22302350	Date	8/24/2022	Order Via	SEND CHECK TO VEND
Vendor	IMAGE BLUEPRINT	Project	CONFIRMING	PO Number	12301877
Ship To	SEE DESCRIPTION IN P.O. FOR LOCATION	Date Required	9/8/2022	PO Date	9/2/2022
DAC	LONG RANGE PLANNING	Order Type	Purchase Order	Revision	0
Requester	HEREDIA, JOHN	Reference	IT SST	Req. App.	Yes
Buyer	Claudia Urqueta	Award Number		Closed Date	09/08/2022
				Status	Closed

Export To

Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax
2	2109.0835.000.0000.8500.6200200.000.000.0	1.000000	EA		CONFIRMING INVOICE 69884 DATED 08.17.2022 \$14.81	14.8100	\$14.81	\$0.00
3	2109.0835.000.0000.8500.6200200.000.000.0	1.000000	EA		CONFIRMING INVOICE 69899 DATED 08.18.2022 \$25.98	25.9800	\$25.98	\$0.00
4	2109.0835.000.0000.8500.6200200.000.000.0	1.000000	EA		CONFIRMING INVOICE 69953 DATED 08.25.2022 \$34.77 CVUSD CONTACT: JOHN HEREDIA, DIRECTOR, FACILITIES, MAINTENANCE & OPERATIONS 619-588-3023	34.7700	\$34.77	\$0.00

## Sample Reimbursement Requisition:

Actions Help

Requisition Detail Addresses Notes PO Board Report

Requisition Information		Order Information		PO Information	
Req. Number	22302587	Date	8/26/2022	Order Via	SEND CHECK TO VEND
Vendor	LARSEN, AIMEE LYNN	Project	REIMBURSEMENT	PO Number	0
Ship To	CAJON VALLEY USD WAREHOUSE	Date Required	9/10/2022	PO Date	
DAC	HILLSDALE MIDDLE	Order Type	Purchase Order	Revision	0
Requester	ASUNCION, TERESA ESTR	Reference		Req. App.	Yes
Buyer	Suzy Willoughby 619.588.3067	Award Number		Closed Date	
				Status	Open

Export To

Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax
1	0100.0875.000.0000.0000.8699098.000.000.0	1.000000	EA	RECEIPT 153002	REIMBURSEMENT FOR REPLACEMENT CHROMEBOOK	250.0000	\$250.00	\$0.00
2	0100.0875.000.0000.0000.8699098.000.000.0	1.000000	EA		REIMBURSEMENT FOR X360 POWER ADAPTER	30.0000	\$30.00	\$0.00

## Sample Independent Contractor Requisition:

Actions Help

Requisition Detail Addresses Notes PO Board Report

Requisition Information		Order Information		PO Information	
Req. Number	22302356	Date	8/24/2022	Order Via	EMAIL
Vendor	CHRISTI'S ADVANCED DANCE	Project	INDEPENDENT CONTRA	PO Number	12301531
Ship To	SEE DESCRIPTION IN P.O. FOR LOCATION	Date Required	9/8/2022	PO Date	8/25/2022
DAC	WD HALL	Order Type	Purchase Order	Revision	0
Requester	MCCLINTOCK, JULIE	Reference	RUSH STARTING 8/29	Req. App.	Yes
Buyer	Katrina Duarteshaw	Award Number	1566-ENRICHMENT	Closed Date	
				Status	Open

Export To

Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax	Freight	Line Total
1	0100.2600.223.1110.1000.5800010.010.000.0	1.000000	EA		AS PER THE TERMS AND CONDITIONS OF RFP 1566, SCHOOL ENRICHMENT PROGRAM SERVICES, DANCE ENRICHMENT ACTIVITIES FOR STUDENTS DANCE ACTIVITIES ENRICHMENT ROTATIONS AT WD HALL ELEMENTARY SCHOOL AFTER SCHOOL HOURS, MONDAY & FRIDAY, AUGUST- OCTOBER. TO BE INVOICED AT \$45 PER HOUR PER STAFF MEMBER CVUSD CONTACT PERSON: JANELLE MERRY, (619) 588-2421, MERRYJ@CAJONVALLEY.NET CONTRACT APPROVED BY GOVERNING BOARD: 10/26/2021	3,645.0000	\$3,645.00	\$0.00	\$0.00	\$3,645.00
		1.000000					\$3,645.00	\$0.00	\$0.00	\$3,645.00