REQUISITION APPROVAL INSTRUCTIONS

Login to Galaxy

Click on + “Purchasing System”
Click on + “Purchasing Requisition Management”
Click on “Approve Purchase Requisitions”

To view ALL requisitions in the queue leave the Purchase Requisition Number field blank – Click Find
To view only 1 Requisition…..type that number in the Purchase Requisition Number Field…..Click Find
Please DO NOT click on “Approve All” without first reviewing each requisition. Click on the different tabs to see all the requisition information.

Note: If you can not see the account code under the Account Distribution tab, then the account code is listed under each line item on the Items tab.

Key fields to review:

**Details tab**
- Approval List – Is it yours?
- Are all white areas except the Board Description field completed?
- Does the routing field include the delivery location site?
- Is the justify-purpose description adequate?

**Items tab**
- Is the item description adequate? More is better here. Must include a full description of item, including: size, color, model number, title, type of item or service (example: is it a book, DVD, software, printer…. etc)
- **New Vendor:** In the Internal Notes, select the standard note called “new vendor”. Fill in all the vendor’s information in the notes section. Please send in any paperwork (quote, order form, copy of catalog pages, print out from internet) with new vendor requisitions. If an existing approved vendor is not available, Purchasing will set up the vendor and assign a number. Please allow extra time for processing of new vendors.
- **Asset items** (over $500) must be listed out individually on the purchase requisition. DO NOT include them on an attached list. They must be listed on the requisition and coded accordingly.
- **Freight Charges:** If freight is NOT charged, please indicate “No freight charges per vendor” in the external notes. If it is not indicated in the notes, and freight charges are not included, the requisition will be returned to the originator to add freight charges.
- Is the Account Code correct? Item is over $500.00 need to be coded to object 44xx (Non-Capitalized Equipment). Items over $5,000.00 need to be coded to object 64xx (Capitalized Equipment).
To view the line item details:
Highlight the line item by double clicking on that line
Click on “View Desc” to view the entire description

Click on the “+” next to the line number to view the account(s) to be charged for each item.
Use the scroll bar to scroll to the right to see the freight, tax, total line item amount and delivery instructions.

Click on **Account Distribution** to see the account code string. Account Distribution can be used if all items will be charged to the same account code(s). The expense can be split by percentage to multiple account codes.

Note: Account codes can also be entered on each line item under the Items tab. If there are no account codes listed under the Account Distribution then check under each line item.
Click on the **Notes** tab to view any notes

**Internal Notes** are viewed by the originator, approvers and purchasing. They do NOT print on the PO

Use this area to note:

- Any attachments, backup that will be sent to the district office
- List new vendor information (back up documentation must be sent with new vendors)
- Special directions or information for the approvers, financial services or purchasing.
- Reference any additional price quotes received.

**External Notes** DO print on the purchase order and are viewed by the vendor.

Use this area to note:

- Quote / Bid numbers
- Notes to the vendor
- Delivery instructions for the warehouse
- Any special notes that need to printed on the purchase order
Click on the **Authorized Purchaser** tab to view the list of purchasers for “OPEN” requisitions only.

All authorized purchasers should be listed as well as “Check CDL” for verification. Only **regular** employees are allowed to pick up and sign for delivered products. This information prints on the Purchase Order for vendors to verify.

Click on the **Approvals** tab to view prior approvers.

**RELEASING THE REQUISITION FROM THE APPROVERS QUEUE**

Once the requisition is fully reviewed, the chooses are:

- “Y” yes - to approve the requisition.
- OR
- “N” no – to deny the requisition.
Type a “Y” for yes or “N” for no

Comments may be entered on Yes approvals

Comments are required on No approvals

Click Save

If a requisition is denied, please note why in the comments and notify the originator of the requisition.

Only the originator can change the requisition and resubmit it for approvals.

When a requisition is changed and resubmitted it will go back though the approval process.

The requisition may be canceled by the originator if needed. Once a requisition is canceled it can not be open and resubmitted. However it can be copied as a new requisition.
Approval status of any Requisition can be viewed on the “View Purchase Requisitions” screen.

From the Menu go to:
- Purchasing System
- View Purchasing
- View Purchase Requisitions
- Search by any of the criteria available