

Purchasing Department

GALAXY

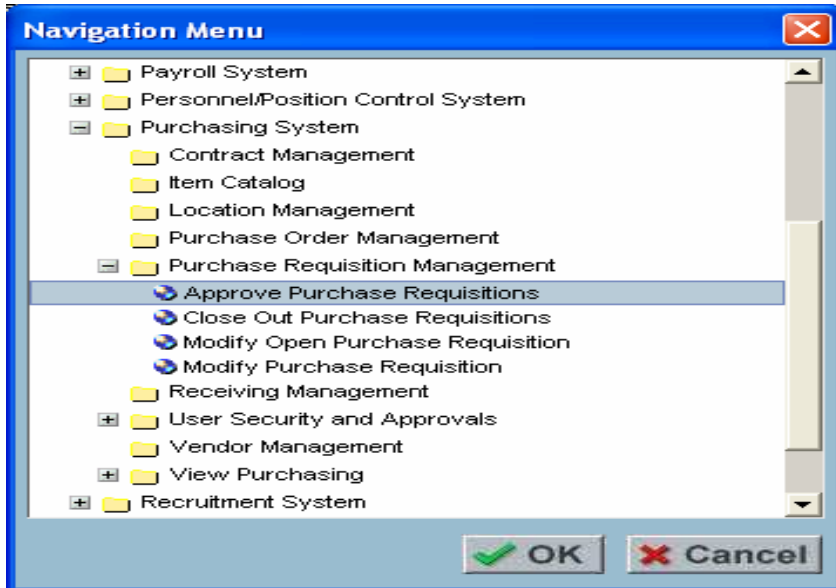
PURCHASE REQUISITION

APPROVAL

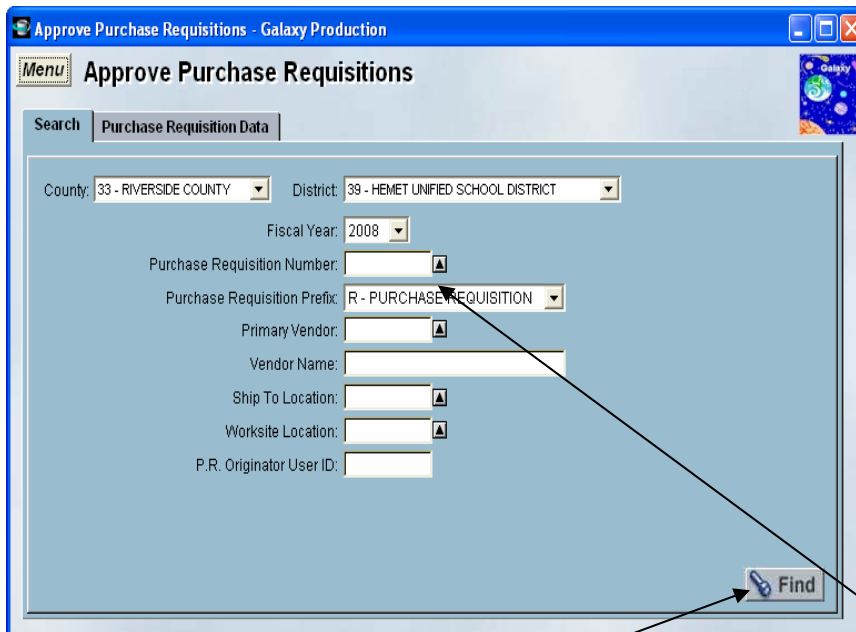
MANUAL

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 Requisitiontype 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

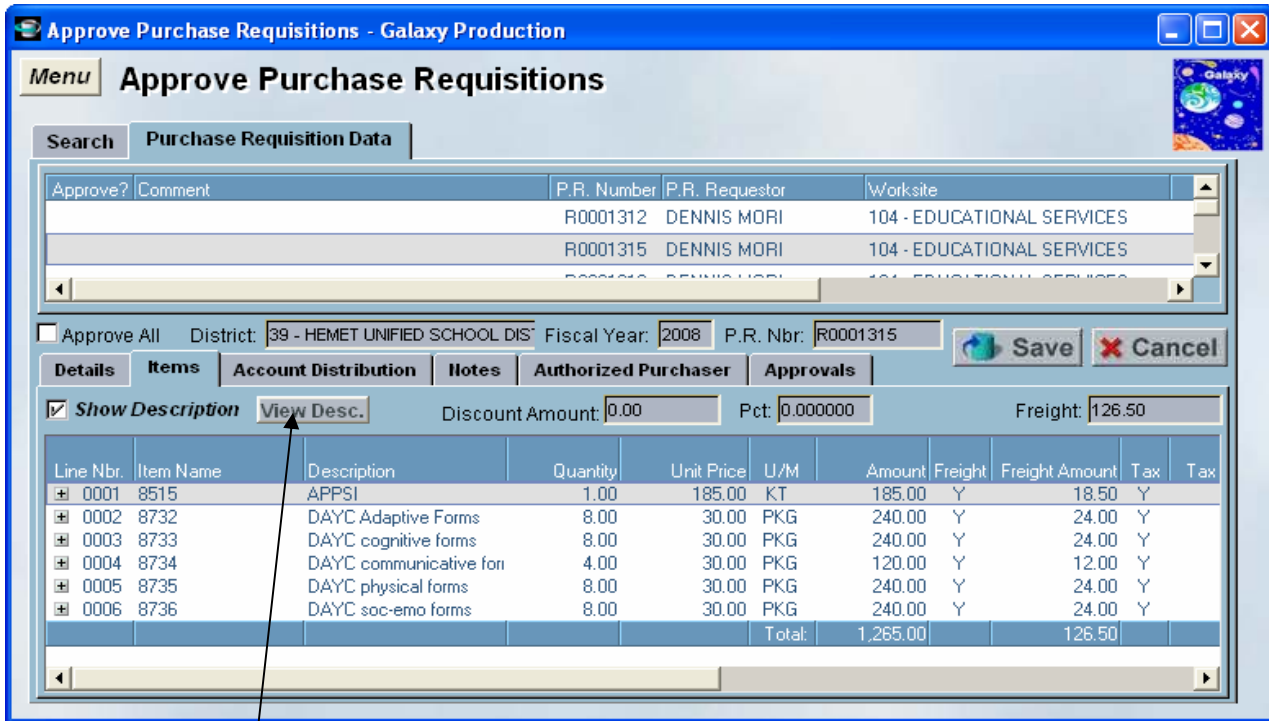
Key fields to review:

Details tab

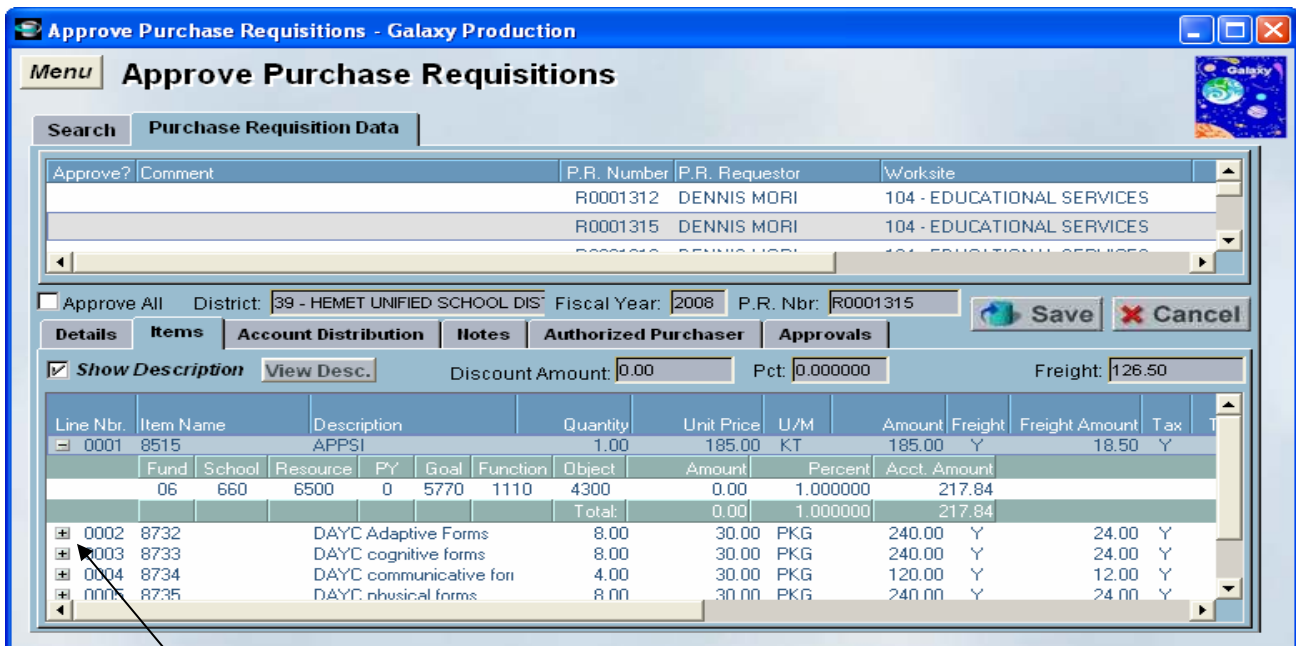
- Approval List – Is it yours?
- Are all white areas except the Board Description field completed?
- Does the routing field include the delivery location site
- Is the justify-purpose description adequate?

Items tab

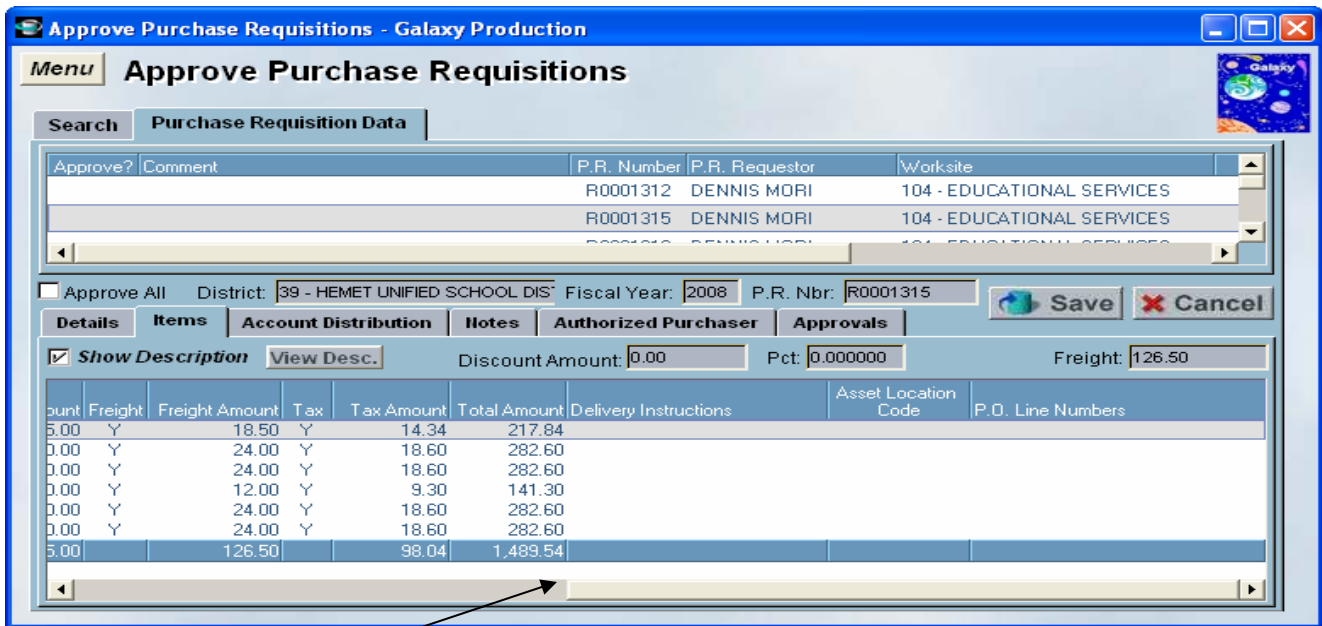
- Is the **item description** adequate? More is better here. Must include a full description of item, including: size, color, model number, title, type of item or service (example: is it a book, DVD, software, printer.... etc)
- **New Vendor:** In the **Internal Notes**, select the standard note called “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).



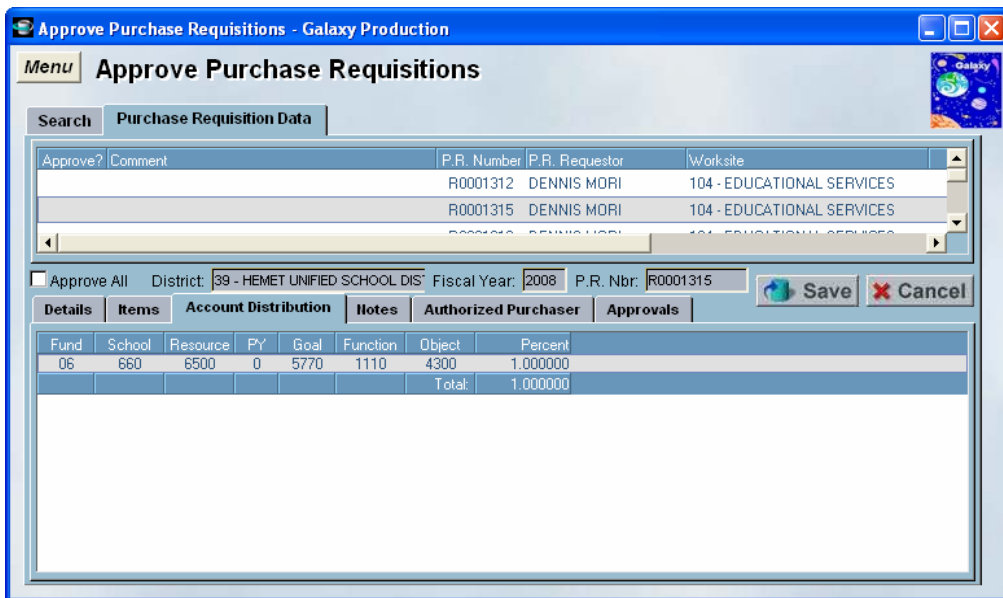
To view the line item details:
 Highlight the line item by double clicking on that line
 Click on "View Desc" to view the entire description



Click on the "+" next to the line number to view the account(s) to be charged for each item.

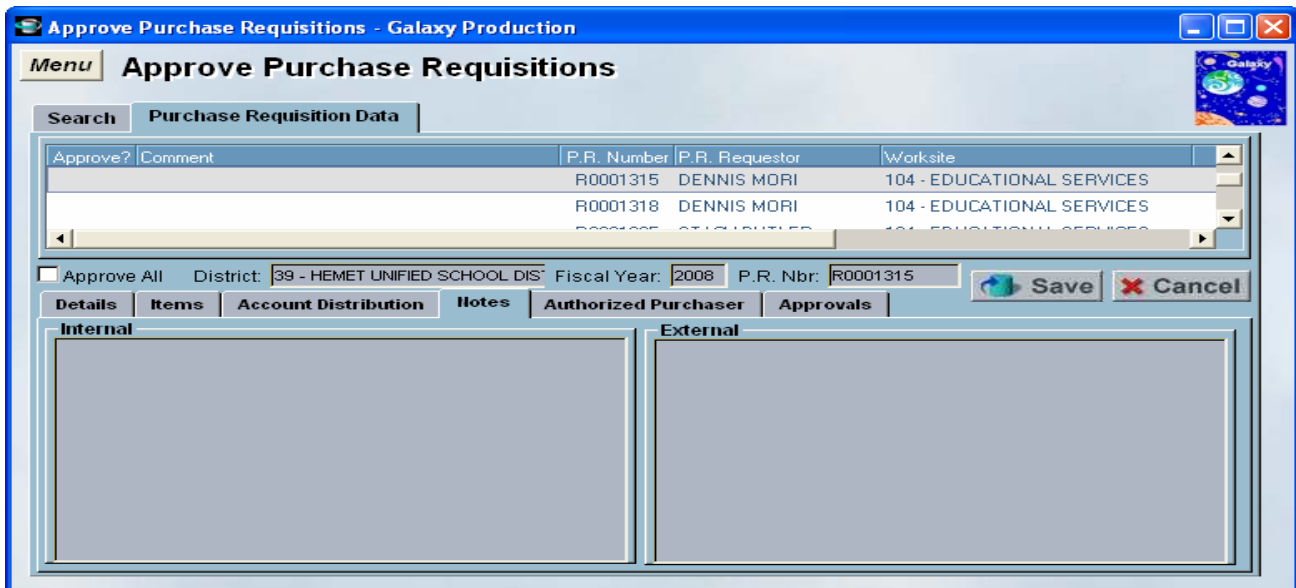


Use the scroll bar to scroll to the right to see the freight, tax, total line item amount and delivery instructions.



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

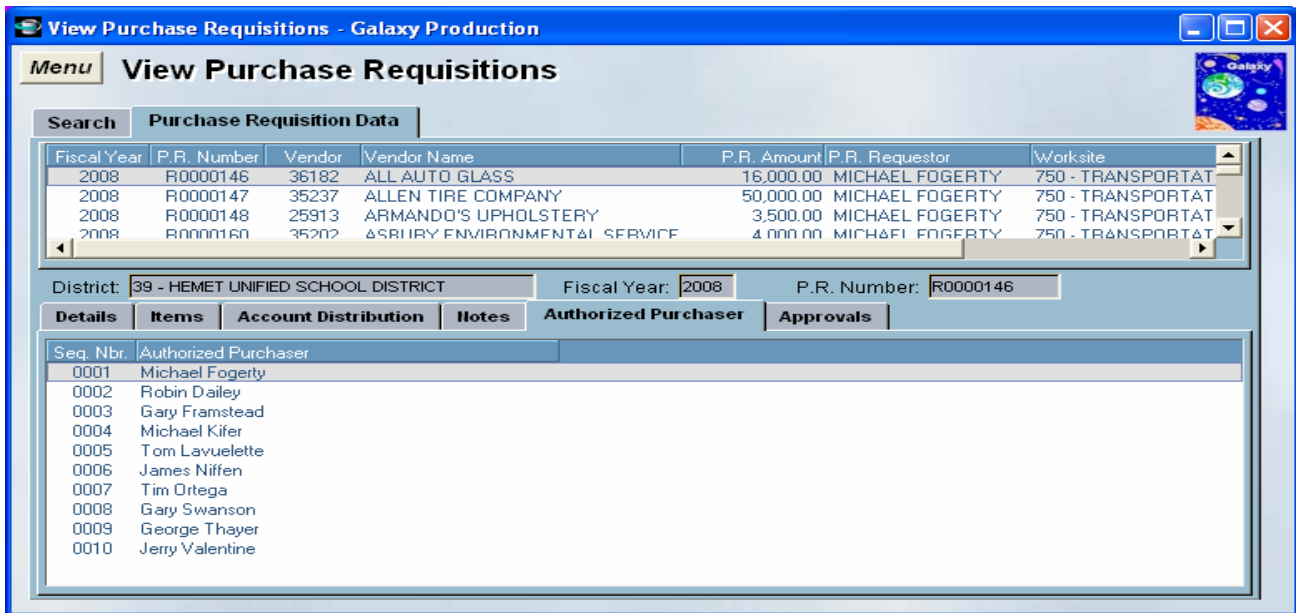
Use this area to note:

- 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.

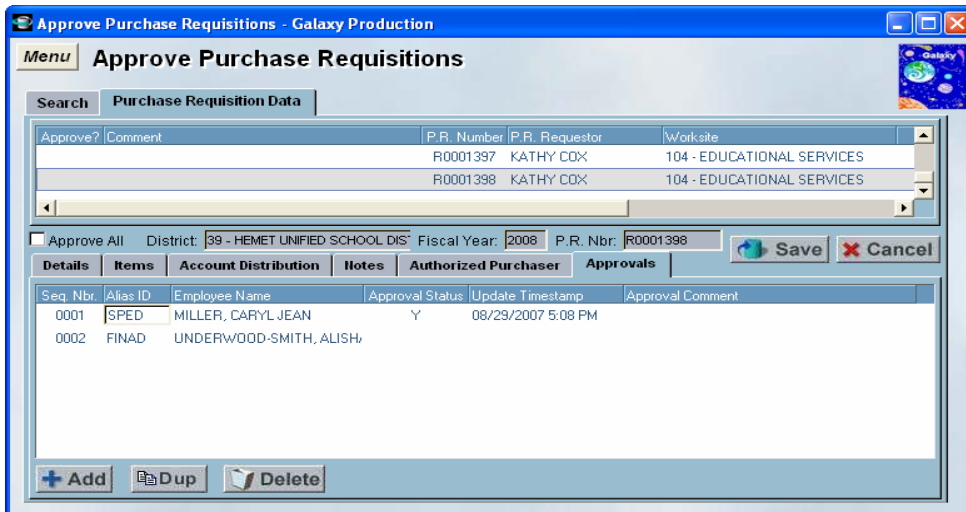
External Notes DO print on the purchase order and are viewed by the vendor.

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.

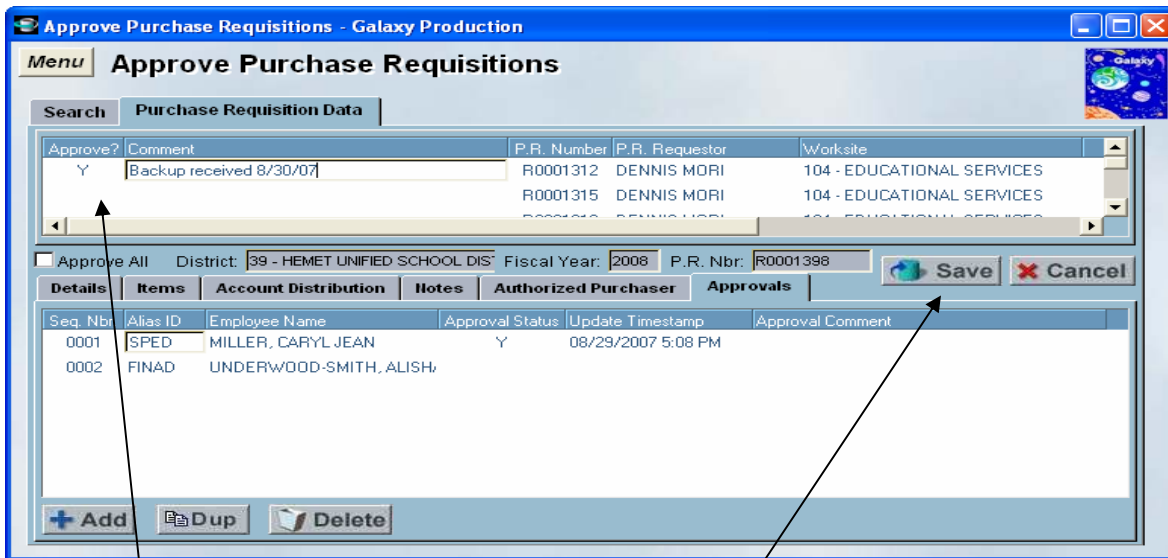
RELEASING THE REQUISITION FROM THE APPROVERS QUEUE

Once the requisition is fully reviewed, the chooses are:

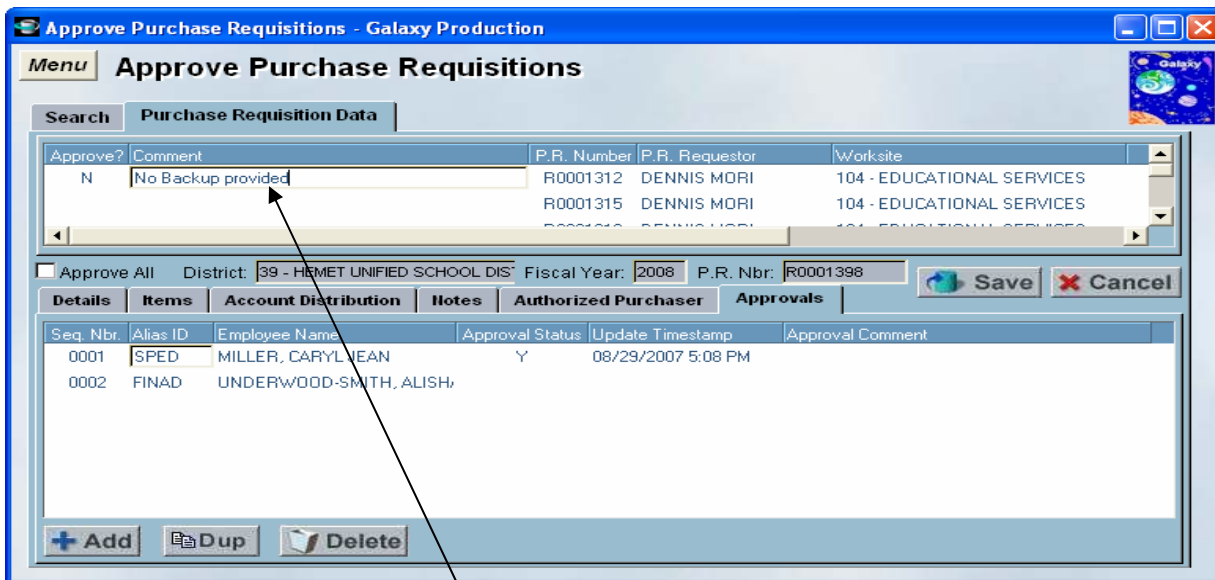
“Y” yes - to approve the requisition.

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.

VIEW PURCHASE REQUISITIONS

View Purchase Requisitions - Galaxy Production

Menu **View Purchase Requisitions**

Search **Purchase Requisition Data**

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2008	R0000568	33194	ROCHESTER 100 INC.	641.11	MARC HORTON	165 - WINCHESTER S
2008	R0001614	15000	PIP PRINTING	1,409.53	DAVID HORTON	104 - EDUCATIONAL S
2008	R0001714	25320	COMPLETE BUSINESS SYSTEMS	808.13	LORI HENRY	201 - DARTMOUTH M
2008	R0001715	26763	CALIFORNIA FARMER OF MIDDLE SC	317.86	LORI HENRY	201 - DARTMOUTH M

District: 39 - HEMET UNIFIED SCHOOL DISTRICT Fiscal Year: 2008 P.R. Number: R0000568

Details **Items** Account Distribution Notes Authorized Purchaser **Approvals**

Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	WINPRIN	LOGAN, KRISTINE A	Y	08/10/2007 9:39 AM	
0002	ACTRES1	MAGBANUA, JOSEPHINE AGE	Y	09/04/2007 1:43 PM	RECVD BACK-UP 09/04/07
0003	CATACT	ALLEN, MARION J			
0004	ESCRD	HERBRANSON, MARCHETA A			

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