



Purchasing Requisition Ordering Procedure

The Corporate Director of Purchasing – CDP is responsible for college wide procurement policies and procedures for all hard line products and services. This includes price negotiation, vendor selection, supply chain management and light maintenance service programs. The CDP in cooperation with SJVC's campus Facility Managers, are charged with maintaining and distributing supplies and services to all campus locations in a time sensitive and efficient manner.

I have a supply need now what ?

Section 1: New Purchase Request for Lab or Office Supplies

1. Check stock availability with your facilities manager prior to generating a new purchase request for supplies. If no stock exists, proceed to step two.
2. Generate new electronic Purchase Request form. Please see [step-by-step instructions](#). Once your purchase request form has been properly filled out and submitted it will be assigned a **service desk** ticket number and sent to your campus director for approval. Once approved your request will be dispatched to your facilities department for fulfillment. **That's It!** It takes approximately **24-72** hours before you will receive your requested supplies.

NOTE: All new purchase requests must have prior written approval from your campus director and/or supervisor before a purchase order can be issued.

NOTE: College credit cards are prohibited for use in purchasing regular classroom supplies and services. These would include: *a. Textbooks, b. Consumable supplies c. Testing materials and services of any kind.*

NOTE: The Facilities Manager is responsible verifying all physical inventory levels prior to vendor order placement.

Section 2: New Purchase Request for Capital or Non-Capital Equipment or Furnishing Items

1. All Capital and Non-Capital equipment and furniture are purchased exclusively by the CDP.
2. Check stock availability with the CDP prior to generating a new purchase request. If no stock exists, proceed to step three.
3. Generate new electronic Purchase Request. See access and [Step-by-Step instructions](#). Once your purchase request form has been properly filled out and submitted it will be assigned a **service desk** ticket number and then forwarded to your campus director for approval and the CDP and controller for review and fulfillment. Delivery time will vary and is dependent on justification, budget scheduling and/or senior management approval.

Continued:

Section 3: Request Purchase for Curriculum Capital Budget Request Items

All equipment items categorized as capital, or non-capital equipment, is purchased through the corporate office utilizing Section 2 of this policy.

1. All order requests for new capital and or non-capital categorized equipment, which is intended for curriculum use, must be introduced through a curriculum program review.
2. Generate new electronic Purchase Request. Please see [Step-by-Step instructions](#). Once your purchase request form has been properly filled out and submitted it will be assigned a **service desk** ticket number and then forwarded to your campus director for approval and the CDP and controller for review and fulfillment. Delivery time will vary and is dependent on justification, budget scheduling and/or senior management approval.

Section 4: Ordering Guidelines for Information Technology Software, Hardware and Licensing, Curriculum and Non-Curriculum

All information technology software and hardware is purchased through the corporate office and cannot be purchased at the campus level without the express approval or knowledge of corporate information services department.

1. Generate new electronic Purchase Request. Please see [Step-by-Step instructions](#). Once your purchase request form has been properly filled out and submitted it will be assigned a **service desk** ticket number and forwarded to your campus director for approval and then to the Corporate Director of Information Services – CDIS for review and approval. Once the CDIS has approved the request it will be sent to the CDP for fulfillment. Delivery time will vary and is dependent on justification, budget scheduling and/or senior management approval.

Section 5. Purchasing - Vendor Register Listing

The Purchasing department has established a Vendor Register Listing for use at all facility locations. A registered vendor is one that, at a minimum, meets many of the vendor selection criteria (i.e., pricing, billing terms, order fill rate, return goods policy, etc.) established by the Corporate Purchasing Department.

The Vendor Register Listing is limited to those vendors most commonly utilized by the college and does not include every vendor in the college vendor database. A goal of the Corporate Purchasing Department is to reduce the number of vendors used by the college in order to leverage our buying power, thus receiving goods and services at greater discounted prices.

The Vendor Register Listing will be updated regularly, as the Purchasing department is continuously negotiating with current and prospective vendors. Vendors not appearing on the Vendor Register Listing may not be used until they are approved by the Corporate Purchasing Department. Vendors can be added to the listing by processing a [New Vendor Request Form](#) and submitting it to the Corporate Purchasing Department. The New Vendor Request form can be obtained in the [Info Zone](#) Purchasing Site Location.

[New Vendor Request Form](#)

Continued:

Section 6. Purchasing – Electronic Vendor Account Creation

In conjunction with Section 5 of this Procurement Policy/Procedure. The Corporate Directors of Purchasing and Controller maintain authority for the purposes of establishing new electronic vendor accounts for any purpose.

Employees are prohibited from establishing new electronic vendor credit or charge accounts with new or existing vendors for any purpose.

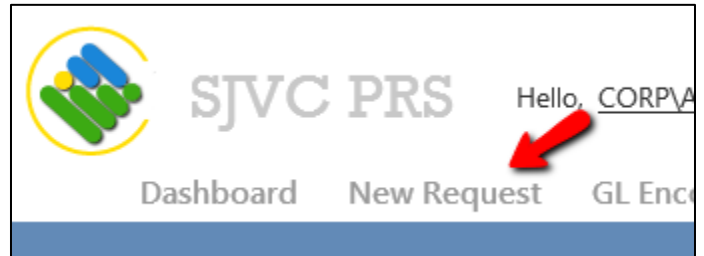
New electronic vendor accounts can be established by having the campus Facilities Manager process a [New Vendor Request Form](#) and submitting it to the Corporate Purchasing Department.

The New Vendor Request form can be obtained in the [Info Zone](#) Purchasing Site Location.

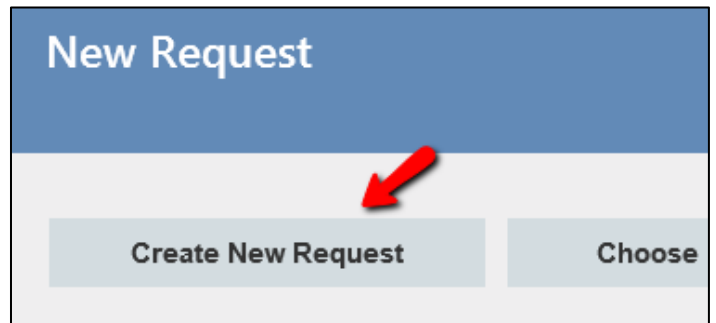
New PRS User Instructions

This instructional overview will show you how to submit a new **PRS Request**, save an **Order template** and recall an order template to submit a new request.

1. Once you access the **PRS**, you can begin creating a new request by clicking on **New Request**.



2. From here, you will choose **Create New Request**.



3. In the **New Request** form, you will begin by typing in the **Vendor**. For this example we will use **Staples Business Advantage**.

Following this by selecting a **Ship To**: location from the dropdown menu.

The **Project ID** field is not a required field. You will enter a Project ID if your Purchase Request is in regards to a Project from the Project Site.

Moving down, you will provide a **Category** and **Subcategory**. Lastly, you will provide a **Required By** date.

A screenshot of the 'New Request' form. The form has a blue header with the text 'New Request'. Below the header, there are several input fields: 'Vendor' with the value 'Staples Business Advantage', 'Ship To' with the value 'CAO Mission Oaks Office', 'Project ID' (empty), 'Category' with the value 'Supplies - Office', 'Subcategory' with the value 'Replenishment', and 'Required By' with the value '8/13/2014'. At the bottom of the form is a 'Submit' button.

4. On this next screen, you will begin typing into the **Item Code** field either the vendor item number of the item description. The field will populate a drop down menu with all approved items matching the characters you have entered.

Please note: The PRS only provides for the purchase of *approved* items.

Provide a **Quantity** for the item and choose **Add Item**. This will add your item to your Request. Repeat this until you have listed all the desired items.

Vendor: Staples Business Advantage
Ship To: CAO Mission Oaks Office
Project ID:
Category: Supplies - Office
Subcategory: Replenishment
Required By: 8/15/2014

Item Code: /051165 - Yellow Highlighters
Quantity: 5
Item Description: Yellow Highlighters
Unit Cost: 5.45
Extended Cost:

Add Item

Red arrows point to the Item Code field, the Quantity field, and the Add Item button.

5. After you have added items to your Request, you may remove them one row at a time by choosing **Remove**.

	Item Code	Item
Remove	/051165	Ye

A red arrow points to the Remove button.

6. At this point in making the **Purchase Request**, you may choose to **Submit** the request, **Cancel** the request or also **Save As Template**. This will allow you to recall this information in the future and place another **Purchase Request** using this information.

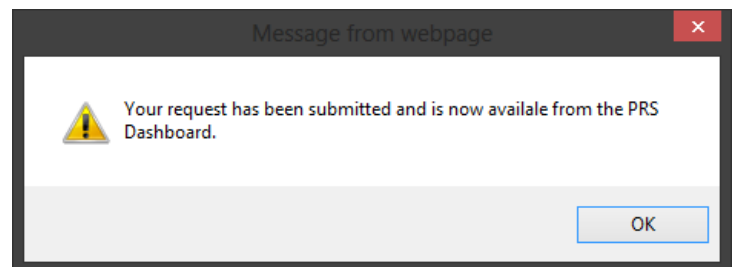
Subtotal: 27.25

Submit **Cancel** **Save As Template**

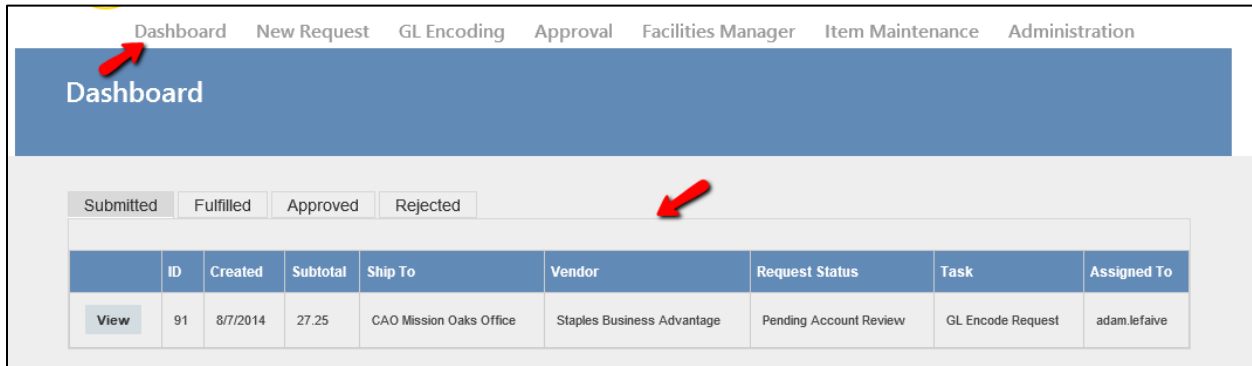
Choosing **Submit** will bring up a confirmation box and then will submit your **Purchase Request**.

7. When your **Purchase Request** is successfully submitted, you will get this pop up box display for you.

In addition, you will also receive an email confirming that your **Purchase Request** has been submitted.



8. After you submit your order, you can track them using the **Dashboard** in the PRS.

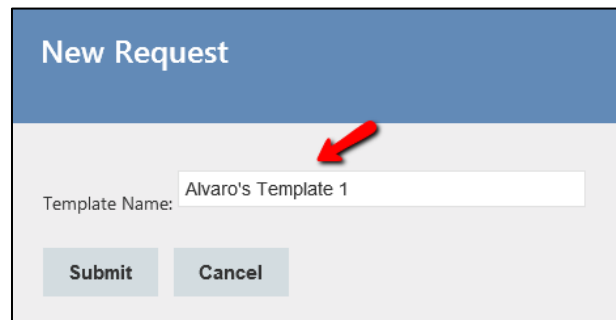


The screenshot shows the PRS Dashboard interface. At the top, there are navigation tabs: Dashboard, New Request, GL Encoding, Approval, Facilities Manager, Item Maintenance, and Administration. The 'Dashboard' tab is selected and highlighted with a red arrow. Below the navigation is a blue header with the word 'Dashboard'. Underneath, there are filter buttons: Submitted, Fulfilled, Approved, and Rejected. A red arrow points to the 'Submitted' filter. Below the filters is a table with the following data:

	ID	Created	Subtotal	Ship To	Vendor	Request Status	Task	Assigned To
View	91	8/7/2014	27.25	CAO Mission Oaks Office	Staples Business Advantage	Pending Account Review	GL Encode Request	adam.lefaive

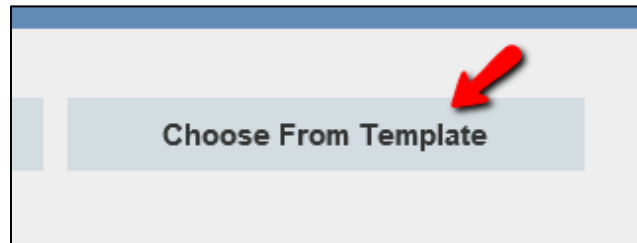
9. From step 6, if you choose **Save As Template**, you will be taken to a screen where you will be asked to provide your template a name.

Once you provide your template a name, select **Submit**. When you choose **Submit**, you will get a confirm message to confirm you'd like to submit. After you do so, you will get a message that your template was saved successfully.



The screenshot shows the 'New Request' screen. At the top, there is a blue header with the text 'New Request'. Below the header, there is a text input field labeled 'Template Name:' containing the text 'Alvaro's Template 1'. A red arrow points to the input field. Below the input field are two buttons: 'Submit' and 'Cancel'.

10. You can create a new **Purchase Request** using a saved template. To complete this, choose **New Request** from the upper navigation and then select **Choose From Template**.



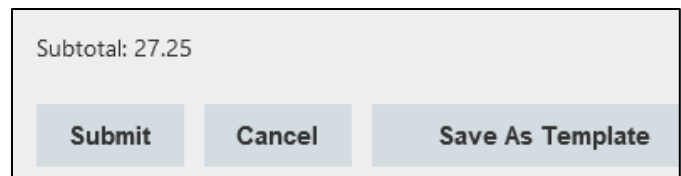
The screenshot shows a large, light blue button with the text 'Choose From Template'. A red arrow points to the button.

11. Select a template from the dropdown menu and then select **Insert**.



The screenshot shows the 'New Request' screen. At the top, there is a blue header with the text 'New Request'. Below the header, there are two buttons: 'Insert' and 'Delete'. A red arrow points to the 'Insert' button. To the right of the buttons is a dropdown menu with the text 'Alvaro's Template 1' and a downward arrow. A red arrow points to the dropdown menu.

12. This will take to Step 6 where you can select **Submit**, and then confirm your **Purchase Request**.



The screenshot shows a screen with the text 'Subtotal: 27.25'. Below the text are three buttons: 'Submit', 'Cancel', and 'Save As Template'.

13. From the Dashboard, you can also view your **Rejected Purchase Requests**. To pull up an individual request, select **View** from the left hand side of the **Purchase Request**.

Dashboard

Submitted | Fulfilled | Approved | **Rejected**

	ID	PO	Created	Subtotal	Approval Date	Ship To	Vendor	Approved By
View	85		8/6/2014	27.25		CAO Mission Oaks Office	Staples Business Advantage	

14. You are be able to view all of the information for the rejected **Purchase Request** and if you'd like to **Resubmit** it, you can click on **Resubmit**.

Detail

Vendor: Staples Business Advantage
 Requested By: Alvaro.Marin
 Category: Supplies - Office
 Status: Rejected

Submitted Data: 8/6/2014 5:37:43 PM
 Subcategory: Replenishment
 Ship To: CAO Mission Oaks Office

Description	Item Code	Quantity	Unit Cost	Extended Cost	GL Account
Yellow Highlighters	/051165	5	5.45	27.25	67210-0080-00

Subtotal: 27.25

Approval Date:

Approved By:

Notes:

[Print Preview](#) [Resubmit](#)

15. Once you have sucsefully submitted your PRS requests it will travel through an approver workflow process.

Approvers Listing

Division/Location Description	Approver
Admissions	Chief Administrative Officer
Marketing	Chief Administrative Officer
Placement	Chief Administrative Officer
Accounting	Chief Financial Officer
Facilities	Chief Financial Officer
Management Information Systems	Chief Financial Officer
Administration	Chief Operating Officer
Teaching & Learning	Vice President of Academic Affairs
Human Resources	Vice President of Administration
Accreditation	Vice President of Legal
Financial Aid	Vice President of Student Financial Services
Campus	Campus Director
Maintenance	Campus Real Estate Development
Software	Director of Network Operations