



# Public Schools of Edison Township

*Nothing Less Than Excellence*

# GENESIS REQUISITION Training Manual

# PURCHASING PROCESS

## REQUISITION

- Item necessary to initiate procurement of all goods and services.
- This process is initiated before goods or services are received or performed.

## PURCHASE ORDER

- The result of an approved requisition, the official document/contract with the vendor needed to purchase goods and services.

## RECEIVING (BLUE SHEET)

- The official acknowledgement that goods and/or services were received and payment can be released.
- Signed Blue Sheet must be sent to Accounts Payable for payment.

# **AUTHORIZED PURCHASES**

**VS.**

# **UNAUTHORIZED PURCHASES**

## **AUTHORIZED PURCHASES**

The Edison Township Board of Education only recognizes purchases made through the approved purchase order process. All purchases made by the District require the following before services has begun or goods have been ordered:

- Written Official Purchase Order with a Purchase Order Number and
- Authorized Signature (School Business Administrator)

## **UNAUTHORIZED PURCHASES**

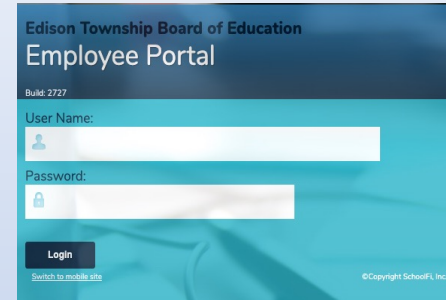
- School district administrators, employees and board of education members are not permitted to contract with vendors on behalf of the district.
- Any Edison Township Public Schools employee who orders and/or receives any materials, supplies or services without first going through the approved purchase order process has made an unauthorized purchase.
- Unauthorized purchases are a violation of State Law and District Policy.
- Any Edison Township Public Schools employee who orders and receives goods and/or services without going through the proper purchase order process may be held responsible for payment of the order.

# Purchase Order Requirements

Amount	Documents for Order	Documents from Vendor
Up to \$6,599	Quote from Vendor	W-9 & Vendor Form (NJBRC is suggested)
\$6,600-\$17,499	At least 2 competitive quotes from different vendors	W-9, NJ Business Registration Cert
\$17,500-\$43,999	At least 2 competitive quotes from different vendors	W-9, NJ Business Registration Cert and Chapter 271 PCD
\$44,000- and over	Bid/RFP or a State Contract or Coop	W-9, NJ Business Registration Cert, Chapter 271 PCD & Affirmative Action Evidence (AA)

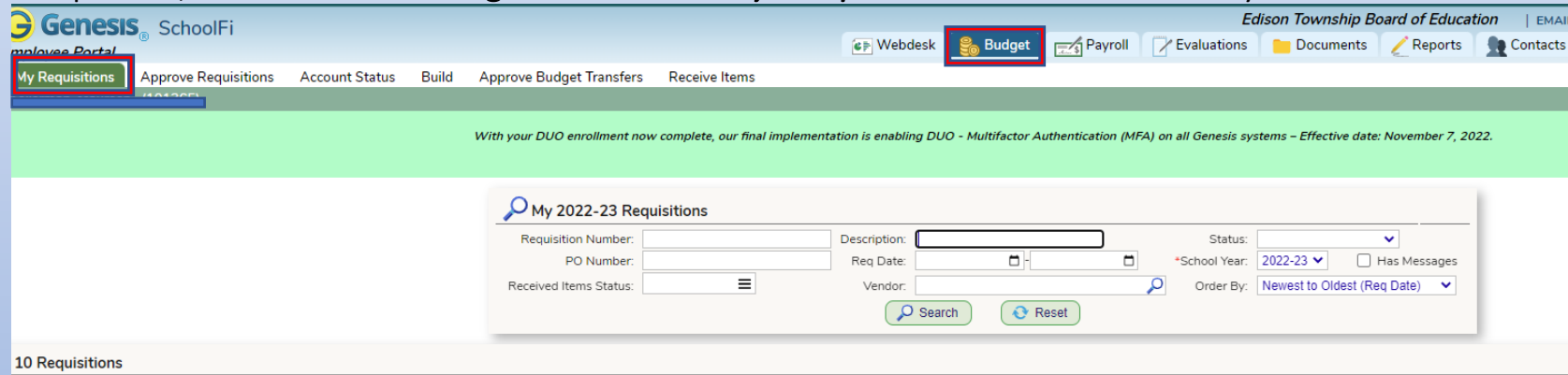
# Entering Requisitions

To work with Requisitions, log into your Employee Portal. 



Edison Township Board of Education  
Employee Portal  
Build: 2727  
User Name:  
Password:  
Login  
[Switch to mobile site](#)  
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Once in your portal, click on the **Budget** Tab. The **My Requisitions** tab is where you will enter a new requisition as



Genesis SchoolFi Edison Township Board of Education | EMAIL: |  
Webdesk **Budget** Payroll Evaluations Documents Reports Contacts  
My Requisitions Approve Requisitions Account Status Build Approve Budget Transfers Receive Items  
With your DUO enrollment now complete, our final implementation is enabling DUO - Multifactor Authentication (MFA) on all Genesis systems - Effective date: November 7, 2022.  
My 2022-23 Requisitions  
Requisition Number: PO Number: Received Items Status: Description: Req Date: Vendor: Status: School Year: 2022-23 Has Messages Order By: Newest to Oldest (Req Date)  
Search Reset  
10 Requisitions

You have the ability to search your list of requisitions by using the Description, Status, Vendor or requisition date fields listed in the search section of this screen.

**NOTE:** throughout Genesis you will notice when entering new data in a field the data is red. This means the data is not saved. Be sure to save often. If you move to another area and do not save the data will be lost and you will have to re-enter. As well as view all previous entered by you for this school year.

# Entering a New Requisition

1. Click on the **New Requisition** button.
2. If you are able to enter requisitions for more than one group, use the Approval Chain drop-down to select the group for which this requisition is being entered and then click the **Create Requisition** button.
3. The Requisition Entry screen opens. Everything entered on this screen becomes a purchase order after the approval process is complete. Notice that it has **three sections**. See below for instructions on entering in each section.

Budget School Year 2022-23    Opened    Jul Aug Sep Oct **Nov** Dec Jan Feb Mar Apr May Jun

Requisitions: **R-23-0003787**

**R-23-0003787**

Status: **Filing Form**    State Check Date: **11/30/2022** (0 days)    School Year: **2022-23**

\*Requisition #: **R-23-0003787**    \*Description:

Category:     \*Type:  Regular     State Contracted     Cooperative

Default Bid Aggregation Category:     \*Originator: **Kellerman, Maureen** [Change...](#)    Board Approval Required

Bid Required:     \*Vendor:     Address: [Select a vendor](#)    Contact: [Select a vendor](#)

Approval Chain: **Business Office** [Change...](#)     Quote attached    Quote #:     \*Requisition Date: **11/30/2022** (0 days)

Save    [Preview PDF](#)   

**Section A**

**Section B**

**Line Items**

Item #	Type	Unit Type	Bid Category	Description	Catalog #	Quantity	Unit Price	Total Price	Actions
There are no line items									
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Save

**Section C**

**Shipping, Delivery, Misc and Billing**

\*Shipping Cost Type:     Shipping Cost:  % \$    \*Total w/ Shipping: **None**    Expires After:

Delivery Type:     Delivery Instructions:

Needed By:     Ship to Attention:     Notes:

\*Ship To:     Ship To Address: [Select a ship to](#)    Ship To Contact: [Select a ship to](#)

Save    [Preview PDF](#)

Charge to budget accounts: [Account Entries](#)    **0 Transactions**

Account Number	Desc	Available	Amount	Request Amount
There are no accounts.				

Charge To...

Documents:

#	Type	Title	Vendor	File	Size	Created On	By	Actions
There are no documents attached to this requisition.								

Attach Document

# Section A

- **Description** –this field is what will show on our reports for board approval. Enter a description that will best describe this order so it is understandable to the board members. For example: Classroom Supplies for Art Class
- **Category** – use this drop-down to select the category to which this order applies.
- **Type** – refers to the vendor:
  - Regular – most orders fall into this category
  - State Contracted – if this order is to a vendor your district has a state contract with, select this option. After selecting this option, the State Contract # field opens where you can enter the state contract number for this vendor.
  - Cooperative –such as Ed-Data, for ordering you can indicate that this is a cooperative order by selecting this option. After selecting this option, the Co-op Contract # field opens where you can enter the co-op contract number for this vendor.
- **Board Approval Required** – when you check this box, a field opens where you can enter the date this order was board approved. Use for circumstances where the board had to approve the item or event prior to the PO being entered.
- **Bid Required** – if this order had gone to bid and you are now entering the order to the vendor who won the bid. Check this box and the Bid Number and Bid Date fields open allowing you to enter that pertinent data
- **Vendor** – in this field, begin typing the vendor’s name and the vendors will appear in a drop-down. When you see the vendor you wish to use, click on their name. To see all of your district’s vendors, press the space bar in this field.
- **Quote Attached** – you must have a quote for this order, **check this box**. If the quote has a number, you can enter that in the Quote # field.

When you are finished with Section A, click the Save button.

# Section B

- **Item #** - this field defaults to 1, meaning it's your first item on the order.
  - If you would like the first line of the order to be a heading (for example: Software Renewal for the YYYY-YY School Year) you can take the 1 out of the Item # field and take the 1 out of the Quantity field. Key the heading in the Description field and click Add. You will notice that the heading becomes line 0 and you have a new item field with 1 ready to start entering the order items
- **Description (The Body)**– key in your item description. There is no limit to the number of characters. To expand this field so you can see everything you're typing, drag the field by using the lines in the lower, right corner.
  - For Events/Services/Trips- must enter the date and a full description of event or service.
  - For Conferences- must have date, location, employee name and full description of the Conference.
  - For Travel Reimbursement- must enter itemized list of reimbursements- ex. mileage, tolls, hotel, airfare, meals.
- **Catalog #** - if your item has a number, you can enter that here.
- **Quantity** – enter the number of this item you are ordering.
- **Unit price** – enter the price of the item.



# Section C

- **Shipping Cost Type** – using the drop-down, select the appropriate Shipping Cost Type. This field is required.
  - **Ship To Attention** – enter the name of the person to whom this order should be shipped.
  - **Notes** – this is for your **internal use**. Whatever is keyed in this field will **not appear on the requisition or purchase order**. If the message is important to the Purchase order make sure its on *The Body (Section B)*
  - **Ship to** – if your district has just one ship to location, that location automatically is populated in this field. If you have more than one, key the name in the ship to field and the options will appear in a drop-down where you can select the appropriation location by clicking on its name. To see all of your district's ship to addresses, press the space bar in this field.
  - **Charge to budget accounts** – to enter the account number(s) to which this order is to be charged, click on the *Charge To* button. When the *Charge To* window opens, begin typing in the account number. As you keep keying in each piece of the account number the list will narrow down. When you see the proper account number, click on it. Enter the amount to be charged to this account, if different than what is shown. Then click on the *Charge To* button. If you need to add more account numbers, repeat this process.
- When you are finished with Section C, click the Save button.

# Section C Cont.

**Documents:** To electronically attach documents to the requisition, click the Attach Document button. In the Type drop-down, select the appropriate document type. Then in the Name field, key in a description of the document (such as Quote from Vendor, or Contract). Use the Choose File button to navigate to the location the document is saved on your computer. Select the document and click Open. You can attach as many documents as you want. **(if you have more than one quote, in the Name Field type -2<sup>nd</sup> Quote)**

- **Required documents for Professional Development** (Requisition must be submitted for approval before attending event)
  - Professional Development Approval Form
  - PD Approved Board Resolution(\$150.00 and over)
  - PD Registration Form
- **Required Documents for Conference/Travel Expenses Reimbursement** (Request for Expense Reimbursement is submitted after attending event)
  - Professional Development Approval Form
  - PD Approved Board Resolution (\$150.00 and over)
  - All invoices- ex. hotel, mileage log with google maps, tolls, transportation.
  - GSA Rate for approved lodging and meal expense

The screenshot shows a web application interface for attaching documents to a requisition. A dialog box titled "Attach Document to this Requisition" is open. It features a green header bar with the title. Below the header, there is a "Type:" dropdown menu with a blue checkmark next to "Quote". Other options in the dropdown include "Voucher", "Receiving", "Other", "Invoice", and "Track Received". To the right of the dropdown is a link labeled "customize Types". Below the dropdown are input fields for "Title:", "Vendor:", and "File:". The "File:" field has a magnifying glass icon and the text "File chosen". At the bottom of the dialog are two buttons: "Upload" and "Cancel". In the background, a "Submit Requisition" button is visible. At the bottom of the screen, there is a navigation bar with a "1" in a box and an "Add" button with a plus sign.

# Error Messages-contact Purchasing Agent

R-23-0003787 Tables for Classrooms

⚠ Total Cost 7,500.00 is greater than the quote threshold of 6,600.00.

Status: Filling Form

🕒 Stale Check Date: 11/30/2022 (5 days)

This message will appear when the district has exceeded the quote threshold for the vendor. Please make sure you have attached your competitive quotes before calling the Purchasing Agent.

**Genesis Mailbox**- if you submit a requisition and it is sent back to you for revisions, you will be notified through your Genesis Mailbox. Located on the top right hand corner of your screen. It will have a red number next to the envelope stating that you have mail. Make the necessary revisions and resubmit your requisition for approval.



# FINALIZING A REQUISITION

- When you are ready to send the requisition through the approval process, click on the *Submit Requisition* button located in Section A. The requisition will then be in the Waiting for Approvals status and can no longer be changed by you.
- If a requisition is denied and sent back to you, a message indicating the reason for denial will be attached. *Correct the required items, then re-submit it through the approval process.*
- Once a requisition has gone through all of the approval levels, the status will become “**Turned into a PO.**” You will then be able to see the purchase order number assigned to your requisition.