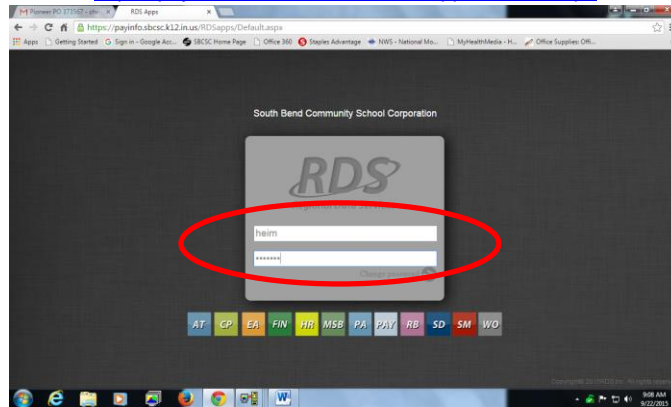


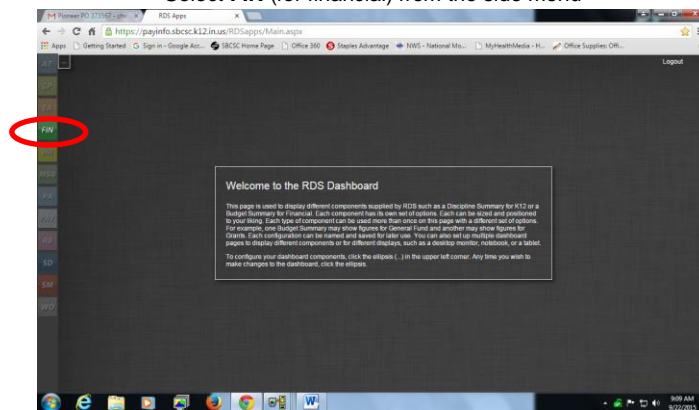
On Line Purchase Orders

Entering a Purchase Order.

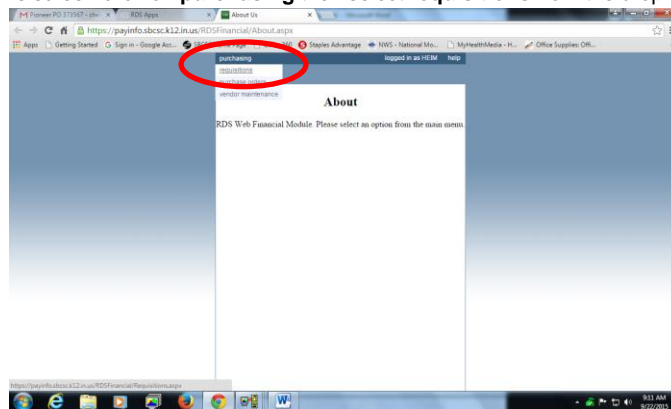
Using your AS400 username and passcode, log in at <https://payinfo.sbcsk.k12.in.us/RDSapps/default.aspx>



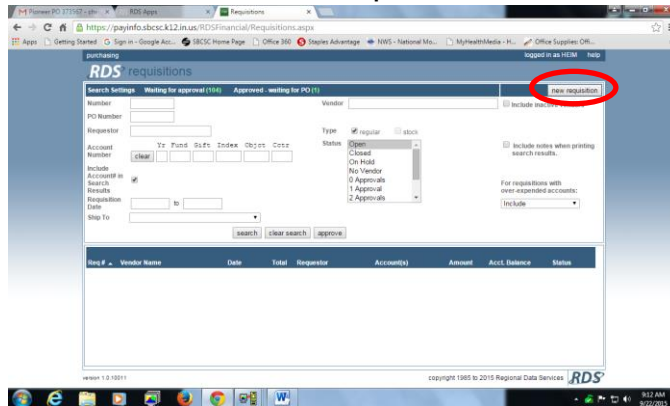
Select **FIN** (for financial) from the side menu



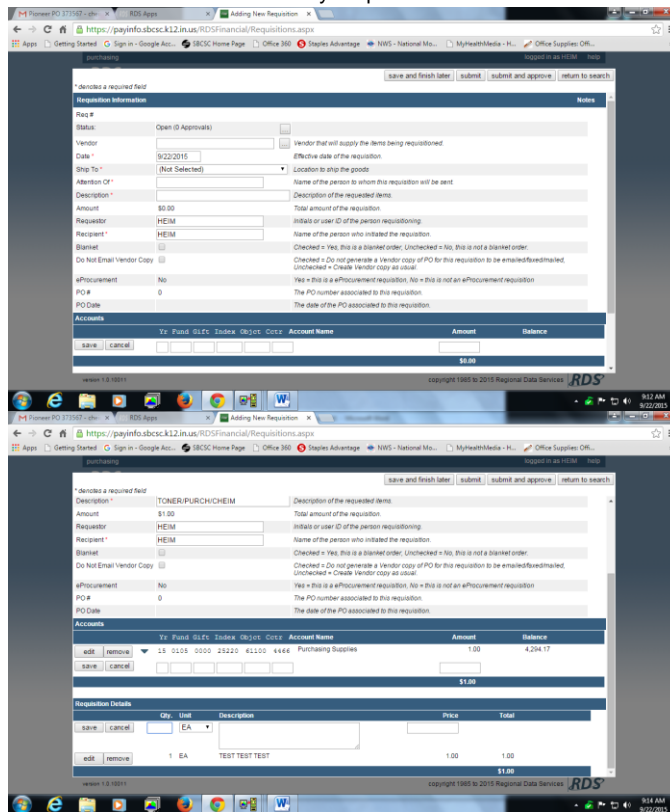
In this screen click on **purchasing** then select **requisitions** from the drop down



Select new requisition



Fill out the form with your purchase information

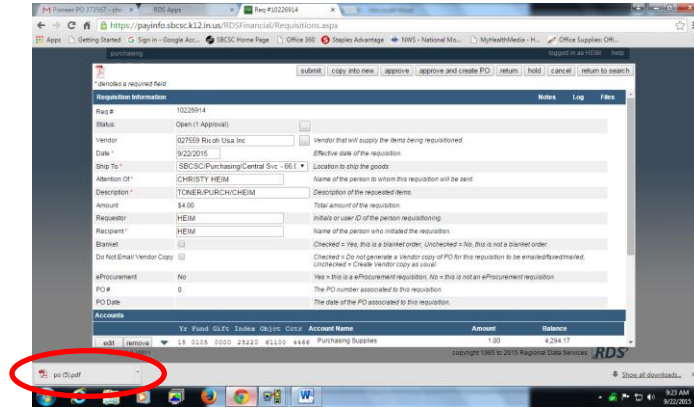


You can add more than one account if by clicking save and adding the additional account number and the amount you would like to come out of each account. If your calculations happen to be incorrect, the system will flag you and show the correct amount. If required, correct your price information and click **submit**

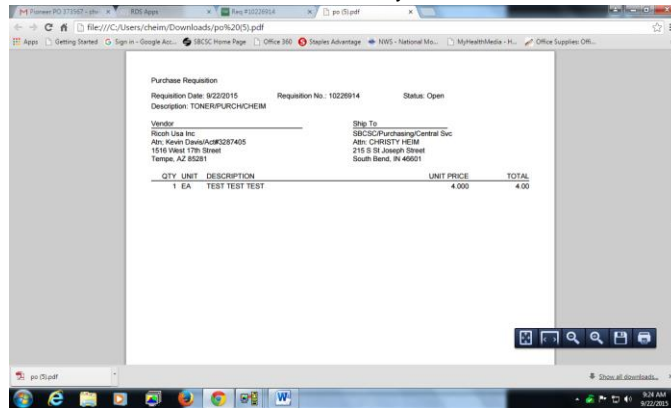
Do not hit print at this screen, select **ok**

Click the pdf symbol to view/print purchase req

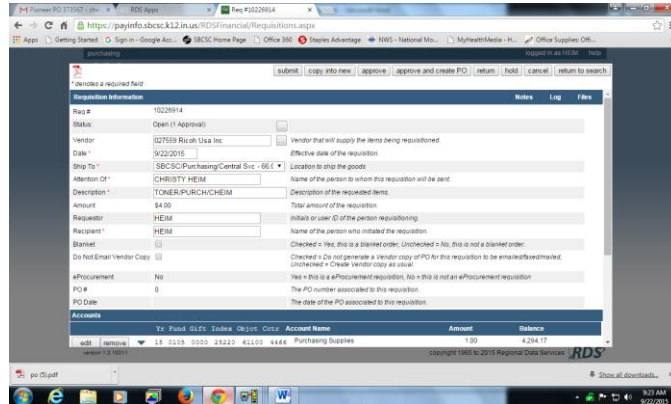
Click the pdf symbol at the bottom of the page



Print out copies of the P.O. and give one to your Building Administrator so he or she knows to approve the P.O.
You can then close this tab when you are finished with it.

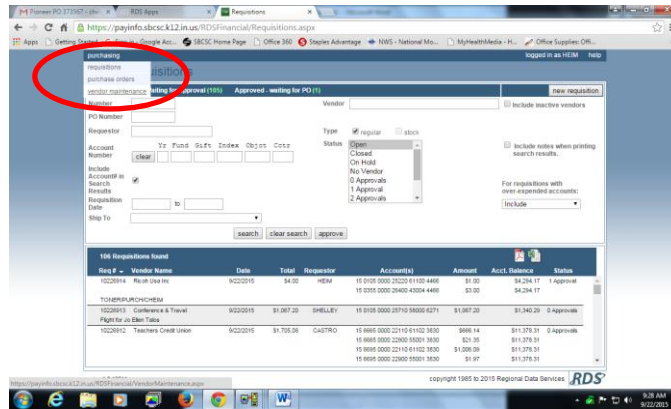


Click return to search

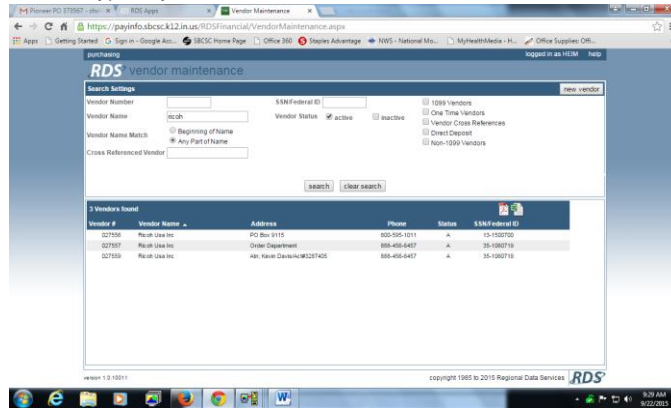


Vender Search

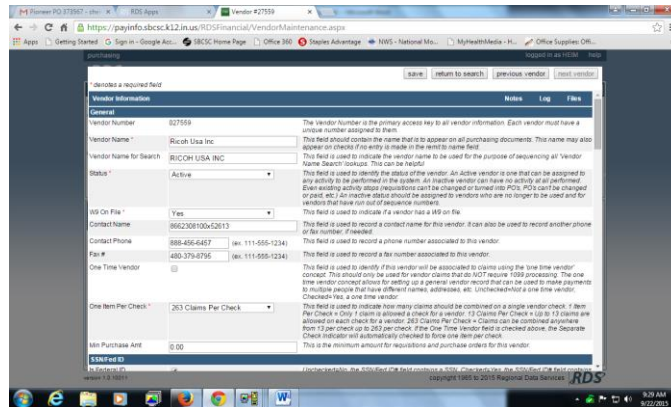
Click on **purchasing** then select **vendor maintenance** from the drop down



Type in your search criteria and click the **search** button



This screen will list all the vendor's information.



Purchase Order Inquiries

Type in your known search criteria such as the req. number, date range, vender name, etc.

Search Settings

Number:

Requestion #:

Attention:

Account Number:

PO Date: to

Vendor:

Type: regular stock

Status:

PO#	Vendor Name	Open Date	Total	Attention	Account(s)	Amount	Status / Printed
-----	-------------	-----------	-------	-----------	------------	--------	------------------

Select search or hit your Enter key

Search Settings

Vendor: rich

Status: Open

Include inactive vendors

PO#	Vendor Name	Open Date	Total	Attention	Account(s)	Amount	Status / Printed
-----	-------------	-----------	-------	-----------	------------	--------	------------------

Select the item you wish to review

Search Settings

Vendor: 027559 Ricoh Usa Inc, Tempe, AZ

Status: Open

Include inactive vendors

PO#	Vendor Name	Open Date	Total	Attention	Account(s)	Amount	Status / Printed
37364	Ricoh Usa Inc TONERBUCHSCHNEIDHAMPER	9/2/2015	893.22	USA MLLER	15 0105 0000 1200-61100-2704	893.22	Open/Printed
37364	Ricoh Usa Inc TONERBUCHSCHNEIDHAMPER	9/18/2015	8133.20	KIM KLINGST	15 0105 0000 2310-61100-3052	8133.20	Open/Printed
37363	Ricoh Usa Inc TONERBUCHSCHNEIDHAMPER	9/18/2015	954.56	CHRY PLANK	15 0105 0000 1200-61100-7402	954.56	Open/Printed
37345	Ricoh Usa Inc TONERBUCHSCHNEIDHAMPER	9/17/2015	8300.04	SUB KINGSH	15 0105 0000 1100-61100-3739	8300.04	Open/Printed

Notes, Logs and Files (attachments)

Click on Notes

The screenshot shows the 'Purchase Order Information' form in a web browser. The 'Notes' tab is highlighted with a red circle. The form contains the following fields:

Purchase Order #	97154	Unique number identifying the Purchase Order
Status	Open	P.O. Status (Open, Closed, Cancelled)
Printed	Y	Y = Purchase Order has been printed
Vendor Number	02769 Ricoh Usa Inc	Unique number identifying the vendor
Ship To Location	Jackson Intermediate Center - 4	
Attention C#	LISA MILLER	To the attention of
Description	TONER/JACKSON/MACENDARFER	P.O. description. Will print multiple lines if description is lengthy. Recommended to use 'word wrap' Default to account file if no description was entered
Open Date	9/21/2015	Date P.O. was issued
Close Date		Date P.O. was closed
Request #	10228757	The number of the requisition, if any, assigned to a P.O.
Recipient	MILLERLI	Name of the person who initiated the requisition. This person will receive a copy of the PO
Amount	\$893.22	Total amount of the P.O.
Liquidated	\$0.00	Amount of P.O. that has been liquidated
Balance	\$893.22	Amount NOT been liquidated
Freight Amount	\$0.00	Amount that represents the freight charge
Blanet	<input type="checkbox"/>	Yes is a blanket order and will be used to buy items over a period of time rather than a single purchase order. Blanket POs to indicate a single delivery and invoice. Select Blanket PO to generate blanket invoices
Do Not Email Vendor Copy	<input type="checkbox"/>	
Prepaid	<input type="checkbox"/>	

Add the information in your note and click done

The screenshot shows the 'Purchase Order Information' form with a 'Notes' dialog box open. The dialog box contains the following text:

PLEASE SUBMIT DISCOUNT OF \$5
ANY NOTES THAT YOU WANT TO GIVE TO THE PURCHASING DEPARTMENT
PLEASE INCLUDE YOUR CHECKS

Notes will be saved when the "done" button is clicked.

done cancel

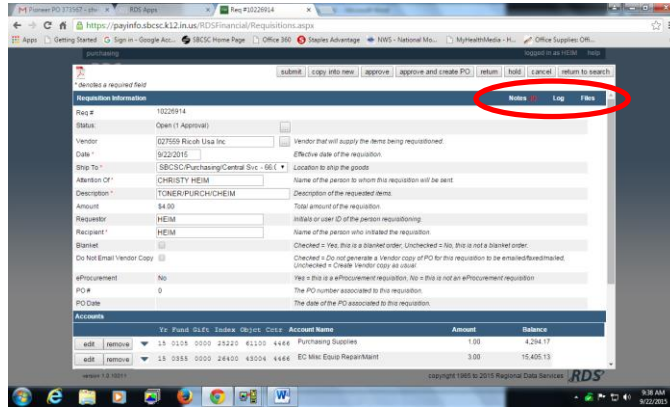
Once a note has been added it will be indicated with a red number as shown below

The screenshot shows the 'Purchase Order Information' form with a red '1' next to the 'Notes' tab, indicating that a note has been added. The form contains the following fields:

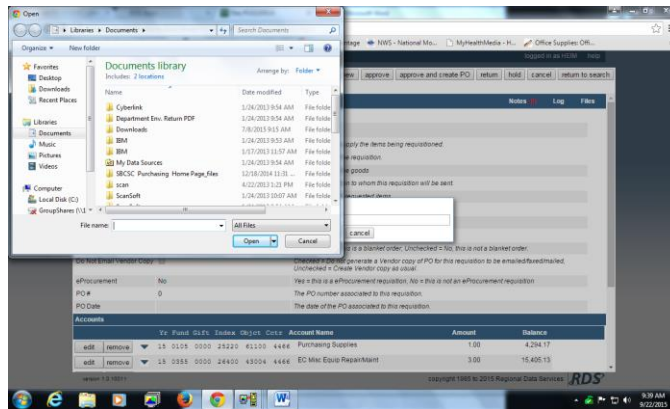
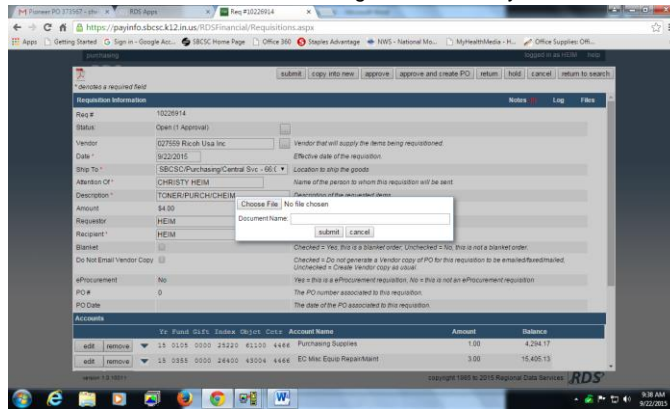
Request Information		
Request #	1022814	
Status	Open (Approval)	
Vendor	02759 Ricoh Usa Inc	Vendor that will supply the items being requisitioned
Date	9/22/2015	Effective date of the requisition
Ship To	SECSCOPurchasing/Central Svc - 661	Location to ship the goods
Attention C#	CHRISTY HEIM	Name of the person to whom this requisition will be sent
Description	TONER/PURCH/CHEIM	Description of the requisitioned items
Amount	\$4.00	Total amount of the requisition
Requestor	HEIM	Initials or user ID of the person requisitioning
Recipient	HEIM	Name of the person who initiated the requisition
Blanet	<input type="checkbox"/>	Checked = Yes, this is a blanket order. Unchecked = No, this is not a blanket order.
Do Not Email Vendor Copy	<input type="checkbox"/>	Checked = Do not generate a Vendor copy of PO for this requisition to be emailed/defaulted. Unchecked = Create Vendor copy as usual.
Effortment	No	Yes = this is an effortment requisition. No = this is not an effortment requisition
PO #	0	The PO number associated to this requisition
PO Date		The date of the PO associated to this requisition

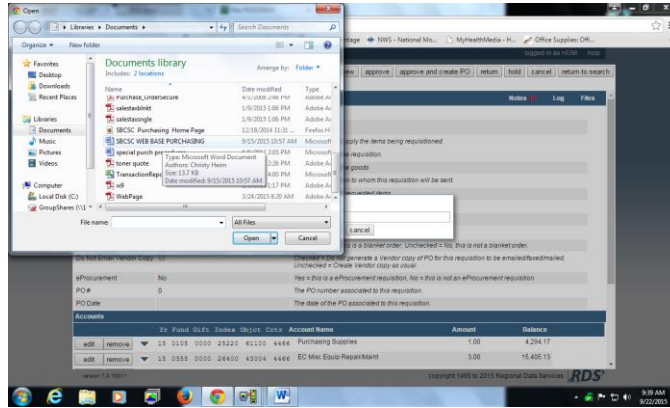
Account	Yr	Fund	GLFC	Subds	Object	Cost	Account Name	Amount	Balance
	15	0105	0000	23220	61100	4466	Purchasing Supplies	1.00	4,294.17
	15	0355	0000	26400	63004	4466	EC Mini Equip Repair/Maint	3.00	15,405.13

To add an attachment to your P.O. select **Files** then

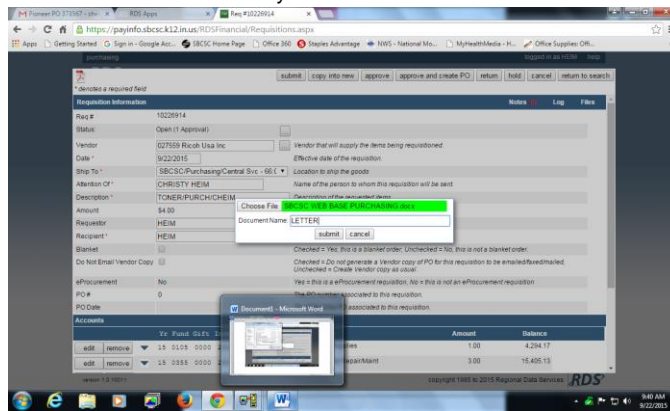


Use the **Choose File** button and navigate to the item you wish to attach

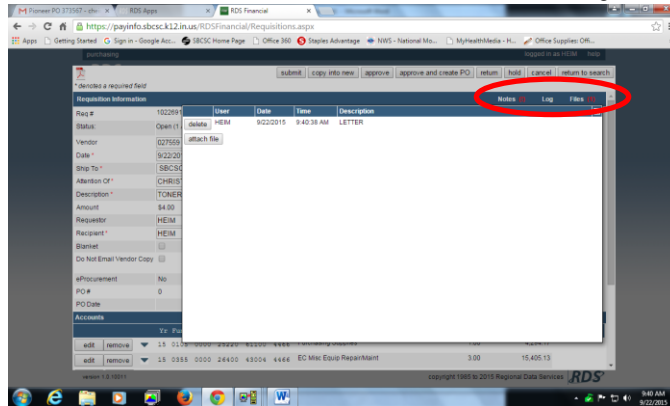




Name your item and submit



If you wish you can add more files. Note that there is now a red number at **Files** indicating that this P.O. has an attachment.



You can view the progress of your P.O. by clicking on Log

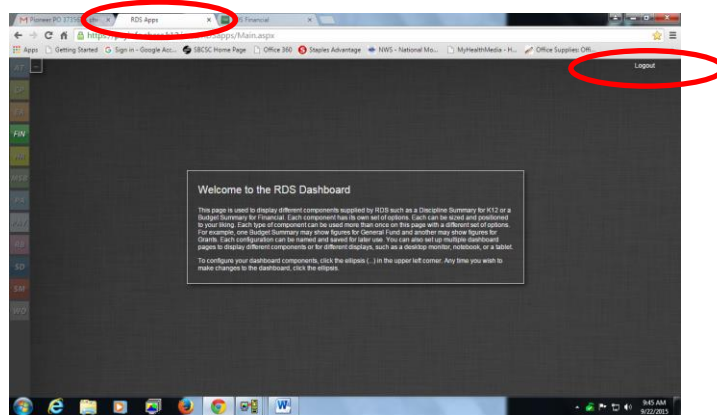
The screenshot shows a web browser window displaying the RDS Financial application. The main content area is titled "Requisition Information" and contains a table with the following data:

Req #	User	Date	Time	Description
	HEM	9/22/2015	9:39:20 AM	Notes updated
	HEM	9/22/2015	9:37:21 AM	Notes updated
	HEM	9/22/2015	9:21:59 AM	Requisition approved. Approval level set to 1.
	HEM	9/22/2015	9:19:23 AM	Requisition 10226914 created.

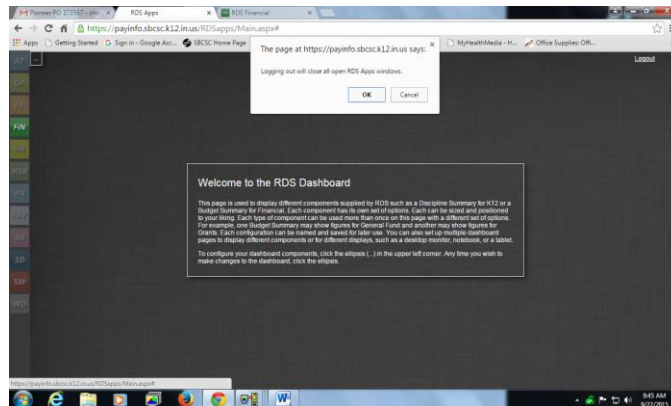
Navigation buttons at the top include "submit", "copy info into new", "approve", "approve and create PO", "edit", "back", "cancel", and "return to search". A red circle highlights the "Log" button in the top right corner of the requisition information section. Below the table, there are fields for "Attention Of:", "Description:", "Amount", "Requestor", "Requester:", "Special:", "Do Not Email Vendor", "eProcurement", "PO #", "PO Date", and "Accounts". At the bottom, there are "edit" and "remove" buttons for each row, and a summary row showing "13 0385 0000 24930 43004 4444 EC Misc Equip Repair/ Maint 3.00 15,406.13". The footer includes "Copyright 1999 to 2015 Regional Data Services" and the RDS logo.

Logging out

You MUST log out each time you are finished using the Purchase Order System
To log out select the tab named RDS Apps and clicking Logout



Click OK



After doing an inquiry to locate the ticket and of course reviewing the order, click on the **approve** button

The screenshot shows a web browser window displaying the RDS financial requisitions system. The main content is a requisition form for Reg # 1022914. The form includes fields for Status (Open (1 Approval)), Vendor (07559 Ricoh Usa Inc), Date (9/22/2016), Ship To (SBCSC Purchasing/Central Svc - 06), Attention Of (CHRISTY HEIM), Description (TCNER PURCH/CHEM), Amount (\$4.00), Requestor (HEIM), Requester (HEIM), Blanket (checked), Do Not Email Vendor Copy (checked), Affirmment (No), PO # (0), and PO Date. Below the form is an 'Accounts' table with columns for 'Acct', 'Fund', 'Dept', 'Item', 'Class', 'Cost', 'Account Name', 'Amount', and 'Balance'. The table contains two rows of data.

Acct	Fund	Dept	Item	Class	Cost	Account Name	Amount	Balance
18	0128	0000	21020	41100	4446	Postmaster Salaries	1.00	4,294.17
15	0355	0000	24400	43004	4446	EC Misc Equip Repair/Maint	3.00	15,405.13

Click **OK** to approve the P.O.

The screenshot shows the same requisition form as above, but with a confirmation dialog box overlaid. The dialog box contains the text: 'The page at https://payinfo.sbcsc.k12.in.us says: Please confirm that you wish to approve this requisition.' There are 'OK' and 'Cancel' buttons in the dialog box.