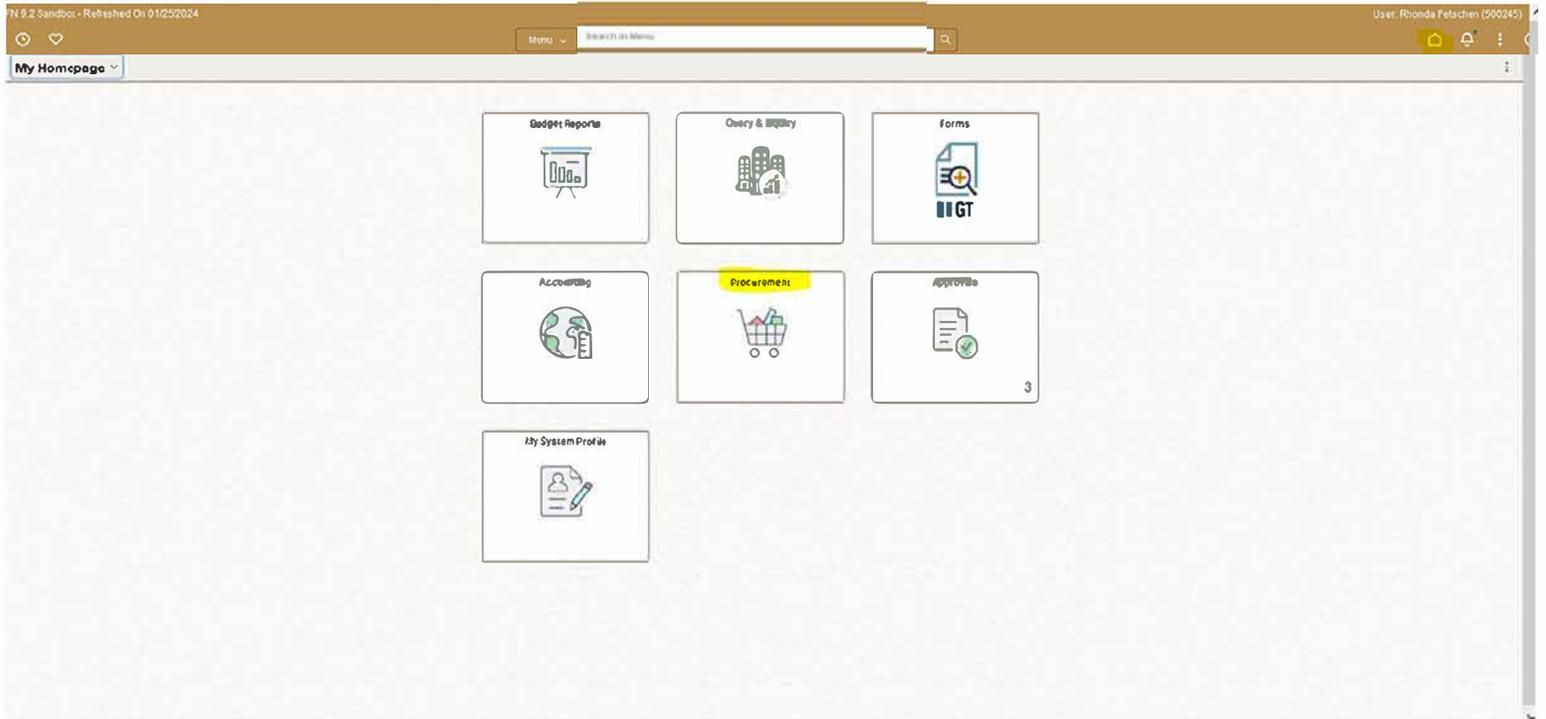


# HOW TO CREATE A SPECIAL REQUISITION

## 1) Select Procurement

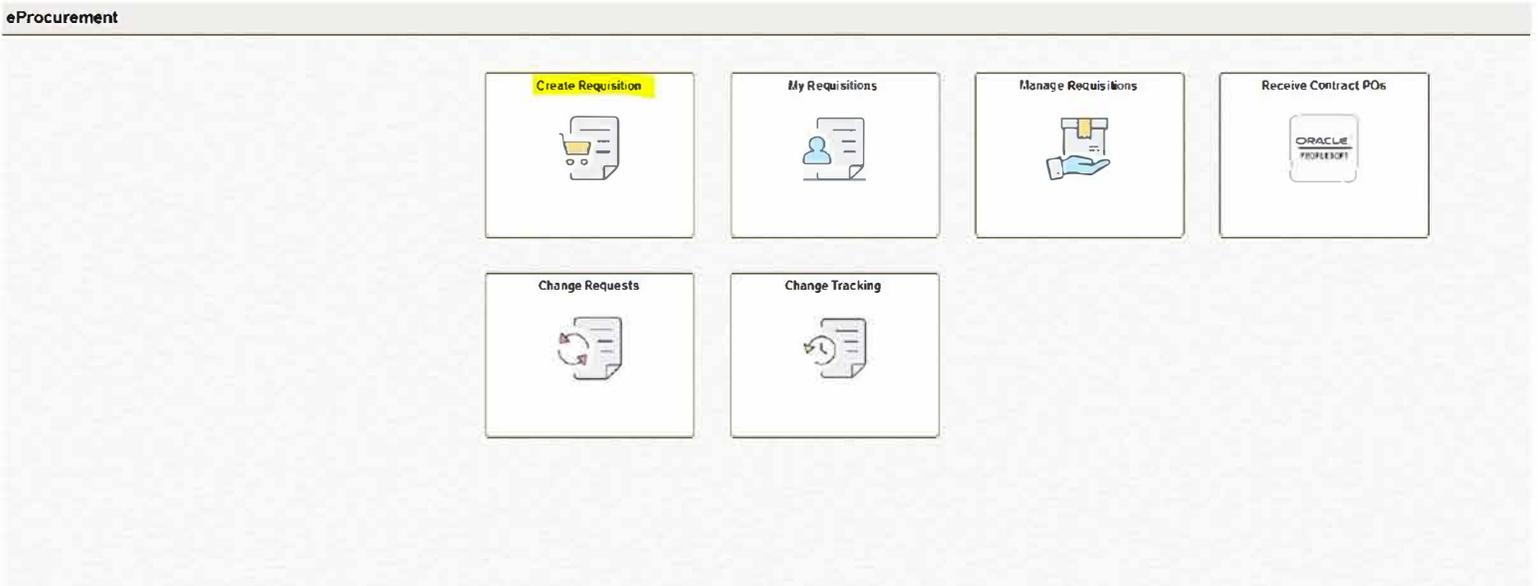


## 2) Select eProcurement

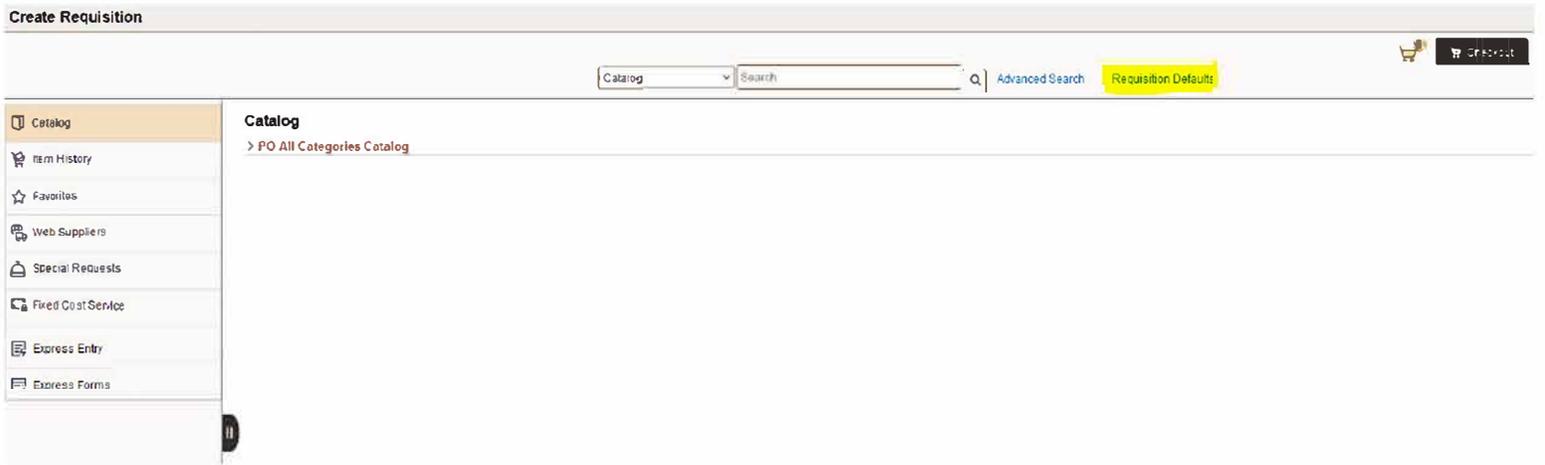
### Procurement



### 3) Select Create Requisition

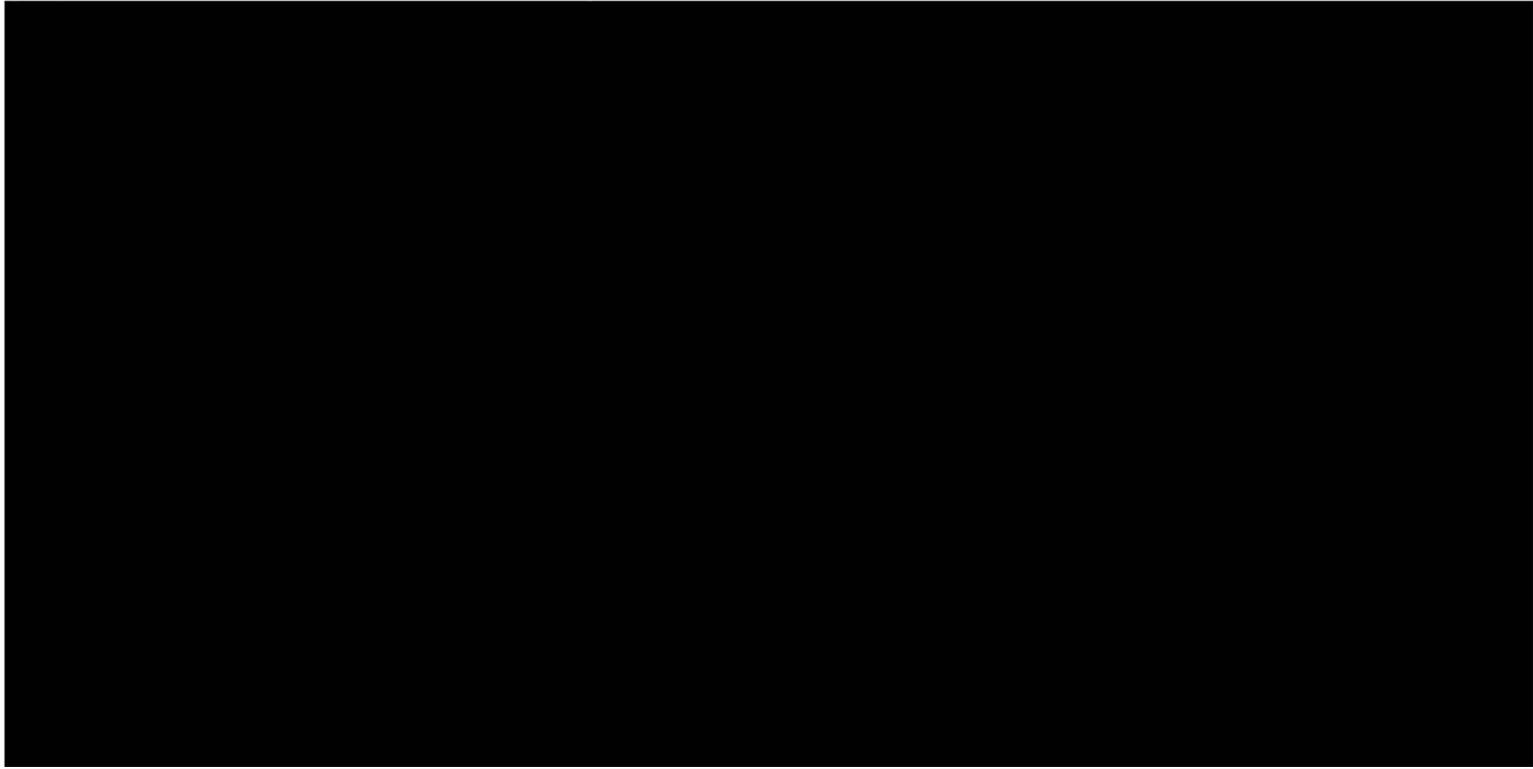


### 4) Select Requisition Defaults



5) Input all information highlighted in the Requisition Defaults pop-up

a) Chartfields - input the budget code for this order



b) Supplier ID (optional) - click the magnifying glass by supplier ID and select the "Search Criteria" Dropdown  
i) If supplier is left blank, the purchasing department will get quotes on behalf of the school for the item.

Cancel Lookup

Search for Supplier ID

> Search Criteria

Search Results

Only the first 300 results can be displayed.

Supplier ID	Short Supplier Name	Supplier Name	Additional Name	Our Customer Number	Old Supplier ID
000000001	1TO1TUTORL-001	1 TO 1 TUTOR LLC			58781
000000003	1000PETALS-001	1000 PETALS LLC			57930
000000004	1000UNIVER-001	1000 UNIVERSITY AVENUE PROPERTIES LP			59167
000000005	1105MEDIA-001	1105 MEDIA			57604
000000007	18XEEMLLC-001	18 XEEM LLC			57160

300 rows

ii) Use the Search Criteria Dropdown, Short Supplier Name to search for the vendor you want to select

Cancel
**Lookup**

Search for: Supplier ID

▼ Search Criteria Show Operators

SetID: SHARE

Supplier ID (begins with)

Short Supplier Name (begins with)

Search Clear

▼ Search Results

Only the first 300 results can be displayed.

300 rows

Supplier ID ↑↓	Short Supplier Name ↑↓	Supplier Name ↑↓	Additional Name ↑↓	Our Customer Number ↑↓	Old Supplier ID ↑↓
000000001	1T01TUTORL-001	1 TO 1 TUTOR LLC			58781
000000003	1000PETALS-001	1000 PETALS LLC			57930
000000004	1000UNIVER-001	1000 UNIVERSITY AVENUE PROPERTIES LP			59167
000000005	1105MEDIA-001	1105 MEDIA			57604
000000007	18XEEMLLC-001	18 XEEM LLC			57160

c) Category Code - select the magnifying glass by category code. Select search by Description and put in a short description of what you are looking for to search.

Fluid Requisitions
https://finsbx.sppserp.org/psc/ps/EMPLOYEE/ERP/c/PV\_MOB\_MENU.PV\_MOB\_855\_CMP.GBL
67%

Look Up Category
84 rows

Note: You may either Search or Browse to look up the appropriate category for your special request.

Search Categories

Search By: Category

Category: Category

Description: Description

Find

Categories	Catalog ↑↓	Category ↑↓	Description ↑↓
1	Non Catalog	96348	Memberships, Dues, etc
2	Non Catalog	04501	Appliances & Nutrition Services Equipment <55K
3	PO_CATEGORIES_ALL	06000	Automotive, Accessories, Maintenance Items and Repair/Repla
4	PO_CATEGORIES_ALL	07000	Vehicles, Cars, Vans, SUV's, Trucks, School Buses, etc
5	PO_CATEGORIES_ALL	15000	Building & Trades Supplies
6	PO_CATEGORIES_ALL	15001	Building & Trades Equip >5K
7	PO_CATEGORIES_ALL	20010	Clothing, Athletic
8	PO_CATEGORIES_ALL	20085	Clothing, Non-Athletic Uniforms & Other
9	PO_CATEGORIES_ALL	20400	Computers (PC/Dell) (Desktop, Laptops, Netbooks)
10	PO_CATEGORIES_ALL	20499	Computers (PC/Dell) Appr (Desktop Laptops Netbook)
11	PO_CATEGORIES_ALL	04500	Appliances & Nutrition Services Equipment >55K
12	PO_CATEGORIES_ALL	20698	iPads - District Technology Approved
13	PO_CATEGORIES_ALL	20699	Computers, Printers, iPads(Apple)/kpv (Desktop Laptop Netbooks)
14	PO_CATEGORIES_ALL	20700	Computer Accessories & Supplies
15	PO_CATEGORIES_ALL	20800	Computer Software
16	PO_CATEGORIES_ALL	20899	Computer Software / District Technology Approved

**Example:** books, computer, service to narrow down the list but include as many options as possible. You can also skip the search and click on Description in the third column to put the list in alpha order to find the category that matches the item(s) you are ordering. If you have multiple categories on the requisition, skip this on the defaults.

**Look Up Category** ✕

Note: You may either Search or Browse to look up the appropriate category for your special request.

▼ Search Categories

Search By Description ▼

Category Description Books

Find

**Categories** 6 rows

	Catalog ↑↓	Category ↑↓	Description ↑↓
1	PO_CATEGORIES_ALL	20400	Computers (PC/Dell) (Desktop, Laptops, Netbooks)
2	PO_CATEGORIES_ALL	20600	Computers iPads (Apple) (Desktop Laptops Netbooks)
3	PO_CATEGORIES_ALL	20699	Computers, Printers, iPads (Apple) Appv (Desktop Laptop Netbooks)
4	PO_CATEGORIES_ALL	71510	Books, Magazines, Pamphlets, Reprints, etc
5	PO_CATEGORIES_ALL	71585	Textbooks: (Includes Student and Teacher Editions)
6	PO_CATEGORIES_ALL	71599	Textbooks Distr Apprvd (Student & Teacher Editions)

> Browse Category Tree

d) Unit of Measure: select correct unit of measurement by clicking on magnifying glass. Most of the time, this should be Each, or "EA."

**Lookup**

Search for: Unit of Measure

▼ Search Criteria

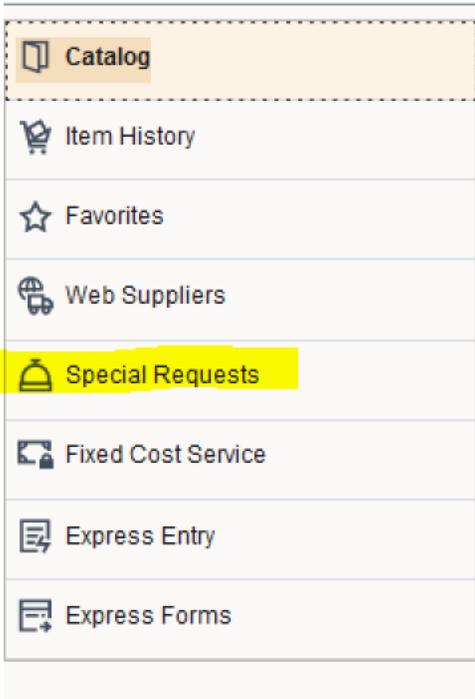
Unit of Measure (begins with) EA

Search Clear

▼ Search Results

Unit of Measure ↑↓	Description ↑↓	Short Description ↑↓
EA	Each	Each

6) Select Special Requests on the left hand tab



7) Since we completed step 5; Category, Vendor, and Unit of Measure will default in for all lines that you entered information under Requisition Defaults. If you've filled out all of those fields, you will just need to enter the Item Description, Price & Quantity. Click Add when finished and add other items if you have more or click Check-Out.

Create Requisition

All Search Advanced Search Requisition Defaults

Catalog Item History Favorites Web Suppliers **Special Requests** Fixed Cost Service Express Entry Express Forms

**Special Requests**

\*Item Description: BOOK, ISBN: 9790526649713

\*Price: 1

\*Quantity: 15

\*Category: 71585

Supplier ID: 0000001100

Location: DEFAULT

Supplier Item ID:

Manufacturer ID:

Manufacturer's Item ID:

\*Currency Code: USD

\*Unit of Measure: EA

Due Date:

Supplier Name: AMAZON.COM

Suggest New Supplier

Manufacturer:

Additional Information:

Send to Supplier:  No

Shown at Receipt:  No

Shown at Voucher:  No

Add

a) Item description: Short description of what you are ordering (one word or a few words)

b) Quantity: Number of items by unit of measure.

Note: If you need to edit any items, go to Cart and click on the Description (in blue), apply changes and update cart.

[Continue Shopping](#) [Update Cart](#) [Checkout](#)

**Edit Shopping Cart**  
3 item(s) to buy now.

▼ Requisition Summary

Business Unit 62500  
Requisition Name   
Requester 500245  
Currency USD

Item Description <sup>1</sup>	Price <sup>1</sup>	Currency <sup>1</sup>	Quantity <sup>1</sup>	Unit of Measure <sup>1</sup>
 TITLE FOR BOOK 1. ISBN: 9781564387496	15.00	USD	30 0000	EA <input type="text" value="q"/> <input type="button" value="Delete"/>
 TITLE FOR BOOK 2. ISBN: 9781532648589	10.00	USD	1.0000	EA <input type="text" value="q"/> <input type="button" value="Delete"/>
 TITLE FOR BOOK3. ISBN: 9789526849713	3.00	USD	15 0000	EA <input type="text" value="q"/> <input type="button" value="Delete"/>

Total 505.00 USD

8) Click Header Comments, select add attachment, and upload the quote you have received for the product in this area then submit when you are done.

[Continue Shopping](#) [Save](#) [Submit](#)

**Checkout**

Order Total 505.00 USD

▼ Requisition Summary

Business Unit 62500 Saint Paul Public Schools Priority Medium  
Requisition Name   
Requester 500245 Rhonda Petschen  
Currency USD

Add Quotes/Attachments

▼ Justification Comments

▼ Requisition Lines Overview

Select All

Line	Description	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request TITLE FOR BOOK 1. ISBN: 9781564387496	30.0000	EA <input type="text" value="q"/>	15.00	USD	450.00 USD	<input type="button" value="ScheduleDetails"/> <input type="button" value=""/>

Line 2 Financial Request

**Requisition Header Comments and Attachments**

Comments

Comment Text

Send to Supplier  No

Show at Receipt  No

Show at Voucher  No

Note: If you are not ready to checkout, click Continue Shopping to add more items or Save to save your requisition and come back to it later.

10) Once you select submit, this is the page that will load. From here you can Edit this requisition, go to My Requisitions or Create a new Req.

If you do not need to Edit the req, click first on View Approval Chain. If it says Skipped, it is usually for a budget issue which will need to be resolved or the req will not be sent to the accounting worklist(s) and will remain in limbo until it is resolved.

If you have a new supervisor, you will need to also make sure that the new supervisor is listed or, again, the req will not route to the correct person. Then click on Print Preview to print a PDF or paper copy of req for your records. Click yes for Distribution Details so that your budget code shows up.

Checkout Confirmation

Print Preview

Requisition Details

Business Unit 62500  
Requisition ID 0000229858  
Requisition Name Test  
Last Modified Date 01/25/2024 12:03:01PM  
Status Pending Approval

Total Lines 3  
Total Amount 505.00 USD  
Budget Checked Status Not Checked

Check Budget Pre-Check Budget

View Approval Chain

Next Steps

Edit this Requisition  
Modify this requisition

My Requisitions  
Go to existing requisitions

Create Requisition  
Create another requisition

Print Preview

Business Unit 62500  
Requisition ID 0000229858  
Requisition Name Test  
Last Modified Date 01/25/2024 12:03:01PM  
Status Pending Approval

Total Lines 3  
Total Amount 505.00 USD  
Budget Checked Status Not Checked

Check Budget Pre-Check Budget

View Approval Chain

Do you want to print the requisition with distribution details ?

Yes No

11) Press Ctrl + P (or Apple + P), to print:

The image shows a requisition form on the left and a print dialog box on the right. The requisition form contains the following information:

**Business Unit:** 62500      **Requester:** 500245  
**Requisition:** 0000229858      **Requested By:** Rhonda Petschen  
**Requisition Name:** Test      **Entered Date:** 1/25/24

**Line: 1**    **Item Description:** TITLE FOR BOOK 1, ISBN: 9781564387496    **Quantity:** 30.0000    **UOM:** EA

**Ship Line: 1**  
**Attention:** Rhonda Petschen  
**Ship Via:** BEST WAY

**Ship To:** 200200  
**Due Date:**  
**Freight Terms:** FOB DEST

**Address:**  
Bridge View  
350 Colborne Street  
St. Paul MN 55102  
United States

**Ship To Comments:**  
Normal Delivery Hours: 7:00 A.M. - 3:00 P.M.

For Truck Carrier Deliveries please note the following:  
Please call pager #651-339-5375 after the beeps enter a call back #,  
24 Hours prior to delivery, to arrange shipment delivery,  
Delivery site phone number: 651-293-8640  
Inside Delivery Required: Y  
Dock Available: Y  
Semi Accessible: Y  
Pallet Jack: N

Dist	Status	Location	Qty	Percent	Amount
1	Open	200200	30.0000	100.00	450.00

Dept	Fund	Program	Class
430	01	203	0000

Open QTY	Open Amt
30.0000	0.0000

GL Base Amount	Currency	Sequence
450.00	USD	0

**Line: 2**    **Item Description:** TITLE FOR BOOK 2, ISBN: 9781532648589    **Quantity:** 1.0000    **UOM:** EA

**Ship Line: 1**  
**Attention:** Rhonda Petschen  
**Ship Via:** BEST WAY

**Ship To:** 200200  
**Due Date:**  
**Freight Terms:** FOB DEST

**Address:**  
Bridge View  
350 Colborne Street  
St. Paul MN 55102  
United States

1 of 3      1/25/2024, 12:07 PM

The print dialog box on the right is titled "Print" and shows "3 sheets of paper". It includes the following settings:

- Destination: Adobe PDF
- Orientation: Portrait (selected), Landscape
- Pages: All
- Color mode: Color
- Fewer settings: expanded
- Paper size: Letter
- Scale: Scale (selected), 115
- Pages per sheet: 1
- Margins: (not specified)

Buttons: Print, Cancel

12) Your Requisition has been created!

After Creation Please use manage requisitions of the "My Requisitions" tile to track requisitions through the approval process.