



Purchasing

Purchase Requisition Management

This document contains step-by-step instructions to complete Internal Transfer Purchase Requisitions, Open Purchase Requisitions. Purchase Requisitions and Process Internal Transfer Purchase Requisition transactions in the *Galaxy* system.

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Purchasing Management System

Purchase Requisition Management

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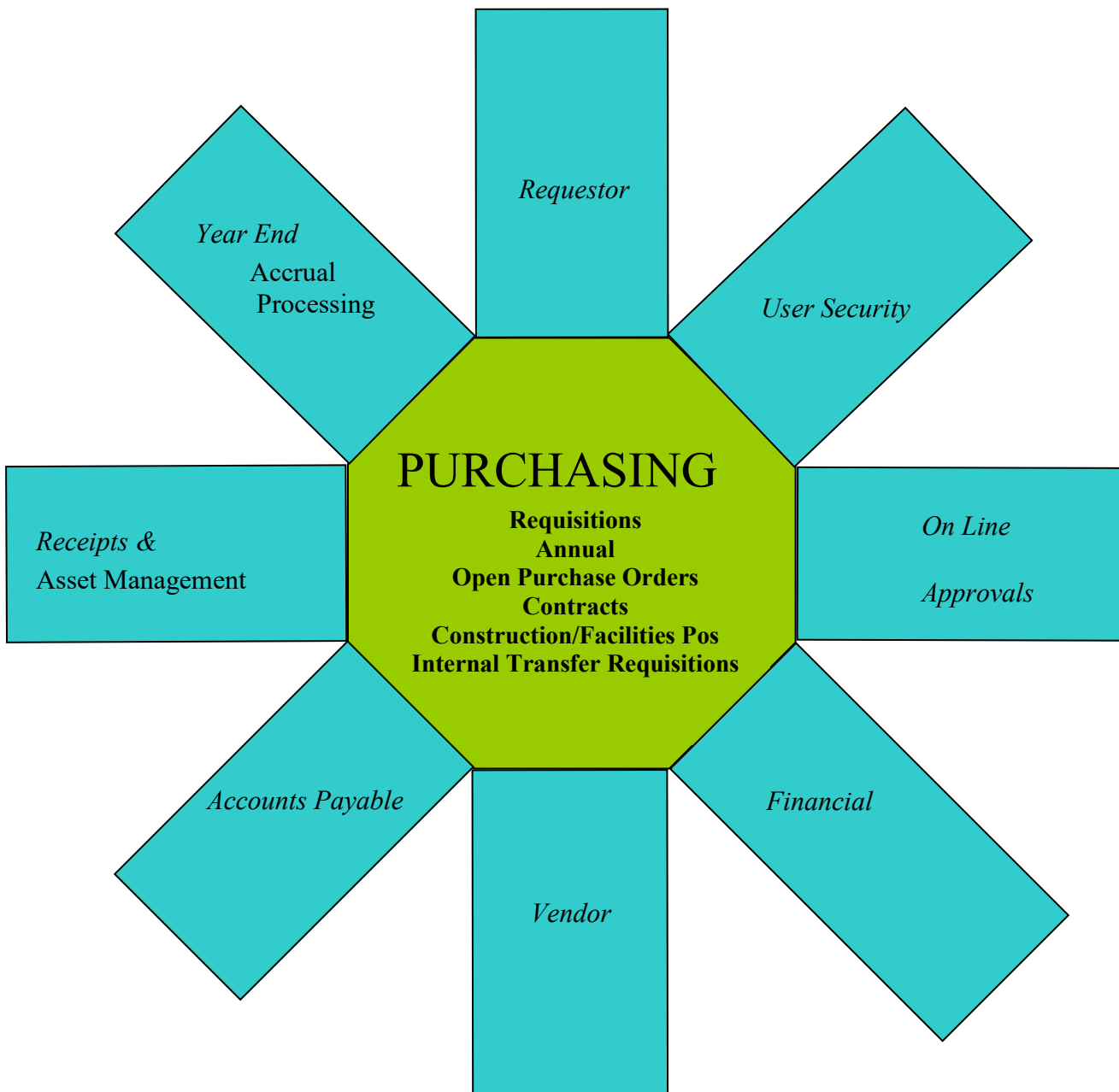
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Introduction

The purpose of this document is to support the **Galaxy** end user in completing purchasing transactions in the **Galaxy** system. This manual incorporates step-by-step instructions for each purchasing screen found in the purchasing module of the **Galaxy** system. Each step is accompanied by a screen capture for easy viewing and further assistance.

The Purchasing module creates transactions that interface with other **Galaxy** modules.



The **Galaxy** Purchasing module is a line driven procurement tool. The purchasing activity begins with the requisition process. **Galaxy** has built in flexibility for electronic purchasing transactions to flow through various levels of user-defined approvals and district specific options.

Electronic purchasing transactions require information from various departments with the district. Prior to deploying **Galaxy** Purchasing, the district will use the Modify District Purchasing Options Screen to setup a series of district specific options. The district will also define user approvals and roles in the system.

Purchasing Module Components

- **Contract Management**
- **Item Catalog**
- **Location Management**
- **Purchase Order Management**
- **Purchase Requisition Managements**
- **Receiving Management**
- **User Security and Approvals**
- **Vendor Management**

Other Modules receiving updates from Galaxy Purchasing

Accounts Payable

- The Purchasing system creates Accounts Payable transactions from Purchase Order payments, Direct Payments and Credit Memos.

Asset Management

- Any purchases received or paid that meet GASB 34/35 requirements, will automatically become a pending asset and will be update to the Modify Asset Screen.

Financial

- The Financial module maintains all of the purchasing encumbering and expenditure information.


Year End Processing

- The Purchasing system sends accruals to the Modify A/P Accruals screen.
- During the Accrual Processing Period, purchase order line items can be transferred back and forth between fiscal years.

Support Plan

There will be trained staff available from the Data Center and Help Desk at RCOE to assist with **Galaxy** questions and to help resolve any issue which may arise. Initial calls for assistance will be made to the Data Center at 909-826-6524. Emails can be sent to galaxy@rcoe.k12.ca.us. Should they need additional assistance, System Support will be available. Additional support is also available through the Applications Systems Trainers and the System Development Department. Should these avenues be unable to resolve the issue, our contacts at Optimus Consulting and Coyote Works will be notified.

Manual Conventions

On any screen where the information has been changed, the  **Save** button must be clicked before leaving the screen. The data is not saved to the database until the **Save** button is clicked.

In most cases, leading zeros are not required, i.e. 0025 can be entered as 25.

Dates are entered in the following format (M/D/YY). An exception would be a year prior to 1950 which requires all four digits for the year, i.e. 1948.

Dashes are not allowed in **Galaxy**. Do not enter them in Social Security Numbers, phone numbers, etc.

The keyboard Tab key can be used on most screens to move to the next field. Shift-Tab will move the cursor to the previous field.

On screens where the following appears:



– Add new line or record - click the **Add** button and type in your data.



- Duplicate a line - If the line you are adding is similar to another line, select the similar line and click the **Dup** button. This will duplicate the line and you can then modify the data.



– Delete a line - select the line by clicking on it and click the **Delete** button to delete the entire row or record.

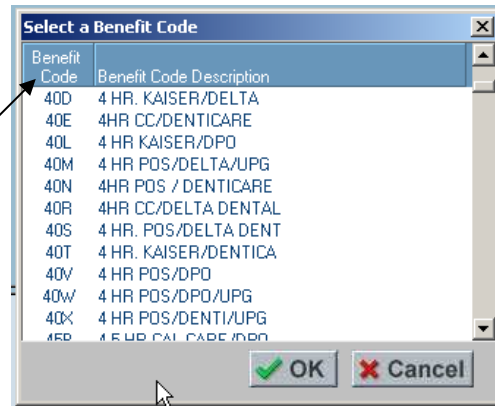


- **Print** the data - The information displayed can be printed from the browser or copied to Excel by clicking the **Print** button. A document describing how to make Excel the default for the Galaxy print button is available on the Galaxy Training web site.












To Modify existing data - click in the field you want to modify, delete the data in the field with the keyboard Delete key, and type in the new data.





Wherever a button is described, the name is displayed in bold type, i.e. **Save**, **Print**, etc.




The columns on the screens and pop up lists can be sorted in ascending order by clicking on a column heading (shift-click for descending).












Purchasing Module Navigation Menu








- [-]  Purchasing (Beta Test)
 - [+]  Contract Management
 -  Direct Payment Management
 - [+]  Item Catalog
 - [+]  Location Management
 - [+]  Purchase Order Management
 - [+]  Purchase Requisition Management
 - [+]  Receiving Management
 - [+]  User Security and Approvals
 - [+]  Vendor Management
 - [+]  View Purchasing



- [-]  Contract Management
 -  Approve Contracts
 -  Close Out Contracts
 -  Modify Contract










- [-]  Item Catalog
 -  Modify Item
 -  Modify Item Category





- [-]  Location Management
 -  Modify Location
 -  Modify Worksite Location




















- [-]  Purchase Order Management
 -  Approve Purchase Orders
 -  Close Out Purchase Orders
 -  Modify Open Purchase Order
 -  Modify Purchase Order
 -  Print Purchase Orders

- [-]  Purchase Requisition Management
 -  Approve Purchase Requisitions
 -  Modify Internal Transfer Purchase Requisition
 -  Modify Internal Transfer Types
 -  Modify Open Purchase Requisition
 -  Modify Purchase Requisition
 -  Process Internal Transfer Purchase Requisition

- [-]  Receiving Management
 -  Receive Items

- [-]  User Security and Approvals
 -  Modify Approval List
 -  Modify District Purchasing Options
 -  Modify SACS Approval List
 -  Modify Substitute User
 -  Modify User Alias
 -  Modify User Approval List
 -  Modify User Roles
 -  Modify User SACS Account Favorites

- [-]  Vendor Management
 -  Modify Note
 -  Modify Vendor
 -  Modify Vendor/Payee Names

- [-]  View Purchasing
 -  View Approval List
 -  View Contracts
 -  View District Purchasing Options
 -  View Internal Transfer Types
 -  View Item
 -  View Item Category
 -  View Location
 -  View Note
 -  View Purchase Orders
 -  View Purchase Requisitions
 -  View SACS Approval List
 -  View Substitute User
 -  View User Alias
 -  View User Approval List
 -  View User Roles
 -  View User SACS Account Favorites
 -  View Vendor
 -  View Worksite Location



Purchase Requisition Management

Purchase Requisition Management consists of the following screens:

- ④ Approve Purchase Requisition
- ④ Modify Internal Transfer Purchase Requisition
- ④ Modify Internal Transfer Types
- ④ Modify Open Purchase Requisition
- ④ Modify Purchase Requisition
- ④ Process Internal Transfer Purchase Requisition

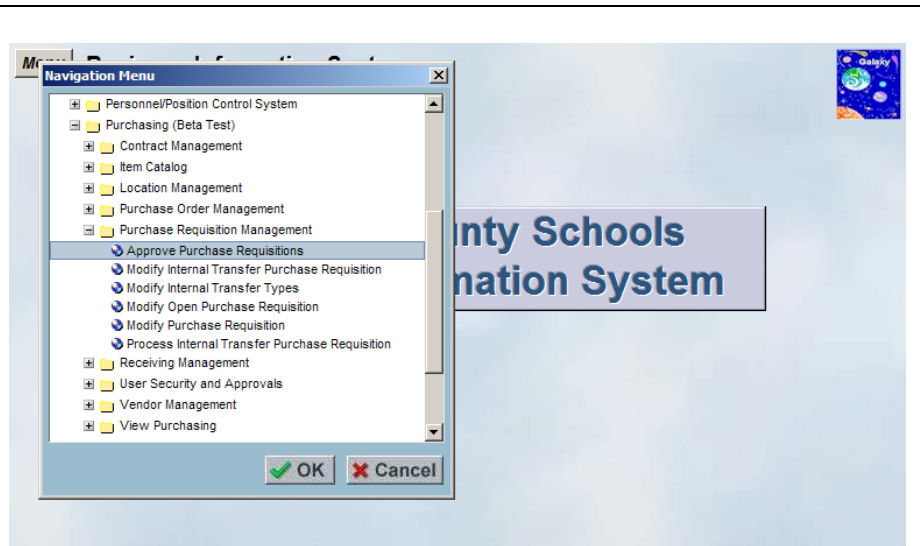
Approve Purchase Requisitions

This screen is used to approve purchase requisitions.

Step 1

From menu select
Approve Purchase
Requisitions

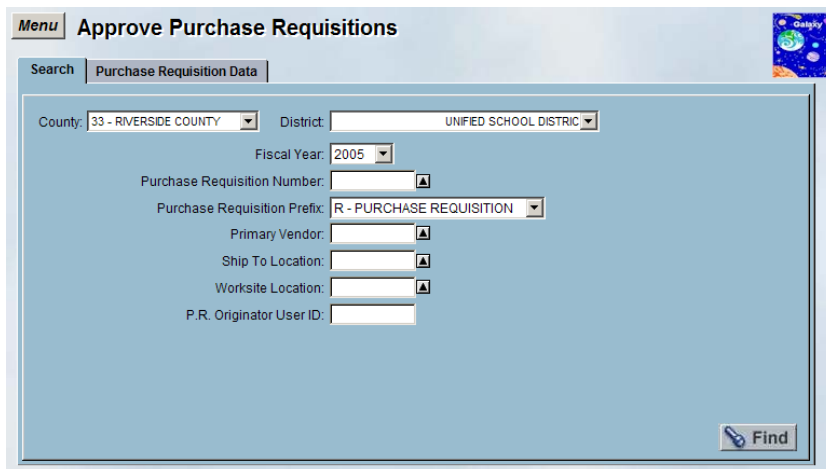
Click **OK**.



Step

To generate a list
of purchase
requisitions to
approve

Click **Find**.



Step

Click the Notes sub tab to view information regarding the notes on the purchase requisition selected in the view above.

Step

Click the Authorized Purchaser sub tab to view information regarding the authorized purchaser on the purchase requisition selected in the view above.

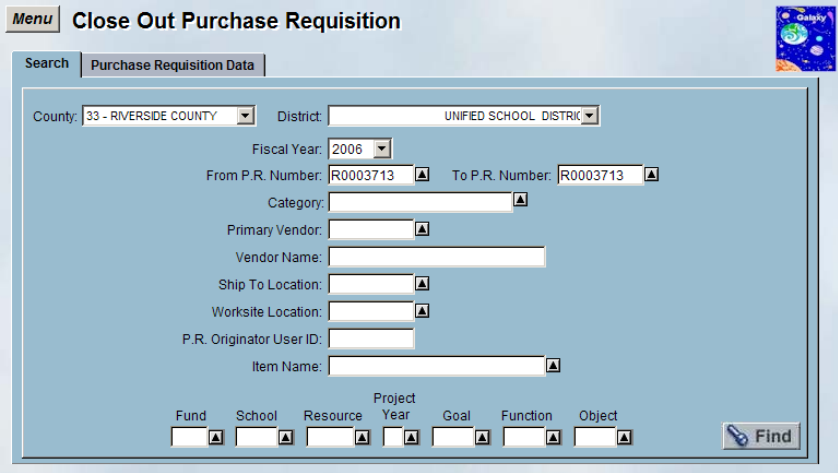
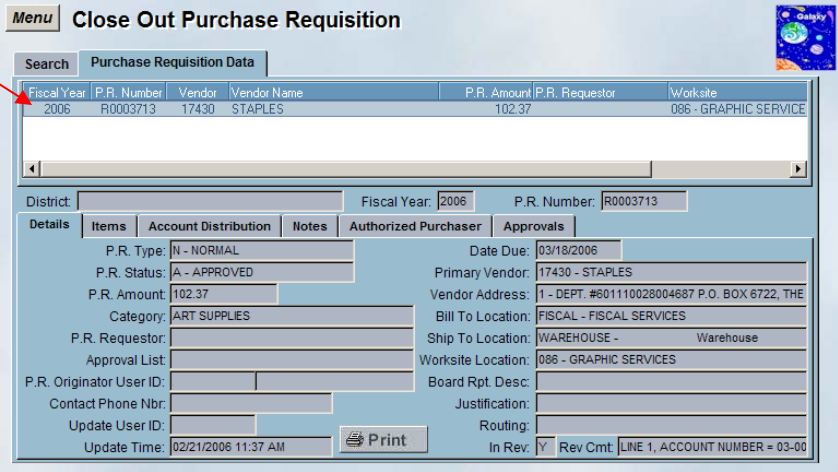
Step

Click the Approvals sub tab to view information regarding the approvals on the purchase requisition selected in the view above.

Seq. Nbr	Atlas ID	User ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	PRIN166				05/24/2005 2:24 PM	

Close Out Purchase Requisitions

The Close Out Purchase Requisitions screen is used to close out purchase requisitions that have line item(s) that are still “open”.

<p>Step 1</p> <p>From menu select Close Out Purchase Requisitions</p> <p>Click OK.</p>	
<p>Step</p> <p>Enter/Select desired search criteria.</p> <p>Click Find</p> <p>A list of all purchase requisitions that match the search criteria will be displayed on the Purchase Requisition Data tab.</p>	
<p>Step</p> <p>Double click the purchase requisition in the upper window to populate sub tabs with the purchase requisition information.</p> <p>View purchase requisition details information on the Details sub tab.</p> <p>Click Items sub tab</p>	 <p>NOTE: Click the print button to print all purchase order data on all tabs to an html file, which is typically displayed by a web browser</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition

Step

To close out specific line item(s) associated to the purchase requisition

Enter “Y” in the Close Out field on the corresponding line.

To close out all line items associated to the purchase order, check the “Select All” checkbox.

Menu Close Out Purchase Requisition

Search Purchase Requisition Data

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2006	R0003713	17430	STAPLES	102.37		086 - GRAPHIC SERVICE

District: Fiscal Year: 2006 P.R. Number: R0003713

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

Show Description View Desc. Discount Amount: 0.00 Pct: 0.000000 Freight: 0.00

Close Out?	Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Freight Amount	Tax	Tax Amount
Y	0001	PAPER	COPY PAPER	10.00	5.00	REAM	0.00	Y	3.88
N	0002	COLORED PENCILS	COLORED PENCILS	15.00	3.00	EACH	0.00	Y	3.49
							Total:	0.00	7.37

Select All Save Cancel

NOTES:

- When a line item is closed out, the remaining encumbrances for that line are disencumbered. Invoices may no longer be applied against that line.
- The user may click the Select All checkbox to toggle the close out action code from “N” to “Y”, and vice versa for all line items. If all line items are closed out, the purchase requisitions status will be set to “F” (finalized – all lines closed out).

Step

Scroll to the right to view additional information.

Click **Save**

Menu Close Out Purchase Requisition

Search Purchase Requisition Data

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2006	R0003713	17430	STAPLES	102.37		086 - GRAPHIC SERVICE

District: Fiscal Year: 2006 P.R. Number: R0003713

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

Show Description View Desc. Discount Amount: 0.00 Pct: 0.000000 Freight: 0.00

Name	Description	Quantity	Unit Price	U/M	Freight Amount	Tax	Tax Amount	Total Amount	Asset Location
R	COPY PAPER	10.00	5.00	REAM	0.00	Y	3.88	53.88	
	RED PENCILS	15.00	3.00	EACH	0.00	Y	3.49	48.49	
							Total:	7.37	102.37

Select All Save Cancel

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Add a New Internal Transfer Purchase Requisition

Step
To view a line items description, place cursor on the line

Click View Desc.

Menu Close Out Purchase Requisition

Search Purchase Requisition Data

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2006	R0003713	17430	STAPLES	102.37		086 - GRAPHIC SERVICE

District: Fiscal Year: 2006 P.R. Number: R0003713

Details Items Account Distribution Notes Authorized Purchaser Approvals

Show Description View Desc. Discount Amount: 0.00 Pct: 0.000000 Freight: 0.00

Close Out?	Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Freight Amount	Tax	Tax Amount
Y	0001	PAPER	COPY PAPER	10.00	5.00	REAM	0.00	Y	3.88
N	0002	COLORED PENCILS	COLORED PENCILS	15.00	3.00	EACH	0.00	Y	3.49
							Total:		7.37

Select All Save Cancel

NOTE: The “View Desc” button prompts a pop up window to view the item description. This pop up window provides a larger field to display more of the item description, as well as display line breaks in the item.

Step
Click the Account Distribution sub tab to view SACS account(s) associated with the purchase requisition.

Menu Close Out Purchase Requisition

Search Purchase Requisition Data

Fiscal Year	P.R. Number	Vendor	Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2006	R0003713	17430	STAPLES	102.37		086 - GRAPHIC SERVICE

District: Fiscal Year: 2006 P.R. Number: R0003713

Details Items Account Distribution Notes Authorized Purchaser Approvals

Fund	School	Resource	PY	Goal	Function	Object	Percent	
03	000	0034	0	0000	3140	4399	1.000000	
							Total:	1.000000

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Add a New Internal Transfer Purchase Requisition

Step
Click the Notes sub tab to view Internal/External notes associated to the purchase requisition.

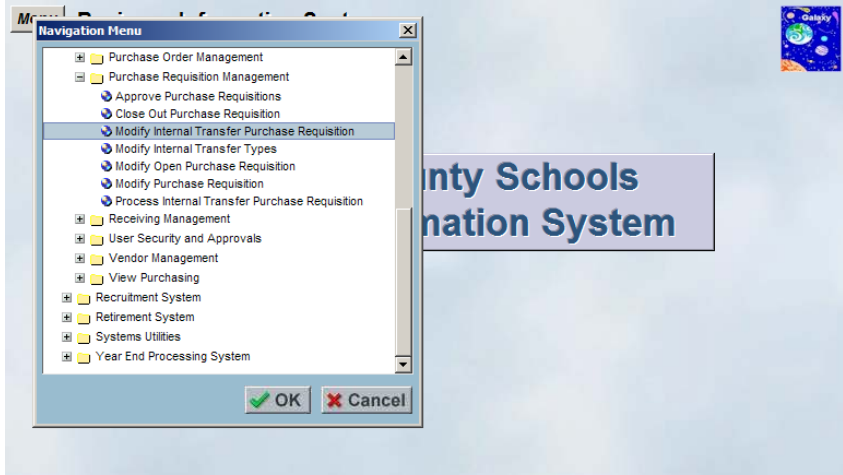
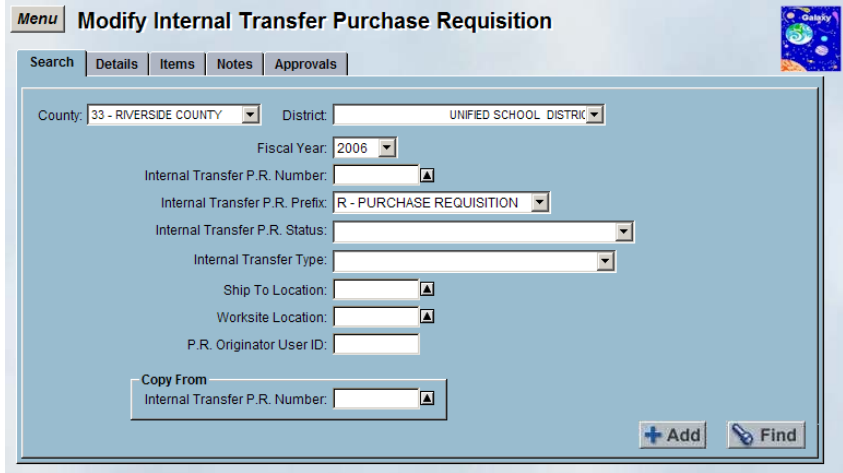
Step
Click the Authorized Purchaser sub tab to view authorized purchaser(s) associated to the purchase requisition.

Step
Click the Approvals tab to view approvals associated to the purchase requisition.

Internal Transfers Purchase Requisitions

Add a New Internal Transfer Purchase Requisition

The Modify Internal Transfer Purchase Requisition screen is used to create new internal transfer purchase requisitions. This screen has been developed for transfers within the District and is specific to object code 5700- (i.e. Repo, Field Trips, etc.).

<p>Step 1</p> <p>From menu select Modify Internal Transfer Purchase Requisition</p> <p>Click OK.</p>	
<p>Step 2</p> <p>To add an internal transfer purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition

Step

Add detail internal transfer purchase requisition information.

After desired information has been entered

Click **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step

To add an item(s) to the internal transfer purchase requisition

Select an **Internal Transfer Type**.

NOTE: Internal Transfer Types must exist before they can be selected on this screen. Internal Transfer Types are set up on the Modify Internal Transfer Type screen.

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Add a New Internal Transfer Purchase Requisition

Step

To add a line item to the internal transfer purchase requisition,

Click **Add Line**.

Enter/Select desired information on the pop up window

Click **Save**.

NOTE: “Edit Desc.” button on the Add Line Nbr. pop up prompts another pop up window to enter a more detailed description of the item.

Step

To add a SACS account string(s) to the line item

Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to “0”.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount
0001	STAMPS		100.00	0.39	EACH	39.00

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:							0.00	1.000000	
Total:									39.00

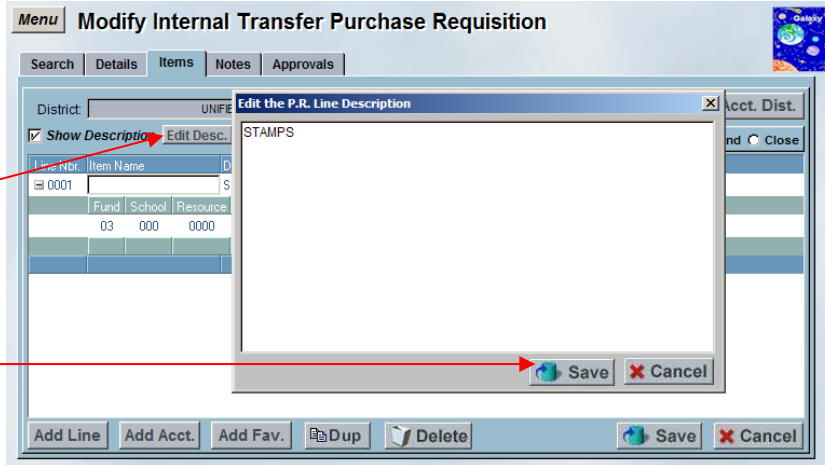
Step

To make changes to the line item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: “Edit Desc.” button provides a pop up window to enter a more detailed description of the item.

Step
 Click **Save**

This will start the budget check process.

Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

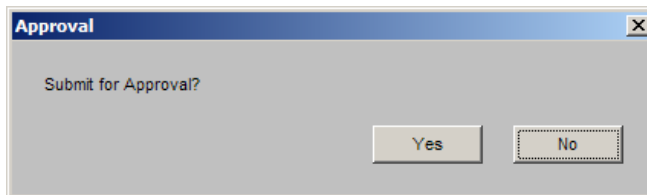
No Approvals

If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).

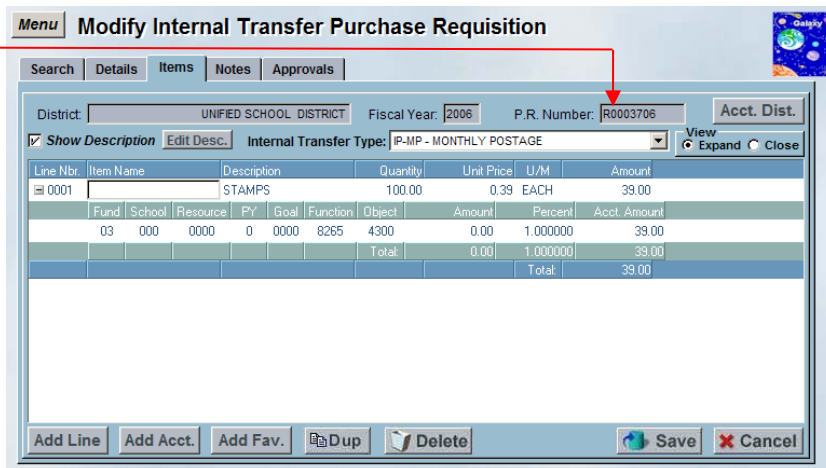
Step
 “Submit for Approval?” warning message prompts

Click **Yes**.



Step
 System will generate an internal transfer purchase requisition number.

Click **Notes** tab



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Add a New Internal Transfer Purchase Requisition

Step
To select a previously defined Internal/External note(s)

Click **Attach**,

or

Manually enter Internal/ External note(s).

Click **Save**

Menu **Modify Internal Transfer Purchase Requisition**

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003706

Internal
Please call to verify receipt of purchase order.

External
NOTE TO VENDOR: Please RUSH this order!

Attach Attach

Save Cancel

NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.

Step
Click the Approvals tab to view approvals associated to this internal transfer purchase requisition.

No changes can be made on this tab.

Menu **Modify Internal Transfer Purchase Requisition**

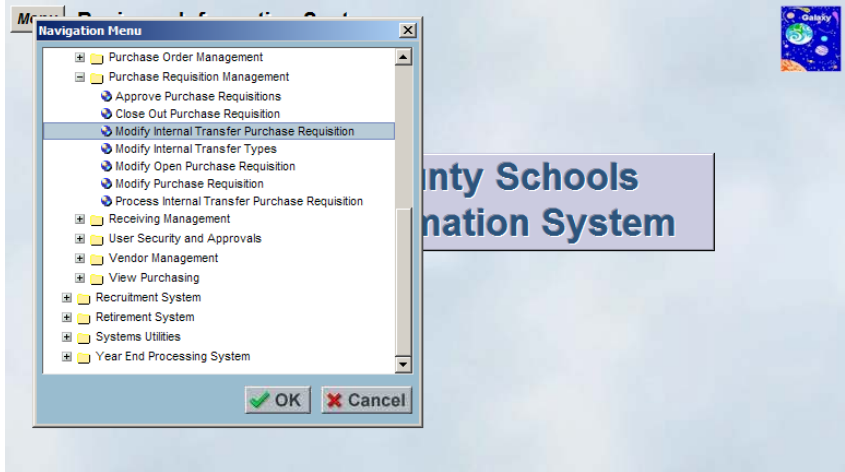
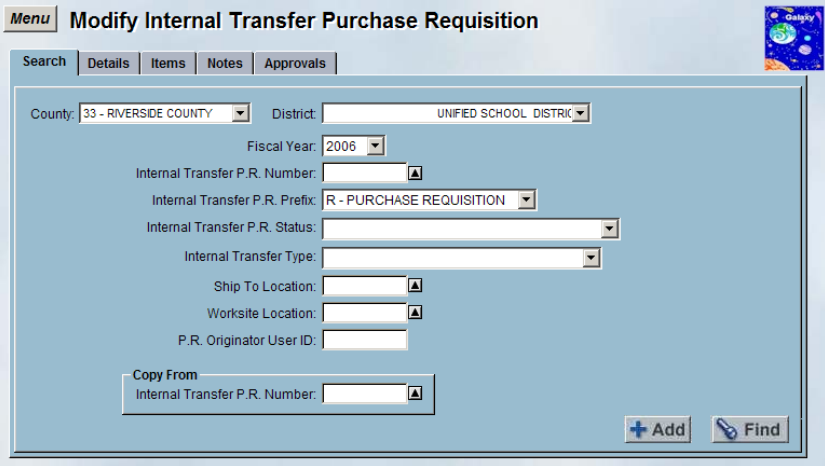
Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003706

Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	PURCHASING			02/13/2006 3:18 PM	

Add a New Internal Transfer Purchase Requisition using Account Distribution

A feature available on the Modify Internal Transfer Purchase Requisition screen is the ability to apply account distribution to line items. If all line items on the new internal transfer purchase requisition will be funded by the same account string(s) the user may set up the account distribution. As a line item is added it will automatically populate the funding with the account string(s) entered into the account distribution pop up window.

<p>Step 1</p> <p>From menu select Modify Internal Transfer Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>To add an internal transfer purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Account Distribution

Step

Add detail internal transfer purchase requisition information.

After desired information has been entered

Click **Items** tab.

Menu Modify Internal Transfer Purchase Requisition

Search | Details | **Items** | Notes | Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0000NEW Delete

P.R. Type: T - INTERNAL TRANSFER Date Due: 03/15/2006

P.R. Status: N - NEW (NOT SUBMITTED FOR A Bill To Location: FISCAL

P.R. Amount: FISCAL SERVICES

Category: OFFICE Ship To Location: WAREHOUSE

Office supplies Warehouse

P.R. Requestor: Worksite Location: 085 PURCHASING DEPARTMENT

Approval List: Board Rpt. Desc:

P.R. Originator User ID: Reference:

Contact Phone Nbr: Routing:

Update User ID: In Rev: Rev Cmt:

Update Timestamp: 02/13/2006 2:16 PM

Print Save Cancel

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step

Click **Acct. Dist.**

Menu Modify Internal Transfer Purchase Requisition

Search | Details | **Items** | Notes | Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0000NEW Acct. Dist.

Show Description Edit Desc. Internal Transfer Type: P-MP - MONTHLY POSTAGE View

Expand Close

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount
					Total	

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Account Distribution

Step

To add default account distribution for all line items to be entered,

Click **Add**.

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Click **Save**

Fund	School	Resource	PY	Goal	Function	Object	Percent
03	000	0000	0	0000	8265	4300	1.000000
Total:							1.000000

NOTE: Clicking the Account Distribution button will popup a window to enter the default account distribution for all line items. The account string percentage is entered as default (the total for all account strings entered in this window must equal 100% or 0%), each line item will be split funded according to the respective percentage. The account string percentage may also be set to 0 for all account strings to establish default funding for all line items without automatically calculating the split funding amounts. Account strings entered in this popup window will go through the account validation routine. Clicking the Save button will close the popup window and apply the account distribution to the line items by multiplying the account string percentage times the total line item amount.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Account Distribution

Step

To add a line item to the internal transfer purchase requisition

Click **Add Line**.

Enter/Select desired information on the pop up window.

Click **Save**.

NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step

Verify line item(s) are populated with the default account distribution.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount
0001	STAMPS	STAMPS	100.00	0.39	EACH	39.00

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
03	000	0000	0	0000	8265	4300	0.00	1.000000	39.00
Total:							0.00	1.000000	39.00

NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Account Distribution

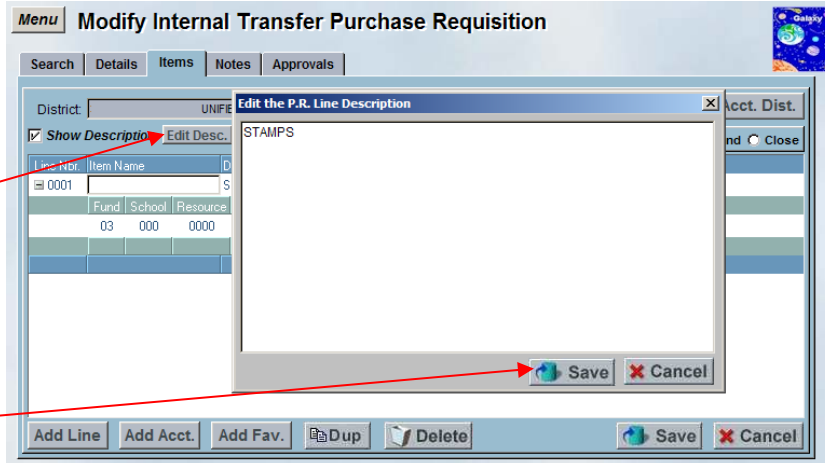
Step

To make changes to the line item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button provides a pop up window to enter a more detailed description of the item.

Step
 Click **Save**

This will start the budget check process.

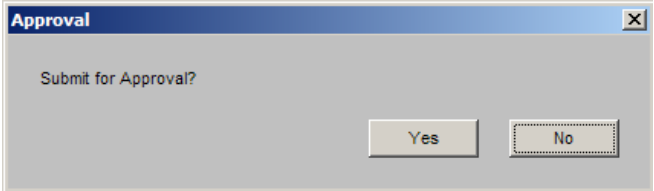
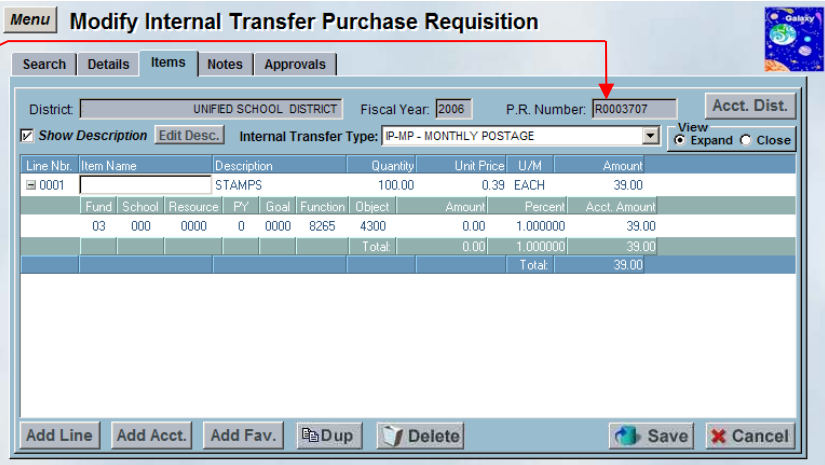
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	
<p>Step System will generate an internal transfer purchase requisition number.</p> <p>Click Notes tab</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Account Distribution

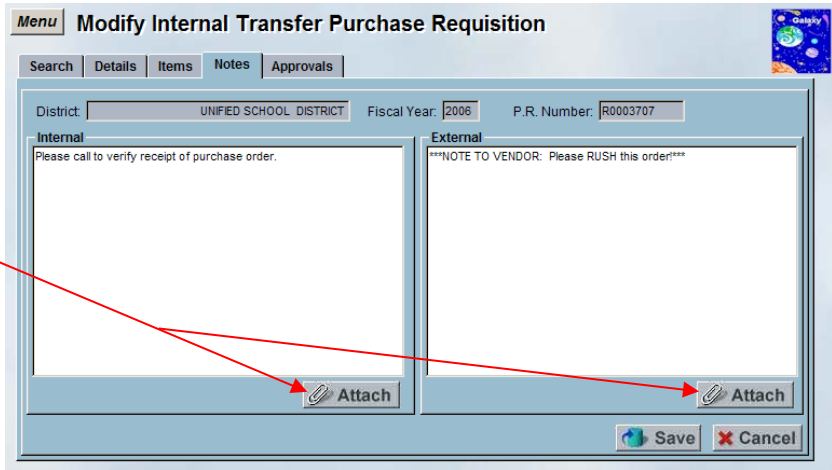
Step
To select a previously defined Internal/External note(s)

Click **Attach**,

or

Manually enter Internal/External note(s).

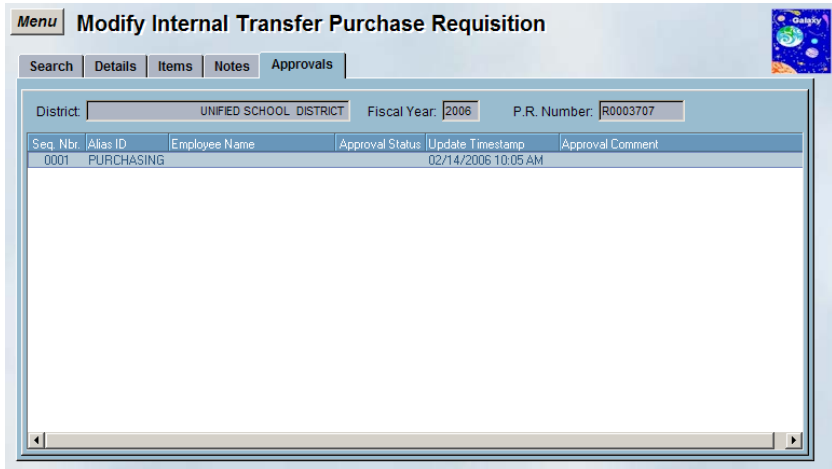
Click **Save**



NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.

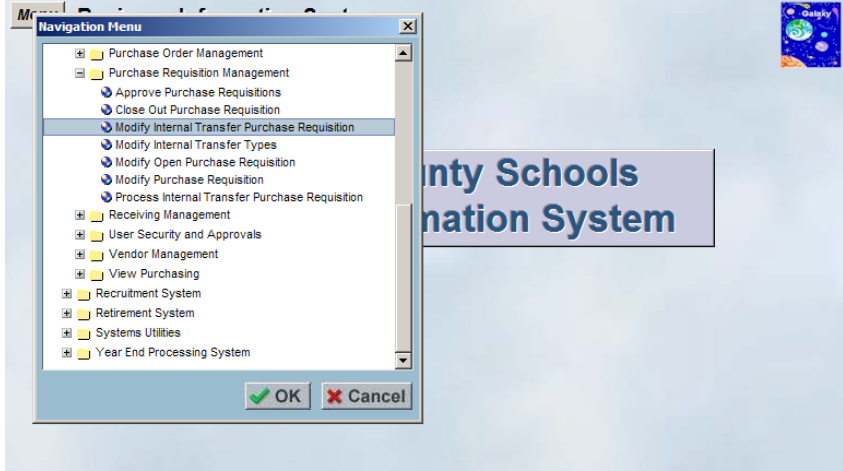
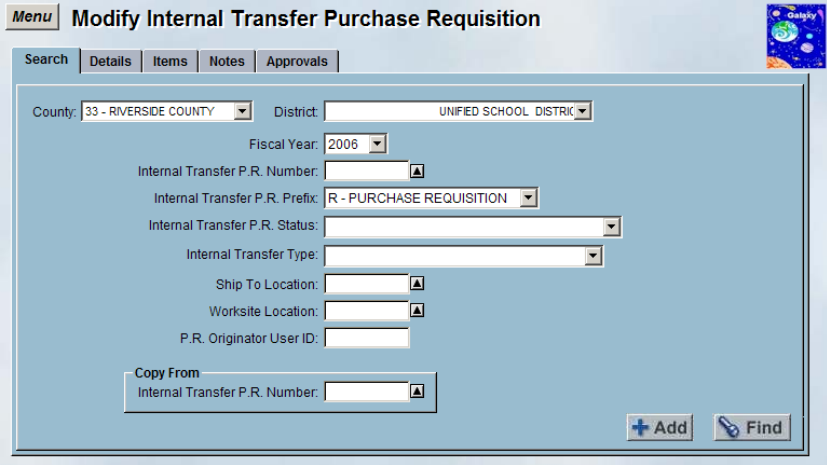
Step
Click the Approvals tab to view approvals associated to this internal transfer purchase requisition

No changes can be made on this tab.



Add a New Internal Transfer Purchase Requisition using Predefined Favorites for Account Distribution

A feature available on the Modify Internal Transfer Purchase Requisition screen is the ability to assign predefined sacs account strings to the account distribution. Predefined SACS account string(s) (accounts used most often by user) can be setup on the Modify User SACS Favorites screen. Once the accounts are setup, whenever the user is entering account distribution (line items that will be funded by the same account string(s)) they can select the “Add Fav.” button on the account distribution pop up window and select their predefined account strings.

<p>Step 1</p> <p>From menu select Modify Internal Transfer Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>To add an internal transfer purchase requisition(s)</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer P. R. using Predefined Favorites for Account Distribution

Step

Add detail internal transfer purchase requisition information.

After desired information has been entered

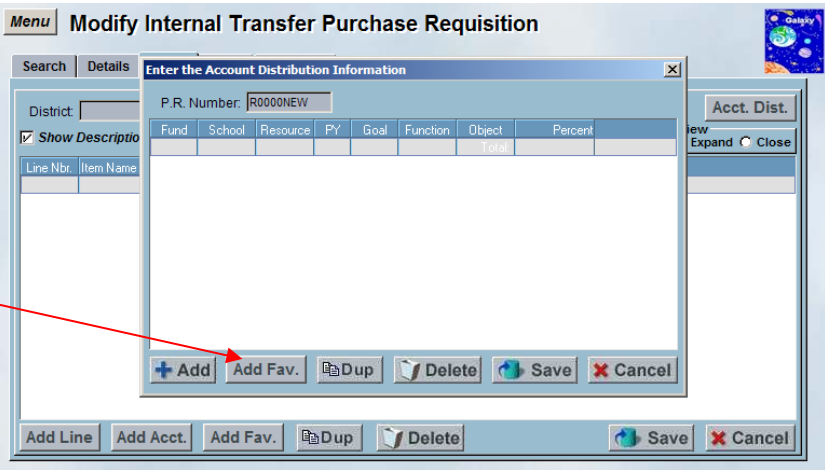
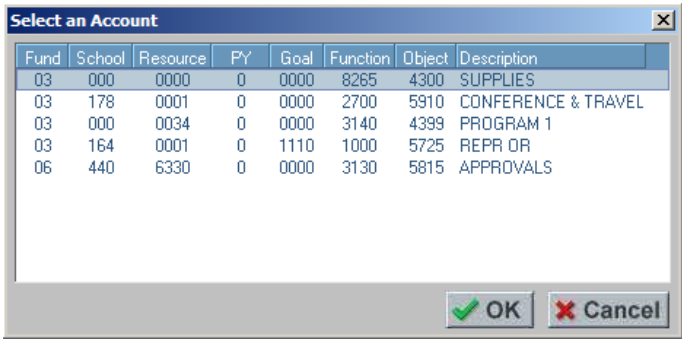
Click the **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

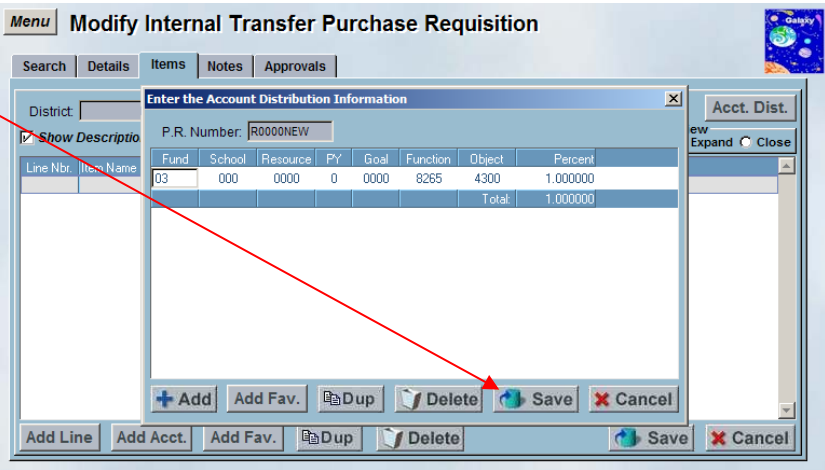
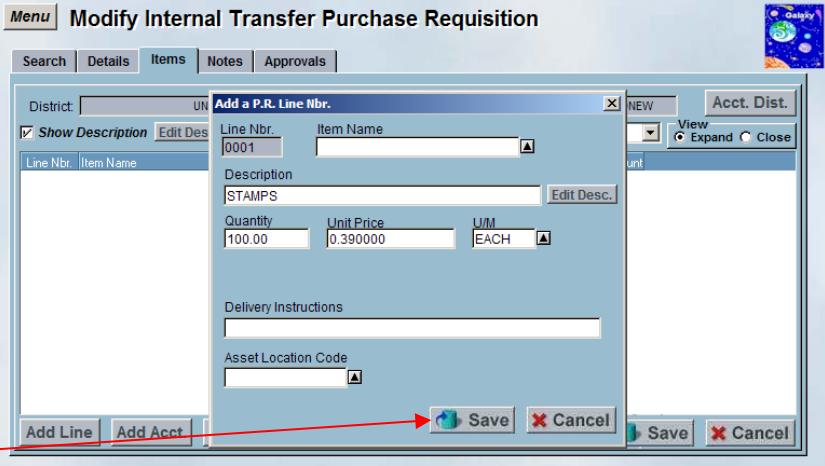
Step

Click **Acct. Dist.**

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer P. R. using Predefined Favorites for Account Distribution

<p>Step To add default account distribution for all line items using a user's predefined SACS account string(s)</p> <p>Click Add Fav.</p>	
<p>Step To select the user's predefined SACS account string(s) for the default account distribution,</p> <p>Highlight each account string row from the pop up window</p> <p>Click OK.</p> <p>Or</p> <p>Double clicking on an account string row will automatically add it to the account distribution.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer P. R. using Predefined Favorites for Account Distribution

<p>Step Click Save</p>	
<p>Step To add a line item(s) to the internal transfer purchase requisition</p> <p>Click Add Line.</p> <p>Enter/Select desired information on the pop up window.</p> <p>Click Save</p>	 <p style="margin-top: 10px;">NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer P. R. using Predefined Favorites for Account Distribution

Step

Verify line item(s) are populated with the default account distribution.

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

Step

To make changes to the line item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**

NOTE: "Edit Desc." button provides a pop up window to enter a more detailed description of the item.

Step

Click **Save**

This will start the budget check process.

Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

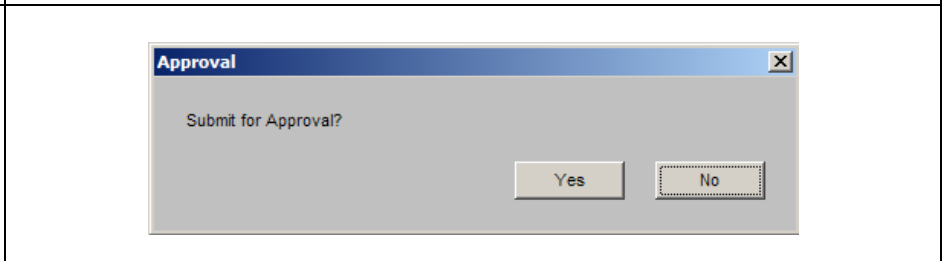
No Approvals

If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).

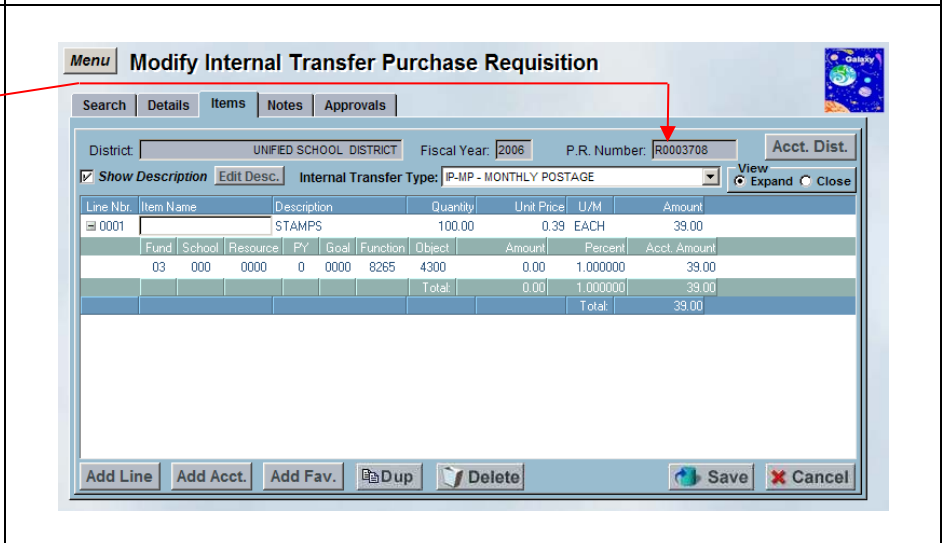
Step
 “Submit for Approval?” warning message prompts

Click **Yes**.

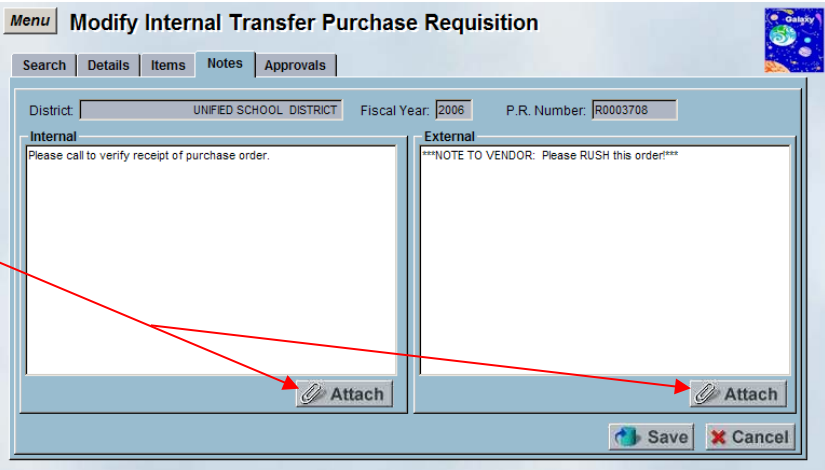
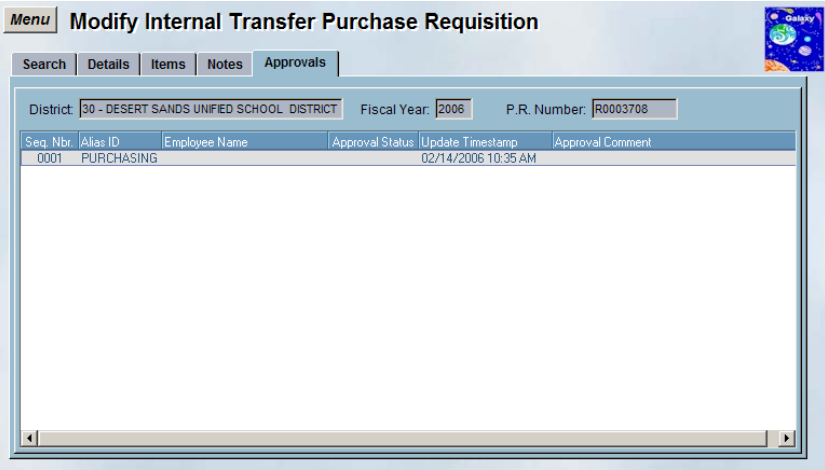


Step
 System will generate an internal transfer purchase requisition number.

Click **Notes** tab

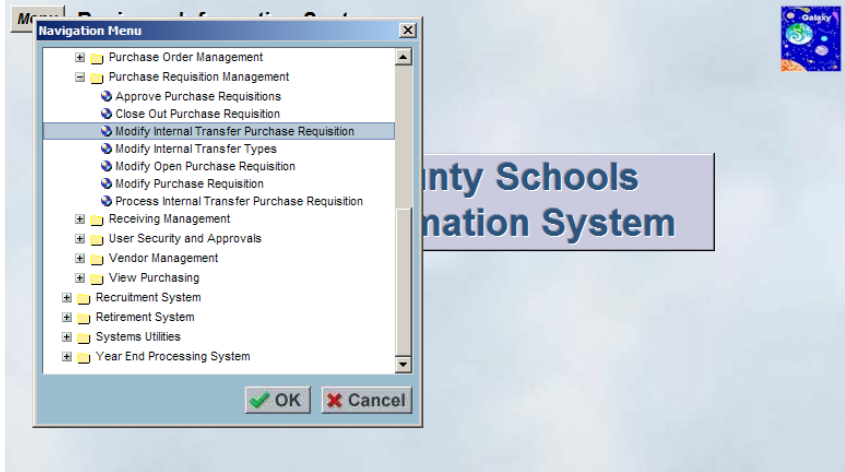
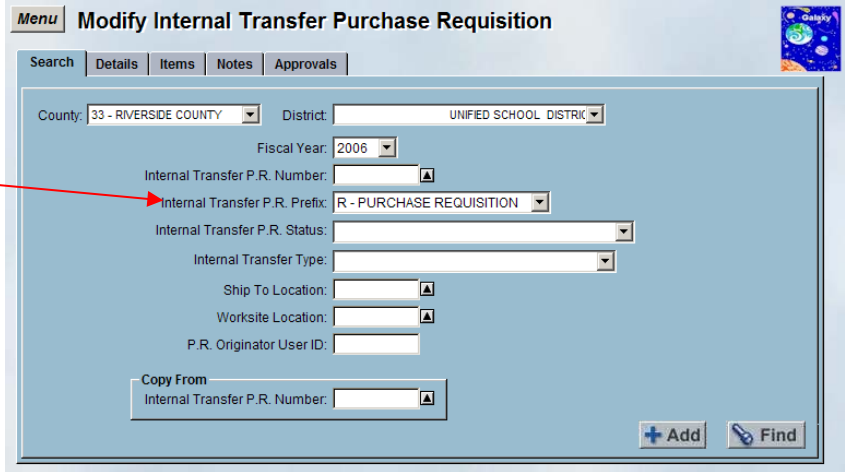


DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer P. R. using Predefined Favorites for Account Distribution

<p>Step To select a previously defined Internal/External note(s)</p> <p>Click Attach,</p> <p>or</p> <p>Manually enter Internal/External note(s).</p> <p>Click Save</p>	 <p style="text-align: center;">NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.</p>
<p>Step Click the Approvals tab to view approvals associated to this internal transfer purchase requisition</p> <p>No changes can be made on this tab.</p>	

Add a New Internal Transfer Purchase Requisition using Predefined Favorites

A feature available on the Modify Internal Transfer Purchase Requisition screen is the ability to assign predefined sacs account strings to line item(s). Predefined SACS account string(s) (accounts used most often by user) can be setup on the Modify User SACS Favorites screen. Once the accounts are setup, the user may assign their predefined SACS account strings to the line items entered on the Items tab by selecting the “Add Fav.” button.

<p>Step 1 From menu select Modify Internal Transfer Purchase Requisition Click OK.</p>	
<p>Step To add an internal transfer purchase requisition, select Internal Transfer P. R. Prefix. If additional fields are selected they will populate the Details tab. Click Add</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Predefined Favorites

Step

Add detail internal transfer purchase requisition information.

After desired information has been entered

Click **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step

To add a line item to the internal transfer purchase requisition

Click **Add Line**.

Enter/Select desired information on the pop up window.

Click **Save**.

NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Predefined Favorites

Step

To add a user's predefined SACS account string(s) to the line item

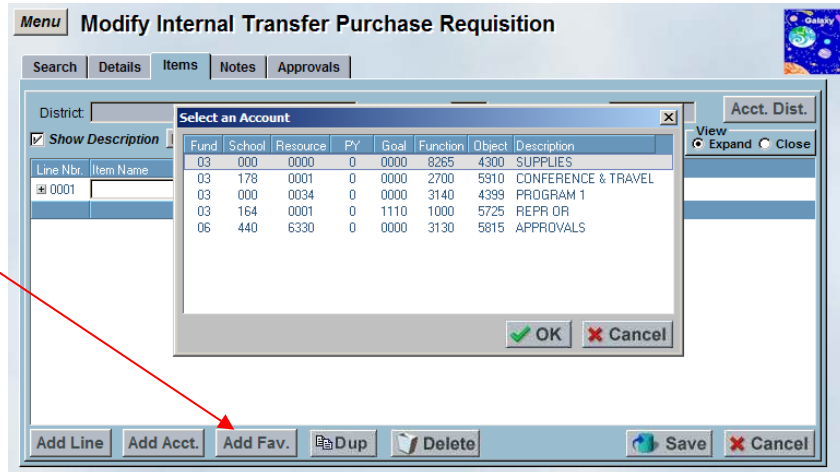
Click **Add Fav.**

Highlight each account string row from the pop up window

Click **OK**.

Or

Double clicking on each account string row will automatically add it to the line item.



Step

Verify line item and account string information for each line item.



NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Predefined Favorites

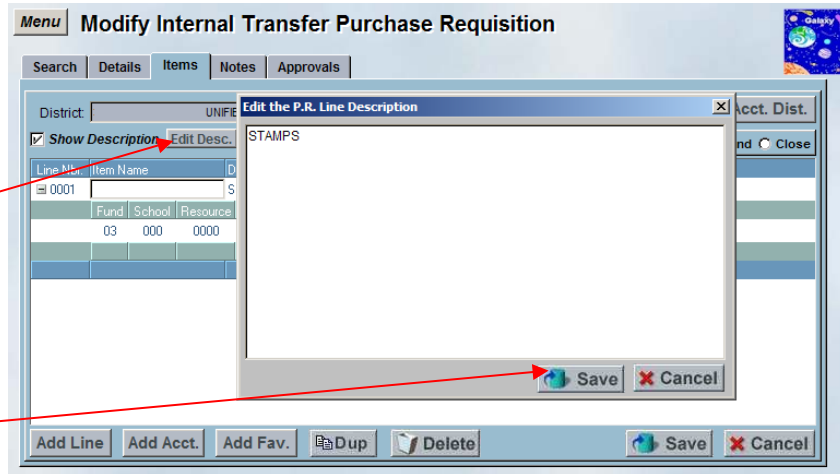
Step

To make changes to the line item description, place cursor on the line,

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button provides a pop up window to enter a more detailed description of the item.

Step
Click **Save**

This will start the budget check process.

Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

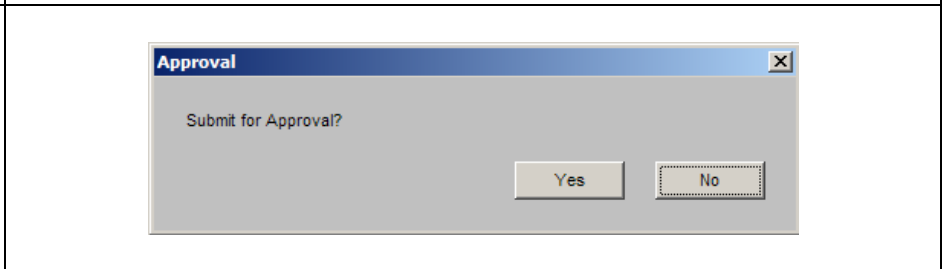
No Approvals

If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).

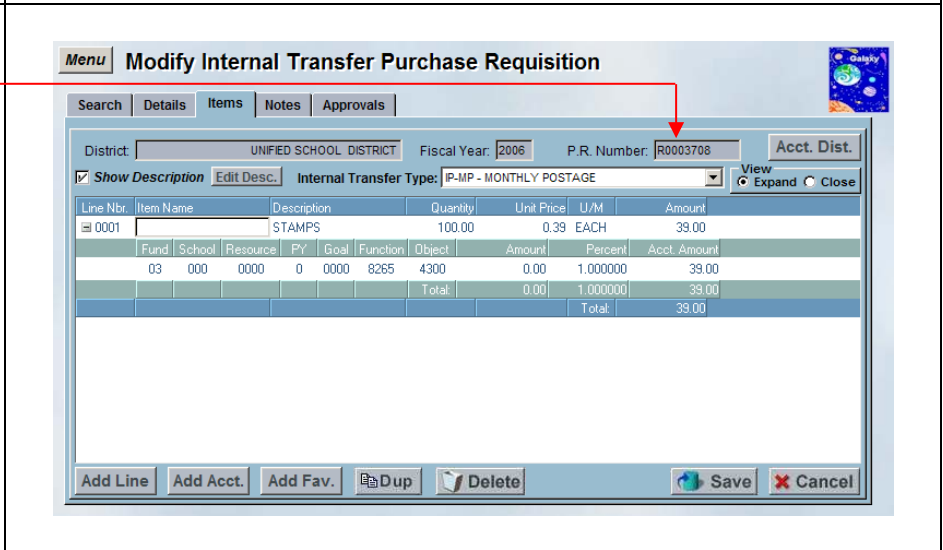
“Submit for Approval?” warning message prompts

Click **Yes**.

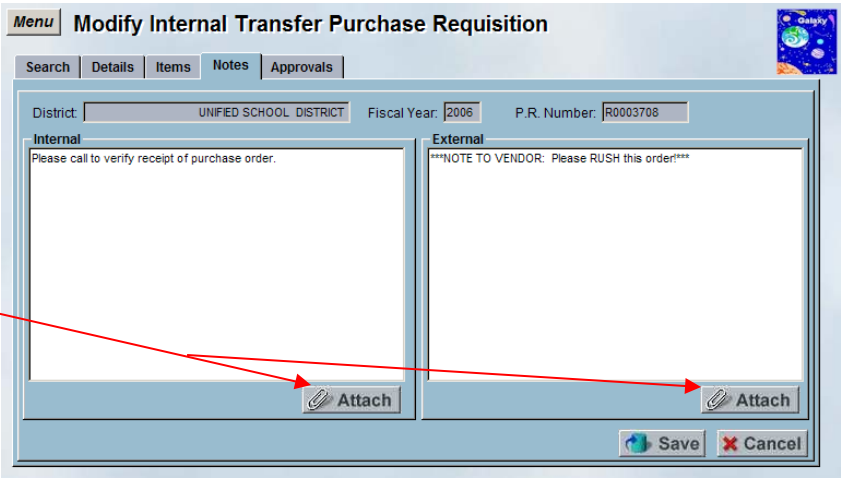
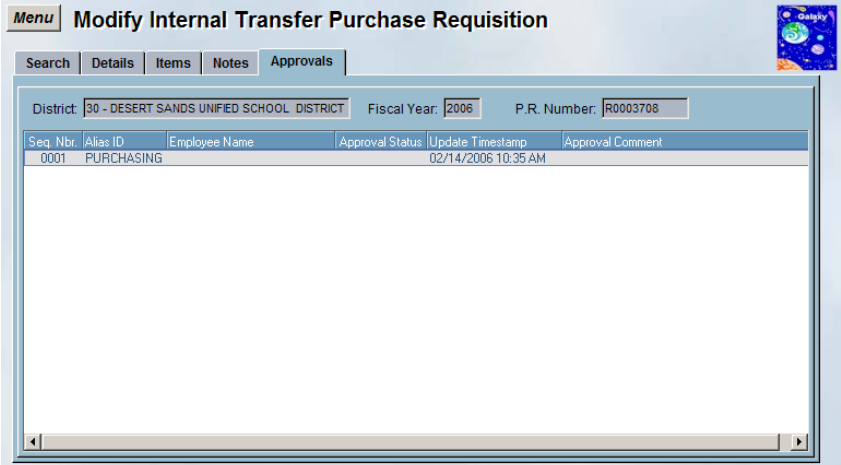


Step
System will generate an internal transfer purchase requisition number.

Click **Notes** tab

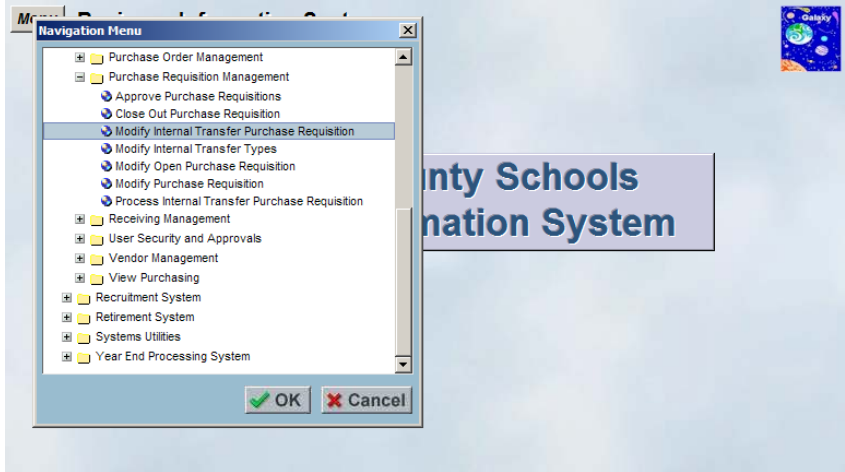
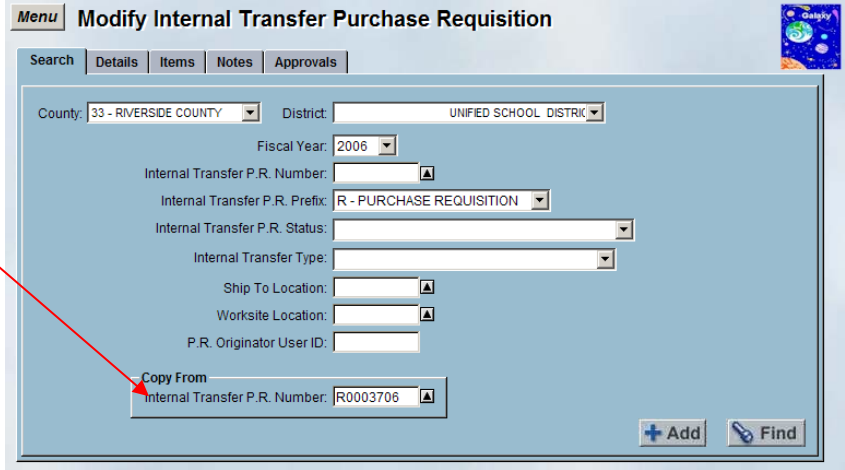


DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Internal Transfer Purchase Requisition using Predefined Favorites

<p>Step To select a previously defined Internal/External note(s) for the internal transfer purchase requisition</p> <p>Click Attach,</p> <p>or</p> <p>Manually enter Internal/External note(s).</p> <p>Click Save</p>	 <p style="text-align: center;">NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.</p>												
<p>Step Click the Approvals tab to view approvals associated to this internal transfer purchase requisition</p> <p>No changes can be made on this tab.</p>	 <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th>Seq. Nbr.</th> <th>Alias ID</th> <th>Employee Name</th> <th>Approval Status</th> <th>Update Timestamp</th> <th>Approval Comment</th> </tr> </thead> <tbody> <tr> <td>0001</td> <td>PURCHASING</td> <td></td> <td></td> <td>02/14/2006 10:35 AM</td> <td></td> </tr> </tbody> </table>	Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment	0001	PURCHASING			02/14/2006 10:35 AM	
Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment								
0001	PURCHASING			02/14/2006 10:35 AM									

Add a New Internal Transfer Purchase Requisition Copying from an Internal Transfer P.R. Number

A feature available on the Modify Internal Transfer Purchase Requisition screen is the ability to create a new internal transfer purchase requisition from an existing purchase requisition using the “Copy From” feature. The internal transfer purchase requisition will be pre-filled with data from the existing purchase requisition selected, which may be modified as necessary.

<p>Step 1</p> <p>From menu select Modify Open Purchase Order</p> <p>Click OK.</p>	
<p>Step</p> <p>Enter/Select an Internal Transfer P. R. Number.</p> <p>Click Add</p>	

Step

Verify and make necessary changes on Details, Items and Approvals tabs.

The screenshot displays the 'Modify Internal Transfer Purchase Requisition' web application. The interface includes a 'Menu' bar with 'Search', 'Details', 'Items', 'Notes', and 'Approvals' tabs. The 'Details' tab is active. The form contains the following fields and values:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2006
- P.R. Number: R0000NEW
- P.R. Type: T - INTERNAL TRANSFER
- Date Due: 03/15/2006
- P.R. Status: N - NEW (NOT SUBMITTED FOR APPROVAL)
- Bill To Location: FISCAL
- P.R. Amount: [Empty]
- Category: OFFICE (Office supplies)
- Ship To Location: WAREHOUSE
- P.R. Requestor: [Empty]
- Worksite Location: 085 PURCHASING DEPARTMENT
- Approval List: [Empty]
- Board Rpt. Desc: [Empty]
- P.R. Originator User ID: [Empty]
- Reference: [Empty]
- Contact Phone Nbr: [Empty]
- Routing: [Empty]
- Update User ID: [Empty]
- Update Timestamp: 02/13/2006 2:16 PM
- In Rev: [Empty]
- Rev Cmt: [Empty]

Buttons for 'Print', 'Save', and 'Cancel' are located at the bottom of the form.

NOTES:

- The new internal transfer purchase requisition is pre-filled with data from the existing purchase requisition, which may be modified as necessary.
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

After all necessary changes have been made

Click **Save**.

This will start the budget check process

Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

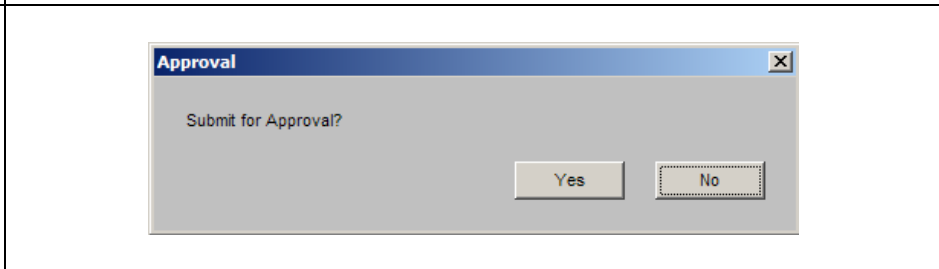
No Approvals

If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

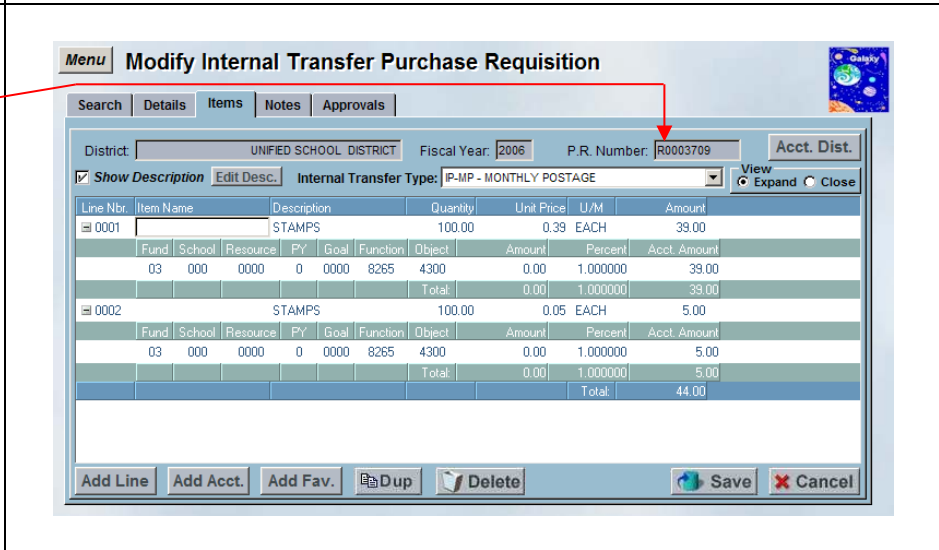
If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).

Step
 “Submit for Approval?” warning message prompts

Click **Yes**.



Step
 System will generate an internal transfer purchase requisition number.



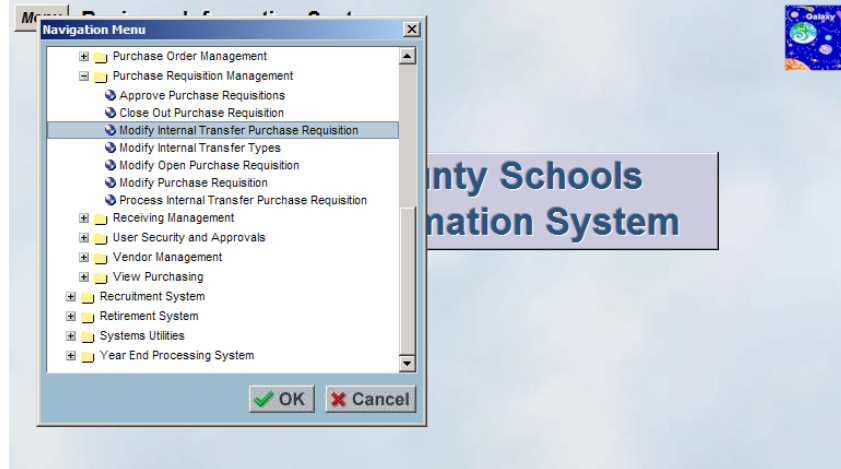
Modify an Existing Internal Transfer Purchase Requisition

The Modify Internal Transfer Purchase Requisition screen allows the user to edit an existing internal transfer purchase requisition.

Step 1

From menu select
Modify Internal
Transfer Purchase
Requisition

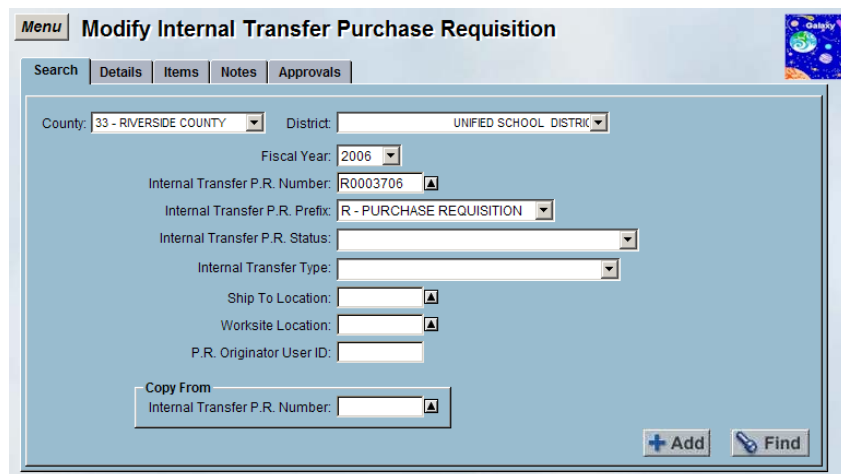
Click **OK**.



Step 2

To edit an existing
Internal Transfer
Purchase Requisition
enter/select
information as
available.

Click **Find**



NOTES:

- In order to modify a particular purchase requisition, the user must be the same person that originally created the purchase requisition, or the user must be assigned the Approver role in user security.
- Purchase requisitions that have been linked to purchase orders may not be modified.

Step

Edit internal purchase requisition detail information as necessary.

Click **Items** tab.

The screenshot displays the 'Modify Internal Transfer Purchase Requisition' web application. The interface includes a 'Menu' bar with 'Search', 'Details', 'Items', 'Notes', and 'Approvals' tabs. The 'Details' tab is active. The form contains the following fields and values:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2006
- P.R. Number: R0003706
- P.R. Type: T - INTERNAL TRANSFER
- Date Due: 03/15/2006
- P.R. Status: S - SUBMITTED FOR APPROVAL
- Bill To Location: FISCAL
- P.R. Amount: 39.00
- Category: OFFICE (Office supplies)
- Ship To Location: WAREHOUSE (Warehouse)
- Worksite Location: 089 (PERSONNEL DEPARTMENT)
- Update Timestamp: 02/13/2006 3:18 PM

Buttons for 'Print', 'Save', and 'Cancel' are visible at the bottom of the form.

NOTES:

- With certain exceptions, any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Click the print button to print all internal transfer purchase requisition data from all tabs.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Purchase Requisition

Step

Edit data associated to the existing line item(s) as necessary.

NOTES:

- Any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

To add new line item(s) to an existing internal transfer purchase requisition

Click **Add Line**.

Enter/Select desired information on pop up window.

Click **Save**

To duplicate an existing line item place cursor on that line

Click **Dup**.

NOTE: “Edit Desc.” button prompts a pop up window to enter a more detailed description of the item.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Purchase Requisition

Step

To manually add a SACS account string(s) to the line item

Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to “0”.

Step

To add a user's predefined SACS account string(s) to a line item

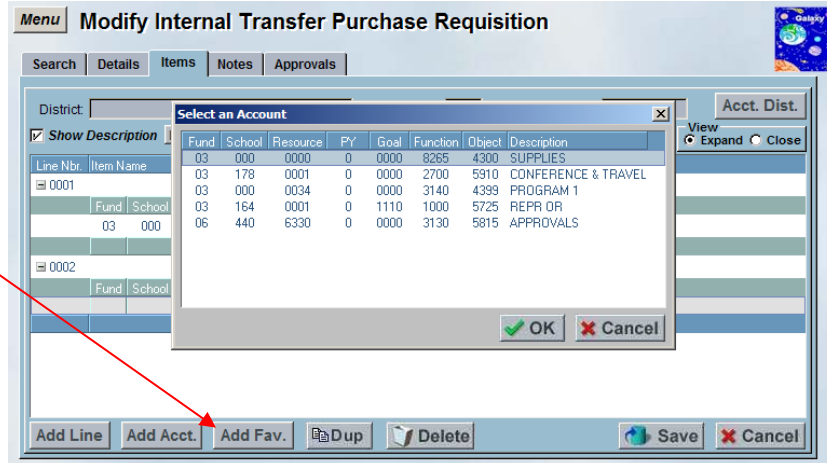
Click **Add Fav.**

Highlight each account string row from the pop up window.

Click **OK**.

Or

Double clicking on an account string row will automatically add it to the line item.



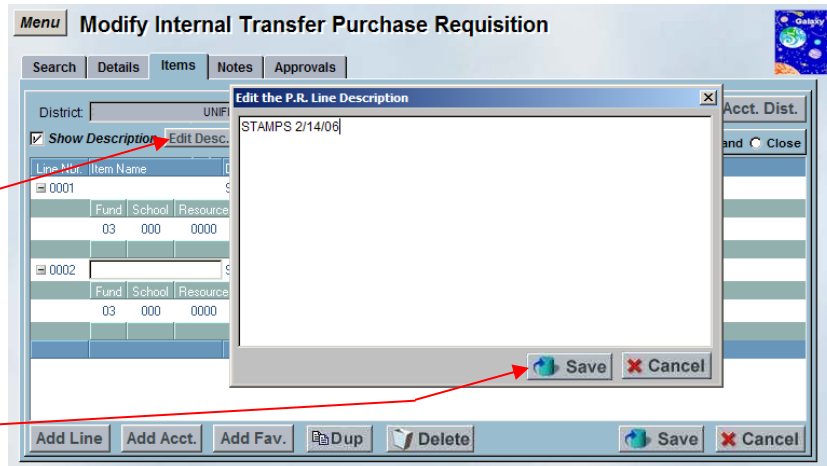
Step

To make changes to the item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button provides a pop up window to enter a more detailed description of the item.

Step
Click Save

This will start the budget check process.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount				
0001		STAMPS	50.00	0.39	EACH	19.50				
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	39.00
							Total:	0.00	1.000000	39.00
0002		STAMPS 2/14/06	50.00	0.05	EACH	2.50				
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
							Total:	0.00	1.000000	
							Total:			22.00

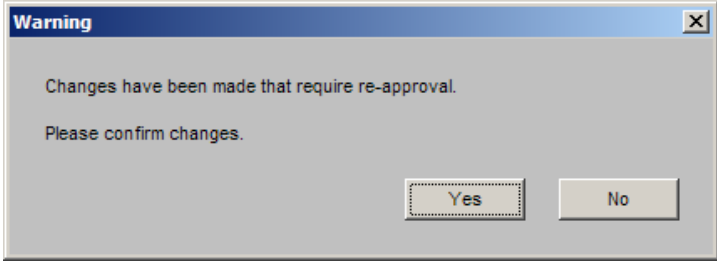
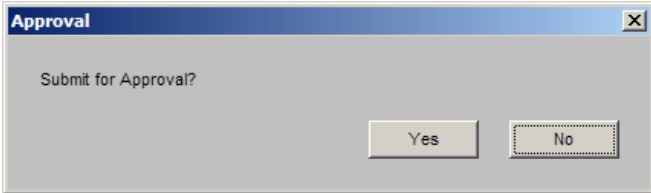
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Warning". The text inside reads: "Changes have been made that require re-approval. Please confirm changes." At the bottom, there are two buttons: "Yes" and "No".</p>
<p>Step “Submit for Approval?” warning prompts</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Approval". The text inside reads: "Submit for Approval?". At the bottom, there are two buttons: "Yes" and "No".</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Purchase Requisition

Step

Click the Notes tab to modify the Internal/External note(s) for the internal purchase requisition,

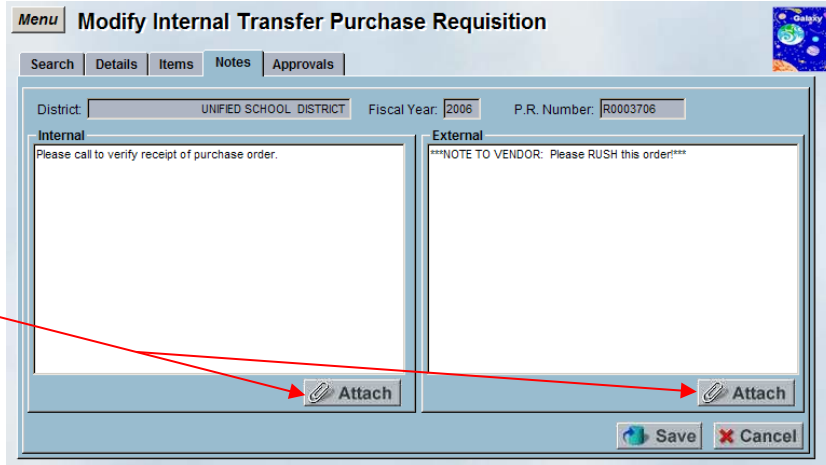
Click **Attach**.

Select from a previously defined note

or

Manually enter Internal/External note(s).

Click **Save**



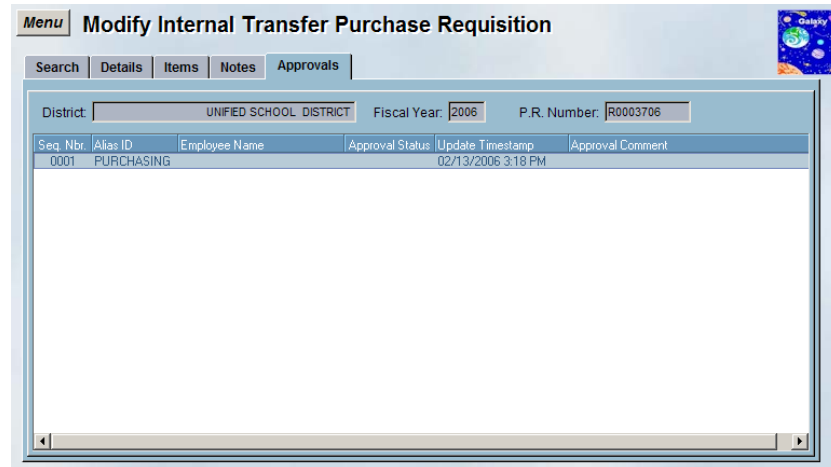
NOTES:

- External notes will print on purchase requisitions and purchase orders, internal notes will not.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

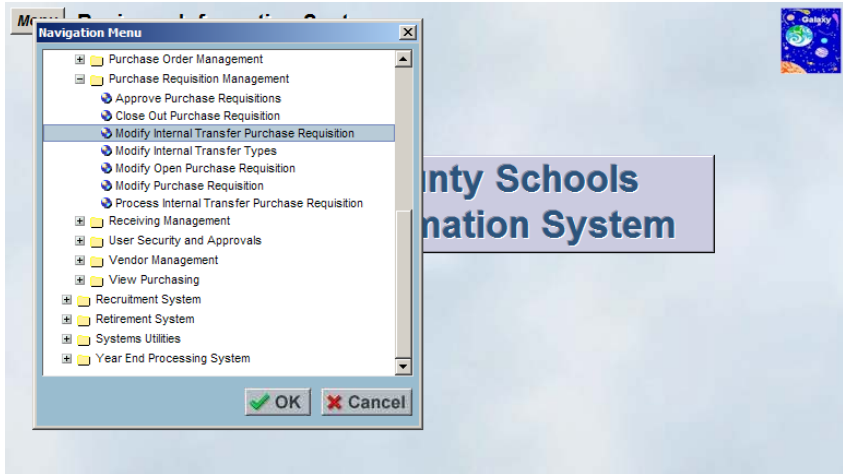
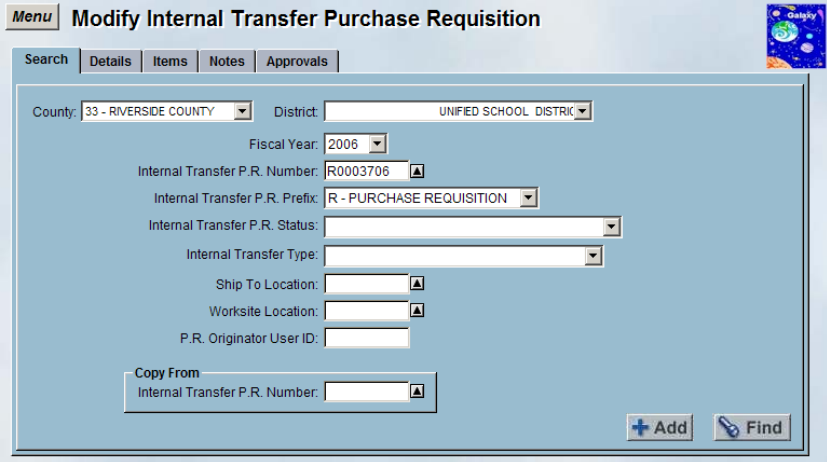
Click the Approvals tab to view approvals associated to this internal transfer purchase requisition.

No Changes can be made on this tab.



Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

The Modify Internal Transfer Purchase Requisition screen allows the user to reapply account distribution to existing line items.

<p>Step 1</p> <p>From menu select Modify Internal Transfer Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>To edit an existing Internal Transfer Purchase Requisition enter/select information as available.</p> <p>Click Find</p>	 <p>NOTES:</p> <ul style="list-style-type: none">• In order to modify a particular purchase requisition, the user must be the same person that originally created the purchase requisition, or the user must be assigned the Approver role in user security.• Purchase requisitions that have been linked to purchase orders may not be modified.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step
Edit internal
purchase requisition
detail information.

Click **Items** tab

The screenshot displays the 'Modify Internal Transfer Purchase Requisition' form. The 'Details' tab is active. Key fields include: District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2006), P.R. Number (R0003706), P.R. Type (T - INTERNAL TRANSFER), P.R. Status (S - SUBMITTED FOR APPROVAL), P.R. Amount (39.00), Category (OFFICE), P.R. Requestor (empty), Approval List (empty), P.R. Originator User ID (empty), Contact Phone Nbr (empty), Update User ID (empty), Update Timestamp (02/13/2006 3:18 PM), Bill To Location (FISCAL), Ship To Location (WAREHOUSE), Worksite Location (089 PERSONNEL DEPARTMENT), Board Rpt. Desc (empty), Reference (empty), Routing (empty), In Rev (checkbox), and Rev Cmt (empty). Buttons for Search, Details, Items, Notes, Approvals, Print, Save, and Cancel are visible.

NOTES:

- With certain exceptions, any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Click the print button to print all internal transfer purchase requisition data from all tabs.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step
 To reapply/reset
 the account
 distribution for
 existing line item(s)

Click **Acct. Dist.**

NOTES:

- Any modifications to data on this tab will reinitiate the approval process (contract status will be set to “N” (new – not submitted for approval)).
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step
 Manually edit existing default account distribution in the pop up window,

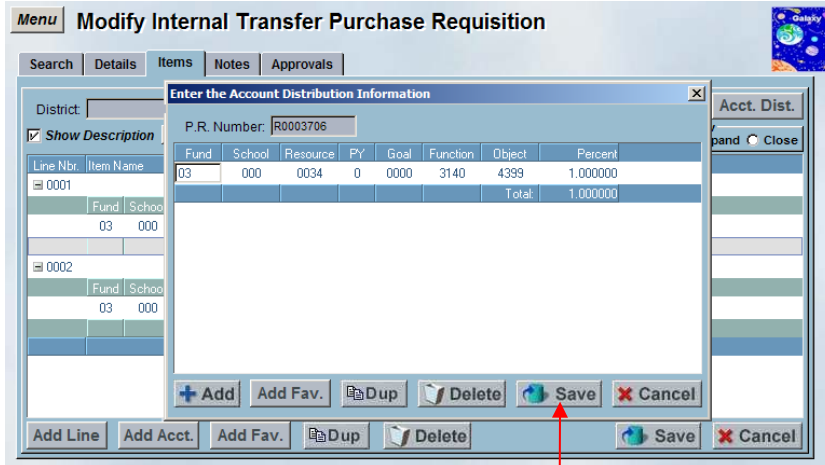
or

Select an account from the user's predefined sacs account favorites to reapply for the account distribution in the pop up window.

Click **Save**

Required fields:

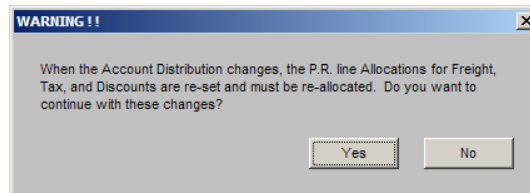
- Fund
- School
- Resource
- PY
- Goal
- Function
- Object



NOTE: Clicking the Account Distribution button will popup a window to enter the default account distribution for all line items. The account string percentage is entered as default (the total for all account strings entered in this window must equal 100% or 0%), each line item will be split funded according to the respective percentage. The account string percentage may also be set to 0 for all account strings to establish default funding for all line items without automatically calculating the split funding amounts. Account strings entered in this popup window will go through the account validation routine. Clicking the Save button will close the popup window and apply the account distribution to the line items by multiplying the account string percentage times the total line item amount.

A warning message will be displayed asking the user if they would like to continue with the changes.

Click **Yes**



DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step
 Verify account
 distribution
 reallocation.

NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

Step
 Click **Save**

This will start the budget check process.

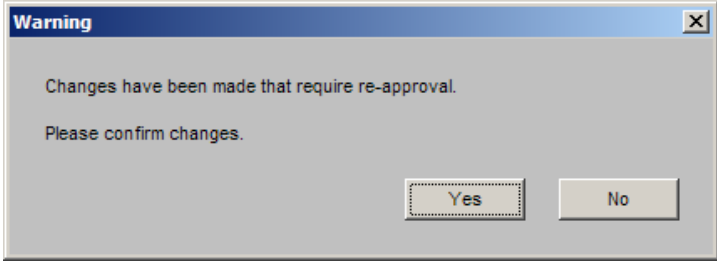
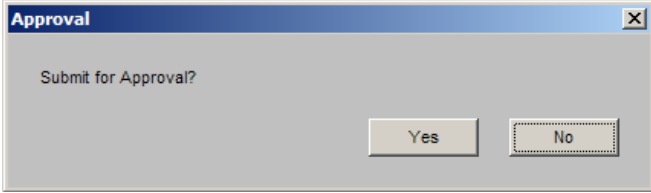
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click Yes.</p>	 <p>A warning dialog box with a blue title bar labeled 'Warning'. The text inside reads: 'Changes have been made that require re-approval. Please confirm changes.' At the bottom, there are two buttons: 'Yes' and 'No'.</p>
<p>Step “Submit for Approval?” warning prompts</p> <p>Click Yes.</p>	 <p>An approval dialog box with a blue title bar labeled 'Approval'. The text inside reads: 'Submit for Approval?'. At the bottom, there are two buttons: 'Yes' and 'No'.</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step
 Click the Notes tab to modify the Internal/External note(s) for the internal transfer purchase requisition

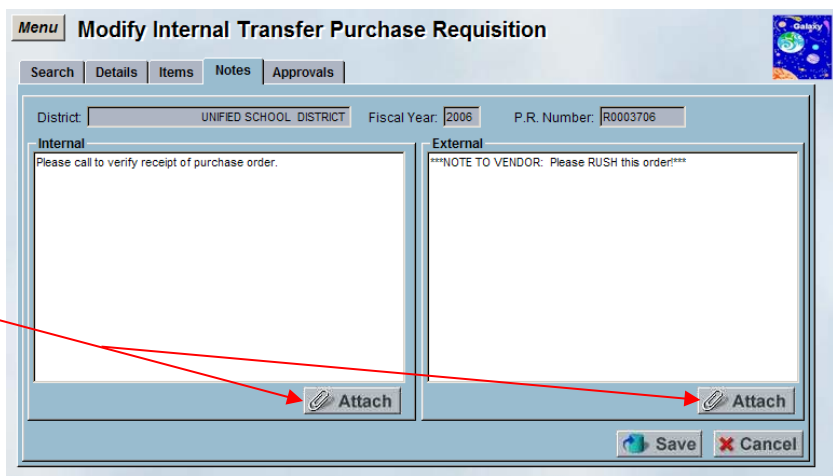
Click **Attach**.

Select from a previously defined note

or

Manually enter Internal/External note(s).

Click **Save**

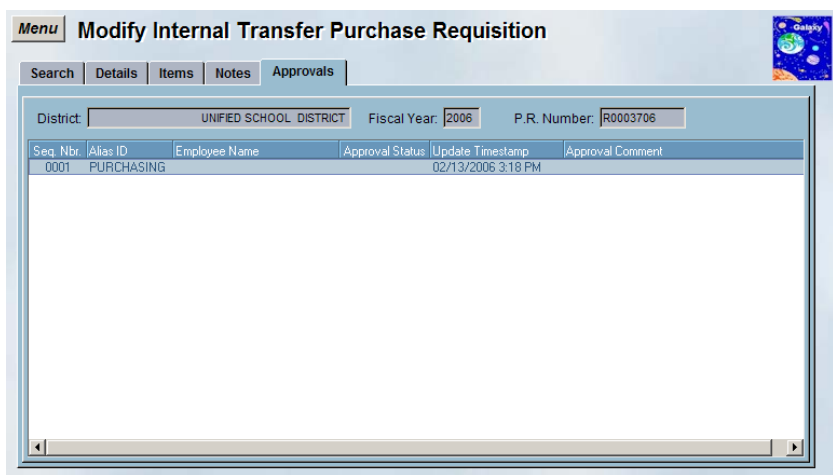


NOTES:

- External notes will print on purchase requisitions and purchase orders, internal notes will not.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step
 Click the Approvals tab to view approvals associated to this internal transfer purchase requisition.

No Changes can be made on this tab.



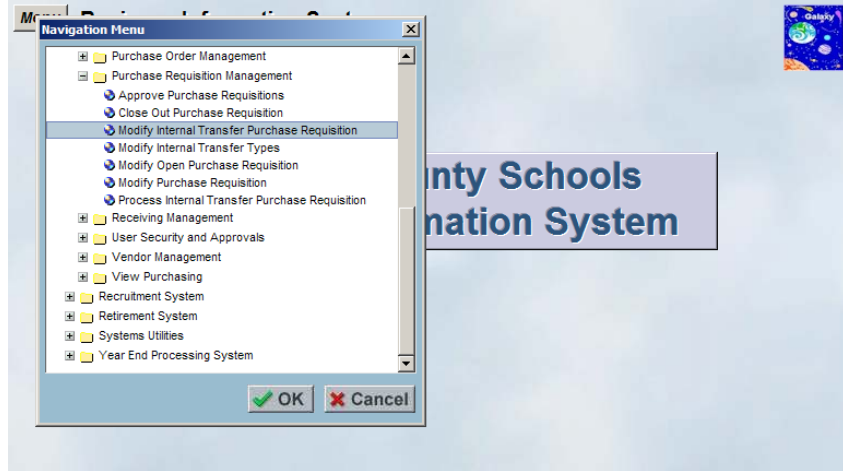
Delete an Internal Transfer Purchase Requisition

The Modify Internal Transfer Purchase Requisition screen allows the user to delete existing internal transfer purchase requisition.

Step 1

From menu select
Modify Internal
Transfer Purchase
Requisition

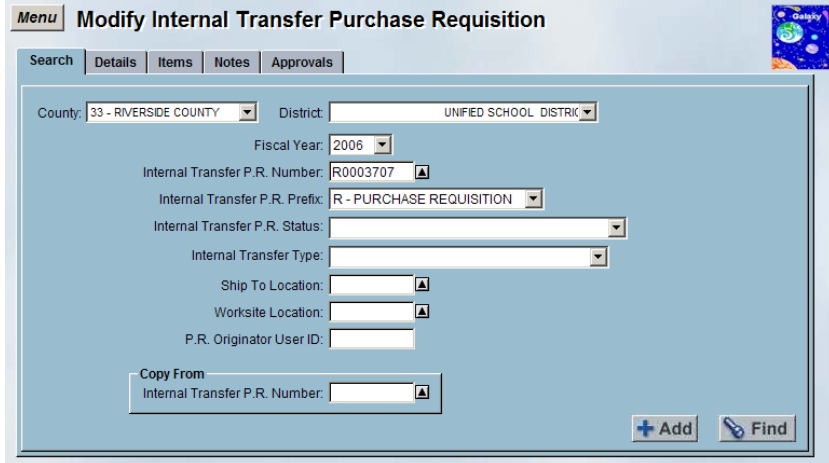
Click **OK**.



Step

To delete an
existing internal
transfer purchase
requisition
enter/select
information as
available.

Click **Find**



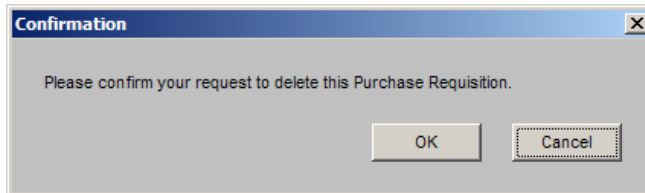
Step
 To delete the
 internal transfer
 purchase requisition

Click **Delete**.

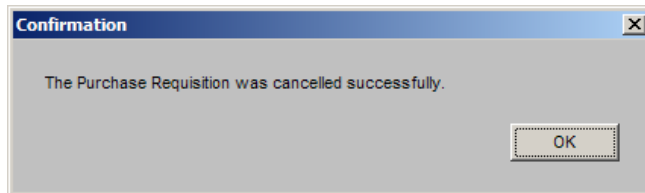
The screenshot shows a web-based form titled "Modify Internal Transfer Purchase Requisition". The form includes fields for District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2006), P.R. Number (R0003707), P.R. Type (T - INTERNAL TRANSFER), P.R. Status (S - SUBMITTED FOR APPROVAL), P.R. Amount (39.00), Category (OFFICE), and various other administrative fields. A "Delete" button is located in the top right corner of the form area. A red arrow originates from the "Delete" button and points to the instruction "Click Delete." in the adjacent text box.

NOTE: This will cancel the purchase requisition set the purchase requisition status to "C", cancelled to prevent any further processing of this purchase requisition.

Step
 Galaxy warning
 prompts to confirm
 the request to delete
 the Purchase
 Requisition.



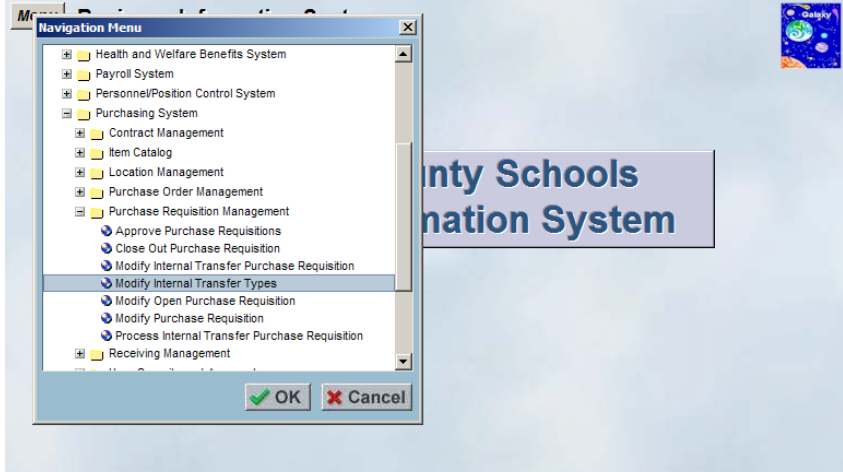
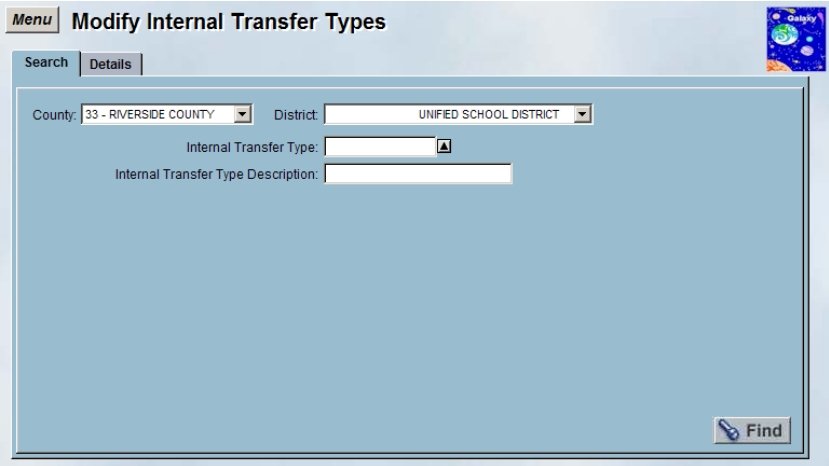
Step
 Confirmation
 message prompts to
 verify purchase
 requisition has been
 cancelled
 successfully.



NOTE: The cancelled purchase requisition remains in the database for future reference.

Modify Internal Transfer Types

This screen is used to add, edit, delete, or view internal transfer type information. Internal Transfer Types must be set up before the user can add internal transfers on the Modify Internal Transfers screen.

<p>Step 1</p> <p>From menu select Modify Internal Transfer Types</p> <p>Click OK</p>	
<p>Step</p> <p>To add, edit or delete internal transfer type(s) enter/select Internal Transfer Type, and/or Internal Transfer Type Description</p> <p>Click Find.</p>	 <p>NOTE: Clicking “Find” with no other selection criteria entered will display all Internal Transfer Types associated to the District on the Details tab.</p>

Step

Add, edit or delete transfer types as necessary.

Click **Save**

Menu **Modify Internal Transfer Types**

Search Details

District: UNIFIED SCHOOL DISTRICT

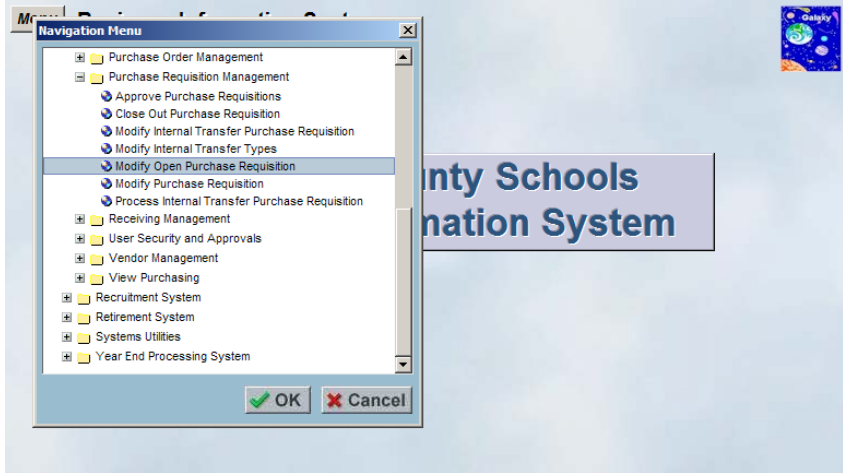
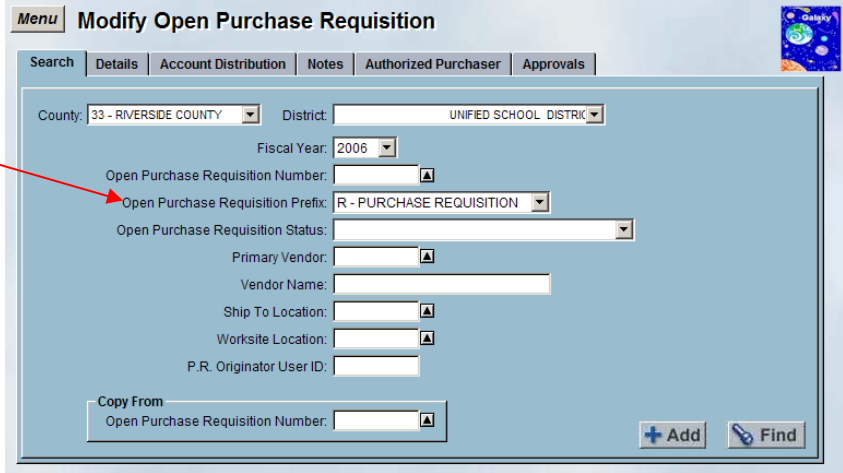
Internal Transfer Type	Internal Transfer Type Description	Fund	School	Resource	PY	Goal	Function	Object
FT	FIELD TRIP	03	176	0000	0	0000	3600	5710

+ Add Dup Delete Print Save Cancel

Open Purchase Requisitions

Add a New Open Purchase Requisition

The Modify Open Purchase Requisition screen is used to create new open purchase requisitions. An Open Purchase Requisition does not have a quantity field; the line item is driven by amount. Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

<p>Step 1</p> <p>From menu select Modify Open Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>To add an open purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Open Purchase Requisition

Step

Add detail open purchase requisition information.

After desired information has been entered

Click **Account Distribution** tab.

Menu **Modify Open Purchase Requisition**

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

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0000NEW **Delete**

P.R. Type: O - OPEN Expiration Date: 06/15/2006 Primary Vendor

P.R. Status: N - NEW (NOT SUBMITTED FOR A... Vendor Name Search: 17430

P.R. Amount: 100.00 Vendor Address: STAPLES

P.R. Description: ORIGINAL Vendor Address: 1

Open P.O. Nbr.: DEPT: #601110028004687 P.O. BOX 6722, THE LAKE

Category: OFFICE Bill To Location: FISCAL FISCAL SERVICES

Office supplies Ship To Location: WAREHOUSE Warehouse

P.R. Requestor: Worksite Location: 089 PERSONNEL DEPARTMENT

Approval List: Board Rpt. Desc:

P.R. Originator User ID: Justification:

Contact Phone Nbr.: Routing:

Update User ID: 02/16/2006 10:09 AM In Rev: Rev Cmt:

Print **Save** **Cancel**

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step

To add SACS account string(s) to the open purchase requisition

Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

Step

Click **Save**

This will start the budget check process.

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt.
03	000	0000	0	0000	8265	4300	0.00	1.000000		0.00
Total:							0.00	1.000000		0.00

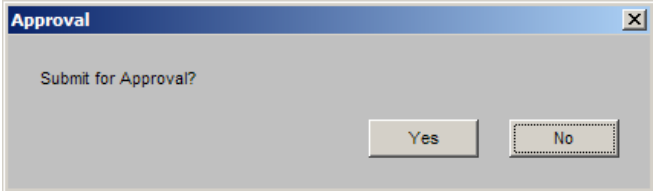
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

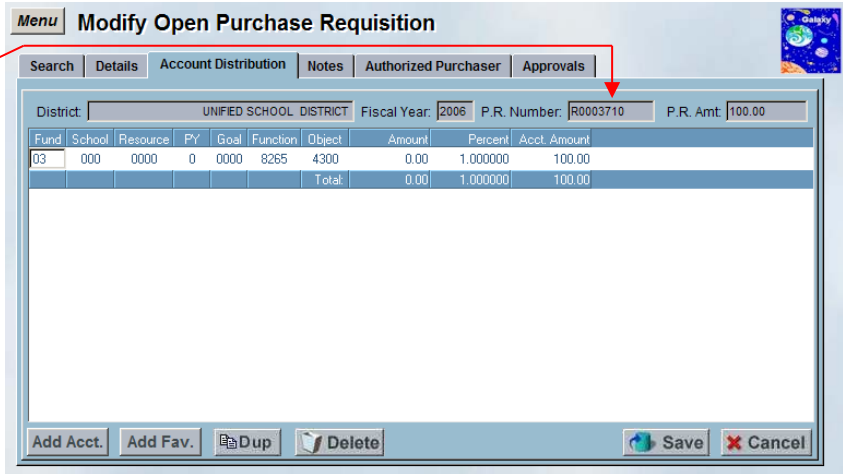
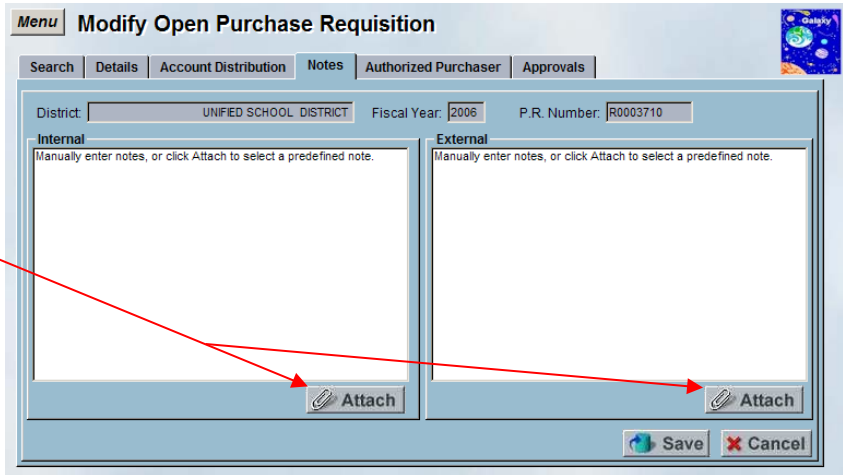
If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	 <p>The screenshot shows a dialog box titled "Approval" with a close button (X) in the top right corner. The main text inside the dialog box reads "Submit for Approval?". Below the text are two buttons: "Yes" and "No". The "No" button is highlighted with a dashed border, indicating it is the selected option.</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Open Purchase Requisition

<p>Step System will generate an open purchase requisition number.</p> <p>Click Notes tab</p>	 <p>The screenshot shows the 'Modify Open Purchase Requisition' window. The 'Notes' tab is selected, and a red arrow points to it from the left. The window displays fields for District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2006), P.R. Number (R0003710), and P.R. Amt (100.00). Below these is a table with columns: Fund, School, Resource, PY, Goal, Function, Object, Amount, Percent, and Acct. Amount. The table contains one row with values: 03, 000, 0000, 0, 0000, 8265, 4300, 0.00, 1.000000, 100.00. At the bottom of the table, there is a 'Total' row with values: 0.00, 1.000000, 100.00. Buttons at the bottom include 'Add Acct.', 'Add Fav.', 'Dup', 'Delete', 'Save', and 'Cancel'.</p>
<p>Step To select a previously defined Internal/External note(s)</p> <p>Click Attach,</p> <p>or</p> <p>Manually enter Internal or External note(s).</p> <p>Click Save</p>	 <p>The screenshot shows the 'Modify Open Purchase Requisition' window with the 'Notes' tab selected. It features two side-by-side text areas for 'Internal' and 'External' notes, each with the instruction 'Manually enter notes, or click Attach to select a predefined note.' Below each text area is an 'Attach' button. Two red arrows point from the left to these 'Attach' buttons. Buttons at the bottom include 'Save' and 'Cancel'.</p> <p>NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.</p>

Step

Click the Authorized Purchaser tab to add an authorized purchaser(s) associated to this open purchase requisition

Click **Add**.

Enter the Authorized Purchaser information.

Click **Save**

Menu Modify Open Purchase Requisition

Search Details Account Distribution Notes Authorized Purchaser Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003710

Seq. Nbr.	Authorized Purchaser
0001	Jane Doe
0002	Tom Doe

+ Add Dup Delete Save Cancel

Step

Click the Approvals tab to view the Approvals associated to this open purchase order.

No changes can be made on this tab.

Menu Modify Open Purchase Requisition

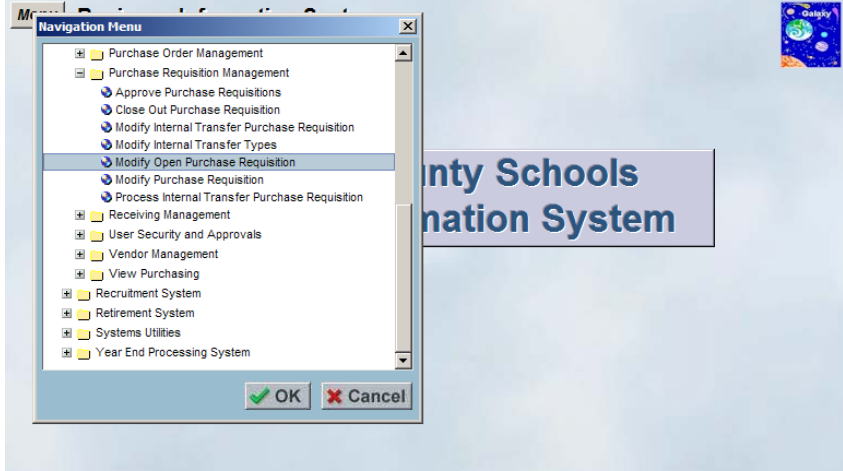
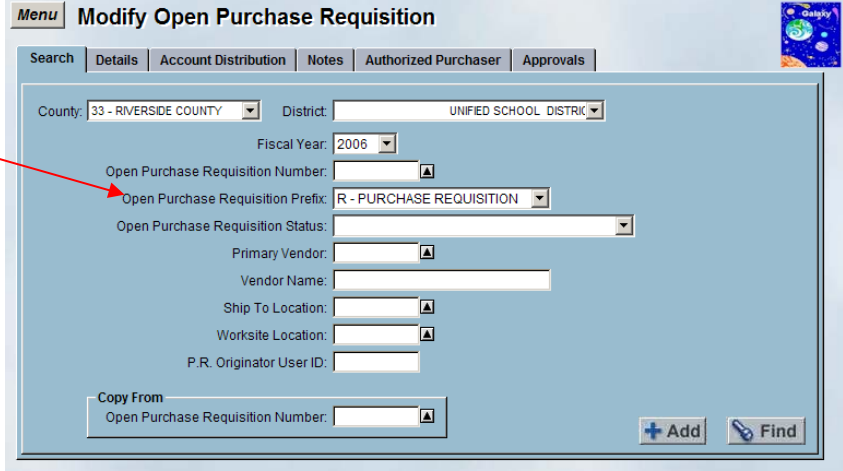
Search Details Account Distribution Notes Authorized Purchaser Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003710

Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	PURCHASING			02/16/2006 10:15 AM	

Add a New Open Purchase Requisition using Predefined Favorites

A feature available on the Modify Open Purchase Requisition screen is the ability to assign predefined sacs account strings to line item(s). Predefined SACS account string(s) (accounts used most often by user) can be setup on the Modify User SACS Favorites screen. Once the accounts are setup, the user may assign their predefined SACS account strings to the line items entered on the Items tab by selecting the “Add Fav.” button. Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

<p>Step 1 From menu select Modify Open Purchase Requisition</p> <p>Click OK.</p>	
<p>Step To add an open purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Open Purchase Requisition Copying from a Purchase Requisition

Step
Add detail open purchase requisition information.

After desired information has been entered

Click **Account Distribution** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step
To add a user's predefined SACS account string(s) to the open purchase requisition

Click **Add Fav.**

Highlight each account string row from the pop up window

Click **OK.**

Or

Double clicking on each account string row will automatically add it to the line item.

Fund	School	Resource	PY	Goal	Function	Object	Description	R. Amt
03	000	0000	0	0000	8265	4300	SUPPLIES	100.00
03	178	0001	0	0000	2700	5910	CONFERENCE & TRAVEL	
03	000	0034	0	0000	3140	4399	PROGRAM 1	
03	164	0001	0	1110	1000	5725	REPR OR	
06	440	6330	0	0000	3130	5815	APPROVALS	

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Add a New Open Purchase Requisition Copying from a Purchase Requisition

Step

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt.
03	000	0000	0	0000	8265	4300	0.00	1.000000	0.00	0.00
Total:							0.00	1.000000		0.00

Step

Click **Save**

This will start the budget check process.

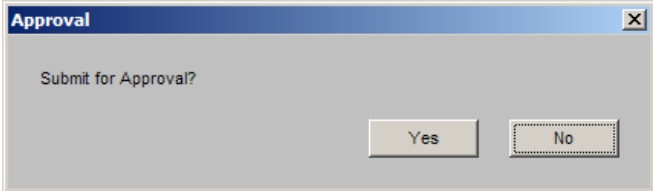
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

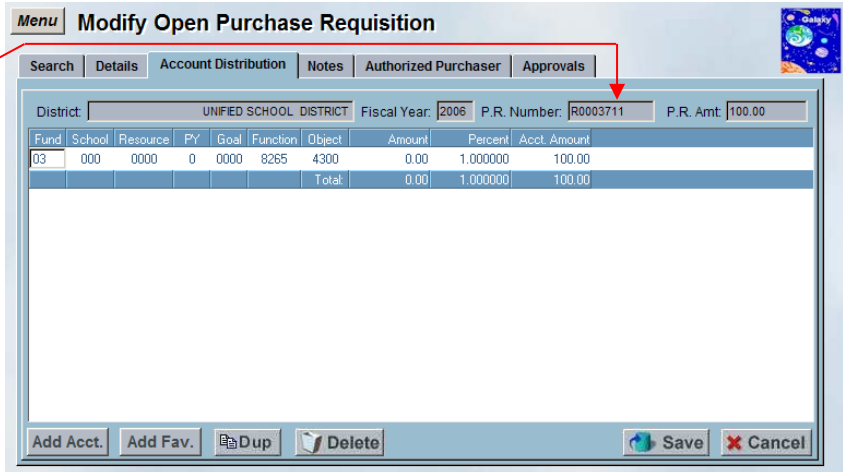
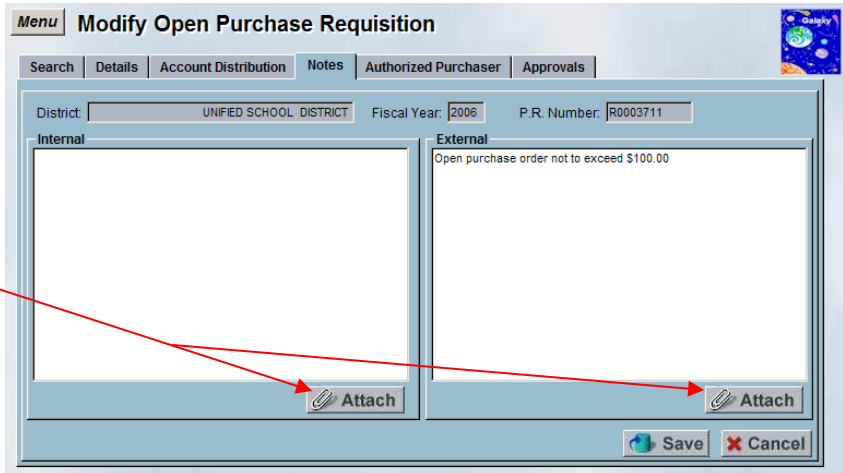
If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

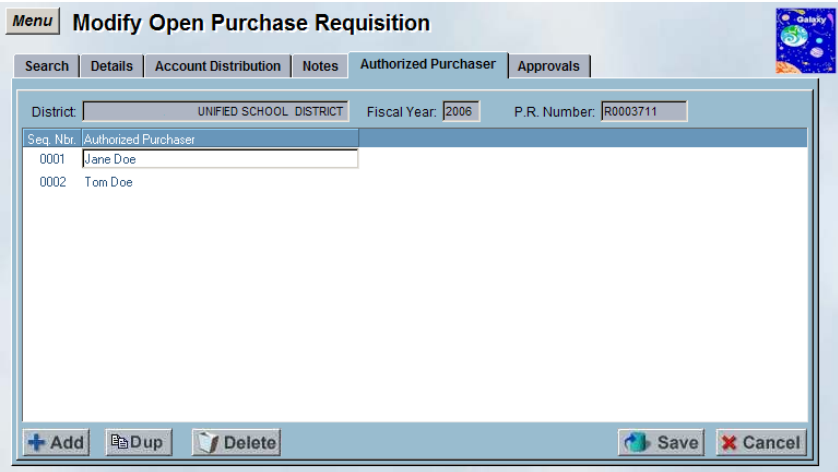
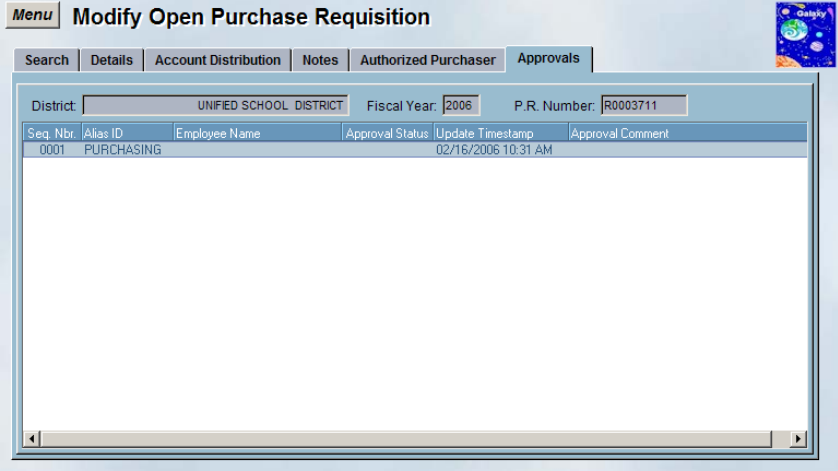
If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	 <p>The screenshot shows a standard Windows-style dialog box. The title bar is blue and contains the word "Approval" in white text, followed by a close button (X). The main area of the dialog is light gray and contains the text "Submit for Approval?". At the bottom right, there are two buttons: "Yes" and "No". The "No" button has a dashed border, indicating it is the default action.</p>

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Add a New Open Purchase Requisition Copying from a Purchase Requisition

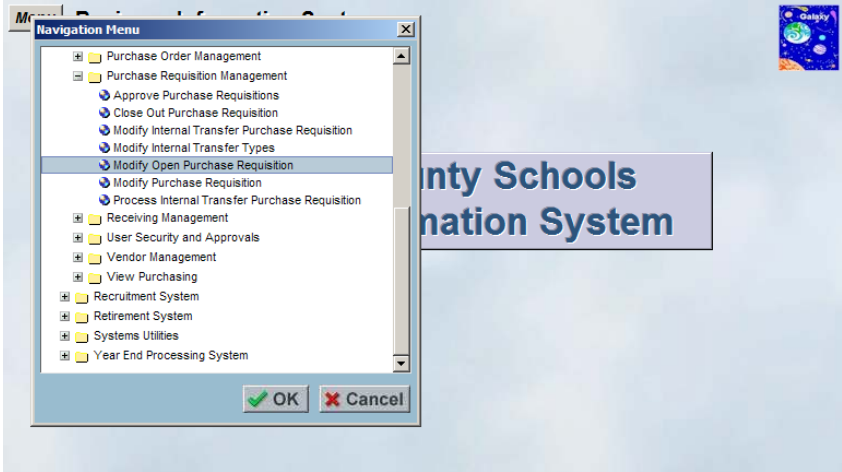
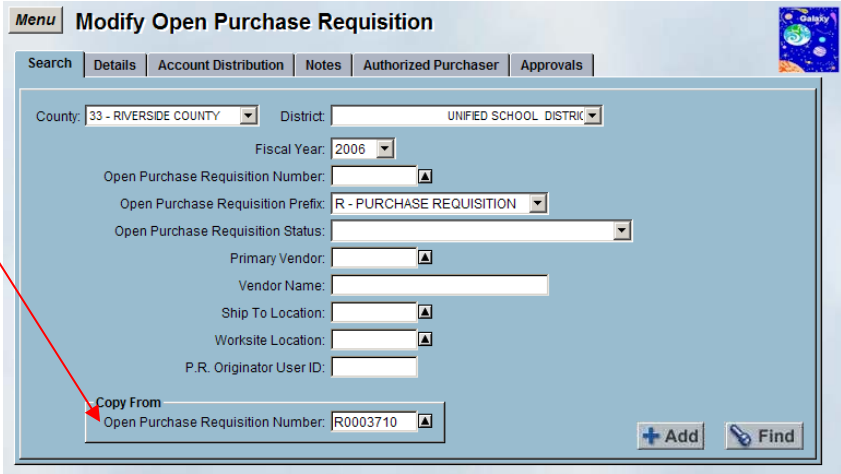
<p>Step System will generate an open purchase requisition number.</p> <p style="text-align: center;">Click Notes tab</p>	
<p>Step To select a previously defined Internal/External note(s) for the open purchase requisition</p> <p style="text-align: center;">Click Attach,</p> <p style="text-align: center;">or</p> <p style="text-align: center;">Manually enter Internal/External note(s).</p> <p style="text-align: center;">Click Save</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Open Purchase Requisition Copying from a Purchase Requisition

<p>Step</p> <p>Click Authorized Purchaser tab to add authorized purchaser(s) associated to this open purchase requisition.</p> <p>Click Add.</p> <p>Enter the Authorized Purchaser information.</p> <p>Click Save</p>	
<p>Step</p> <p>Click the Approvals tab to view the approvals associated to this open purchase requisition.</p>	

Add a New Open Purchase Requisition Copying from a Purchase Requisition

A feature available on the Modify Open Purchase Requisition screen is the ability to create a new open purchase requisition from an existing purchase requisition using the “Copy From” feature. The open purchase requisition will be pre-filled with data from the existing purchase requisition selected, which may be modified as necessary. Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

<p>Step 1</p> <p>From menu select Modify Open Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>Enter/Select an Open Purchase Requisition Number</p> <p>Click Add.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Open Purchase Requisition Copying from a Purchase Requisition

Step

Verify and make necessary changes on Details tab, Account Distribution tab, Notes tab and Authorized Purchaser tab.

The screenshot displays the 'Modify Open Purchase Requisition' window. At the top, there is a 'Menu' button and the title 'Modify Open Purchase Requisition'. Below the title are several tabs: 'Search', 'Details', 'Account Distribution', 'Notes', 'Authorized Purchaser', and 'Approvals'. The 'Details' tab is active. The form contains the following fields and values:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2006
- P.R. Number: R0000NEW
- P.R. Type: O - OPEN
- Expiration Date: 06/15/2006
- Primary Vendor: 17430
- P.R. Status: N - NEW (NOT SUBMITTED FOR A)
- Vendor Name Search: 17430
- P.R. Amount: 200.00
- Vendor Address: STAPLES
- P.R. Description: ORIGINAL
- Vendor Address: 1
- Open P.O. Nbr.: [empty]
- DEPT: #601110028004687 P.O. BOX 6722, THE LAKE
- Category: OFFICE
- Bill To Location: FISCAL
- FISCAL SERVICES
- Office supplies
- Ship To Location: WAREHOUSE
- Warehouse
- P.R. Requestor: [empty]
- Worksite Location: 089
- PERSONNEL DEPARTMENT
- Approval List: [empty]
- Board Rpt. Desc: [empty]
- P.R. Originator User ID: [empty]
- Justification: [empty]
- Contact Phone Nbr: [empty]
- Routing: [empty]
- Update User ID: 02/16/2006 10:37 AM
- In Rev: N
- Rev Cmt: [empty]

At the bottom of the form, there are buttons for 'Print', 'Save', and 'Cancel'.

NOTES:

- The new open purchase requisition is pre-filled with data from the existing purchase requisition, which may be modified as necessary.
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

After all necessary changes have been made

Click **Save**.

This will start the budget check process.

The screenshot shows a web-based form titled "Modify Open Purchase Requisition". The form is organized into several sections. At the top, there are tabs for "Search", "Details", "Account Distribution", "Notes", "Authorized Purchaser", and "Approvals". The "Details" tab is active. The form fields include: District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2006), P.R. Number (R0000NEW), P.R. Type (0 - OPEN), P.R. Status (N - NEW (NOT SUBMITTED FOR APPROVAL)), P.R. Amount (200.00), P.R. Description (ORIGINAL), Open P.O. Nbr., Category (OFFICE), P.R. Requestor, Approval List, P.R. Originator User ID, Contact Phone Nbr., Update User ID (02/16/2006 10:37 AM), Expiration Date (06/15/2006), Vendor Name Search (17430), Vendor Address (STAPLES), Bill To Location (FISCAL), Ship To Location (WAREHOUSE), Worksite Location (089 PERSONNEL DEPARTMENT), Board Rpt. Desc, Justification, Routing, In Rev (N), and Rev Cmt. There are buttons for "Print", "Save", and "Cancel" at the bottom of the form.

Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

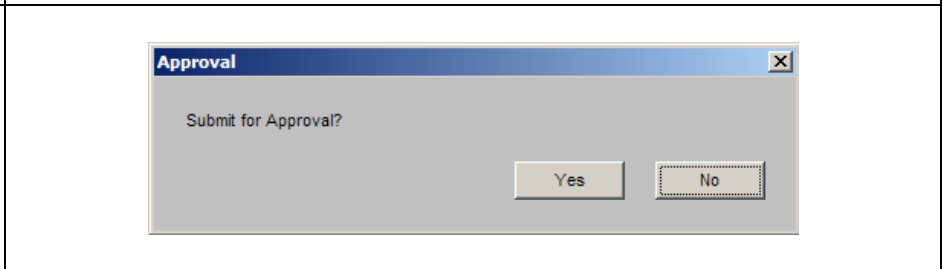
If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

No Approvals

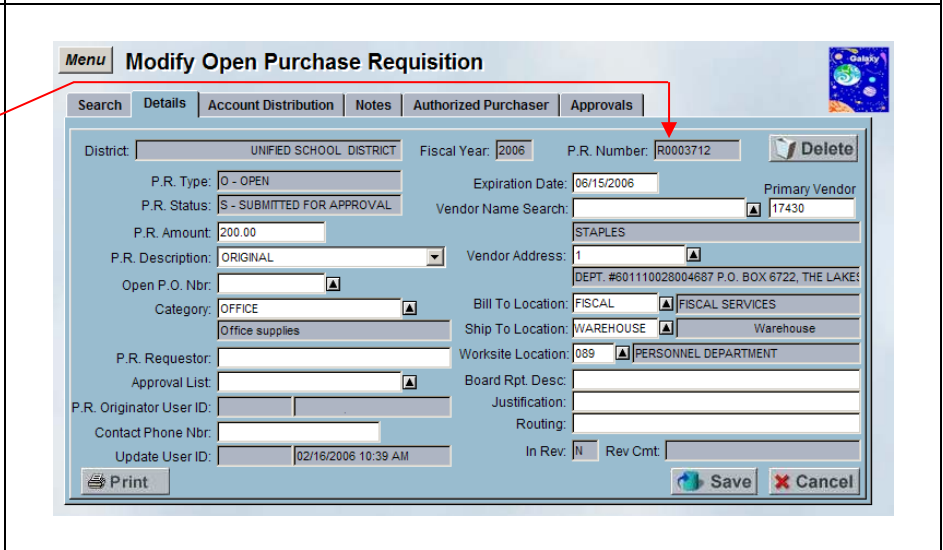
If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).

Step
 “Submit for Approval?” warning message prompts
 Click **Yes**.



Step
 System will generate a purchase requisition number.



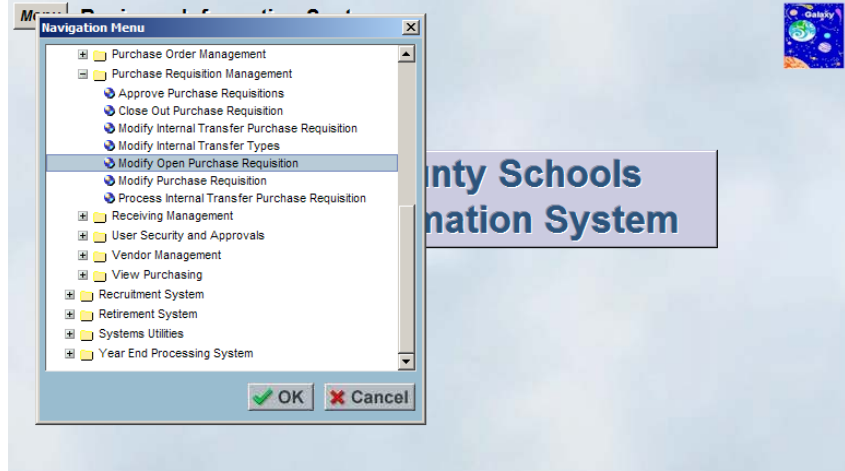
Modify an Existing Open Purchase Requisition

The Modify Open Purchase Requisition screen allows the user to edit an existing open purchase requisition.

Step 1

From menu select
Modify Open
Purchase Requisition

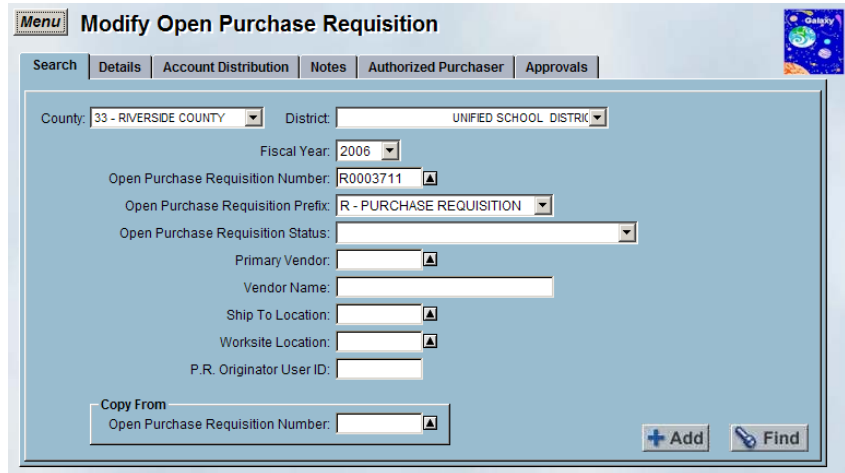
Click **OK**.



Step

To edit an existing
open purchase
requisitions
enter/select
information as
available.

Click **Find**



Step

Edit open purchase requisition detail information if necessary.

Click Save

Click **Account Distribution** tab

The screenshot displays the 'Modify Open Purchase Requisition' web application. The interface is organized into several sections. At the top, there is a 'Menu' bar with tabs for 'Search', 'Details', 'Account Distribution', 'Notes', 'Authorized Purchaser', and 'Approvals'. The 'Details' tab is currently selected. Below the tabs, there are several input fields and dropdown menus. The 'District' is set to 'UNIFIED SCHOOL DISTRICT', 'Fiscal Year' is '2006', and 'P.R. Number' is 'R0003711'. The 'P.R. Type' is 'O - OPEN' and 'P.R. Status' is 'S - SUBMITTED FOR APPROVAL'. The 'P.R. Amount' is '100.00' and the 'P.R. Description' is 'ORIGINAL'. The 'Vendor Name' is 'UNITED RENTALS' and the 'Vendor Address' is '36025 CATHEDRAL CANYON DRIVE, CATHEDRAL CT'. There are also fields for 'Bill To Location' (FISCAL), 'Ship To Location' (WAREHOUSE), and 'Worksite Location' (PERSONNEL DEPARTMENT). At the bottom of the form, there are 'Print', 'Save', and 'Cancel' buttons.

NOTES:

- With certain exceptions, any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Click the print button to print all open purchase order data from all tabs.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

Edit the SACS account string(s) associated to this open purchase requisition as necessary.

Click **Save**

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:							0.00	1.000000	

NOTE: Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

To add a new SACS account string(s)

Click **Add Acct.**

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object
- Amount or Percent

To duplicate an existing account string place cursor on the account string

Click **Dup.**

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt
03	000	0000	0	0000	8265	4300	0.00	0.500000	200.00	0.00
03	178	0001	0	0000	2700	5910	0.00	0.500000		0.00
Total:							0.00	1.000000	200.00	0.00

NOTE: Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

To add a user's predefined SACS account string(s)

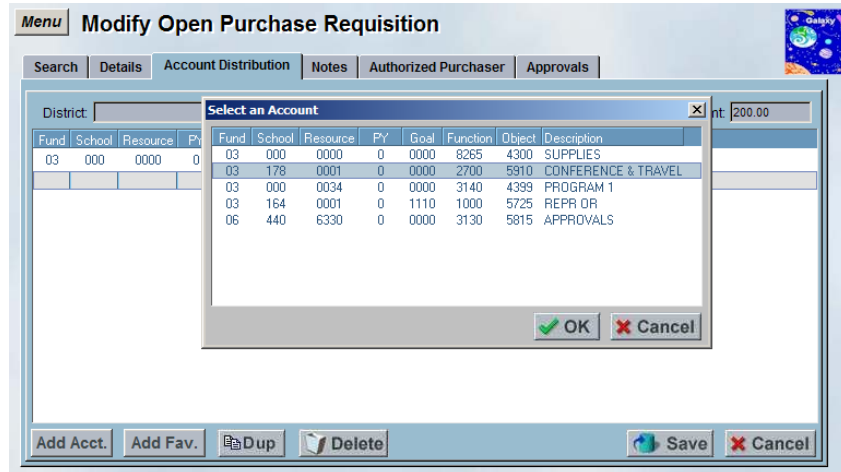
Click **Add Fav.**

Highlight each account string row from the pop up window

Click **OK**.

Or

Double clicking on each account string row will automatically add it to the line item.



Step
 Click Save

This will start the budget check process.

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt.
03	000	0000	0	0000	8265	4300	0.00	0.500000	200.00	0.00
03	178	0001	0	0000	2700	5910	0.00	0.500000	0.00	0.00
Total:							0.00	1.000000	200.00	0.00

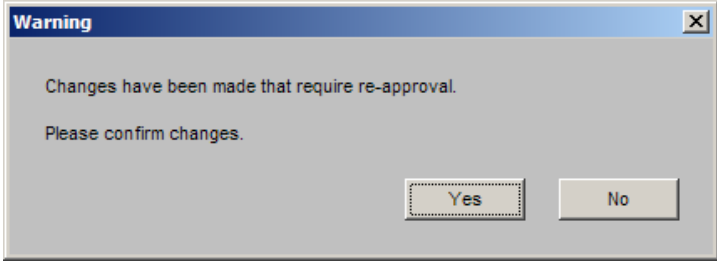
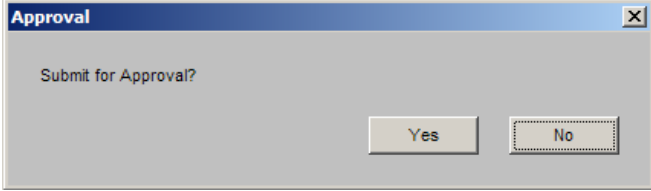
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Warning". The text inside reads: "Changes have been made that require re-approval. Please confirm changes." At the bottom, there are two buttons: "Yes" and "No".</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Approval". The text inside reads: "Submit for Approval?". At the bottom, there are two buttons: "Yes" and "No".</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Modify an Existing Open Purchase Requisition

Step
To modify the Internal/External note(s) for the open purchase requisition

Click **Attach**.

Select from a previously defined note,

or

Manually enter Internal/External note(s).

Click **Save**

Menu **Modify Open Purchase Requisition**

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

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003711

Internal

External
Open purchase for art supplies not to exceed \$100.00

Attach Attach

Save Cancel

Step
Click the Authorized Purchaser tab to edit authorized purchaser information as necessary.

Click **Save**

Menu **Modify Open Purchase Requisition**

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

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003711

Seq. Nbr.	Authorized Purchaser
0001	Jane Doe
0002	Tom Doe
0003	Sally Doe

+ Add Dup Delete

Save Cancel

Step

Click the Approvals tab to view the approvals associated to this open purchase requisition.

No changes can be made on this tab.

The screenshot displays the 'Modify Open Purchase Requisition' window. At the top, there is a 'Menu' button and the title 'Modify Open Purchase Requisition'. Below this is a tabbed interface with 'Approvals' selected. The 'Approvals' tab shows a search area with 'District' set to 'UNIFIED SCHOOL DISTRICT', 'Fiscal Year' set to '2006', and 'P.R. Number' set to 'R0003711'. Below the search area is a table with the following columns: 'Seq. Nbr.', 'Alias ID', 'Employee Name', 'Approval Status', 'Update Timestamp', and 'Approval Comment'. The table contains one row with the following data: '0001', 'PURCHASING', (blank), (blank), '02/16/2006 10:45 AM', and (blank). The table is scrollable, as indicated by the scrollbar at the bottom.

Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	PURCHASING			02/16/2006 10:45 AM	

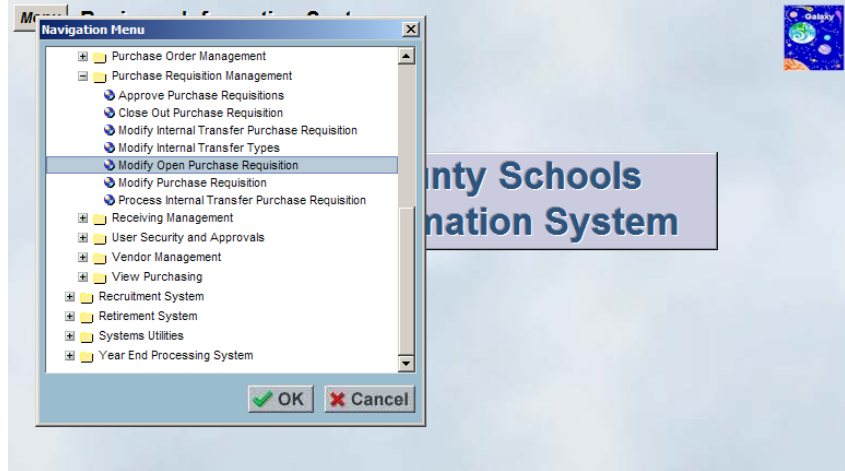
Delete an Open Purchase Requisition

The Modify Open Purchase Requisition screen allows the user to delete existing open purchase requisitions.

Step 1

From menu select
Modify Open
Purchase Requisition

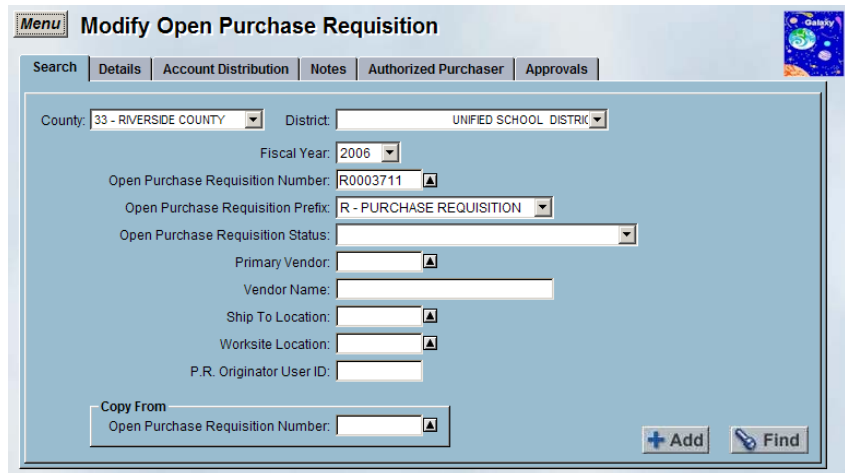
Click **OK**.



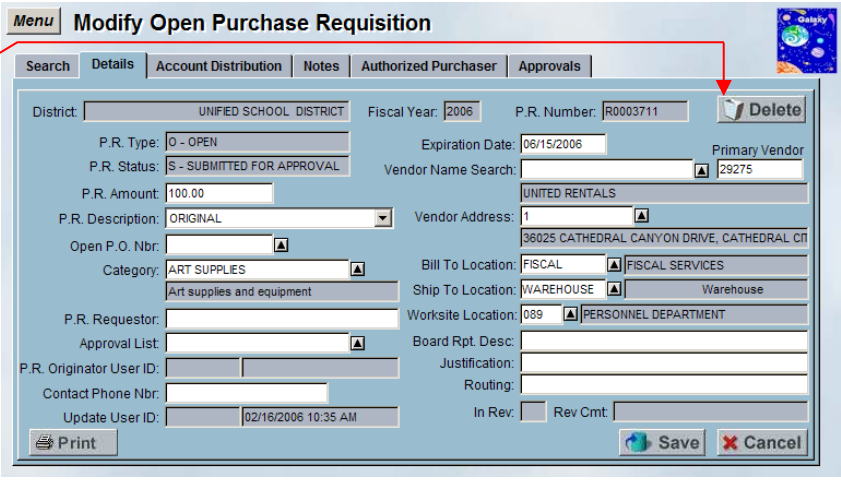
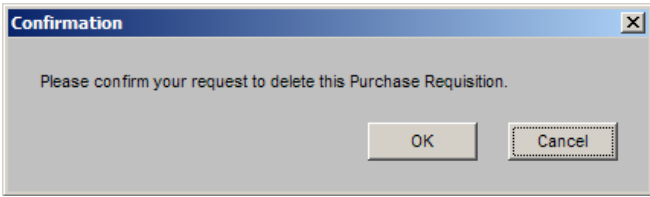
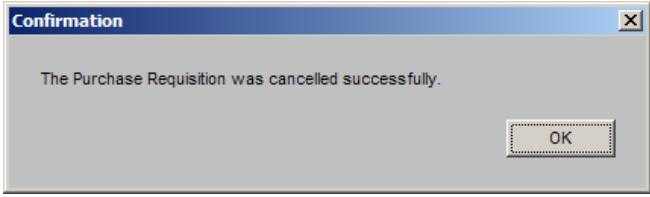
Step

To delete an
existing open
purchase requisition,
enter/select
information as
available.

Click **Find**



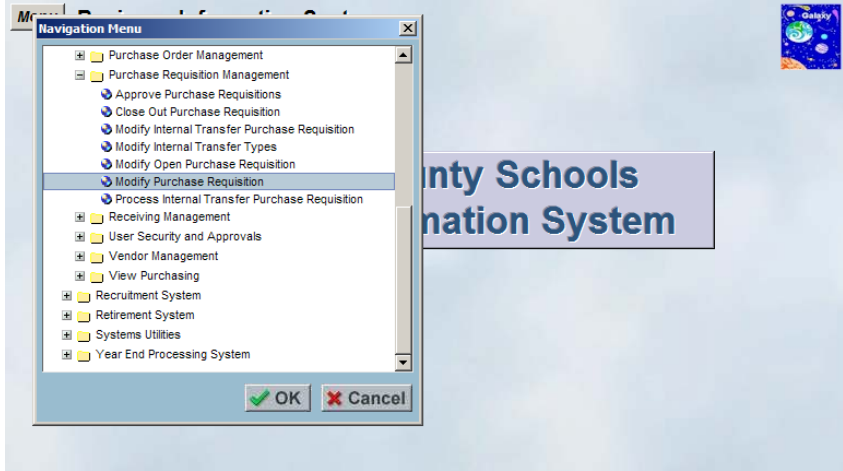
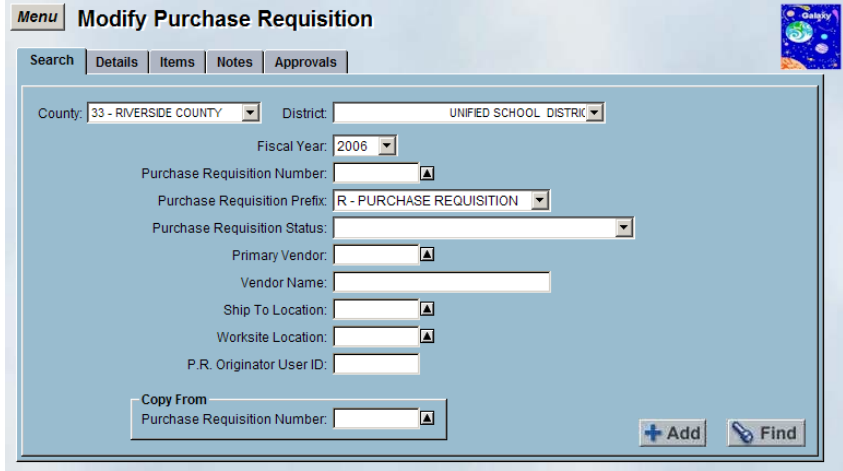
DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Delete an Open Purchase Requisition

<p>Step To delete the open purchase requisition</p> <p>Click Delete.</p>	 <p>NOTE: This will cancel the purchase requisition set the purchase requisition status to “C”, cancelled to prevent any further processing of this purchase requisition.</p>
<p>Step Galaxy warning prompts to confirm the request to delete the Purchase Requisition.</p>	
<p>Step Confirmation message prompts to verify purchase requisition has been cancelled successfully.</p>	 <p>NOTE: The cancelled purchase requisition remains in the database for future reference.</p>

Purchase Requisitions

Add a New Purchase Requisition

The Modify Purchase Requisition screen is used to create new purchase requisitions in purchasing. The Purchase Requisition is the originating process. Purchase Requisition lines carry forward in the system to create Purchase Orders, Receipts and Payments. Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

<p>Step 1 From menu select Modify Purchase Requisition</p> <p>Click OK.</p>	
<p>Step To add a purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

Step
Add detail
purchase requisition
information.

After desired
information has been
entered

Click **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step
To add line item(s)
to the purchase
requisition

Click **Add Line**.

Enter/Select
desired information
on the pop up
window.

Click **Save**

NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step

To add a SACS account string(s) to the line item

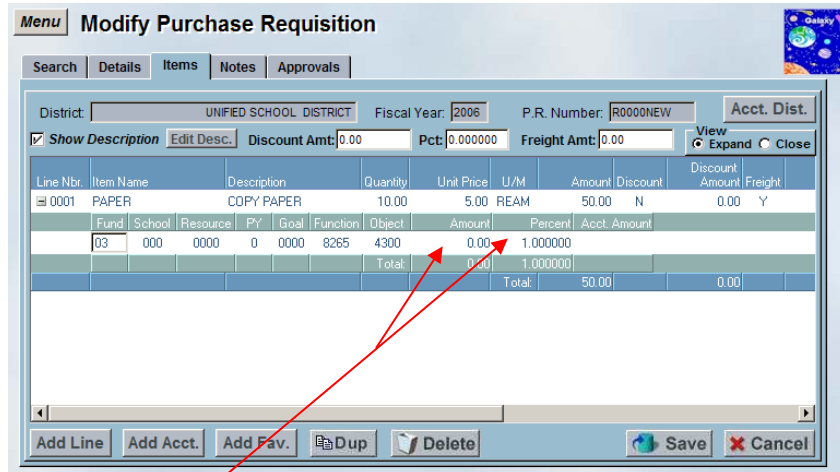
Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".



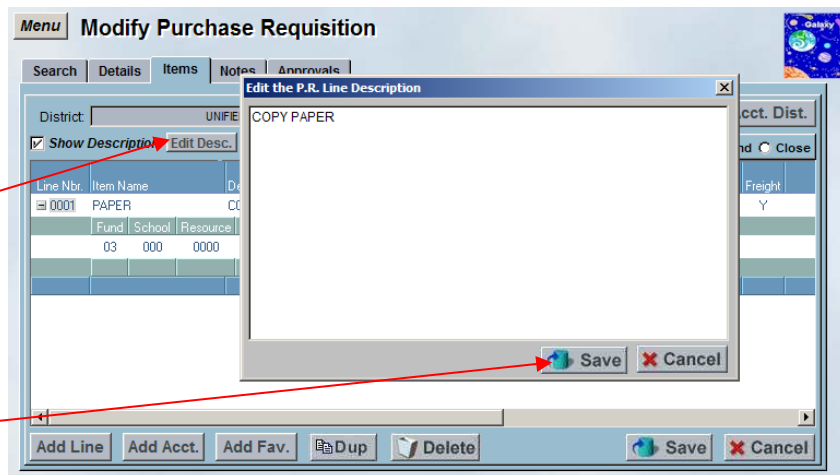
Step

To make changes to the line item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step
Click **Save**

This will start the budget check process.

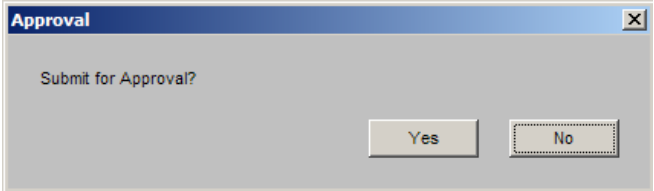
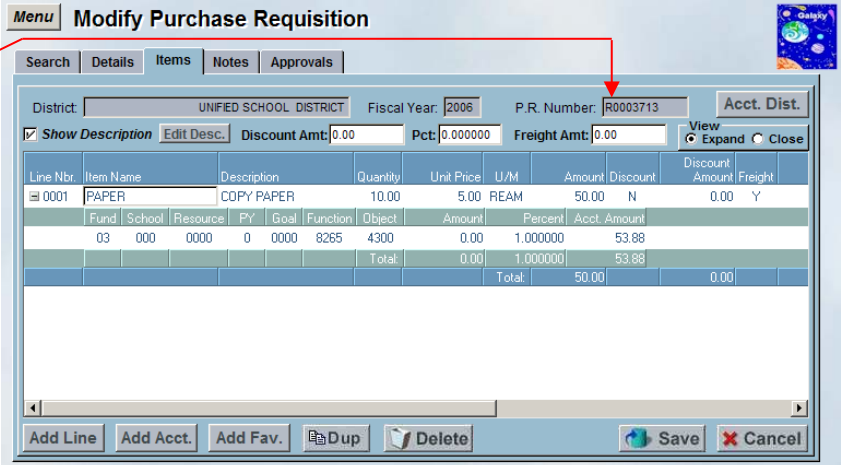
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	
<p>Step System will generate a purchase requisition number.</p> <p>Click Notes tab</p>	

Step
To select a previously defined Internal/External note(s)

Click **Attach**,

or

Manually enter Internal/External note(s).

Click **Save**

NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.

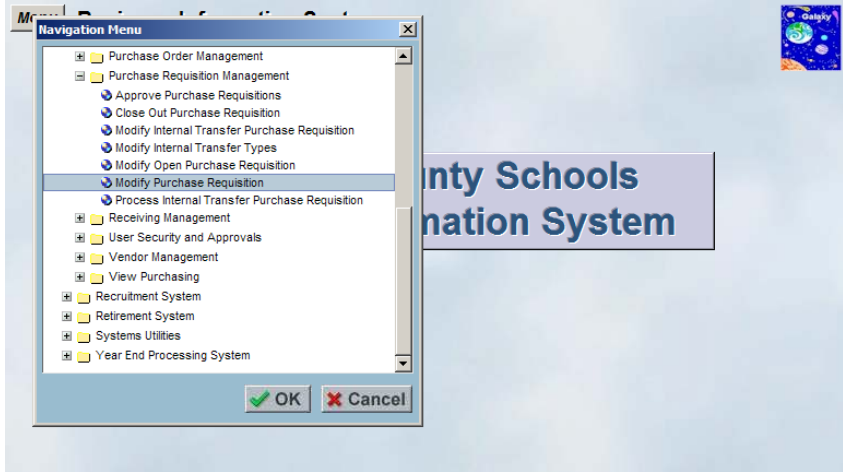
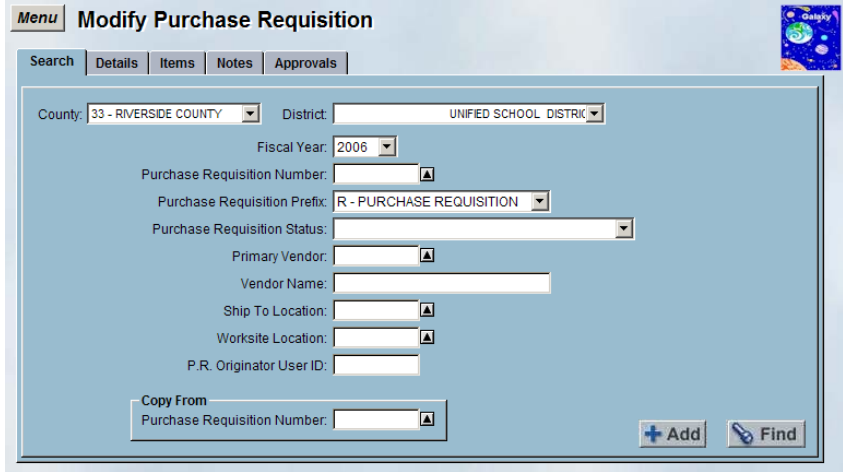
Step
Click the Approvals tab to view approvals associated to this purchase requisition

No changes can be made on this tab.

Seq. Nbr.	Alias ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	PURCHASING			02/16/2006 10:53 AM	

Add a New Purchase Requisition using Account Distribution

A feature available on the Modify Purchase Requisition screen is the ability to apply account distribution to line items. If all line items on the new contract will be funded by the same account string(s) the user may set up the account distribution. As a line item is added it will automatically populate the funding with the account string(s) entered into the account distribution pop up window.

<p>Step 1 From Menu Select Modify Purchase Requisition</p> <p>Click OK.</p>	
<p>Step 2 To add a purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Add a New Purchase Requisition using Account Distribution

Step
 Add detail
 purchase requisition
 information.

After desired
 information has been
 entered

Click **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step
 Click **Acct. Dist.**

Step

To add, default account distribution for all line items

Click Add.

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Click Save



NOTE: Clicking the Account Distribution button will popup a window to enter the default account distribution for all line items. The account string percentage is entered as default (the total for all account strings entered in this window must equal 100% or 0%), each line item will be split funded according to the respective percentage. The account string percentage may also be set to 0 for all account strings to establish default funding for all line items without automatically calculating the split funding amounts. Account strings entered in this popup window will go through the account validation routine. Clicking the Save button will close the popup window and apply the account distribution to the line items by multiplying the account string percentage times the total line item amount.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Account Distribution

Step

To add line item(s) to the purchase requisition

Click **Add Line**.

Enter/Select desired information on the pop up window.

Click **Save**

Menu Modify Purchase Requisition

Search Details Items **Add a P.R. Line Nbr.**

Line Nbr: 0001 Item Name: PAPER

Description: COPY PAPER

Quantity: 10.00 Unit Price: 5.000000 U/M: REAM

Discount Freight Taxable

Delivery Instructions:

Asset Location Code:

Save Cancel

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step

Verify line item(s) are populated with the default account distribution.

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R000NEW Acct. Dist.

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View Expand Close

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Percent	Acct. Amount	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
						Total:		0.00	1.000000	
						Total:		50.00		0.00

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Account Distribution

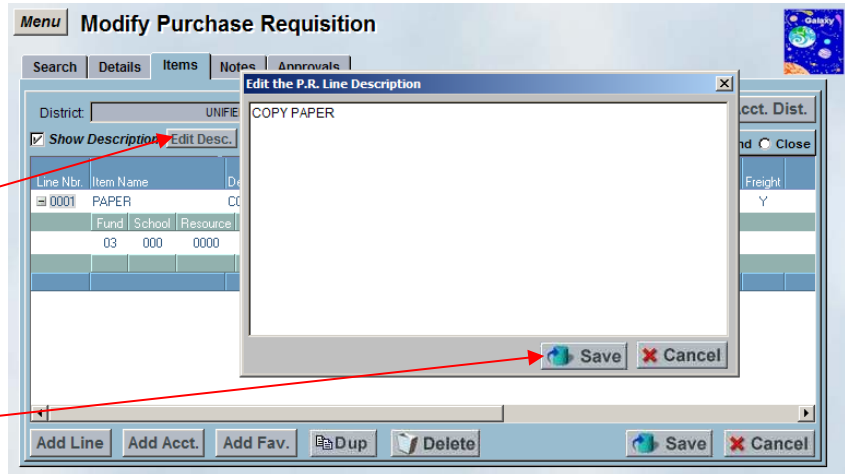
Step

To make changes to the line item description, place cursor on the line,

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step
 Click Save

This will start the
 budget check process.



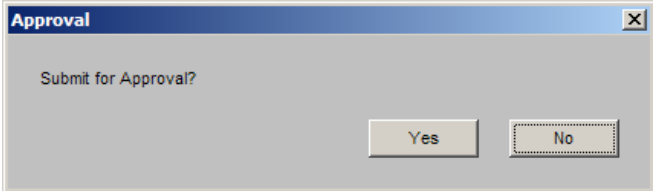
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	 <p>The image shows a screenshot of a software dialog box titled "Approval". The dialog box has a blue header bar with the title "Approval" and a close button (X) in the top right corner. The main area of the dialog box is light gray and contains the text "Submit for Approval?". Below the text are two buttons: "Yes" and "No". The "No" button is highlighted with a dashed border, indicating it is the selected option.</p>

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Add a New Purchase Requisition using Account Distribution

Step
 System will generate a purchase requisition number.

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003714 Acct. Dist.

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View Expand Close

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	53.88
Total:							0.00	1.000000	53.88	
Total:							50.00		0.00	

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

Step
 To select a previously defined Internal/External note(s) for the purchase requisition

Click **Attach**,

or

Manually enter Internal/External note(s).

Click **Save**

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003714

Internal Manually enter notes, or click Attach to select a predefined note.

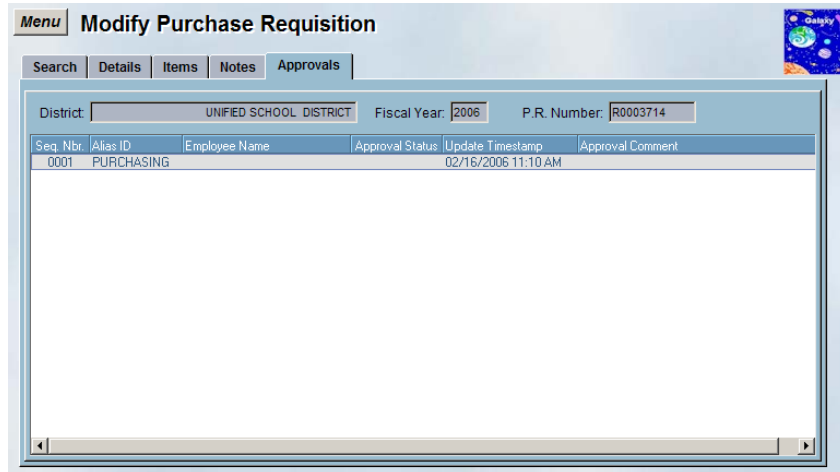
External Manually enter notes, or click Attach to select a predefined note.

Attach Attach Save Cancel

Step

Click the Approvals tab to view approvals associated to this purchase requisition.

No changes can be made on this tab.



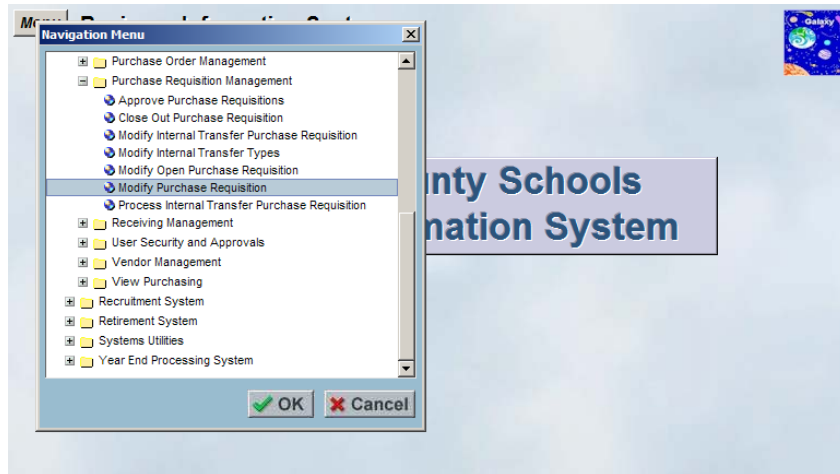
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

A feature available on the Modify Purchase Requisition screen is the ability to assign predefined sacs account strings to the account distribution. Predefined SACS account string(s) (accounts used most often by user) can be setup on the Modify User SACS Favorites screen. Once the accounts are setup, whenever the user is entering account distribution (line items that will be funded by the same account string(s)) they can select the “Add Fav.” button on the account distribution pop up window and select their predefined account strings.

Step 1

From menu select Modify Purchase Requisition

Click **OK**.



DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

Step
To add a purchase requisition

Click **Add**

If additional fields are selected they will populate the Details tab.

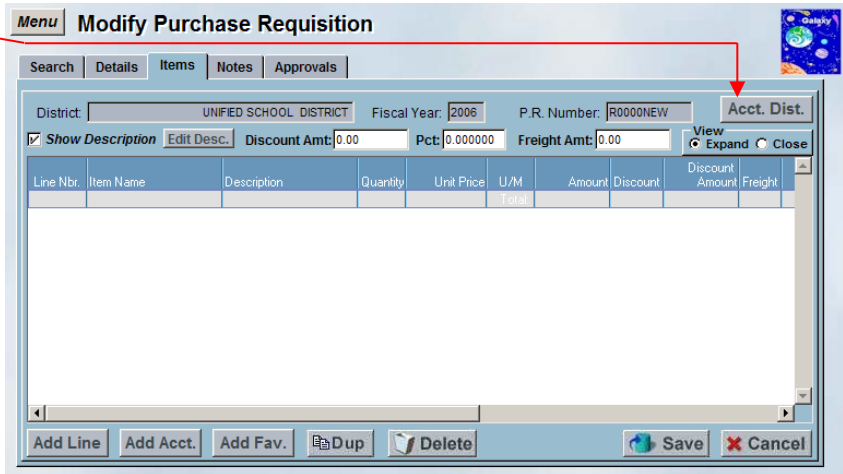
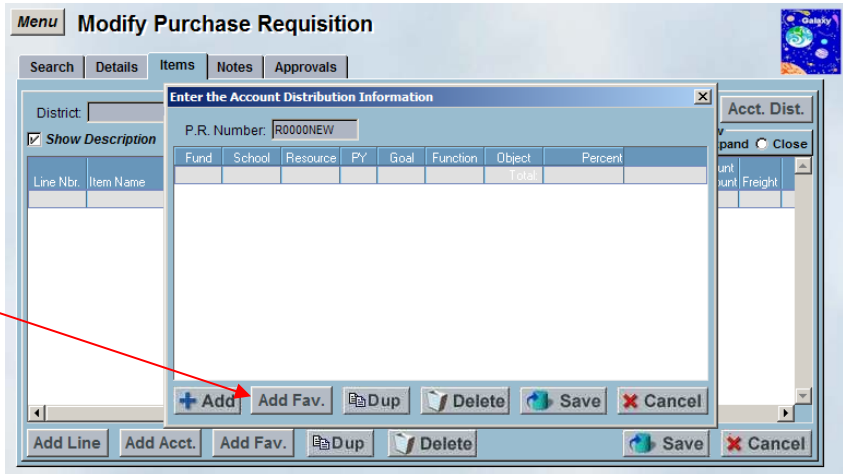
Step
Add detail purchase requisition information.

After desired information has been entered

Click **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Add a New Purchase Requisition using Predefined Favorites for Account Distribution

<p>Step Click Acct. Dist.</p>	
<p>Step To add default account distribution for all line items using a user's predefined SACS account string(s)</p> <p>Click Add Fav.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

Step

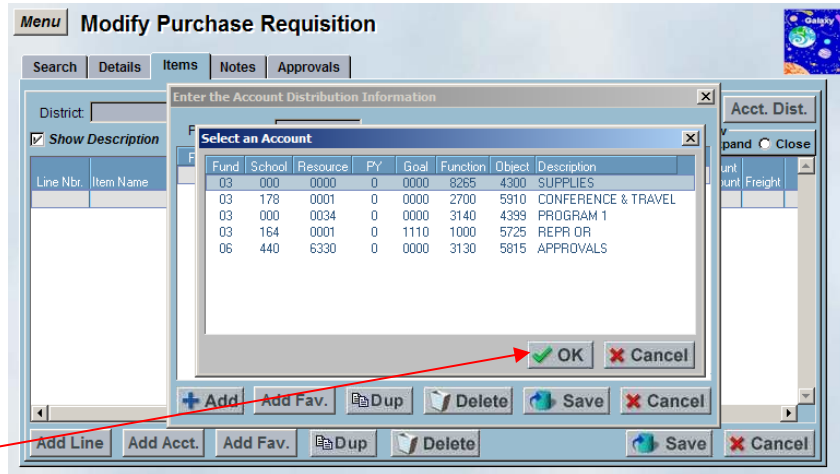
To select the user's predefined SACS account string(s) for the default account distribution,

Highlight each account string row from the pop up window

Click **OK**.

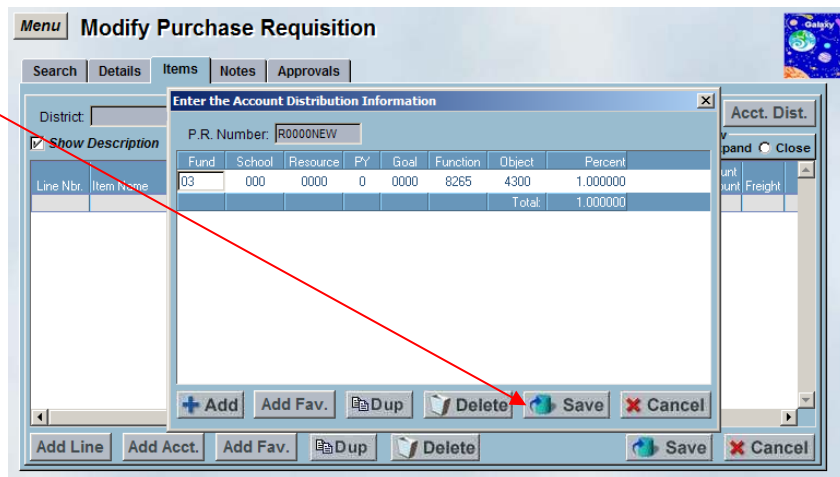
Or

Double clicking on each account string row will automatically add it to the account distribution.



Step

Click **Save**



DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

Step
To add line item(s)
to the purchase
requisition

Click **Add Line**.

Enter/Select
desired information
on the pop up
window.

Click **Save**.

NOTE: “Edit Desc.” button prompts a pop up window to enter a more detailed description of the item.

Step
Verify line item(s)
are populated with the
default account
distribution.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:							0.00	1.000000	
Total:							50.00		0.00

NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

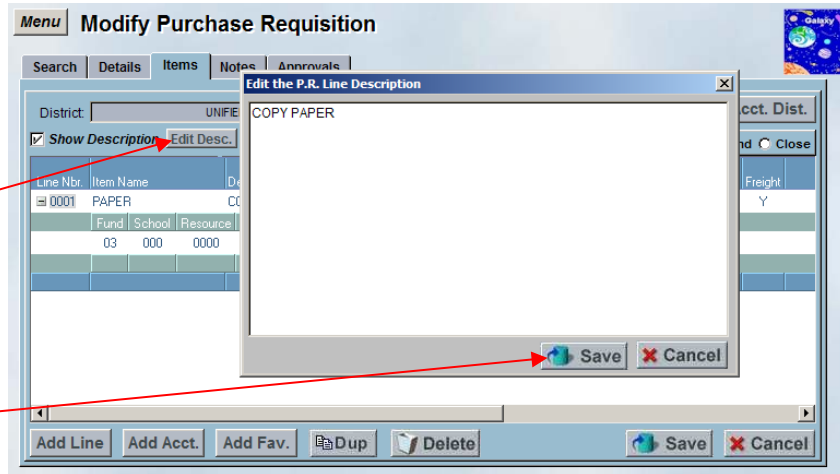
Step

To make changes to the line item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: “Edit Desc.” button prompts a pop up window to enter a more detailed description of the item.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

Step
Click **Save**

This will start the budget check process.

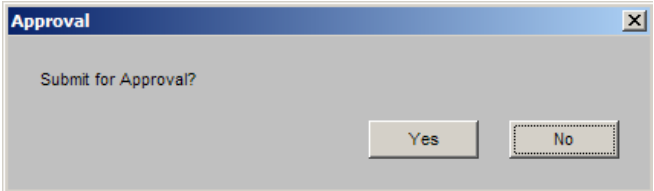
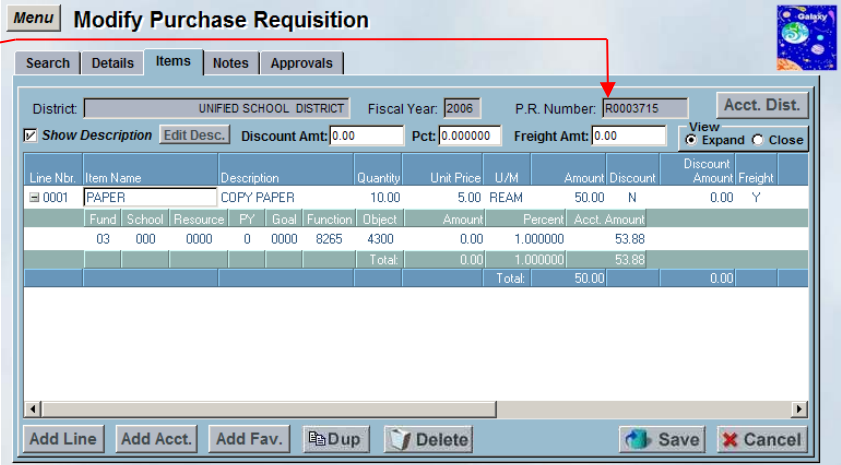
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

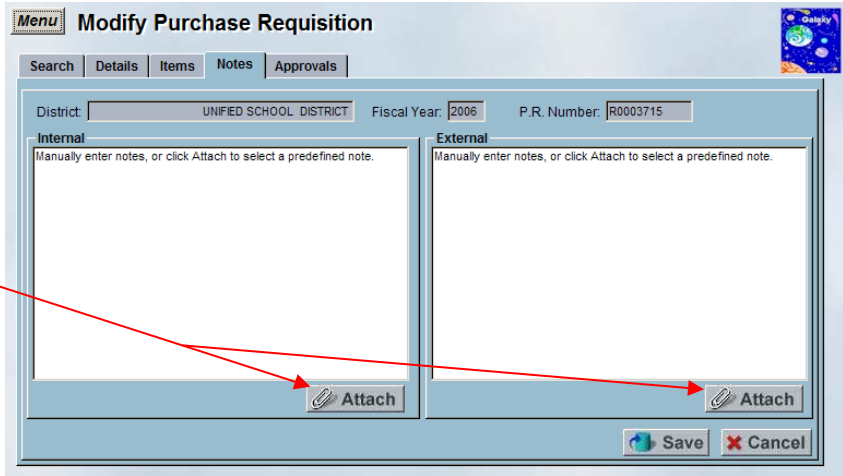
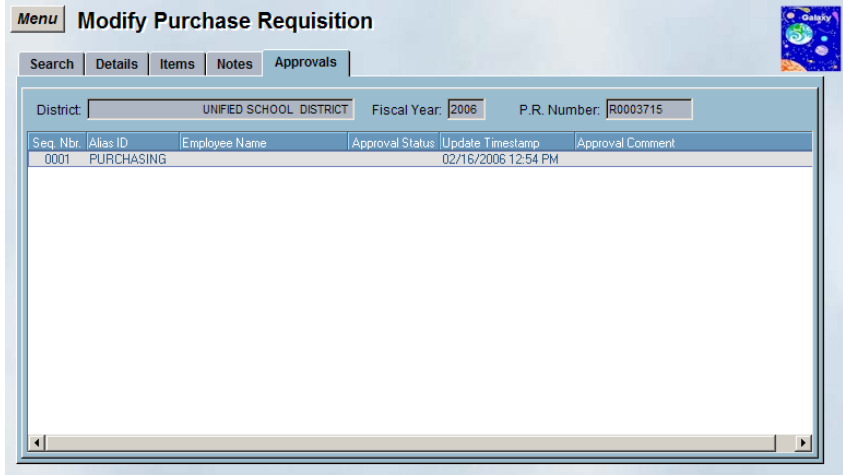
If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

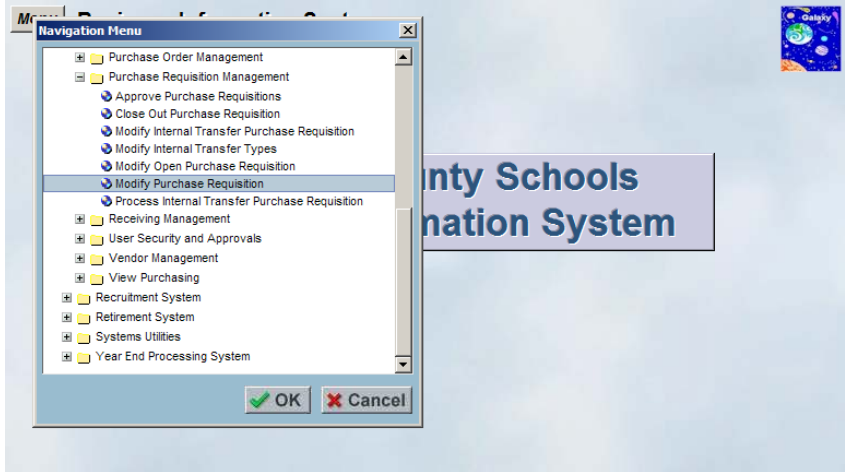
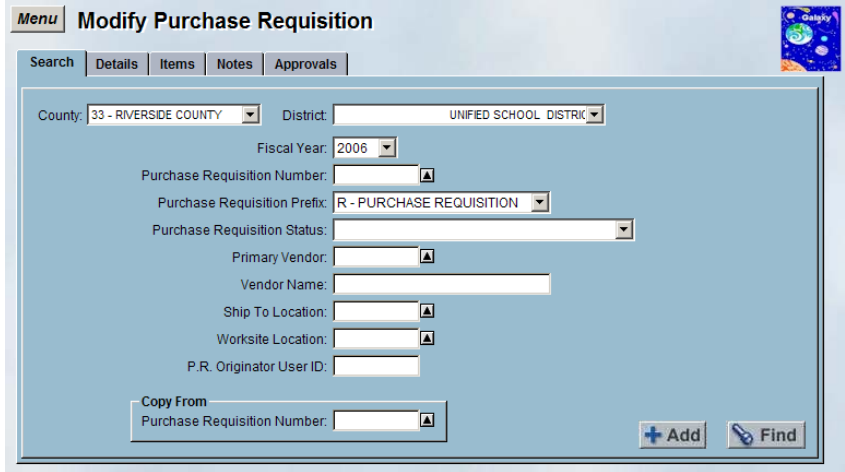
	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	
<p>Step System will generate a purchase requisition number.</p> <p>Click Notes tab</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites for Account Distribution

<p>Step To select a previously defined Internal/External note(s) for the purchase requisition</p> <p>Click Attach,</p> <p>or</p> <p>Manually enter Internal/External note(s).</p> <p>Click Save</p>	 <p style="text-align: center;">NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.</p>
<p>Step Click the Approvals tab to view approvals associated to this purchase requisition.</p> <p>No changes can be made on this tab.</p>	

Add a New Purchase Requisition using Predefined Favorites

A feature available on the Modify Purchase Requisition screen is the ability to assign predefined sacs account strings to line item(s). Predefined SACS account string(s) (accounts used most often by user) can be setup on the Modify User SACS Favorites screen. Once the accounts are setup, the user may assign their predefined SACS account strings to the line items entered on the Items tab by selecting the “Add Fav.” button.

<p>Step 1</p> <p>From menu select Modify Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>To add a purchase requisition</p> <p>Click Add</p> <p>If additional fields are selected they will populate the Details tab.</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites

Step
Add detail
purchase requisition
information.

After desired
information has been
entered

Click **Items** tab.

NOTE: Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.

Step
To add line item(s)
to the purchase
requisition

Click **Add Line**.

Enter/Select
desired information
on the pop up
window.

Click **Save**.

NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites

Step

To add a user's predefined SACS account string(s) to the line item(s)

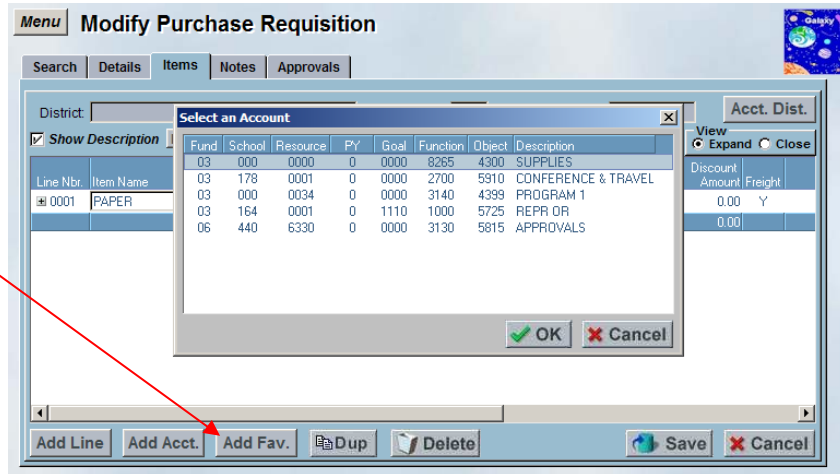
Click **Add Fav.**

Highlight each account string row from the pop up window

Click **OK**.

Or

Double clicking on each account string row will automatically add it to the line item.



Step

Verify line item(s) are populated with the default account distribution.



NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition using Predefined Favorites

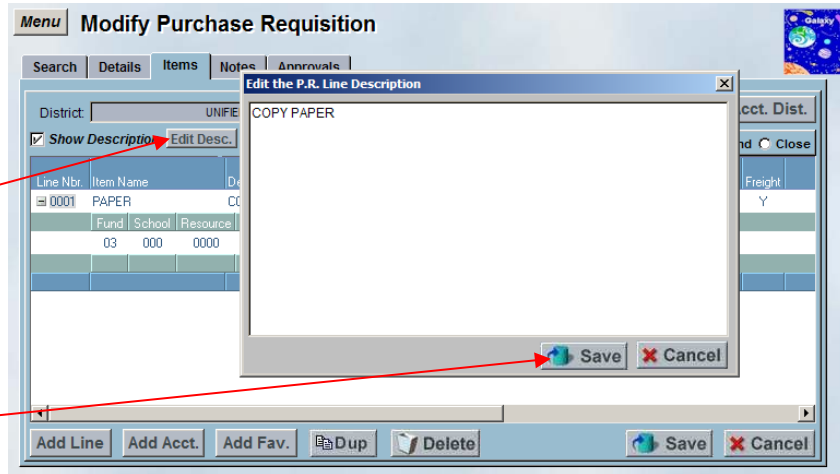
Step

To make changes to the line item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step
 Click Save

This will start the
 budget check process.

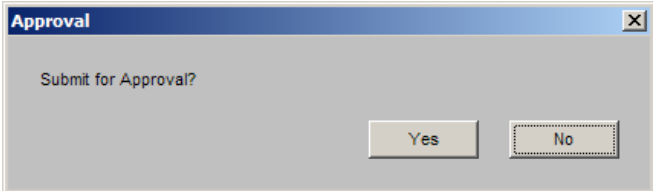
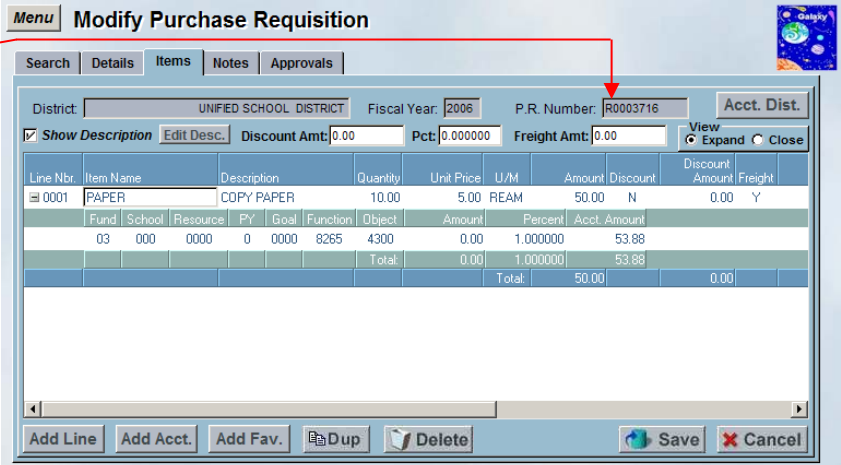
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

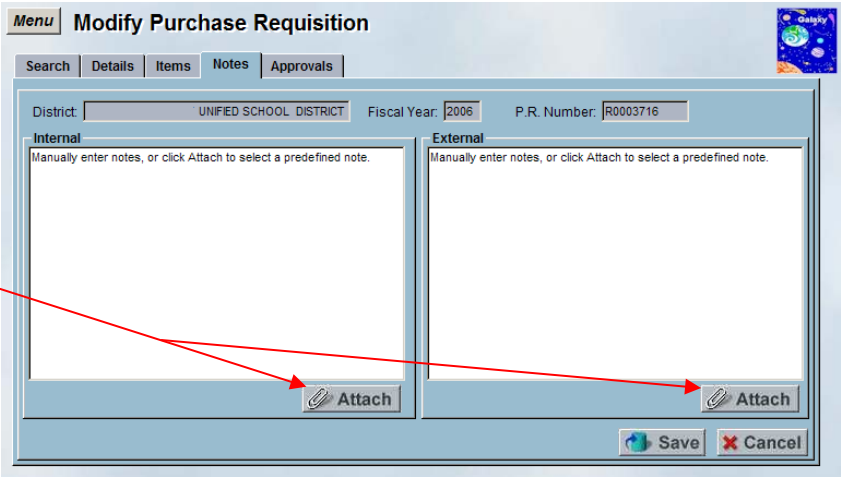
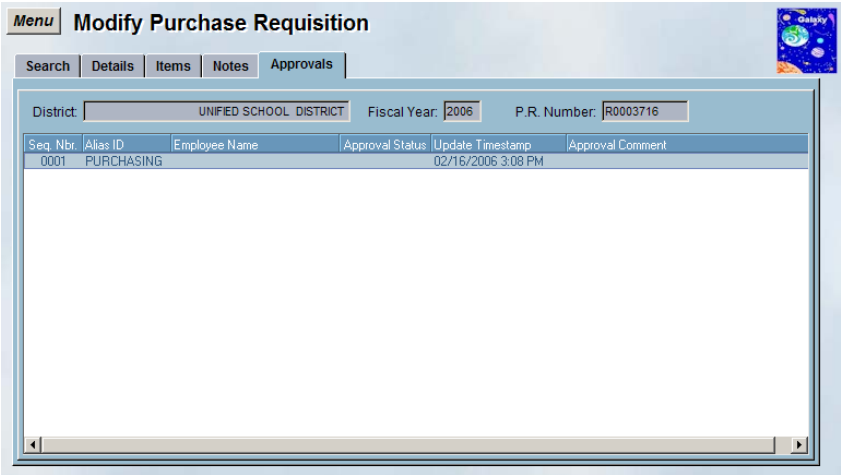
If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

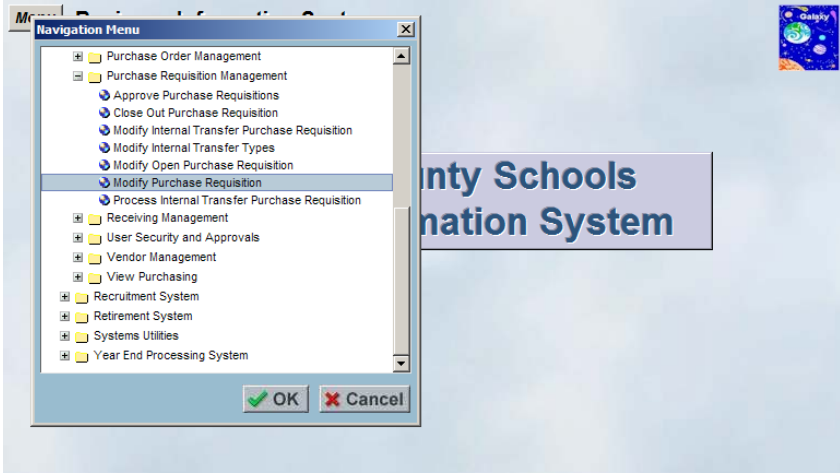
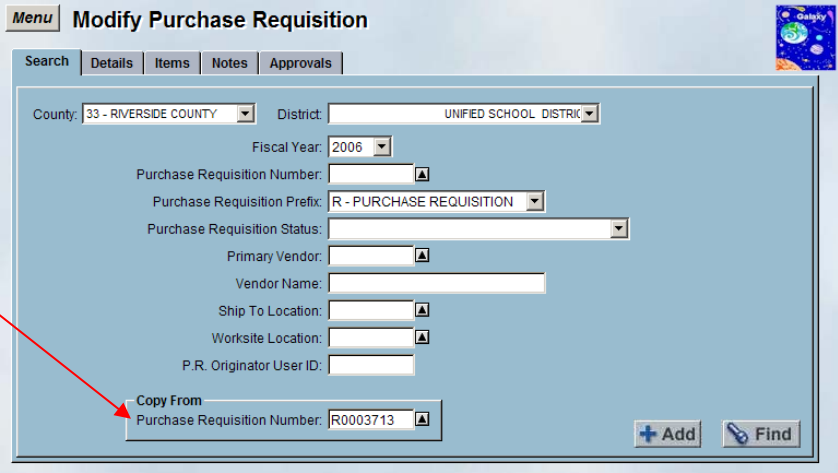
	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	
<p>Step System will generate a purchase requisition number.</p> <p>Click Notes tab</p>	

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Add a New Purchase Requisition using Predefined Favorites

<p>Step To select previously defined Internal/External note(s) for the purchase requisition</p> <p>Click Attach,</p> <p>or</p> <p>Manually enter Internal/External note(s).</p> <p>Click Save</p>	 <p>NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.</p>
<p>Step Click the Approvals tab to view approvals associated to this purchase requisition.</p> <p>No changes can be made on this tab.</p>	

Add a New Purchase Requisition Copying from a Purchase Requisition

A feature available on the Modify Purchase Requisition screen is the ability to create a new purchase requisition from an existing purchase requisition using the “Copy From” feature. The purchase requisition will be pre-filled with data from the existing purchase requisition selected, which may be modified as necessary.

<p>Step 1</p> <p>From menu select Modify Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>Enter/Select a Purchase Requisition Number.</p> <p>Click Add</p>	

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Add a New Purchase Requisition Copying from a Purchase Requisition

Step

Verify and make necessary changes on the Details tab, Items tab and Notes tab.

The screenshot displays the 'Modify Purchase Requisition' window. At the top, there is a 'Menu' button and a 'Delete' button. Below the menu are tabs for 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. The 'Details' tab is active. The form contains the following fields and values:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2006
- P.R. Number: R0000NEW
- P.R. Type: N - NORMAL
- Date Due: 03/18/2006
- P.R. Status: N - NEW (NOT SUBMITTED FOR A)
- Primary Vendor: 17430
- P.R. Amount: \$3.88
- Vendor Name Search: STAPLES
- Category: ART SUPPLIES (dropdown menu)
- Vendor Address: DEPT. #601110028004687 P.O. BOX 6722, THE LAKE
- P.R. Requestor: (empty)
- Bill To Location: FISCAL (dropdown menu)
- Ship To Location: WAREHOUSE (dropdown menu)
- P.R. Originator User ID: (empty)
- Worksite Location: 089 (dropdown menu) PERSONNEL DEPARTMENT
- Contact Phone Nbr: (empty)
- Board Rpt. Desc: (empty)
- Update User ID: (empty)
- Justification: (empty)
- Update Timestamp: 02/16/2006 3:13 PM
- Routing: (empty)
- In Rev: N
- Rev Cmt: (empty)

Buttons at the bottom include 'Print', 'Save', and 'Cancel'.

NOTES:

- The new purchase requisition is pre-filled with data from the existing purchase requisition, which may be modified as necessary
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

After all necessary changes have been made

Click Save.

This will start the budget check process.

The screenshot shows a web-based form titled "Modify Purchase Requisition". The form is organized into several sections. At the top, there are tabs for "Search", "Details", "Items", "Notes", and "Approvals". The "Details" tab is active. The form contains various input fields and dropdown menus. Key fields include: District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2006), P.R. Number (R0000NEW), P.R. Type (N - NORMAL), Date Due (03/18/2006), P.R. Status (N - NEW (NOT SUBMITTED FOR A)), Vendor Name Search (17430), P.R. Amount (\$3.88), Category (ART SUPPLIES), Vendor Address (STAPLES), P.R. Requestor, Approval List, P.R. Originator User ID, Contact Phone Nbr, Update User ID, Update Timestamp (02/16/2006 3:13 PM), Bill To Location (FISCAL), Ship To Location (WAREHOUSE), Worksite Location (089), Board Rpt. Desc, Justification, Routing, In Rev (N), and Rev Cmt. There are also buttons for "Print", "Save", and "Cancel".

Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

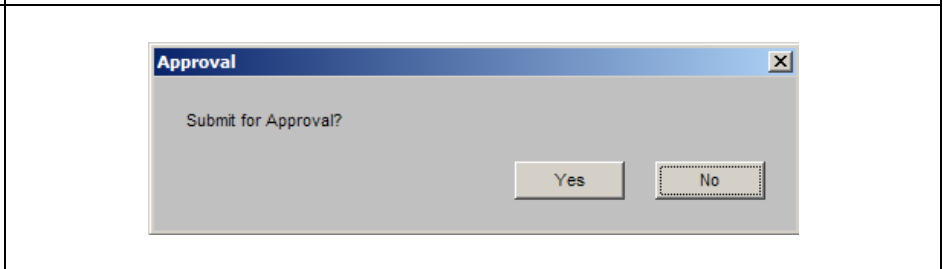
If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

No Approvals

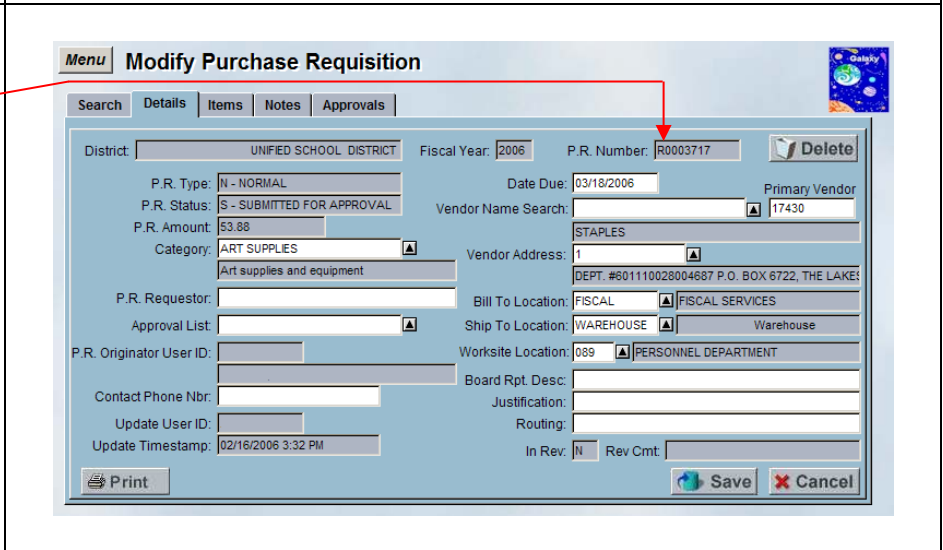
If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).

Step
 “Submit for Approval?” warning message prompts
 Click **Yes**.



Step
 System will generate a purchase requisition number.



Add a New Purchase Requisition selecting Discount and Freight checkboxes when adding line items

Step

To add line item(s) to the purchase requisition

Click **Add Line**.

Enter/Select desired information on the pop up window.

Check the applicable checkboxes if a discount amount and/or freight amount will be applied to the line item.

Click **Save**

The screenshot shows the 'Modify Purchase Requisition' application window. A modal dialog box titled 'Add a P.R. Line Nbr.' is displayed in the foreground. The dialog contains the following fields and controls:

- Line Nbr.:** 0001
- Item Name:** PAPER
- Description:** COPY PAPER
- Quantity:** 10.00
- Unit Price:** 5.000000
- U/M:** REAM
- Discount:**
- Freight:**
- Taxable:**
- Delivery Instructions:** (empty text field)
- Asset Location Code:** (empty dropdown menu)
- Buttons:** Save (highlighted with a red arrow), Cancel

The background window shows a table with the following columns: Line Nbr., Item Name, Quantity, Unit Price, U/M, and Acct. Dist. The 'Save' button at the bottom right of the background window is also highlighted with a red arrow.

NOTE: Freight may be selected by default. This means it was selected on the District Purchasing Option screen.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Purchase Requisition

Step

To add a SACS account string(s) to the line item

Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

The screenshot shows the 'Modify Purchase Requisition' window. At the top, it displays 'District: UNIFIED SCHOOL DISTRICT', 'Fiscal Year: 2006', and 'P.R. Number: R0000NEW'. Below this, there are fields for 'Discount Amt: 0.00', 'Pct: 0.000000', and 'Freight Amt: 0.00'. A table lists line items:

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:								0.00	1.000000	
Total:						50.00		0.00		

Buttons at the bottom include 'Add Line', 'Add Acct.', 'Add Fav.', 'Dup', 'Delete', 'Save', and 'Cancel'.

Step

Once all line items are entered, enter the Discount Amt and Freight Amt.

The screenshot shows the 'Modify Purchase Requisition' window with two line items. The 'Discount Amt' is now 10.00 and 'Freight Amt' is 5.00. The table lists:

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	Y	6.67	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:								0.00	1.000000	
0002	PENS	BLACK PENS	5.00	5.00	BOX	25.00	Y	3.33	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:								0.00	1.000000	
Total:						75.00		10.00		

Buttons at the bottom include 'Add Line', 'Add Acct.', 'Add Fav.', 'Dup', 'Delete', 'Save', and 'Cancel'.

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Modify an Existing Purchase Requisition

Step

The Discount and Freight flag are set to “Y” and the amount entered in the Discount Amt. and Freight Amt fields at the top of the view have been distributed to those lines.

Click **Save**

Menu Modify Purchase Requisition

Search
Details
Items
Notes
Approvals

District:

Fiscal Year:

P.R. Number:

Acct. Dist.

Show Description

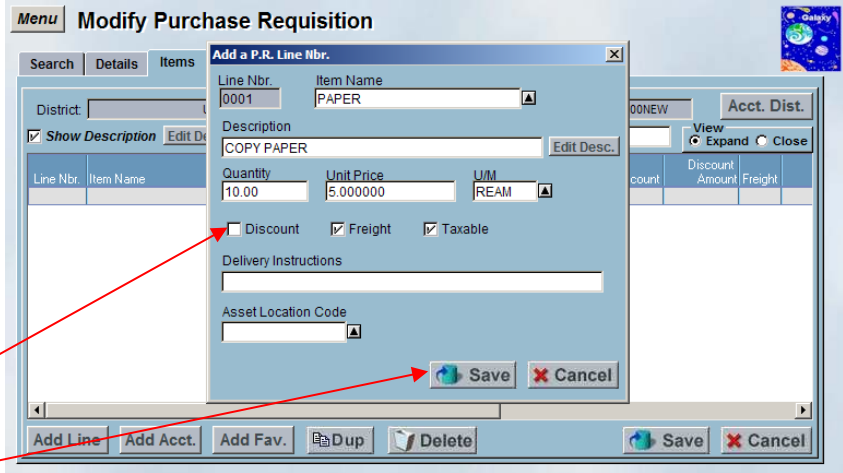
Discount Amt:

Pct:

Freight Amt:

Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount	Delivery Instructions	Asset Location Code
50.00	Y	6.67	Y	3.33	Y	3.36	50.02		
Percent Acct. Amount <input type="text" value="000000"/>									
Percent Acct. Amount <input type="text" value="000000"/>									
25.00	Y	3.33	Y	1.67	Y	1.68	25.02		
Percent Acct. Amount <input type="text" value="000000"/>									
Percent Acct. Amount <input type="text" value="000000"/>									
75.00		10.00		5.00		5.04	75.04		

Add a New Purchase Requisition without selecting Discount and Freight checkboxes when adding line items

<p>Step To add line item(s) to the purchase requisition</p> <p>Click Add Line.</p> <p>Enter/Select desired information on the pop up window.</p> <p>Discount and Freight are not checked.</p> <p>Click Save</p>	 <p>NOTE: Freight may be selected by default. This means it was selected on the District Purchasing Option screen.</p>
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Modify an Existing Purchase Requisition

Step

To add a SACS account string(s) to the line item

Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0000NEW Acct. Dist.

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View Expand Close

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
Total:								0.00	1.000000	
Total:							50.00		0.00	

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

Step

Once all line items are entered, if Discount and/or Freight need to be applied to one or more of the line items, enter

Discount Amt
Freight Amt

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000NEW Acct. Dist.

Show Description Edit Desc. Discount Amt: 10.00 Pct: 0.000000 Freight Amt: 5.00 View Expand Close

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	N	0.00	N	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	172	0001	0	1110	1000	4300	0.00	1.000000	
Total:								0.00	1.000000	
0002	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	N	0.00	N	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	172	0001	0	1110	1000	4300	0.00	1.000000	
Total:								0.00	1.000000	
Total:							10.00		0.00	

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

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 Modify an Existing Purchase Requisition

Step
 Discount,
 Discount Amount,
 Freight
 Freight Amount
 columns will appear
 in the view.

Click **Save**

The screenshot shows the 'Modify Purchase Requisition' window with the following data in the table:

Line	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount
1	1.00	5.00	REAM	5.00	N	0.00	N	0.00	Y	0.39	5.39
Goal Function Object				Amount	Percent	Acct. Amount					
1110 1000 4300				0.00	1.000000						
Total:				0.00	1.000000						
Total: 10.00 0.00 0.00 0.78 10.78											

NOTE: The Discount and Freight flag are set to “N” and the amount in the Discount Amt and Freight Amt are “0.00”

Step
 Enter Discount
 and/or Freight to one
 or more of the line
 items.

Enter “Y” in the
 Discount column and
 Freight column and
 enter Amount in the
 Discount Amount and
 Freight Amount.

Click **Save**

The screenshot shows the 'Modify Purchase Requisition' window with the following data in the table:

Line	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount
1	1.00	5.00	REAM	5.00	Y	5.00	Y	2.50	Y	0.39	2.89
Goal Function Object				Amount	Percent	Acct. Amount					
1110 1000 4300				0.00	1.000000						
Total:				0.00	1.000000						
Total: 10.00 10.00 5.00 0.78 5.78											

NOTE: The Discount and Freight flags must be set to “Y” and an amount must be entered in the Discount Amount and Freight Amount columns in the view in order for these amounts to be applied when the user clicks Save.

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 Modify an Existing Purchase Requisition

Step

Double check Discount and Freight amount in the view to make sure they match the Discount and Freight amount entered in these fields

Modify Purchase Requisition

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000NEW Acct. Dist.

Discount Amt: 10.00 Pct: 0.000000 Freight Amt: 5.00

Item	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount
PER	1.00	5.00	REAM	5.00	Y	5.00	y	2.50	Y	0.39	2.89
PER	1.00	5.00	REAM	5.00	Y	6.00	y	2.50	Y	0.39	1.89
				Total:		10.00		11.00		0.78	4.78

Step

If the incorrect amount is entered in the view, the incorrect amount will be reflected in the Discount and Freight amount fields when the user clicks Save.

Modify Purchase Requisition

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R000099 Acct. Dist.

Discount Amt: 11.00 Pct: 0.000000 Freight Amt: 5.00

Item	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount
PER	1.00	5.00	REAM	5.00	Y	5.00	Y	2.50	Y	0.39	2.89
Goal	Function	Object	Amount	Percent	Acct. Amount						
1110	1000	4300	0.00	1.000000	2.89						
				Total:		0.00	1.000000	2.89			
PER	1.00	5.00	REAM	5.00	Y	6.00	Y	2.50	Y	0.39	1.89
Goal	Function	Object	Amount	Percent	Acct. Amount						
1110	1000	4300	0.00	1.000000	1.89						
				Total:		0.00	1.000000	1.89			
				Total:		10.00		11.00		0.78	4.78

NOTE: The Discount Amt field and Freight Amt field will reflect the change from the view. This is because the Discount and Freight is summed from the last line item upward to the first line item.

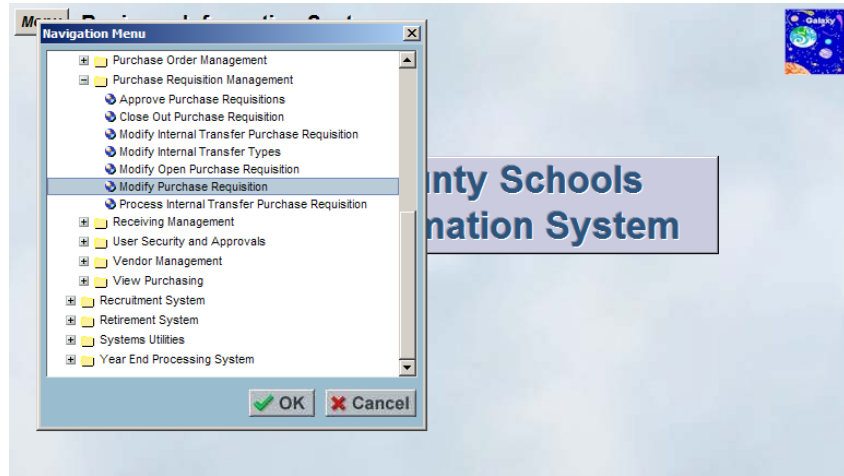
Modify an Existing Purchase Requisition

The Modify Purchase Requisition screen allows the user to edit an existing purchase requisitions.

Step 1

From Menu select
Modify Purchase
Requisition

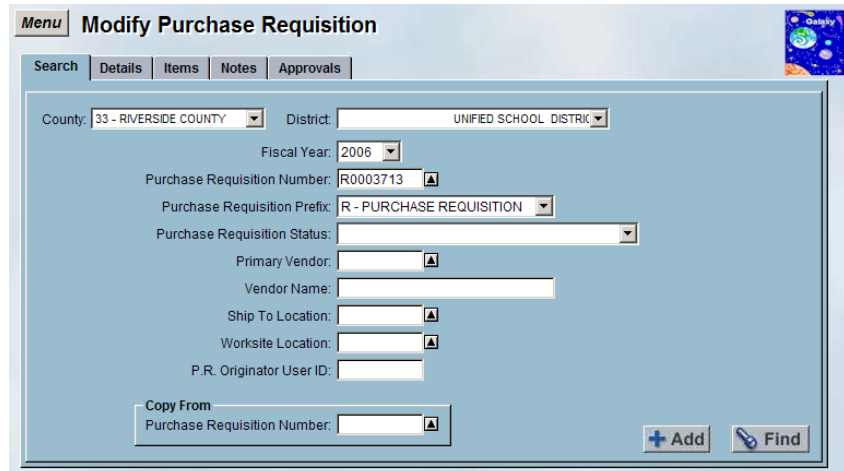
Click **OK**.



Step

To edit an existing
purchase requisition,
enter/select
information as
available.

Click **Find**



Step

Edit purchase requisition detail information if necessary.

Click **Items** tab

The screenshot displays the 'Modify Purchase Requisition' web application. The interface includes a 'Menu' bar with 'Modify Purchase Requisition' selected. Below the menu are tabs for 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. The main form contains the following fields and values:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2006
- P.R. Number: R0003713
- P.R. Type: N - NORMAL
- P.R. Status: S - SUBMITTED FOR APPROVAL
- P.R. Amount: \$3.88
- Category: ART SUPPLIES
- Vendor Name: STAPLES
- Vendor Address: 1
- Bill To Location: FISCAL
- Ship To Location: WAREHOUSE
- Worksite Location: 086
- Update Timestamp: 02/16/2006 10:59 AM

Buttons for 'Print', 'Save', and 'Cancel' are visible at the bottom of the form.

NOTES:

- With certain exceptions, any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Click the print button to print all open purchase order data from all tabs.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

Edit data associated to the existing line item(s) as necessary.

NOTES:

- Any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

To add new line item(s) to an existing purchase requisition

Click **Add Line**.

Enter/Select desired information on pop up window.

Click **Save**

To duplicate an existing line item place cursor on that line and

Click **Dup**.

NOTE: “Edit Desc.” button prompts a pop up window to enter a more detailed description of the item.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
Modify an Existing Purchase Requisition

Step

To manually add a SACS account string(s) to the line item

Click **Add Acct.**

Enter SACS account string(s) information.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Percent is shown by default; the user may enter an Amount, making sure to change the Percent to "0".

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	53.88
							Total:	0.00	1.000000	53.88
0002	COLORED PENCILS	COLORED PENCILS	15.00	3.00	EACH	45.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
							Total:	0.00	1.000000	
							Total:	95.00		0.00

Step

To add a user's predefined SACS account string(s) to a line item

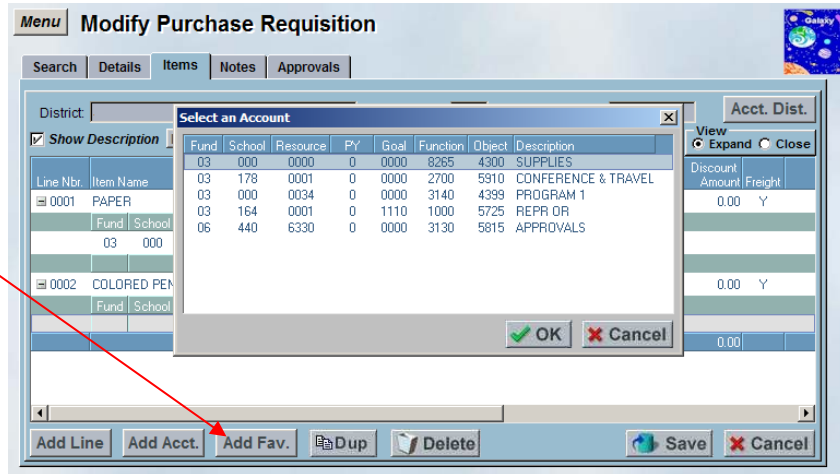
Click **Add Fav.**

Highlight each account string row from the pop up window

Click **OK**.

Or

Double clicking on an account string row will automatically add it to the line item.



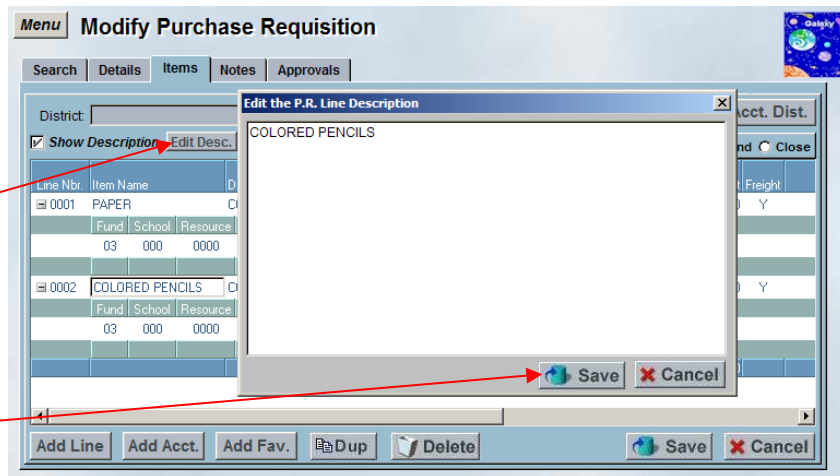
Step

To make changes to the item description, place cursor on the line

Click **Edit Desc.**

Edit the description in the pop up window.

Click **Save**



NOTE: "Edit Desc." button prompts a pop up window to enter a more detailed description of the item.

Step
 Click Save

This will start the
 budget check process.

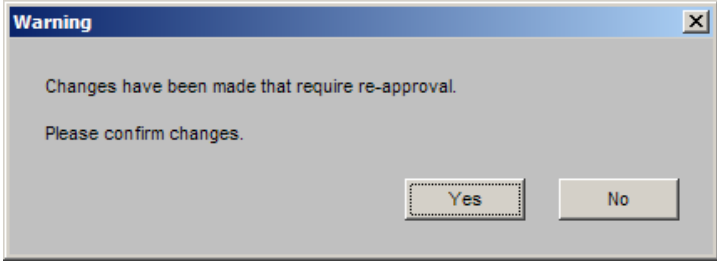
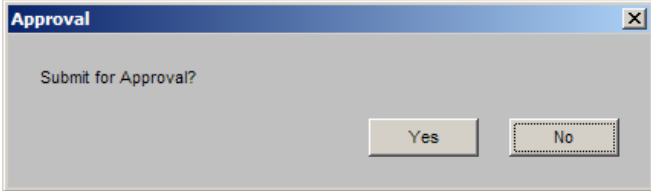
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Warning". The text inside reads: "Changes have been made that require re-approval. Please confirm changes." At the bottom, there are two buttons: "Yes" and "No".</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Approval". The text inside reads: "Submit for Approval?". At the bottom, there are two buttons: "Yes" and "No".</p>

Step

Click the Notes tab to modify the Internal/External note(s) for the purchase requisition

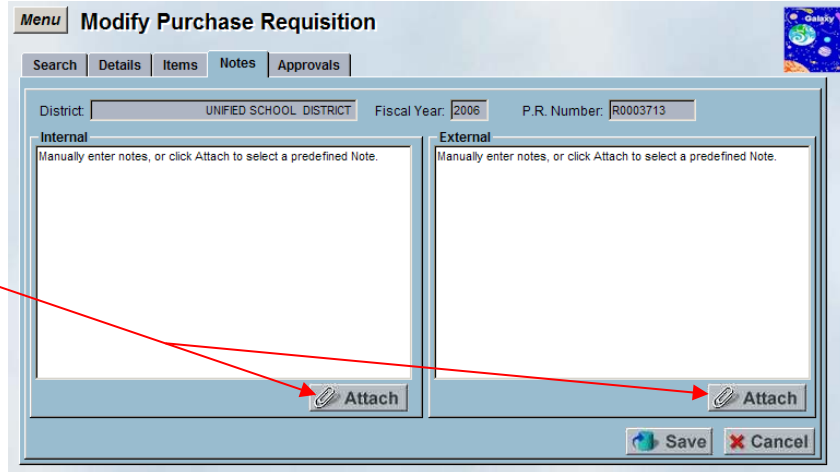
Click **Attach**.

Select from a previously defined note,

or

Manually enter Internal/External note(s).

Click **Save**



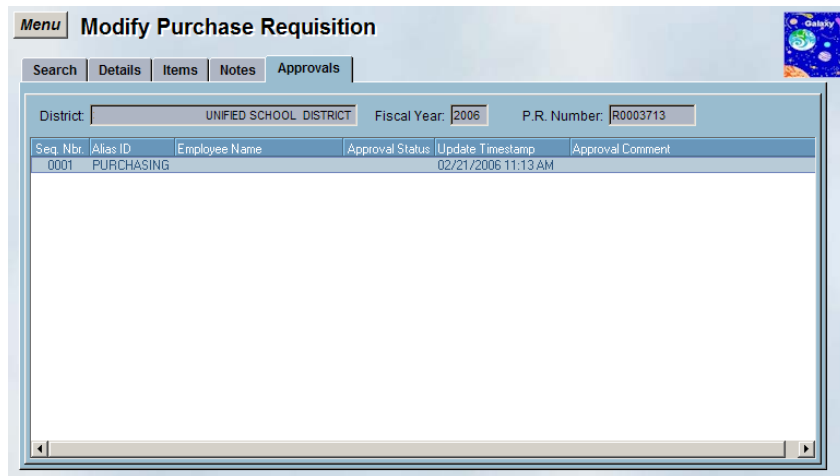
NOTES:

- External notes will print on purchase requisitions and purchase orders, internal notes will not.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step

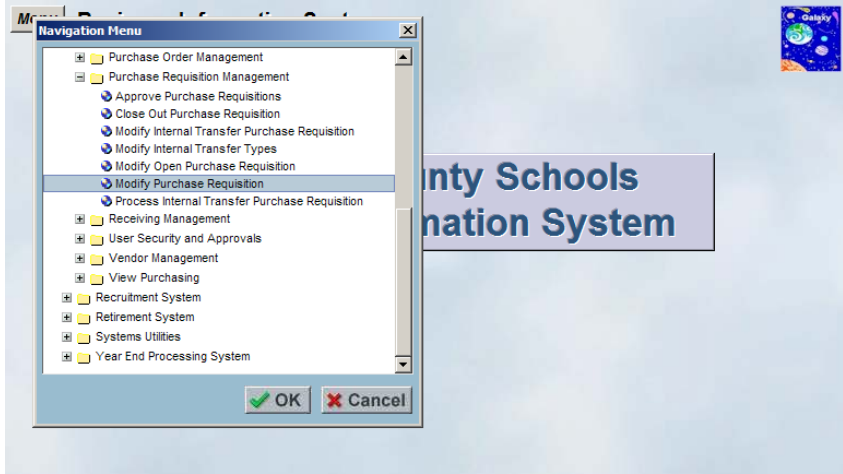
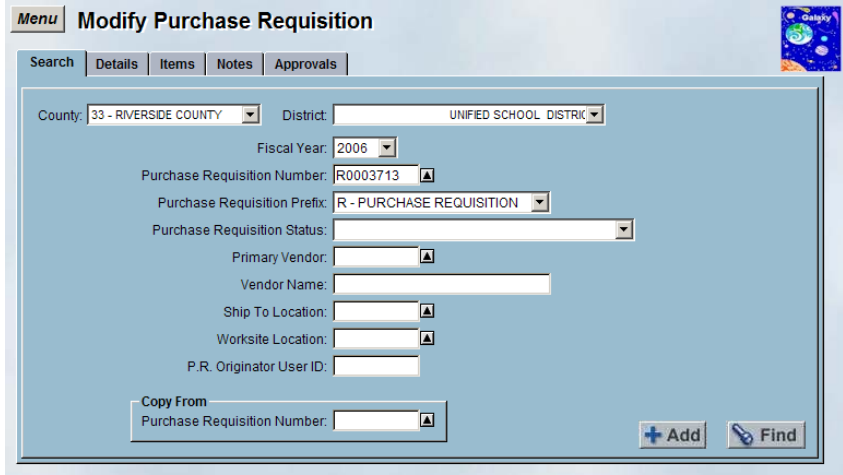
Click the Approvals tab to view approvals associated to this purchase requisition

No Changes can be made on this tab.



Modify an Existing Purchase Requisition – Reapply Account Distribution

The Modify Purchase Requisition screen allows the user to reapply account distribution to existing line items.

<p>Step 1 From menu select Modify Purchase Requisition</p> <p>Click OK.</p>	
<p>Step To edit an existing purchase requisitions enter/select information as available.</p> <p>Click Find</p>	

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Modify an Existing Purchase Requisition – Reapply Account Distribution

Step

Edit purchase requisition detail information if necessary.

Click **Items** tab

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: 30 - DESERT SANDS UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003713 Delete

P.R. Type: N - NORMAL Date Due: 03/18/2006 Primary Vendor

P.R. Status: S - SUBMITTED FOR APPROVAL Vendor Name Search: 17430

P.R. Amount: \$3.88 Category: ART SUPPLIES Vendor Address: STAPLES

Category: Art supplies and equipment Vendor Address: 1

P.R. Requestor: Bill To Location: FISCAL FISCAL SERVICES

Approval List: Ship To Location: WAREHOUSE Desert Sands Warehouse

P.R. Originator User ID: PURCH5 Worksite Location: 086 GRAPHIC SERVICES

Contact Phone Nbr: ABEYTA, REBECCA L Board Rpt. Desc:

Update User ID: PURCH5 Justification:

Update Timestamp: 02/16/2006 10:59 AM Routing:

In Rev: Rev Cmt:

Print Save Cancel

NOTES:

- With certain exceptions, any modifications to data on this tab will reinitiate the approval process (purchase requisition status will be set to “N” (new – not submitted for approval)).
- Depending on the options chosen for each District on the District Purchasing Options Screen, certain fields may be required on the Details tab.
- Click the print button to print all open purchase order data from all tabs.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Modify an Existing Purchase Requisition – Reapply Account Distribution

Step
 To reapply/reset
 the account
 distribution for all
 existing line item(s)

Click **Acct. Dist.**

The screenshot shows the 'Modify Purchase Requisition' window. At the top, there are tabs for 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. The 'Items' tab is active. The window displays the following information:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2006
- P.R. Number: R0003713
- Discount Amt: 0.00
- Pct: 0.000000
- Freight Amt: 0.00
- View: Expand

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	53.88
							Total	0.00	1.000000	53.88
0002	COLORED PENCILS	COLORED PENCILS	15.00	3.00	EACH	45.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0000	0	0000	8265	4300	0.00	1.000000	
							Total	0.00	1.000000	
							Total	95.00		0.00

At the bottom of the window, there are buttons for 'Add Line', 'Add Acct.', 'Add Fav.', 'Dup', 'Delete', 'Save', and 'Cancel'.

NOTES:

- Any modifications to data on this tab will reinitiate the approval process (contract status will be set to “N” (new – not submitted for approval)).
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

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 Modify an Existing Purchase Requisition – Reapply Account Distribution

Step
 Manually edit existing default account distribution in the pop up window.

Or

Select an account from the user's predefined sacs account favorites to reapply for the account distribution in the pop up window.

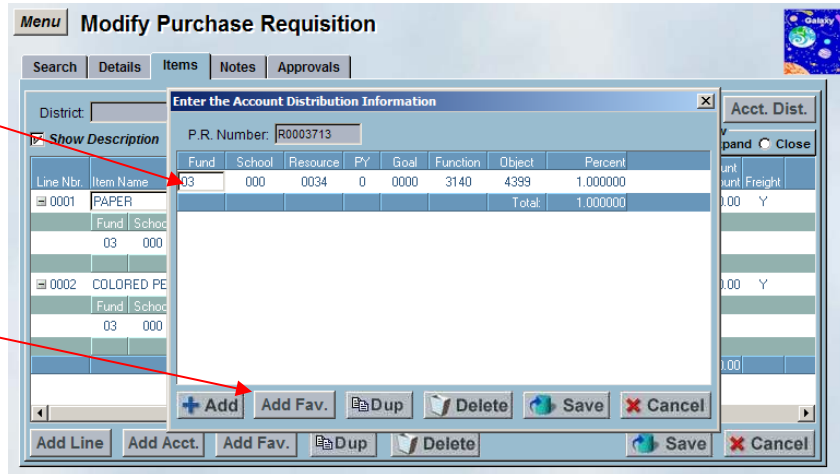
Click **Save**

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object

Optional field:

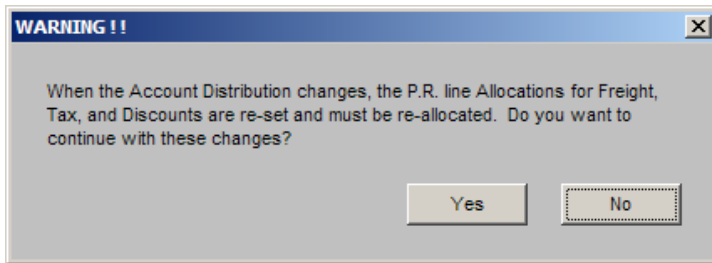
- Percent



NOTE: Clicking the Account Distribution button will popup a window to enter the default account distribution for all line items. The account string percentage is entered as default (the total for all account strings entered in this window must equal 100% or 0%), each line item will be split funded according to the respective percentage. The account string percentage may also be set to 0 for all account strings to establish default funding for all line items without automatically calculating the split funding amounts. Account strings entered in this popup window will go through the account validation routine. Clicking the Save button will close the popup window and apply the account distribution to the line items by multiplying the account string percentage times the total line item amount.

A warning message will be displayed asking the user if they would like to continue with the changes.

Click **Yes**



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 Modify an Existing Purchase Requisition – Reapply Account Distribution

Step
 Verify account
 distribution
 reallocation.

Menu Modify Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003713 Acct. Dist.

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View
 Expand Close

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0034	0	0000	3140	4399	0.00	1.000000	53.88
							Total:	0.00	1.000000	53.88
0002	COLORED PENCILS	COLORED PENCILS	15.00	3.00	EACH	45.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0034	0	0000	3140	4399	0.00	1.000000	48.49
							Total:	0.00	1.000000	48.49
							Total:	95.00		0.00

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

NOTE: By default all lines will be shown expanded. Select Close to hide account information for all line items.

Step
 Click Save

This will start the
 budget check process.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	
0001	PAPER	COPY PAPER	10.00	5.00	REAM	50.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0034	0	0000	3140	4399	0.00	1.000000	53.88
							Total:	0.00	1.000000	53.88
0002	COLORED PENCILS	COLORED PENCILS	15.00	3.00	EACH	45.00	N	0.00	Y	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0034	0	0000	3140	4399	0.00	1.000000	48.49
							Total:	0.00	1.000000	48.49
							Total:	95.00		0.00

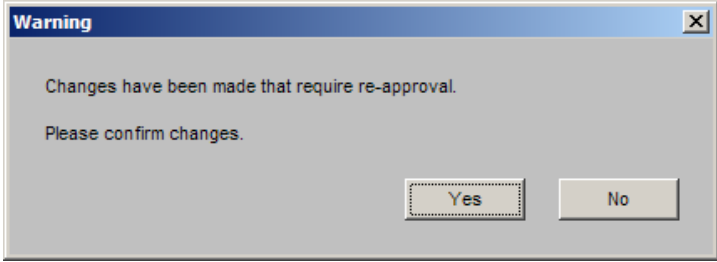
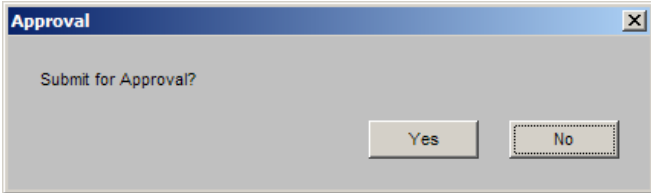
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step If any changes that were made require re-approval, a warning message will prompt asking you to confirm changes.</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Warning". The text inside reads: "Changes have been made that require re-approval. Please confirm changes." At the bottom, there are two buttons: "Yes" and "No".</p>
<p>Step “Submit for Approval?” warning message prompts</p> <p>Click Yes.</p>	 <p>A screenshot of a Windows-style dialog box titled "Approval". The text inside reads: "Submit for Approval?". At the bottom, there are two buttons: "Yes" and "No".</p>

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 Modify an Existing Purchase Requisition – Reapply Account Distribution

Step
 Click the Notes tab to modify the Internal/External note(s) for the purchase requisition

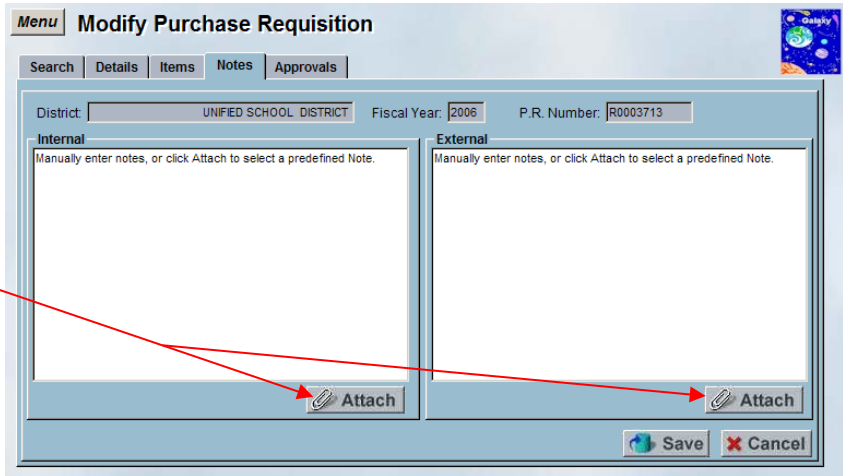
Click **Attach**.

Select from a previously defined note,

or

Manually enter Internal/External note(s).

Click **Save**

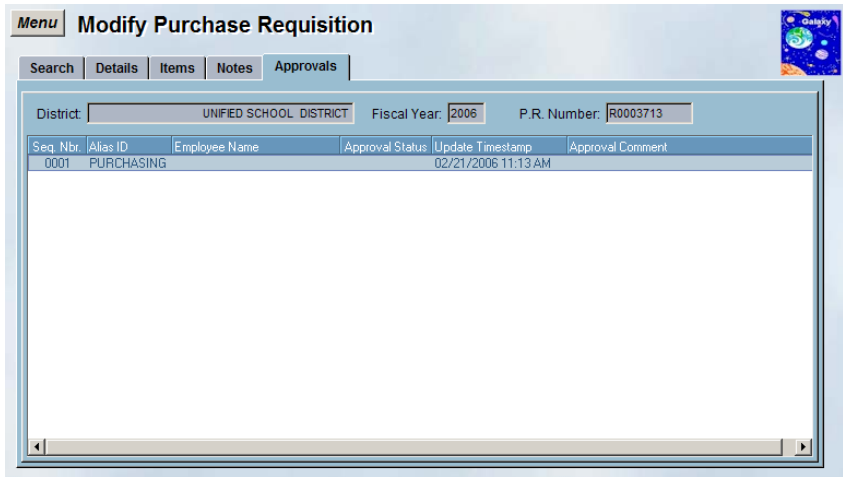


NOTES:

- External notes will print on purchase requisitions and purchase orders, internal notes will not.
- Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.

Step
 Click the Approvals tab to view approvals associated to this purchase requisition

No Changes can be made on this tab.



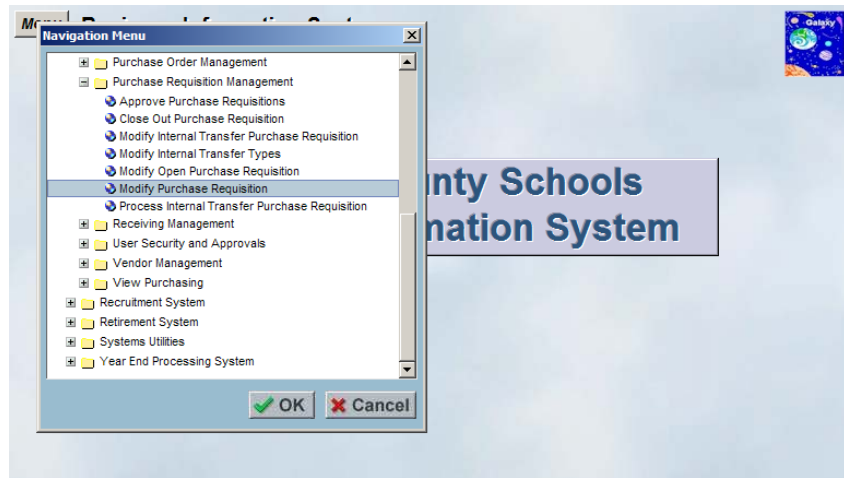
Delete a Purchase Requisition

The Modify Purchase Requisition screen allows the user to delete existing purchase requisitions.

Step 1

From menu select
Modify Purchase
Requisition

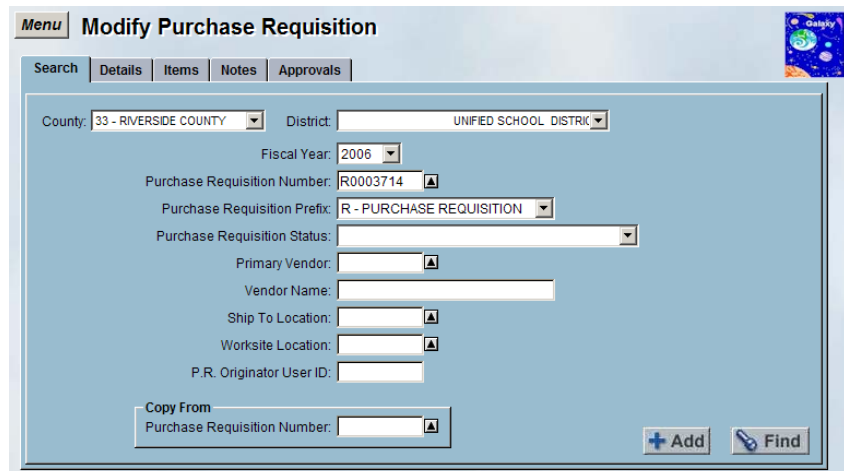
Click **OK**.

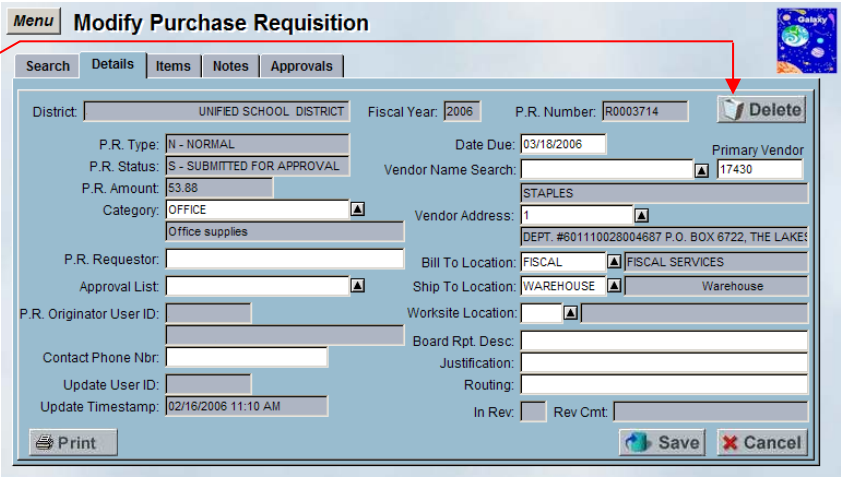
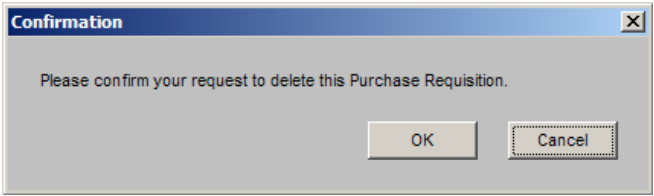
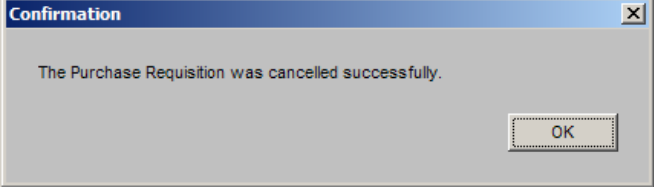


Step

To delete an
existing purchase
requisitions
enter/select
information as
available.

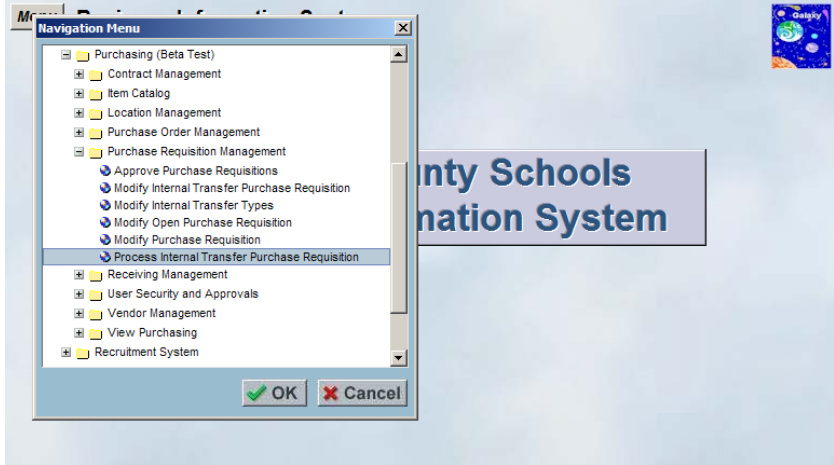
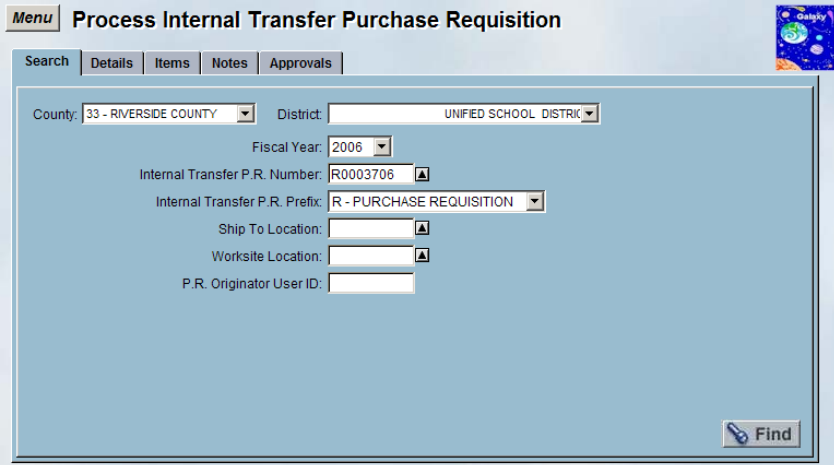
Click **Find**



<p>Step To delete the purchase requisition</p> <p>Click Delete.</p>	 <p>NOTE: This will cancel the purchase requisition set the purchase requisition status to “C”, cancelled to prevent any further processing of this purchase requisition.</p>
<p>Step Confirmation message prompts to confirm the request to delete the Purchase Requisition.</p>	
<p>Step Confirmation message prompts to verify purchase requisition has been cancelled successfully.</p>	 <p>NOTE: The cancelled purchase requisition remains in the database for future reference.</p>

Process Internal Transfer Purchase Requisition

This screen is used to process internal transfer purchase requisition information. Only users with proper user security will have access to this screen. This screen performs an internal transfer of funds for requisitioned items that are within the 5700 object code.

<p>Step 1</p> <p>From menu select Process Internal Transfer Purchase Requisition</p> <p>Click OK.</p>	
<p>Step</p> <p>To process an existing internal transfer purchase requisition enter/select information as available.</p> <p>Click Find</p>	 <p>NOTE: Internal Transfer Purchase Requisitions that have not received final approval, or that have already been processed, may not be modified.</p>

Step Enter information if necessary.

Click **Items** tab

NOTES:

- Misc. Field 1 and Misc. Field 2 are optional fields that when entered will show on the printed report.
- Modifications on data on this tab will not reinstate the approval process.
- Clicking the Delete button will cancel the requisition and set the requisition status to prevent any further processing of this requisition (purchase requisition status will be set to "C" (cancelled)). This will also disencumber the requisition. The cancelled purchase requisition remains in the database for future reference.

Step Edit internal transfer credit SACS account string if necessary.

Required fields:
 Fund
 School
 Resource
 PY
 Goal
 Function
 Object

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/J/M	Amount
0001	STAMPS		50.00	0.39	EACH	19.50
Total: 19.50						
0002	STAMPS 2/14/06		50.00	0.05	EACH	2.50
Total: 2.50						
Total:						22.00

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Process Internal Transfer Purchase Requisition

Step 4
Edit line item
SACS account string
if necessary.

Required fields:

- Fund
- School
- Resource
- PY
- Goal
- Function
- Object
- Amount or Percent

Click **Save**

Click **Notes** tab

Menu Process Internal Transfer Purchase Requisition

Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2006 P.R. Number: R0003706

Internal Transfer Type: P-MP - MONTHLY POSTAGE View Expand Close

Show Description View Desc.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount					
0001		STAMPS	50.00	0.39	EACH	19.50					
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Revised Amt.
	03	000	0034	0	0000	3140	4399	0.00	1.000000	19.50	19.50
							Total:	0.00	1.000000	19.50	
							50.00	0.05	EACH	2.50	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Revised Amt.
	03	000	0034	0	0000	3140	4399	0.00	1.000000	2.50	2.50
							Total:	0.00	1.000000	2.50	
								Total:		22.00	

Approve Save Cancel

NOTE: If the screen edits are passed successfully, the purchase requisition is saved to the database and the appropriate financial transactions are applied to the financial ledgers to transfer (expense) the funds. The encumbrances associated with the account strings are also disencumbered. The purchase requisition status will be set to "F" (finalized- all lines closed out)

Step
 Click Save

This will start the
 budget check process.

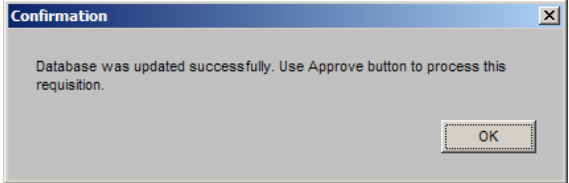
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

Continuous Budget Check

If the “continuous budget check” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If not, a warning message will be displayed listing the account strings that have insufficient funds. This is only a warning; the user may continue their data entry.

Requires Budget Check Before Submission

If the screen edits are passed successfully, the purchase requisition is saved to the database and a message is displayed asking the user if the purchase requisition should be sent to the approval process. If the “require budget check before submission” district option is enabled, the Save button logic will check the financial ledgers to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the list of approvers will be built based on the step and extended approval parameters (purchase requisition status will be set to “S” (submitted for approval)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.

	<p>No Approvals</p> <p>If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges.</p> <p>If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition to perform another budget check. If there are sufficient funds, the account strings will be encumbered (purchase requisition status will be set to “A” (approved)). If not, an error message will be displayed listing the account strings that have insufficient funds. The user will be given the opportunity to override the budget check, provided that they have sufficient user security privileges (purchase requisition status will be set to “A” (approved)).</p>
<p>Step Confirmation message will appear informing the user to click the Approve button to process the requisition.</p> <p>Click Ok</p>	

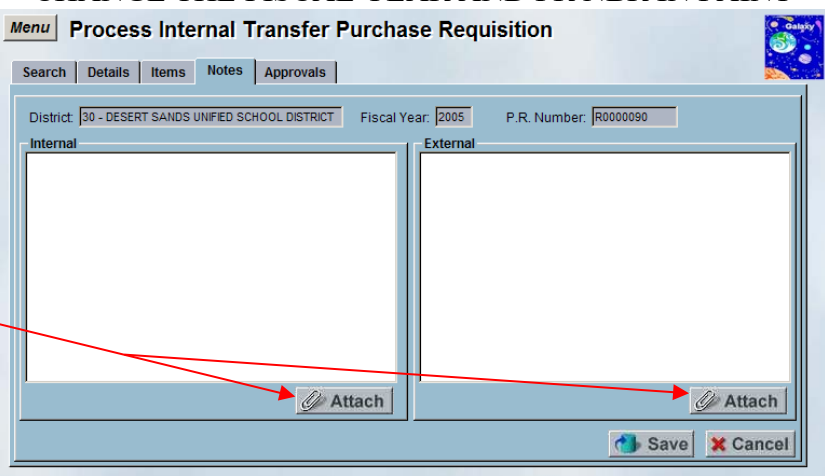
DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0
 Process Internal Transfer Purchase Requisition

Step
 Click the Approve button to process the requisition.

The screenshot shows the 'Process Internal Transfer Purchase Requisition' application. At the top, there is a menu bar with 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. Below the menu, the following information is displayed: District: UNIFIED SCHOOL DISTRICT, Fiscal Year: 2006, P.R. Number: R0003706, Internal Transfer Type: P-MP - MONTHLY POSTAGE. There are also fields for Fund (03), School (890), Resource (0000), Year (0), Goal (0000), Function (7200), and Object (5910). A 'Show Description' checkbox is checked. The main area contains a table with columns: Line Nbr, Item Name, Description, Quantity, Unit Price, U/M, Amount, Fund, School, Resource, PY, Goal, Function, Object, Amount, Percent, Acct. Amount, Revised Amt. The table lists two items: 0001 STAMPS (Quantity 50.00, Unit Price 0.39, Amount 19.50) and 0002 STAMPS 2/14/06 (Quantity 50.00, Unit Price 0.05, Amount 2.50). A total row shows a total amount of 22.00. At the bottom right, there are buttons for 'Approve', 'Save', and 'Cancel'.

Step
 A processed transaction id is assigned

This screenshot shows the same application as the previous one, but with a modal dialog box open. The dialog box is titled 'Expenditure a transfer Purchase Requisition' and contains the text 'Processed Transaction ID: GP00031468' and an 'OK' button. The background application is dimmed, but the table and buttons are still visible. The 'Approve' button is highlighted, indicating it has been clicked.

<p>Step Click the Notes tab to modify the Internal/External note(s) for the internal transfer purchase requisition</p> <p>Click Attach.</p> <p>Select from a previously defined note</p> <p>or</p> <p>Manually enter Internal/External note(s).</p> <p>Click Save</p>	<p style="text-align: center;">CHANGE THE FISCAL YEAR AND PR NBR IN PAINT</p>  <p>NOTES:</p> <ul style="list-style-type: none"> • External notes will print on purchase requisitions and purchase orders, internal notes will not. • Regardless of which tab you are currently working on, if you click save or cancel it will save or cancel all changes made to that point.
<p>Step Click the Approvals tab to view approvals associated to this internal transfer purchase requisition</p> <p>No Changes can be made on this tab.</p>	<p style="text-align: center;">CHANGE FISCAL YR AND PR NBR IN PAINT</p> 