

PO REQUEST & PURCHASE CARD PROCESS & APPROVAL

Entering a Purchase Order Requestion. Steps 1 -27

Person Responsible

Program / Document

Purchase Order Request & Entry Process

Sub-Entry Process

Steps 1 to 13

Purchasing Requestor

Requestion Form .xls

1. Date, enters Date.
2. Vendor, enters vendor name.
3. IFB# or Contract, enters LCPS IFB number or contract name & number.
4. PO Description, brief description of what is being ordered.
5. Line or Group description, specific description of item.
6. Item number/description of item to be ordered.
7. Enter unit of order, i.e.: cs/pk/doz/ea./etc.
8. Enter quantity of items required in the unit of order.
9. Enter price consistent with Unit of order.
10. Enter the quantity and cost for each item.
11. Total cost of requestion.
12. Enter address and contact information for delivery.
13. Send, email copy of request to warehouse manager.

Steps 14 to 17

Purchasing Requestor

Tracking Form .xls

14. Enter quantity ordered.
15. Enter total cost ordered.
16. Enter date ordered.
17. Send request to department/division Finance administrator.

Steps 18 to 22

FACS Finance / Purchasing

Oracle

18. Enters request into Oracle.
19. Confirms item costs on IFB and contract information.
20. Secures all approvals.
21. Purchasing sends approved PO's to Vendor.
22. Sends PO confirmation to requestor with PO # and \$ value.

Steps 23 to 27

Purchasing Requestor

Tracking Form xls

Email

SchoolDude

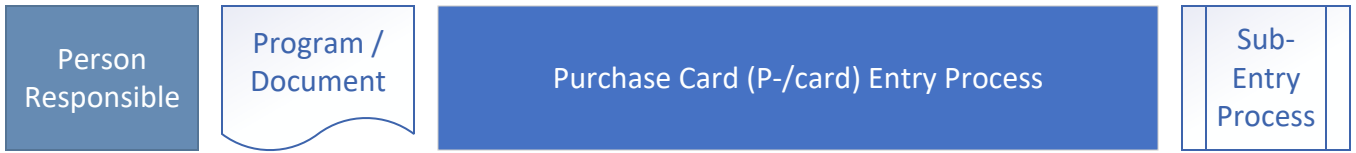
23. Updates Tracking form with PO# on Tracking.
24. Updates Tracking form to date PO confirmed.

25. Forwards PO confirmation to Warehouse Manager to update request with PO #.

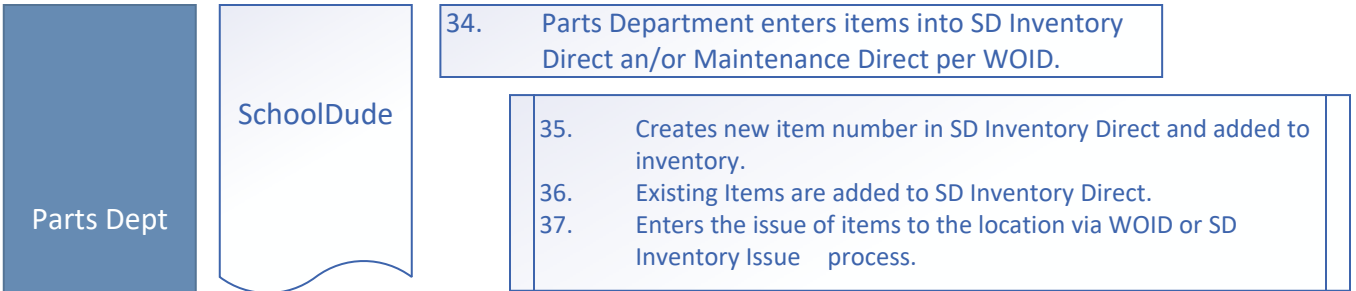
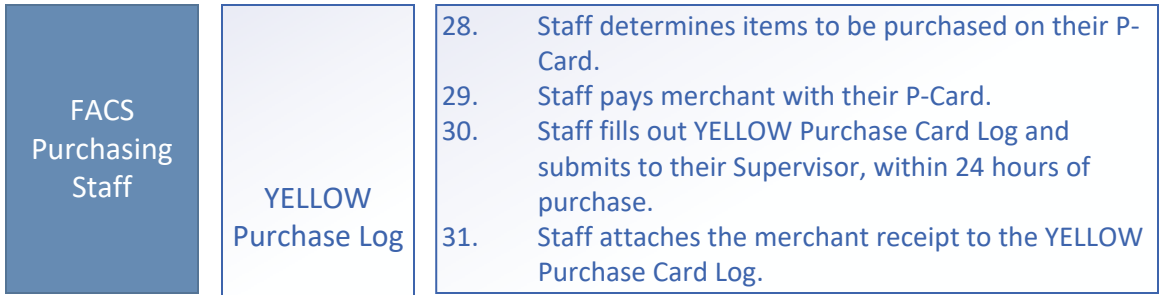
26. New item - enter into SD Inventory Direct.
27. Existing item, into SD Inventory Direct.

PO REQUEST & PURCHASE CARD PROCESS & APPROVAL

Entering a Purchase Order Request. Steps 28-38

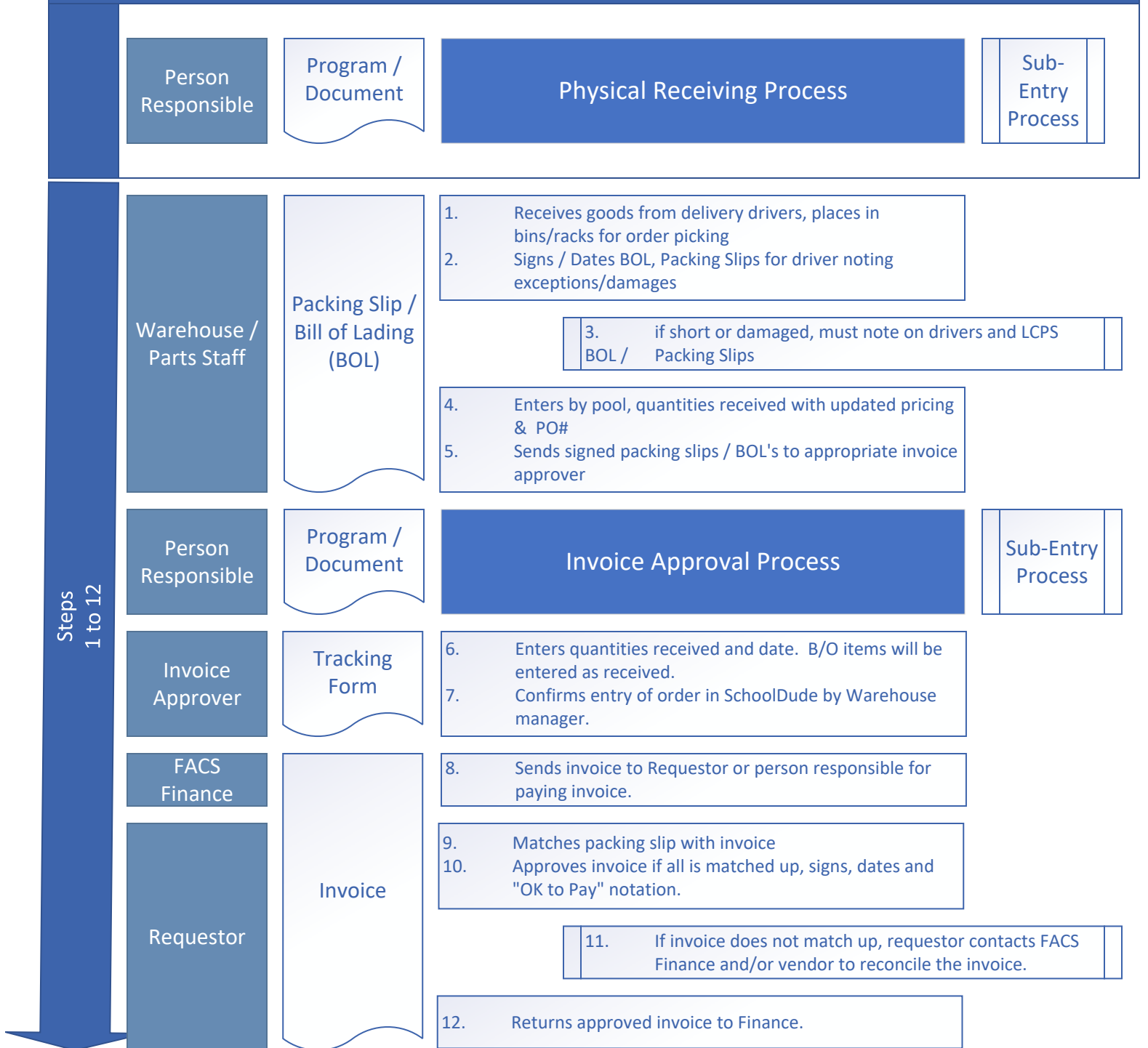


Steps 28 to 38



Receiving & Invoice Process & Approval

Receiving and entering inventory and Invoice Approval Process. Steps 1 - 12



SchoolDude Inventory Direct Processes

Creating a New Item. Steps 1 - 43

Person Responsible

Program / Document

Creating a new item in SchoolDude

Sub-Entry Process

Steps 1 to 43

Requestor

SchoolDude Inventory Direct

1. FROM HOME SCREEN, Click on "Inventory Tab"; to Inventory Shortcuts page.
2. Click on "New Inventory" box; to Add/Update Inventory.
3. Enter Item number (see New Item Number Convention.
4. Enter a description of the item.
5. Enter Type (Custodial, Food Services, Instructional Mechanical, Technology, Tools.
6. Enter Primary Commodity.
7. Enter Commodity or on 1 or more boxes as necessary.
8. Enter Asset Info if value of item is over \$5,000.

9. Enter tag number.
10. Click Asset Item box.
11. Serial # if applicable.
12. Date Purchased if applicable.

13. Enter Disposition information (entries may need to be maintained per contract date).

14. Enter On Contract Y/N.
15. Enter expiration date.
16. Enter Contract Number.
17. Enter Stock item Y/N.
18. Enter Discontinued Y/N.
19. Enter MySchoolBuilding & site admin request item.
20. Enter notes, click private as applicable.

21. Enter Order Info.

22. Enter Product Order Description.
23. Enter Primary Supplier or New Supplier.
24. Enter Supplier Part Number.
25. Enter Part URL if applicable.
26. Enter Manufacturer or New Manufacturer name.
27. Enter Manufacturer model or item number.
28. Enter Lead Time (days).
29. Click box for fixed cost if required.
30. Quantity on Order (if applicable).
31. Click box for On Order (if applicable).
32. Enter Last order placed on (if applicable).

33. Enter Transaction Details.

34. Unit of issue dropdown box.
35. Enter Tolerance Level (if applicable).
36. Enter Avg Unit Cost (if applicable).
37. Enter Fixed Unit Cost (if applicable).
38. Click box Issue with fixed cost (if applicable).
39. Enter Markup % if applicable.

40. Enter Pool Management (location that items will be inventoried).

41. Select pool, where items will be inventoried.
42. Review all entries and click Submit button.

43. Confirmation or add missing information.

2/14/2023

SchoolDude Inventory Direct Processes, continued

Receiving an item into SD, Inventory Direct. Steps 1 – 22 and 1 - 10

Person Responsible

Program / Document

Receiving an Item into SD Inventory Direct

Sub-Entry Process

Steps 1 to 22

Warehouse / Parts Staff

SchoolDude Inventory Direct

1. FROM HOME SCREEN, Click on Receiving tab; to Receiving Shortcuts page.
2. Click on New Receiving box; to Add/Update Receiving, New Transaction page.
3. Click Start New Transaction after Save box if applicable.
4. Click on Type drop down box, select your primary commodity.
5. Enter Item Number or use search icon to find number.
6. Enter Supplier Item ID or use search icon to find ID.
7. Enter Supplier name or use search to find correct ID.
8. Enter the Pool where item will be cross docked or inventoried.
9. Enter Budget Code if applicable.
10. Enter Reorder Batch Number if applicable.
11. Enter Invoice Number if applicable.
12. Enter Transaction Date if applicable.
13. Enter Quantity received (as per the unit of issue).
14. Enter Cost per the PO.
15. Enter Tax, not normally applicable.
16. Enter Shipping/Freight for the particular item.
17. Enter PO number.
18. Enter notes if applicable.
19. Click on ON Order button if applicable.
20. Review entries.
21. Click on Submit button.
22. Confirmation or Missing Information screen will appear.

Receiving MULTIPLE Items, Clerk Form

Sub-Entry Process

1. FROM HOME SCREEN, Click on Receiving tab; to Receiving's Shortcuts page.
2. Click on New New Receiving (Clerk Form) box; to Add/Update Receiving page.

- | | |
|----|--|
| 3. | This screen will let you issue to 5 locations at a time. |
| 4. | Enter each box with a RED CHECK MARK in the header. |

5. Date, select or type date of item issued to new location.
6. Quantity, enter quantity received based on unit of Issue.
7. Enter Type, select primary commodity.
8. Enter Item Number or use search icon.
9. Select Pool that item is being stored at or sent to.
10. All other boxes are discretionary only.

SchoolDude Inventory Direct Processes, continued

Issuing and item to one or more locations, Inventory Direct. Steps 1 – 20 & 1 - 11

Person Responsible

Program / Document

Issuing an item to a SINGLE Location / Pool

Sub-Entry Process

Steps 1 to 20

Warehouse / Parts Staff

SchoolDude Inventory Direct

1. FROM HOME SCREEN, Click on Issue tab; to Issue Shortcuts page.
2. Click on New Issue box; to Add/Update Issue page.
3. Click on Type drop down box, select your primary commodity.
4. Click on Item Number and enter number or use search.
5. Enter Transaction Date for when the item was sent.
6. Enter the WOID, work order number if applicable.

7. This will auto populate to the work order.

8. Location, select the location the item was delivered to.
9. Building, select the building (if applicable).
10. Pool, select the pool where item was located before transferred to new location.
11. Project, select if applicable.
12. Assign To, select if applicable.
13. Budget Code, select if applicable.
14. Pick List, select if applicable.

15. Create New Pick List if applicable.

16. Quantity, enter quantity issued based on unit of Issue
17. Notes, enter notes if applicable.

18. If issuing an item with a serial number, enter the S/N here.

19. Review Entries.
20. Click on Submit button.

Issuing an item to MULTIPLE Locations / Pools

Sub-Entry Process

1. FROM HOME SCREEN, Click on Issue tab; to Issue Shortcuts page.
2. Click on New Issue (Clerk Form) box; to Add/Update Issue page.

3. This screen will let you issue to 5 locations at a time.
4. Enter each box with a RED CHECK MARK in the header.

5. Date, select or type date of item issued to new location.
6. Quantity, enter quantity issued based on unit of Issue.
7. Enter Type, select primary commodity.
8. Enter Item Number or use search icon.
9. Select Pool that item is being issued from.
10. Select Location that item is being delivered to.
11. All other boxes are discretionary only.

SchoolDude Maintenance Direct Processes

Entering a Purchase Transaction on a Work Order. Steps 1 – 17 & 1 - 12

Person Responsible

Program / Document

Entering a Purchase Transaction on a work order for an item that WILL NOT be inventoried

Sub-Entry Process

Steps 1 to 17

Requestor / Parts Staff

SchoolDude Maintenance Direct

1. FROM HOME SCREEN, enter the WOID into the Search For box; to Work Order.
2. Transactions tab; scroll down as this tab is near the bottom of the WO form.
3. Select New Purchase Transaction link; to Purchases page
4. Trans Date, enter date item was purchased.
5. Type, select the primary commodity.
6. Select Supplier by using the search icon or enter a new supplier.
7. Enter Invoice Number or PO#.
8. Enter Budget Code if applicable.
9. Enter Purchased by using drop down box.
10. Enter as complete description of item as possible.
11. Enter quantity.
12. Enter Cost per receipt.
13. Sales tax is not applicable.
14. Enter Freight charged for the item.
15. Enter Other Charges is applicable.
16. Review Entries.
17. Click on Submit button.

Entering an ISSUE Transaction on a work order for an item FOR AN inventoried item

Sub-Entry Process

1. FROM HOME SCREEN, enter the WOID into the Search. For box; to Work Order.
2. Transactions tab; scroll down as this tab is near the bottom of the WO form.
3. Select New Issue Transaction link; to Add/Update Issue
4. Type, select primary commodity.
5. Item Number, enter number or use search icon.
6. Pool, select location that item is inventoried.
7. Budget Code, enter if applicable.
8. Trs Date, enter date that item was issued to new location.
9. Quantity, enter the quantity issued per the Unit of Issue.
10. Notes, enter comments as applicable, i.e.: serial numbers.
11. Review Entries.
12. Click on Submit button.

Steps 1 to 12