

REQUISITION REQUIREMENTS

All requisitions must be approved and a purchase order generated **PRIOR** to a purchase or event. **This includes food and catering.** Failure to do so will result in department/campus being responsible for payment of unauthorized purchase.

ON ALL REQUISITIONS:

1. **Comments line:** list bid reference in 1st line of comments section
2. **Attention line:** list who warehouse will deliver items to. Ex: Jane Doe/ Rm 201
3. **Notes:** list vendor quote # & info vendor would need, or details related to order
4. **Description lines:** list the model number first, then description (ex: SPR4321- Graphing Mat)
5. **Limit** to 30 lines
6. Add **shipping** line *even if no charges (on supplies)*
7. Attach **quote** in pdf format
8. Choose **department code** for proper approval routing of requisitions (F=federal, T=technology)

Send all charge slips/receipts for vendors below to Accounts Payable within 5 days. **DO NOT HOLD!**



TECHNOLOGY & AUDIO VISUAL

See the *CODING GUIDELINES FOR TECHNOLOGY & AV* list on CISD Intranet/ Purchasing- Internal

WAREHOUSE DELIVERIES You can tell if a delivery is from the warehouse if it has **green** writing on boxes. Do not receive – the warehouse receives in eFinancePlus. Remember this way:

If it's in Green, Do not receive on the Screen!

WAREHOUSE REQUISITIONS

- Warehouse Inventory> WHSE Admin> Requests
- Click 
- Ship To Code should be the location to which the items are to be delivered.
- Click  to save

PURCHASING RESOURCES

LOCATED AT CISD Intranet >
Financial Services > Purchasing-Internal

MOST USED VENDOR REQ INFO

- Shopping A-Z
- Instructions for Specific Vendors
- Coding Guidelines for Technology & AV list

WHERE DOES IT SHIP TO?

Warehouse 727W **EXCEPT:**

- Some technology (See the *CODING GUIDELINES FOR TECHNOLOGY & AV* list)
- Book binding (Technology – 728)

Ship direct to the campus (campus responsible for receiving them in the eFinancePlus System):

- Large orders (attached lists) of library books and videos (see shopping A-Z)
- Trophies
- Daniel Office Products
- Large Clay orders
- Heavy or bulky items (over 100 lbs.)
- Items for which installation is part of the purchase price
- Furniture (see shopping A-Z)
- Repaired instruments
- Pianos, risers, and folio cabinets
- Formal gowns, tuxedos, and items transported in hanging clothes racks
- Subscriptions (see shopping A-Z)
- Pickup orders
- Registrations/ Memberships (see shopping A-Z)
- Chemicals, live specimens

****When shipping items to the campus list a campus contact name & phone # in the notes field so the vendor can call to schedule/ notify of delivery.**

ADD ATTACHMENT



- Any required attachments/ backup should be attached **in PDF format** to the requisition by clicking the Attachment icon.
- NO photos of document (.jpg, .bmp, etc.)
- NO Excel files

AVOID THESE MISTAKES!

- Not attaching vendor quote to requisition and not listing quote number in notes.
- More than 30 line items on a requisition
- Putting "See Attached list" on comments line
- Not listing each item as a separate line item.
- Referencing expired bid/quote numbers
- Referencing more than one invoice or order number on your requisition for online orders
- Not using the *Coding Guidelines for Technology & AV* list
- Choosing the wrong department code for routing of requisitions for approval

BID REFERENCE: How the vendor is awarded for the items you are purchasing. It is a CISD bid #, CISD quote #, co-op (EPIC 6, TCPN, DIR, etc.). This info can be found on the *CISD Awarded Vendor List*. Enter in comments line of the requisition.

QUOTES

- Must be in **PDF format**
- One (1) quote if using local funds
- Two (2) quotes and signed and completed quote tabulation form if using federal funds
 - Attach quotes & quote form to requisition
- Enter quote # in notes section

WHAT DOES IT MEAN?

In Progress – Partially entered but not complete.

Open - Has not been approved at any level.

Partly Approved - Has been approved at the campus or departmental level, but is still awaiting approval from Purchasing.

Approved - Has been approved at all levels, but has not yet been converted to a purchase order.

Needs Correction - Needs corrections before it can be approved.

PO-XXXXXXXX - Has been converted to a PO.

Purchase order transaction codes:

17 -This indicates the item is encumbered.

18 -This indicates a change order to adjust amount(s).

21 -Amount of payment