



# 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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## 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](mailto: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  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.

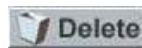
On screens where the following appears:



– 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.

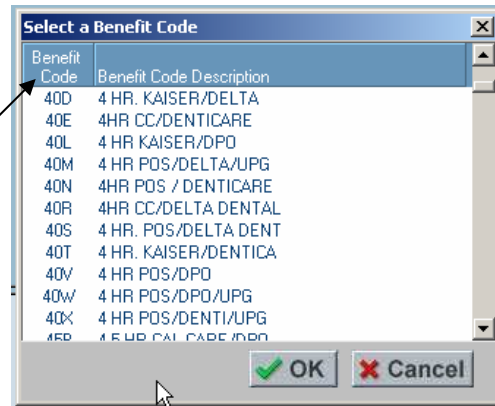


- **Print** the data - The information displayed can be printed from the browser or copied to Excel by clicking the **Print** button. A document describing how to make Excel the default for the Galaxy print button is available on the Galaxy Training web site.

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

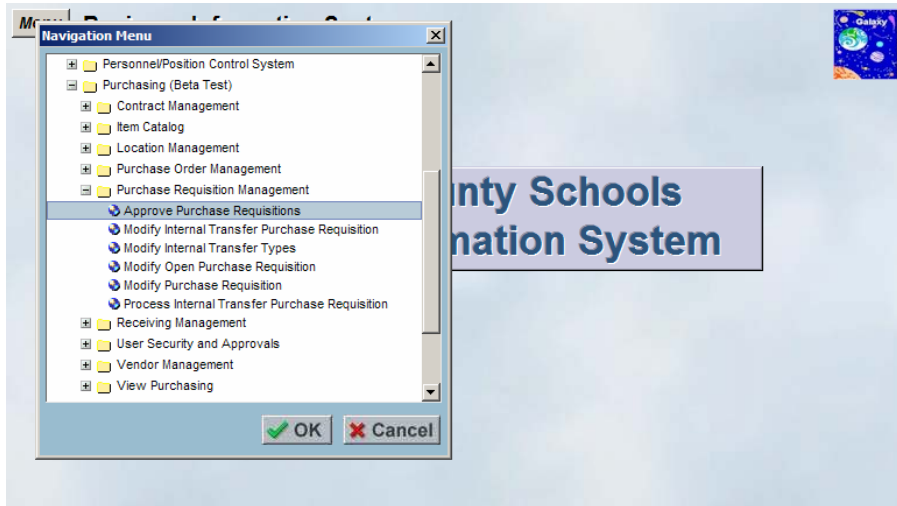
### Approve Purchase Requisitions

This screen is used to approve purchase requisitions.

#### Step 1

From menu select  
Approve Purchase  
Requisitions

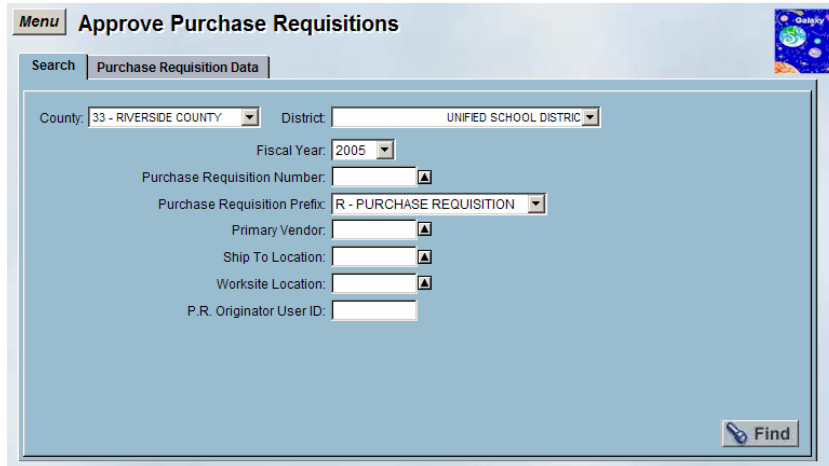
Click **OK**.



#### Step

To generate a list  
of purchase  
requisitions to  
approve

Click **Find**.



Step  
To approve specific purchase requisitions enter “**Y**” in the Approve Field.  
  
To approve all purchase requisitions check the “**Approve All**” Checkbox.  
  
Click **Save**

**Menu Approve Purchase Requisitions**

Search Purchase Requisition Data

Approve?	Comment	P.R. Number	P.R. Requestor	Worksite
Y		R0000100		
		R0000101		

Approve All District: UNIFIED SCH Fiscal Year: 2005 P.R. Nbr: R0000100 Save Cancel

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

P.R. Type: N - NORMAL Date Due: 08/23/2005  
P.R. Status: S - SUBMITTED FOR APPROVAL Primary Vendor: 22186 - OFFICE DEPOT  
P.R. Amount: 7.27 Vendor Address: 2 - 72339 HWY 111, PALM DESERT, CA 92260 US  
Category: OFFICE Bill To Location: BUSINESS SVC - Business Services  
P.R. Requestor: Ship To Location: WAREHOUSE - Warehouse  
Approval List: Worksite Location: -  
P.R. Originator User ID: Board Rpt. Desc:  
Contact Phone Nbr: Misc. Field 1:  
Update User ID: Misc. Field 2:  
Update Time: 05/24/2005 2:24 PM In Rev: Rev Cmt

Step  
Click the Items sub tab to view information regarding the item(s) on the purchase requisition selected in the view above.

**Menu Approve Purchase Requisitions**

Search Purchase Requisition Data

Approve?	Comment	P.R. Number	P.R. Requestor	Worksite
Y		R0000100		
		R0000101		

Approve All District: UNIFIED SCH Fiscal Year: 2005 P.R. Nbr: R0000100 Save Cancel

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

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

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Tax	Tax Amount	Total Amount	
0001	PAPER	Xerox Paper	5.00	0.75	REAM	3.75	Y	0.29	4.04	
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	166	0001	0	1110	1000	4300	0.00	1.000000	4.04
							Total	0.00	1.000000	4.04
0002	CONSTRUCTION Pk	Multi color package	3.00	1.00	PKG	3.00	Y	0.23	3.23	
						Total		6.75	0.52	7.27

Step  
Click the Account Distribution sub tab to view information regarding the account distribution on the purchase requisition selected in the view above.

**Menu Approve Purchase Requisitions**

Search Purchase Requisition Data

Approve?	Comment	P.R. Number	P.R. Requestor	Worksite
Y		R0000100		
		R0000101		

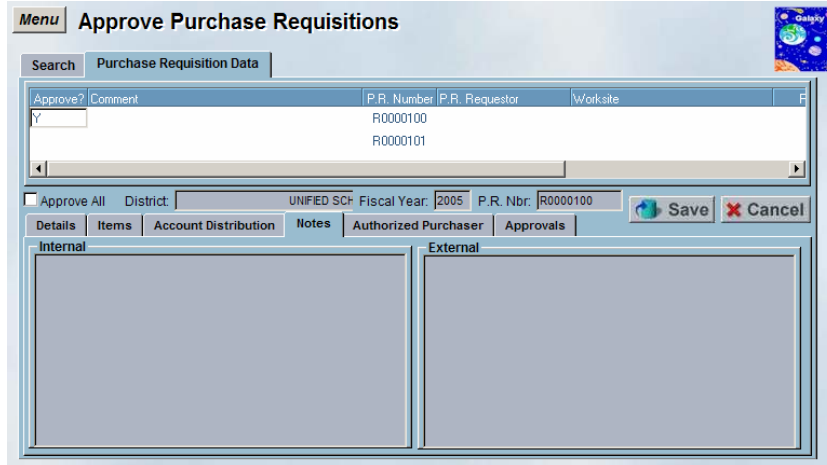
Approve All District: UNIFIED SCH Fiscal Year: 2005 P.R. Nbr: R0000100 Save Cancel

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

Fund	School	Resource	PY	Goal	Function	Object	Percent
Total							

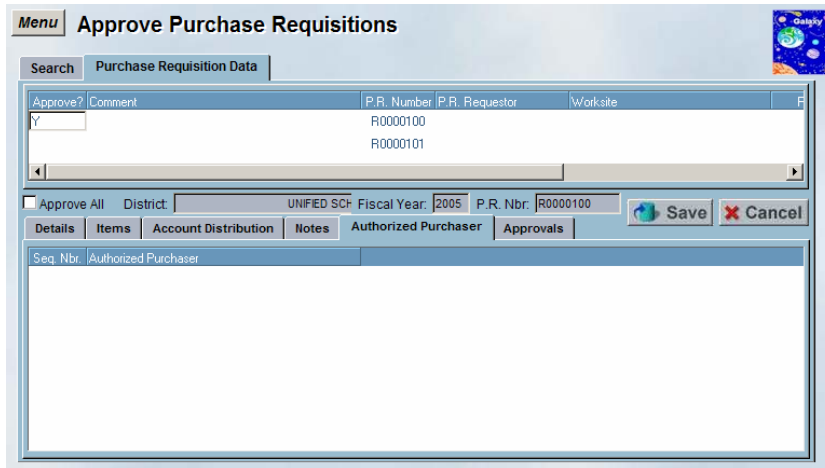
**Step**

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



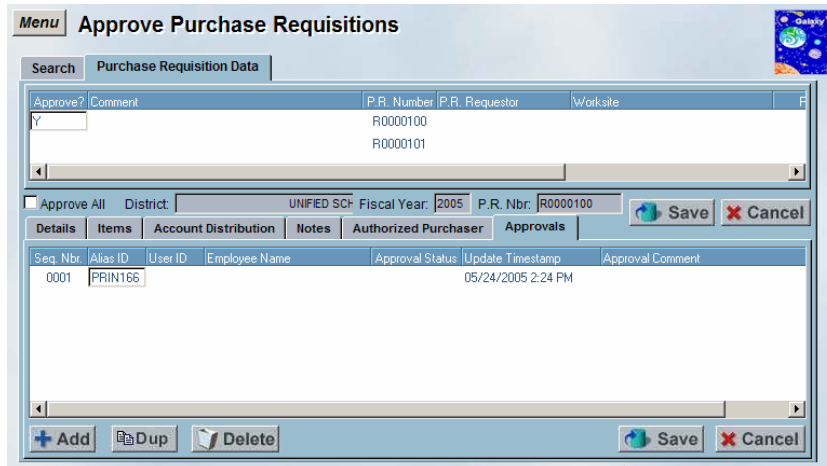
**Step**

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



**Step**

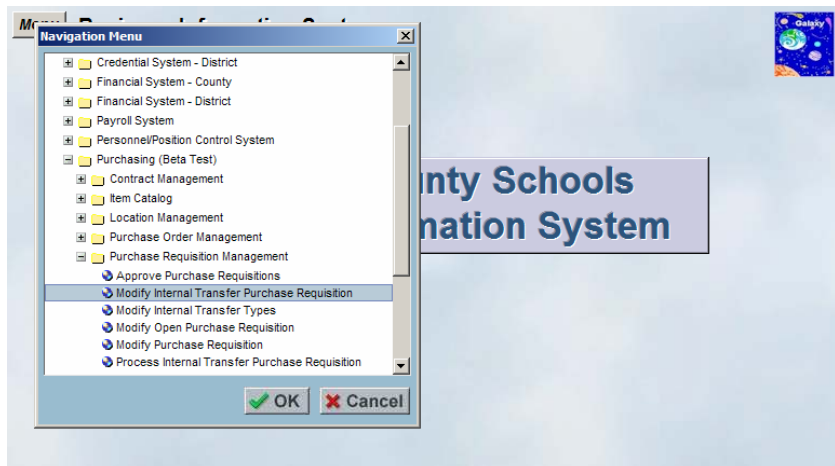
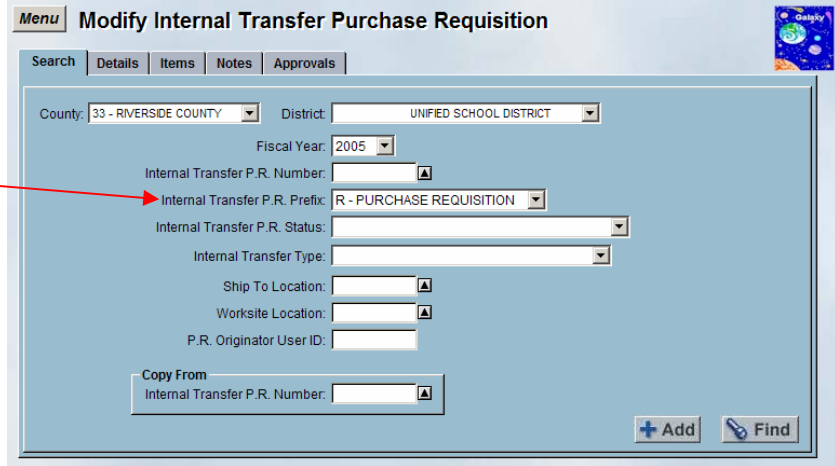
Click the Approvals sub tab to view information regarding the approvals on the purchase requisition selected in the view above.



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

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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**.

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

**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	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt.	
0001	FIELD TRIP	FIELD TRIP 1/27/05	1.00	200.00	EACH	200.00								0.00	1.000000		0.00	
Total:														0.00	1.000000		200.00	

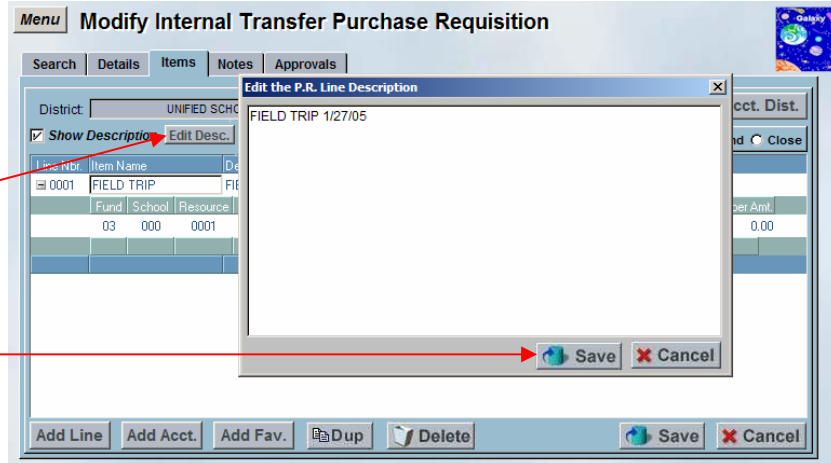
Step

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.

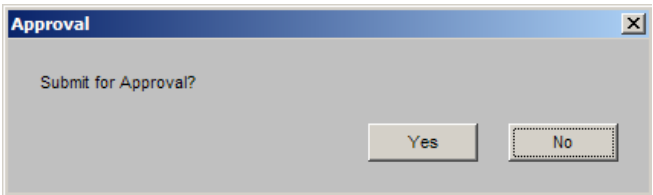
**No Approvals**

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)).

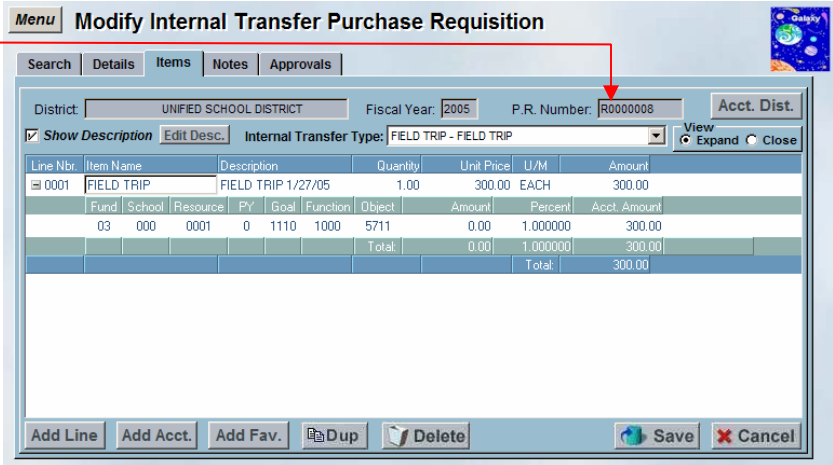
Step  
 “Submit for Approval?” warning message prompts

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

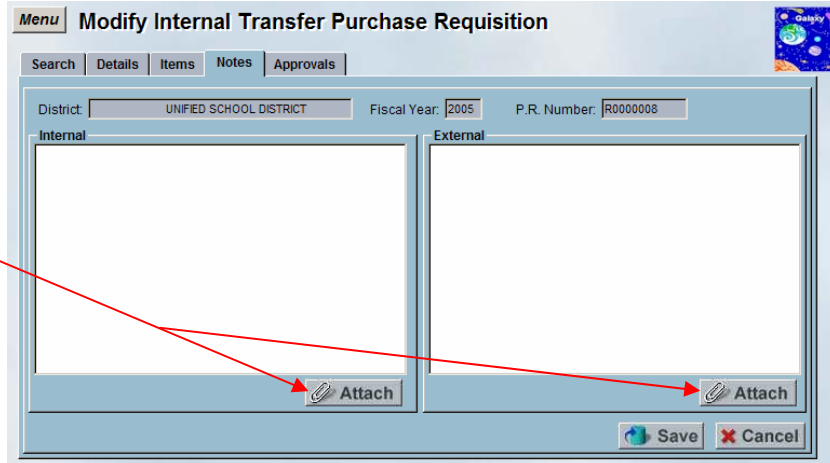
Step  
To select a previously defined Internal/External note(s)

Click **Attach**,

or

Manually enter Internal/ External note(s).

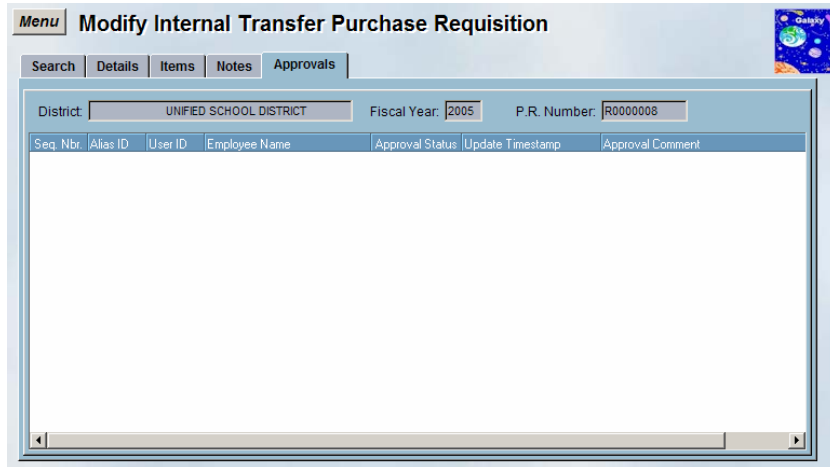
Click **Save**



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

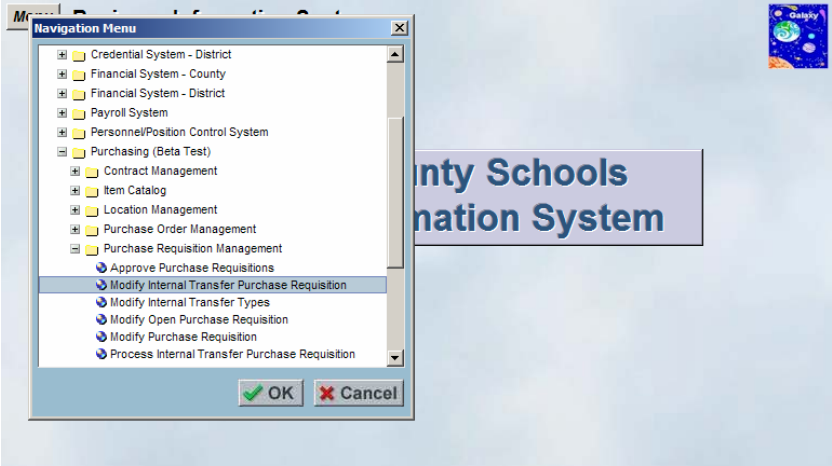
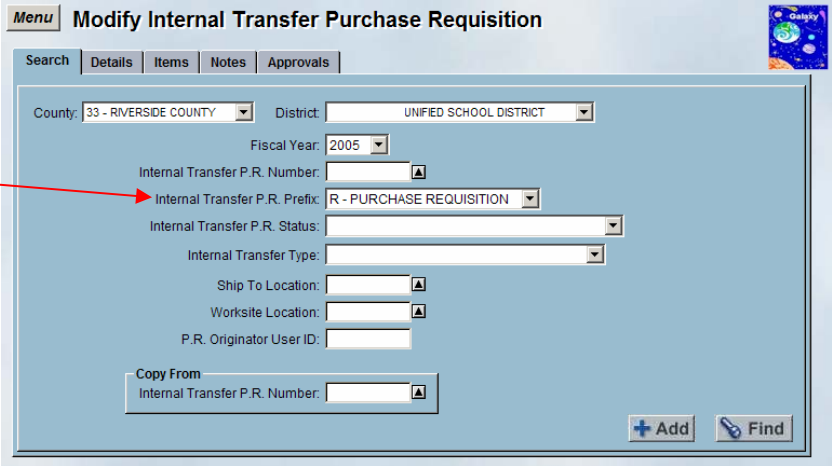
Step  
Click the Approvals tab to view approvals associated to this internal transfer purchase requisition.

No changes can be made on this tab.



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

**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.**

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

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**



**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.



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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**.

The screenshot shows a pop-up window titled "Add a P.R. Line Nbr." with the following fields:

- Line Nbr.: 0001
- Item Name: FIELD TRIP
- Description: FIELD TRIP 1/27/05
- Quantity: 1.00
- Unit Price: 300.000000
- U/M: EACH

Buttons include "Save" (highlighted with a red arrow) and "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.

The screenshot shows the main application window with a table of line items and account distribution. The table is as follows:

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount					
0001	FIELD TRIP	FIELD TRIP 1/27/05	1.00	200.00	EACH	200.00					
	Fund	School	Resource	FY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt.
	03	000	0001	0	1110	1000	5711	0.00	1.000000		0.00
Total:								0.00	1.000000		
Total:										200.00	

Buttons at the bottom include "Add Line", "Add Acct.", "Add Fav.", "Dup", "Delete", "Save", and "Cancel". A red arrow points to the "Close" button in the "View" section.

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

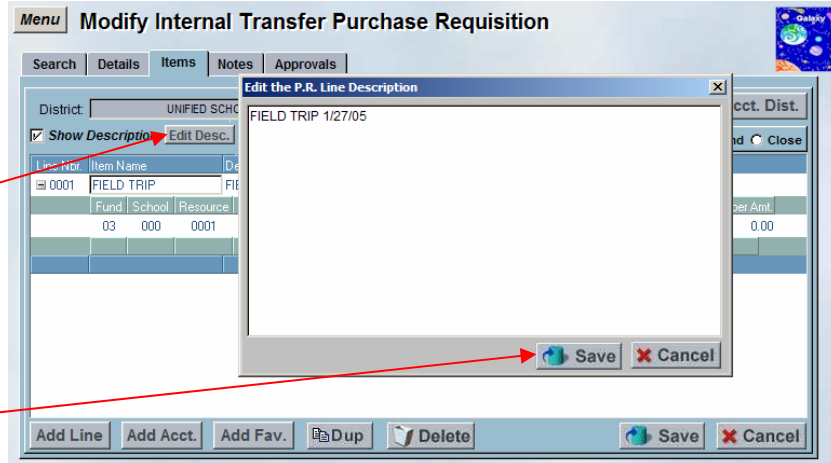
Step

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.

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

Step  
Click **Save**

This will start the budget check process.

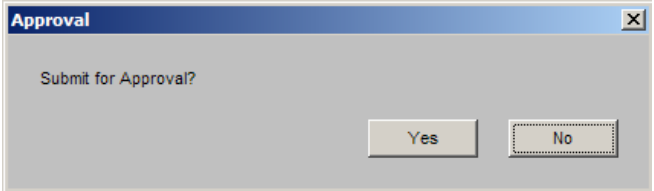
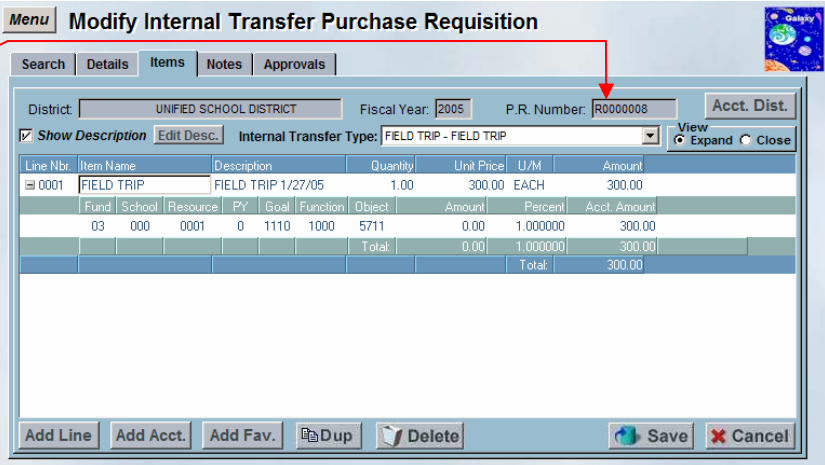
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

**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><b>No Approvals</b></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 <b>Yes</b>.</p>	
<p>Step                  System will generate an internal transfer purchase requisition number.</p> <p>Click <b>Notes</b> tab</p>	

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

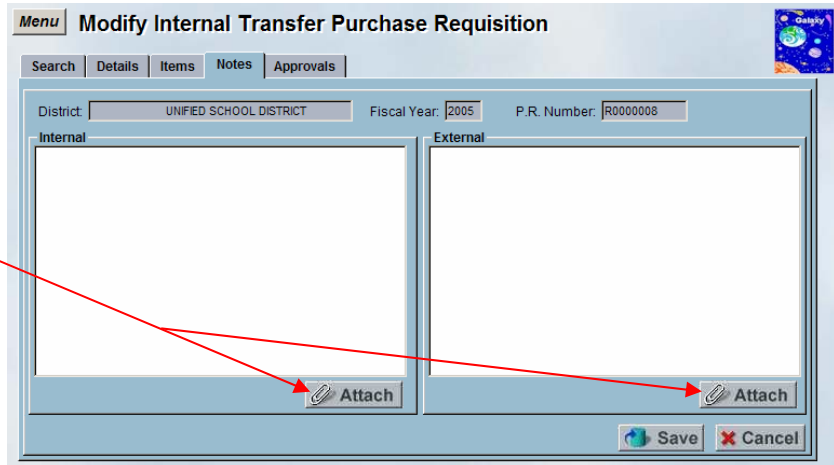
Step  
To select a previously defined Internal/External note(s)

Click **Attach**,

or

Manually enter Internal/External note(s).

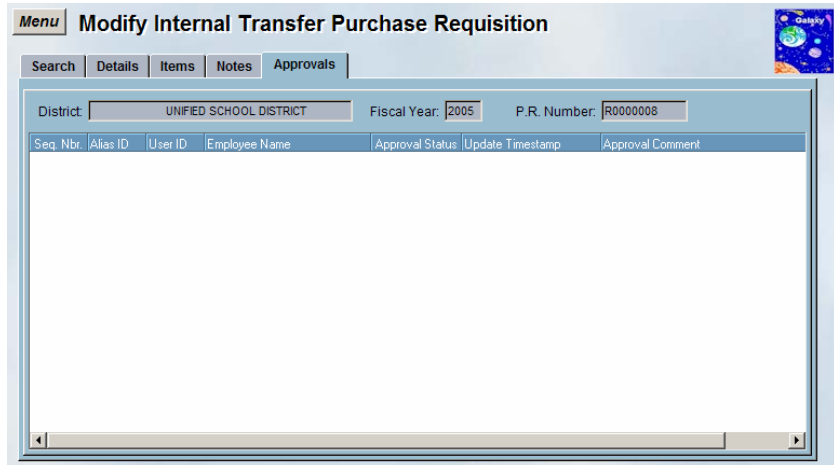
Click **Save**



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

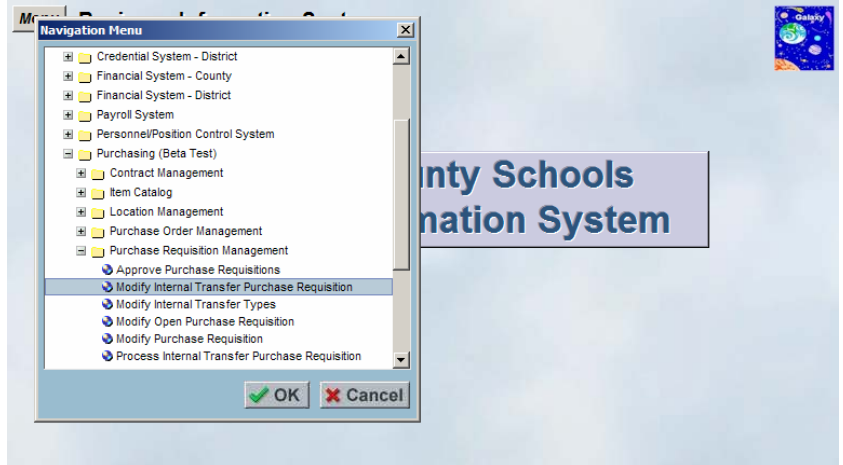
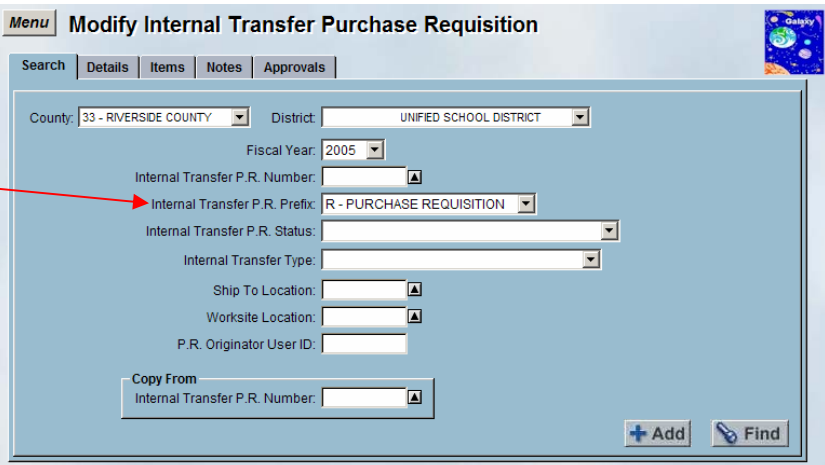
Step  
Click the Approvals tab to view approvals associated to this internal transfer purchase requisition

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

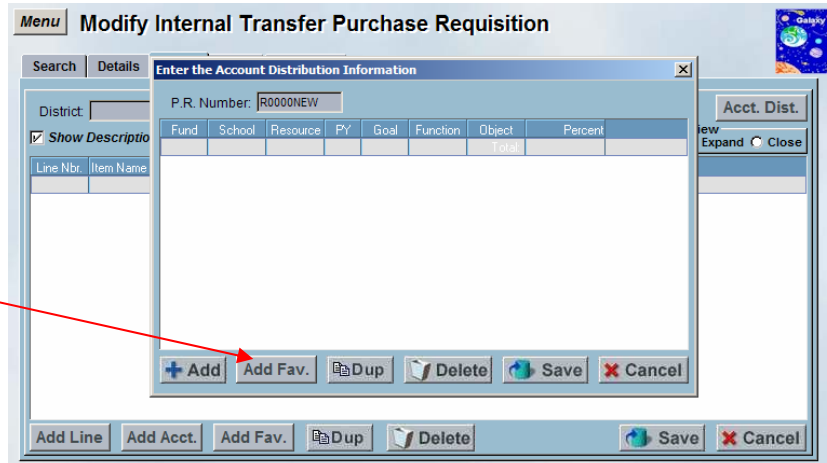
**Step**

Click **Acct. Dist.**

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

**Step**  
To add default account distribution for all line items using a user's predefined SACS account string(s)

Click **Add Fav.**



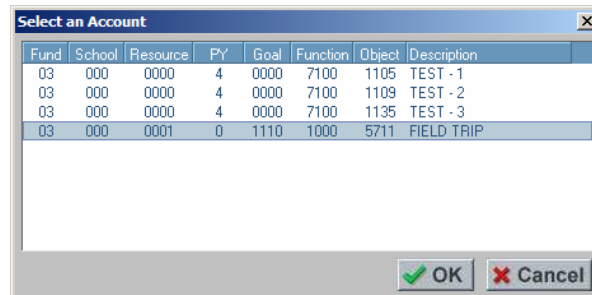
**Step**  
To select the user's predefined SACS account string(s) for the default account distribution,

Highlight each account string row from the pop up window

Click **OK**.

Or

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





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

**Step**  
Click **Save**

**Step**  
To add a line item(s) 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 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.

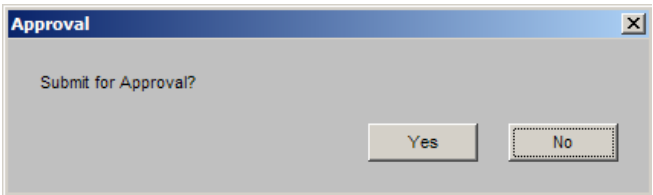
**No Approvals**

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)).

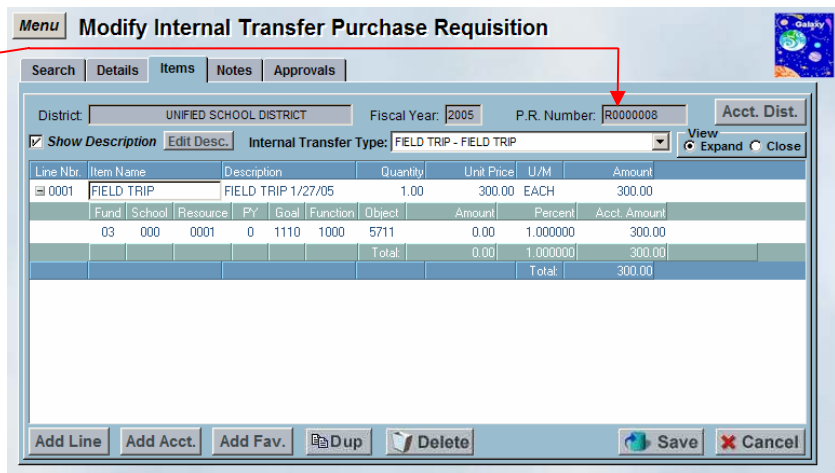
Step  
 “Submit for Approval?” warning message prompts

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

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

Click **Attach**,

or

Manually enter Internal/External note(s).

Click **Save**

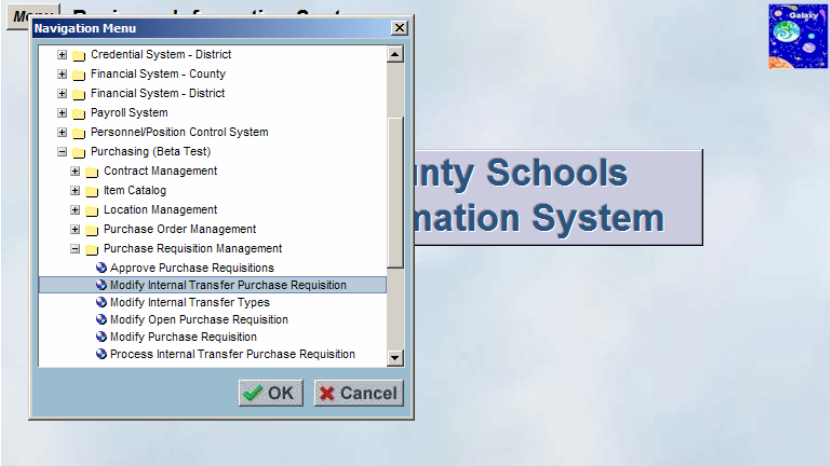
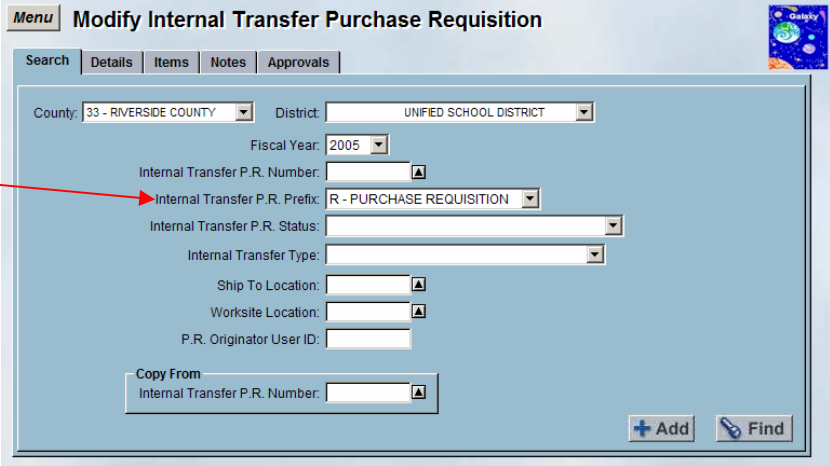
NOTE: External notes will print on purchase requisitions and purchase orders, internal notes will not.

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**

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

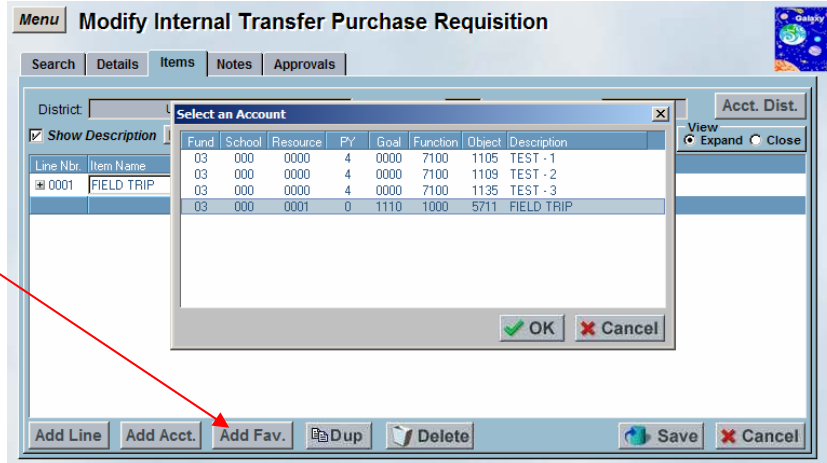
Click **Add Fav.**

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

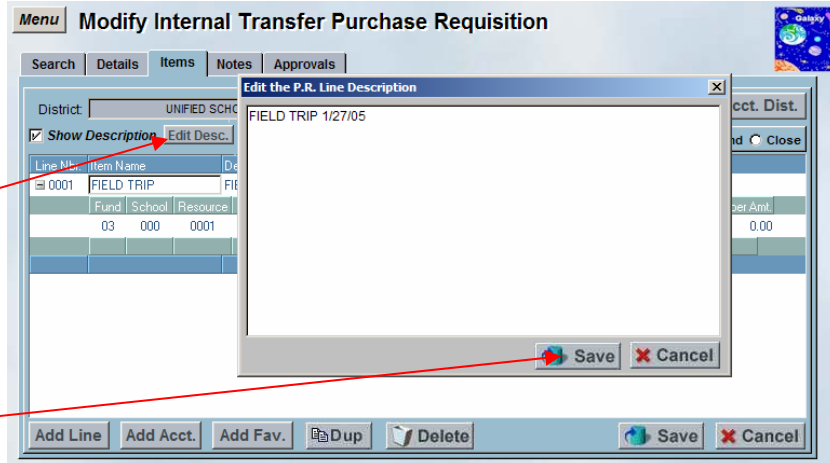
Step

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.

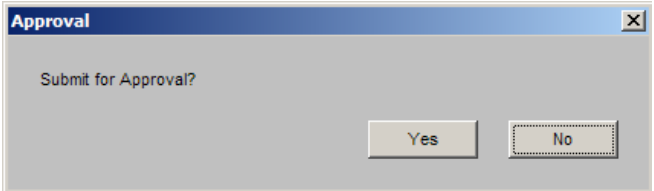
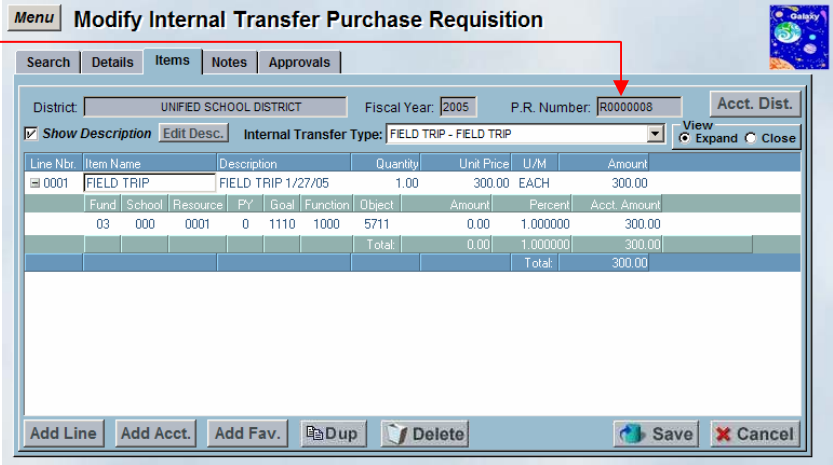
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

**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.

	<p><b>No Approvals</b></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>“Submit for Approval?” warning message prompts</p> <p>Click <b>Yes</b>.</p>	
<p>Step</p> <p>System will generate an internal transfer purchase requisition number.</p> <p>Click <b>Notes</b> tab</p>	

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

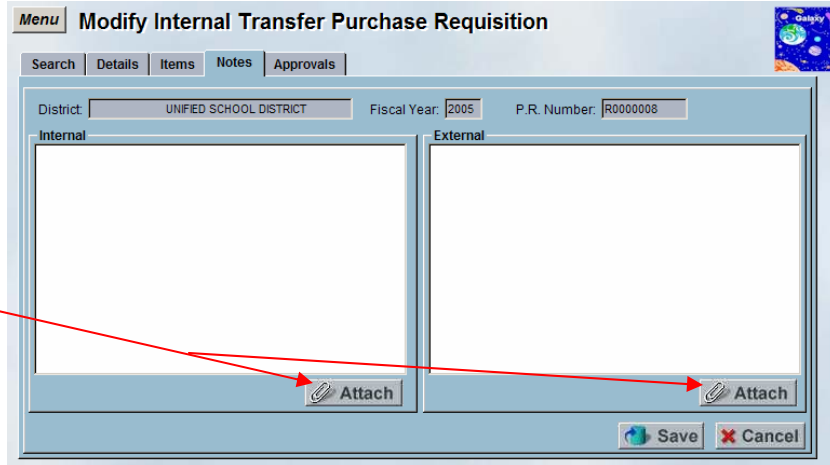
Step  
To select a previously defined Internal/External note(s) for the internal transfer purchase requisition

Click **Attach**,

or

Manually enter Internal/External note(s).

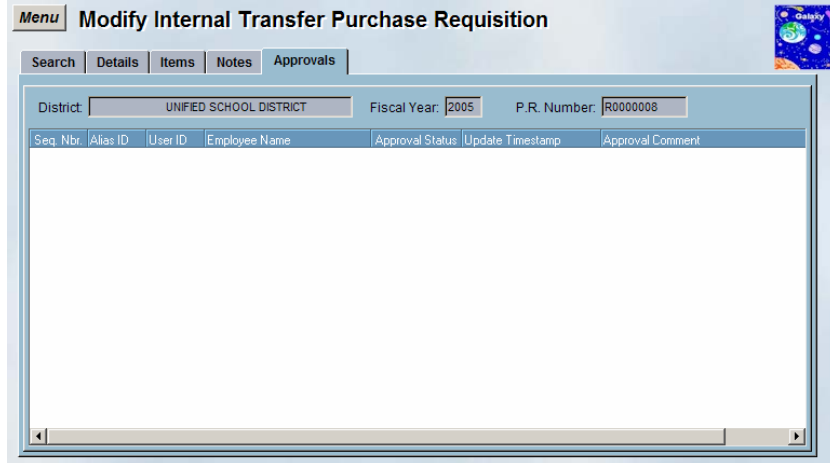
Click **Save**



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

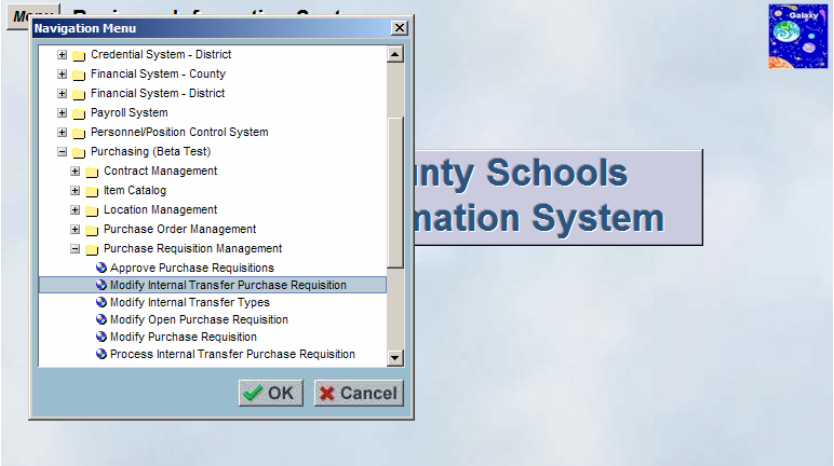
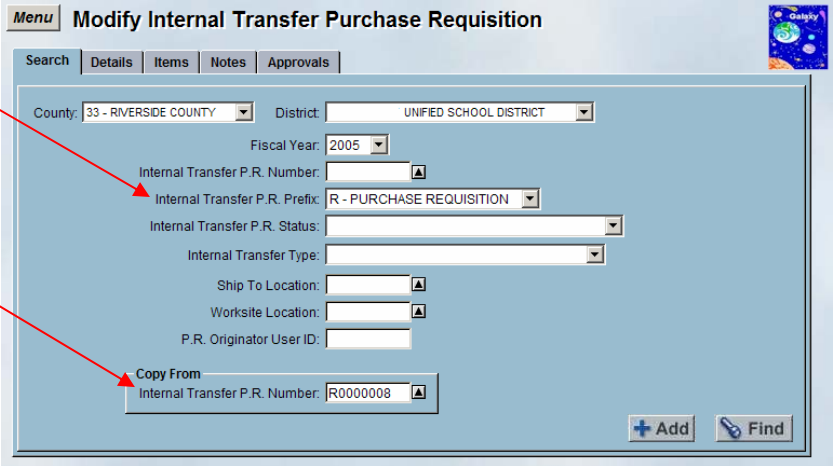
Step  
Click the Approvals tab to view approvals associated to this internal transfer purchase requisition

No changes can be made on this tab.



**Add a New Internal Transfer Purchase Requisition 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 From menu select Modify Open Purchase Order</p> <p>Click <b>OK</b>.</p>	
<p>Step Select an Internal Transfer P.R. Prefix.</p> <p>Enter/Select an Internal Transfer P. R. Number.</p> <p>Click <b>Add</b></p>	

Step

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

**Menu** **Modify Internal Transfer Purchase Requisition**

Search Details Items Notes Approvals

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

P.R. Type: T - INTERNAL TRANSFER Date Due: 03/11/2005

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

P.R. Amount: 300.00 Category: FIELD TRIP Ship To Location: WHS

P.R. Requestor: Approval List: Worksite Location:

P.R. Originator User ID: Board Rpt. Desc:

Contact Phone Nbr: PR Misc Fld 1:

Update User ID: PR Misc Fld 2:

Update Timestamp: 02/09/2005 10:37 AM In Rev: N Rev Cmt:

Print Save Cancel

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.

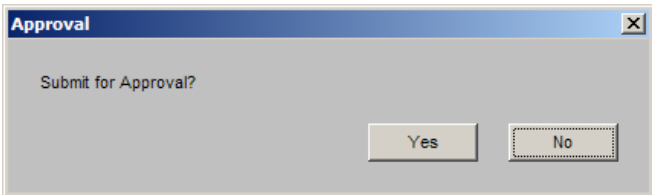
**No Approvals**

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.

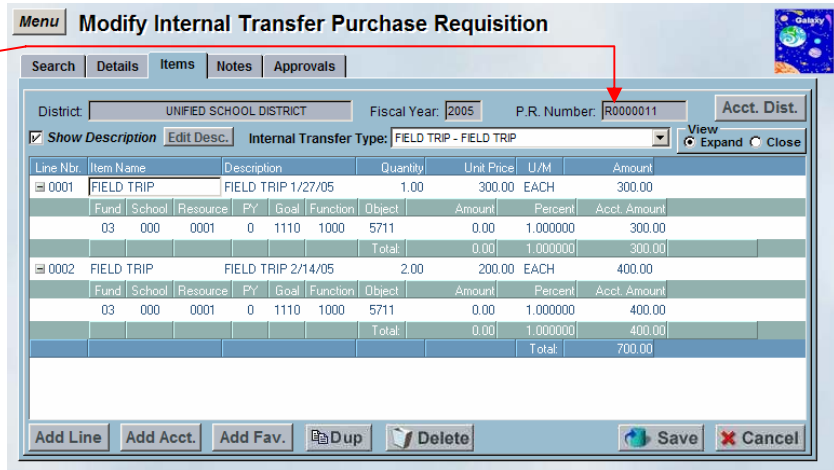
If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Internal Transfer Purchase Requisition screen to re-save the purchase requisition 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.





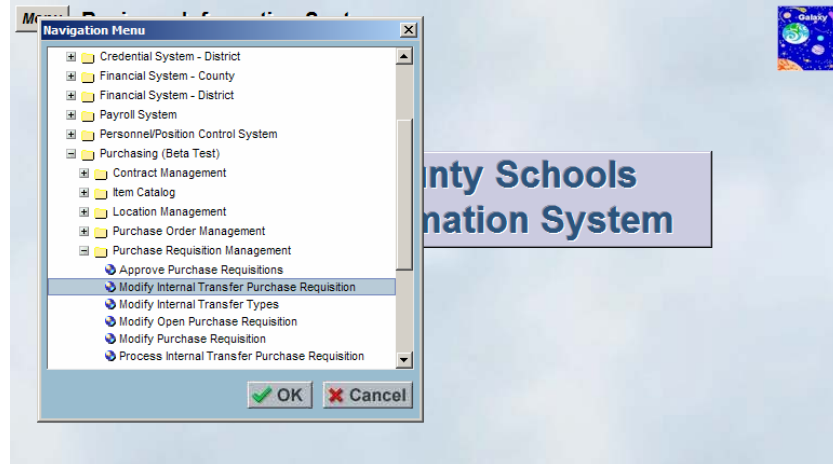
### Modify an Existing Internal Transfer Purchase Requisition

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

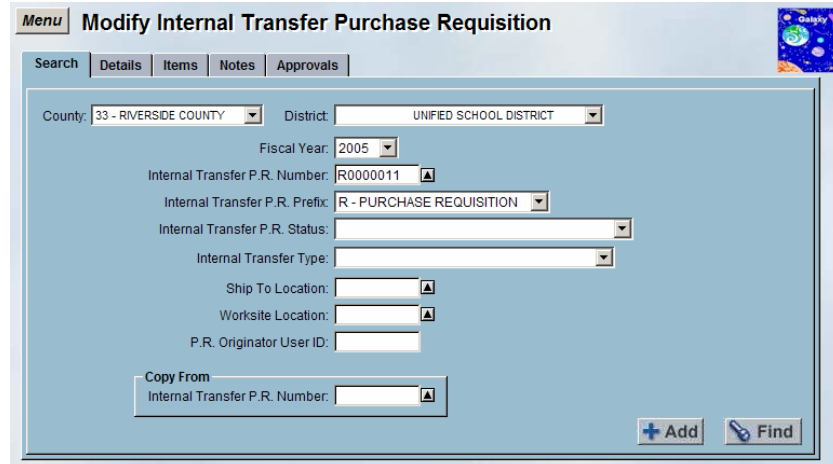
Click **OK**.



#### Step

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 'Details' tab is active, showing a form with the following fields: District (UNFED SCHOOL DISTRICT), Fiscal Year (2005), P.R. Number (R0000011), P.R. Type (T - INTERNAL TRANSFER), P.R. Status (A - APPROVED), P.R. Amount (700.00), Category (FIELD TRIP), Date Due (03/11/2005), Bill To Location (WHS), Ship To Location (WHS), P.R. Requestor, Approval List, P.R. Originator User ID, Contact Phone Nbr, Update User ID, Update Timestamp (02/09/2005 10:56 AM), Board Rpt. Desc, PR Misc Fld 1, PR Misc Fld 2, In Rev (N), and Rev Cmt. Buttons for Print, Save, and Cancel are located 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".

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

Step

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

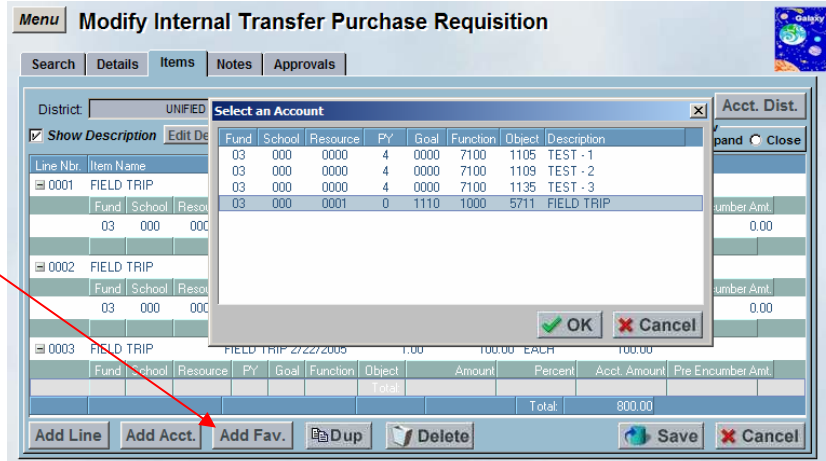
Click **Add Fav.**

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.



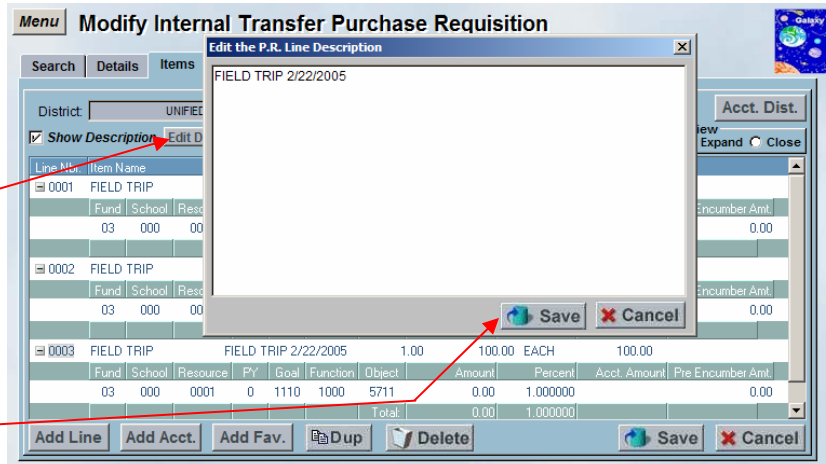
Step

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	FIELD TRIP	FIELD TRIP 1/27/05	1.00	300.00	EACH	300.00				
		Fund   School   Resource   PY   Goal   Function   Object   Amount   Percent   Acct. Amount								
		03   000   0001   0   1110   1000   5711		0.00	1.000000	300.00				
		Total:		0.00	1.000000	300.00				
0002	FIELD TRIP	FIELD TRIP 2/14/05	2.00	200.00	EACH	400.00				
		Fund   School   Resource   PY   Goal   Function   Object   Amount   Percent   Acct. Amount								
		03   000   0001   0   1110   1000   5711		0.00	1.000000	400.00				
		Total:		0.00	1.000000	400.00				
0003	FIELD TRIP	FIELD TRIP 2/22/2005	1.00	100.00	EACH	100.00				
		Fund   School   Resource   PY   Goal   Function   Object   Amount   Percent   Acct. Amount								
		03   000   0001   0   1110   1000   5711		0.00	1.000000	100.00				
		Total:		0.00	1.000000	100.00				


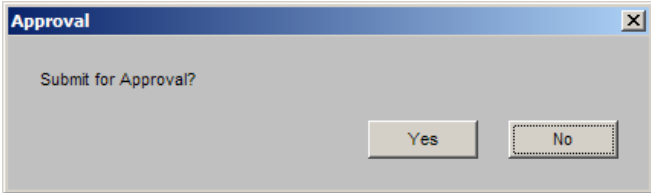
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

### 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><b>No Approvals</b></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><b>Step</b>        If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click <b>Yes</b>.</p>	 <p>A warning dialog box with a blue title bar labeled 'Warning' and a close button (X). 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><b>Step</b>        “Submit for Approval?” warning prompts</p> <p>Click <b>Yes</b>.</p>	 <p>An approval dialog box with a blue title bar labeled 'Approval' and a close button (X). 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 internal purchase requisition,

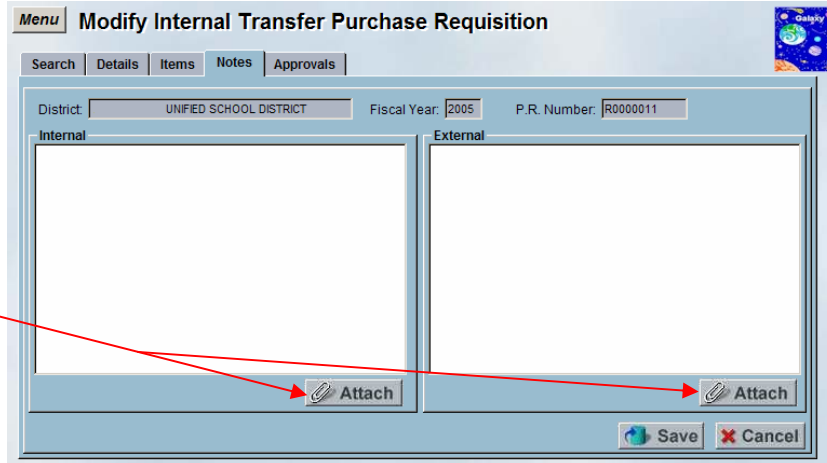
Click **Attach**.

Select from a previously defined note

or

Manually enter Internal/External note(s).

Click **Save**



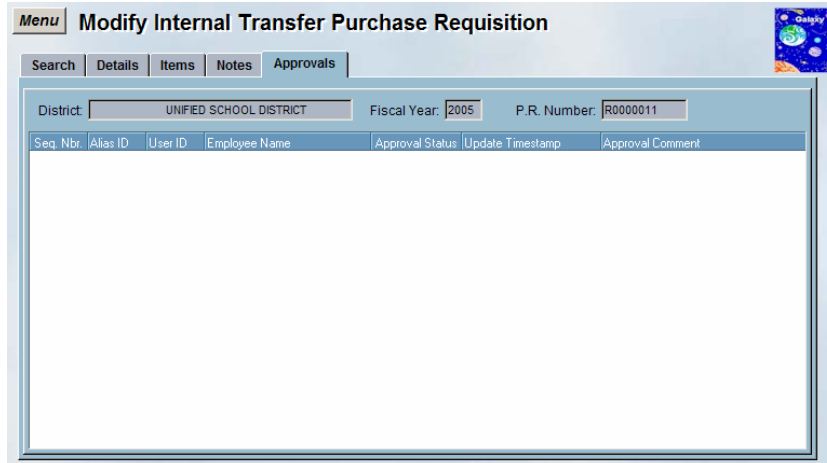
**NOTES:**

- 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.





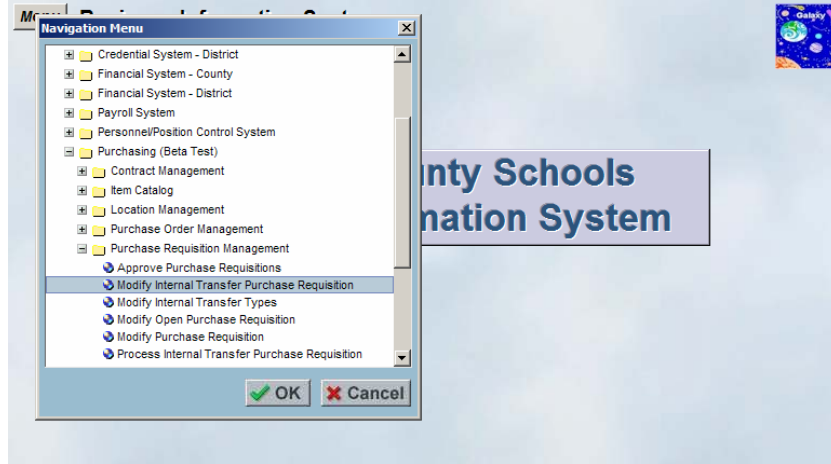
### **Modify an Existing Internal Transfer Requisition – Reapply Account Distribution**

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

#### Step 1

From menu select  
Modify Internal  
Transfer Purchase  
Requisition

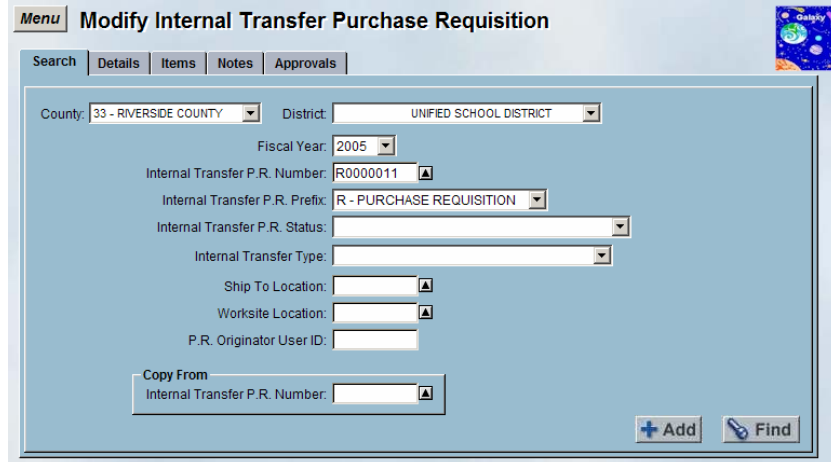
Click **OK**.



#### Step

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.

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Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step  
Edit internal  
purchase requisition  
detail information.

Click **Items** tab

**Menu** Modify Internal Transfer Purchase Requisition

Search Details **Items** Notes Approvals

District: UNFED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000011 Delete

P.R. Type: T - INTERNAL TRANSFER Date Due: 03/11/2005

P.R. Status: A - APPROVED Bill To Location: WHS

P.R. Amount: 700.00 Category: FIELD TRIP Ship To Location: WHS

Category: FIELD TRIP

P.R. Requestor: Worksite Location:

Approval List: Board Rpt. Desc:

P.R. Originator User ID: PR Misc Fld 1:

Contact Phone Nbr: PR Misc Fld 2:

Update User ID: Update Timestamp: 02/09/2005 10:56 AM In Rev: N 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 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.

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 Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

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

Click **Acct. Dist.**

**Menu** Modify Internal Transfer Purchase Requisition

Search Details **Items** Notes Approvals

District: UNFED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000011 Acct. Dist.

Show Description Edit Desc. Internal Transfer Type: FIELD TRIP - FIELD TRIP View Expand Close

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount				
0001	FIELD TRIP	FIELD TRIP 1/27/05	1.00	300.00	EACH	300.00				
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0001	0	1110	1000	5711	0.00	1.000000	300.00
							Total:	0.00	1.000000	300.00
0002	FIELD TRIP	FIELD TRIP 2/14/05	2.00	200.00	EACH	400.00				
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0001	0	1110	1000	5711	0.00	1.000000	400.00
							Total:	0.00	1.000000	400.00
0003	FIELD TRIP	FIELD TRIP 2/22/2005	1.00	100.00	EACH	100.00				
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
	03	000	0001	0	1110	1000	5711	0.00	1.000000	
							Total:	0.00	1.000000	

Add Line Add Acct. Add Fav. Dup Delete Save 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 Internal Transfer Requisition – Reapply Account Distribution

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

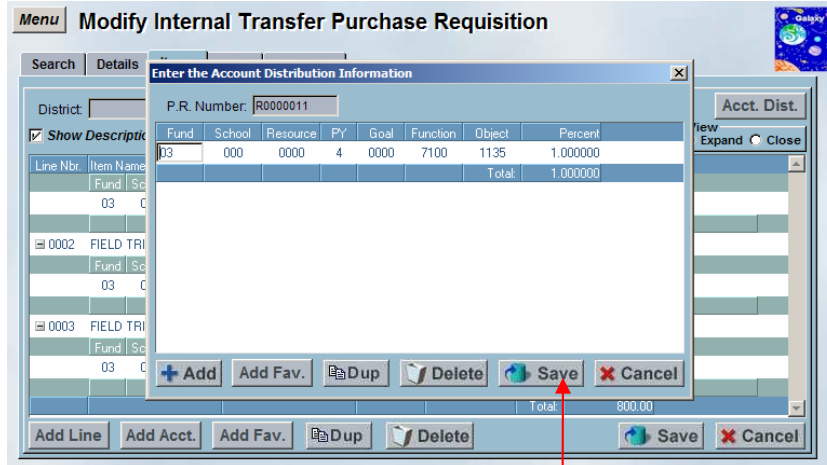
or

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:**

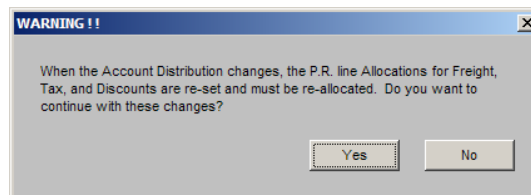
- Fund
- School
- Resource
- PY
- Goal
- Function
- Object



**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**



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Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step  
Verify account  
distribution  
reallocation.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Acct. Amount		
03	000	0000	4	0000	7100	1135	0.00	1.000000	300.00
Total:							0.00	1.000000	300.00
0002	FIELD TRIP	FIELD TRIP 2/14/05	2.00	200.00	EACH	400.00			
03	000	0000	4	0000	7100	1135	0.00	1.000000	400.00
Total:							0.00	1.000000	400.00
0003	FIELD TRIP	FIELD TRIP 2/22/2005	1.00	100.00	EACH	100.00			
03	000	0000	4	0000	7100	1135	0.00	1.000000	100.00
Total:							0.00	1.000000	100.00
Total:							0.00	1.000000	800.00

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

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 Modify an Existing Internal Transfer Requisition – Reapply Account Distribution

Step  
 Click **Save**

This will start the budget check process.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount
03	000	0000 4 0000 7100	1135	0.00	1.000000	300.00
Total:						300.00
0002	FIELD TRIP	FIELD TRIP 2/14/05	2.00	200.00	EACH	400.00
03	000	0000 4 0000 7100	1135	0.00	1.000000	400.00
Total:						400.00
0003	FIELD TRIP	FIELD TRIP 2/22/2005	1.00	100.00	EACH	100.00
03	000	0000 4 0000 7100	1135	0.00	1.000000	100.00
Total:						100.00
Total:						800.00

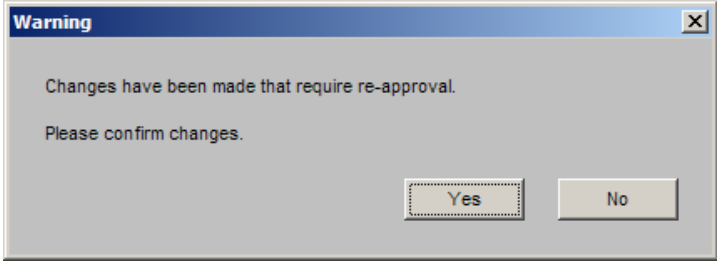
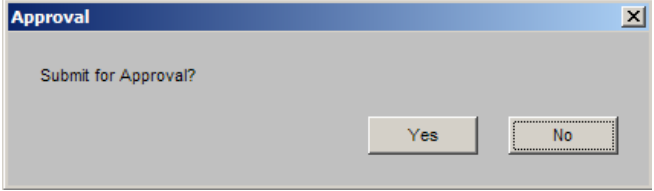
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

**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><b>No Approvals</b></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><b>Step</b>                  If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p style="text-align: center;"><b>Click Yes.</b></p>	 <p>A warning dialog box with a blue title bar labeled "Warning" and a close button (X). 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><b>Step</b>                  “Submit for Approval?” warning prompts</p> <p style="text-align: center;"><b>Click Yes.</b></p>	 <p>An approval dialog box with a blue title bar labeled "Approval" and a close button (X). 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 Internal Transfer Requisition – Reapply Account Distribution

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

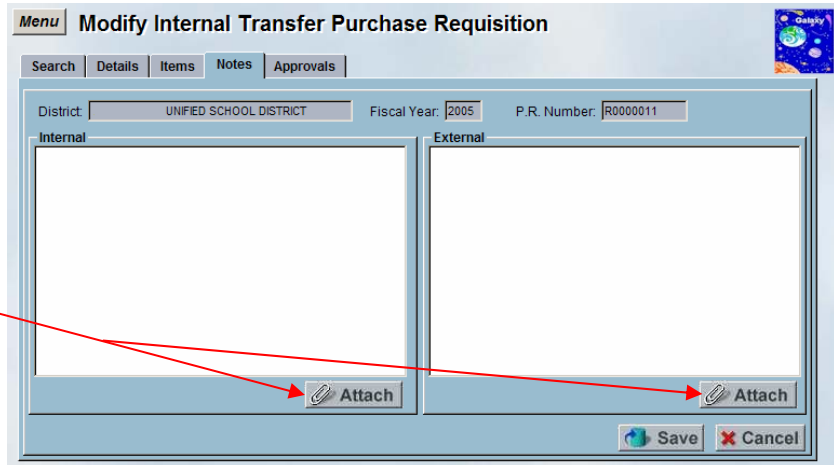
Click **Attach**.

Select from a previously defined note

or

Manually enter Internal/External note(s).

Click **Save**

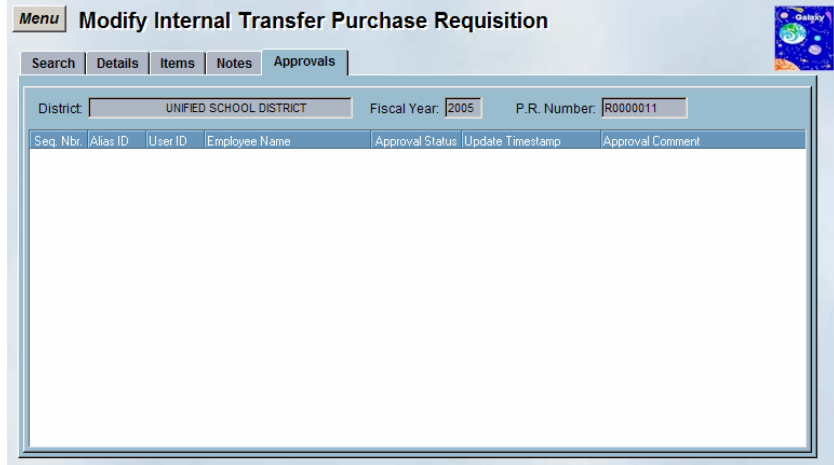


**NOTES:**

- 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.





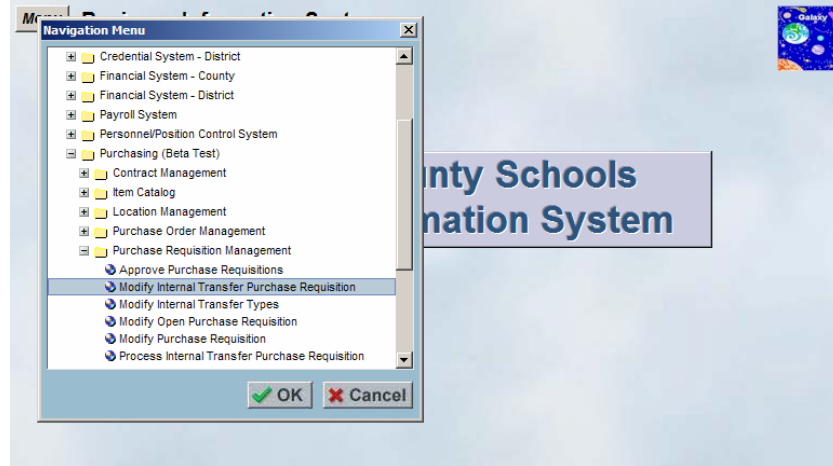
### Delete an Internal Transfer Purchase Requisition

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

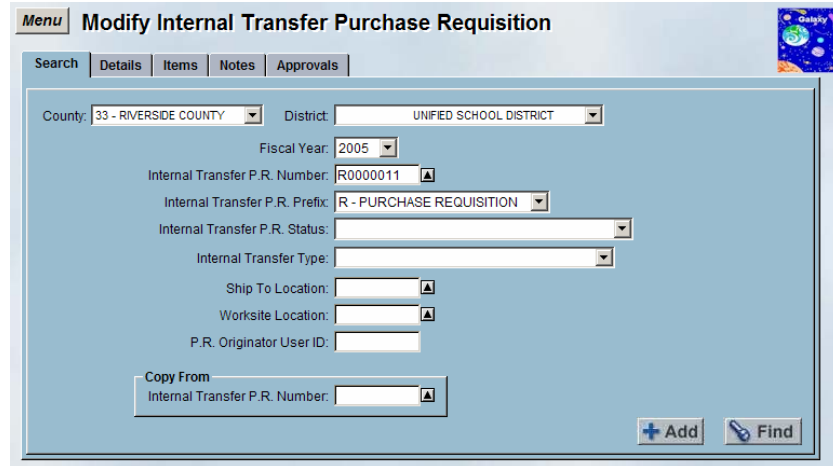
Click **OK**.



#### Step

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

Click **Find**

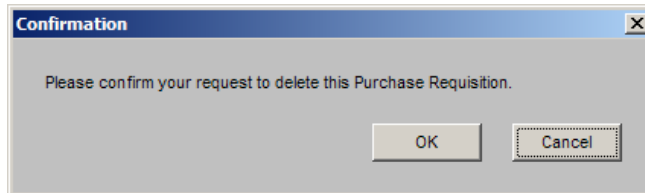


Step  
 To delete the  
 internal transfer  
 purchase requisition

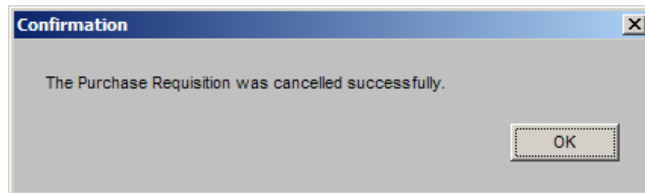
Click **Delete**.

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.



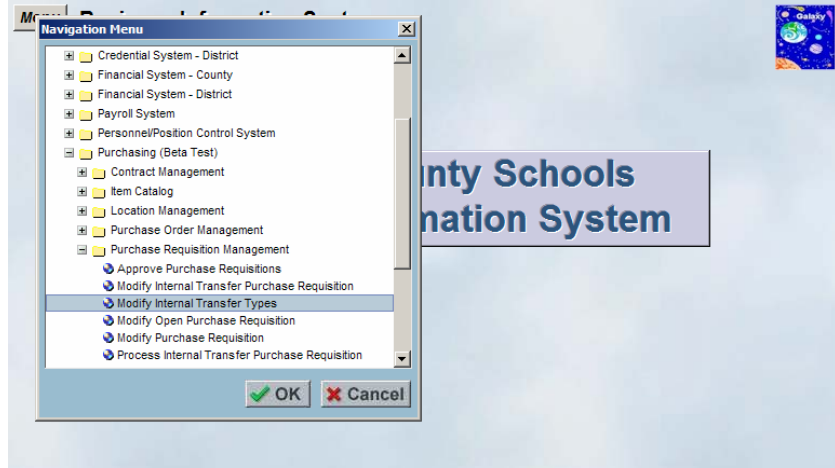
NOTE: The cancelled purchase requisition remains in the database for future reference.

### 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.

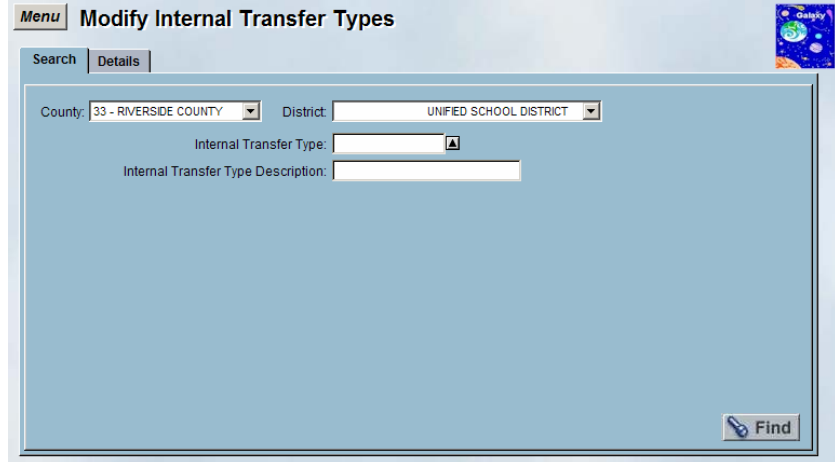
Step 1  
From menu select  
Modify Internal  
Transfer Types

Click **OK**



Step  
To add, edit or  
delete internal  
transfer type(s)  
enter/select Internal  
Transfer Type, and/or  
Internal Transfer  
Type Description

Click **Find**.



NOTE: Clicking "Find" with no other selection criteria entered will display all Internal Transfer Types associated to the District on the Details tab.

**Step**

Add, edit or delete transfer types as necessary.

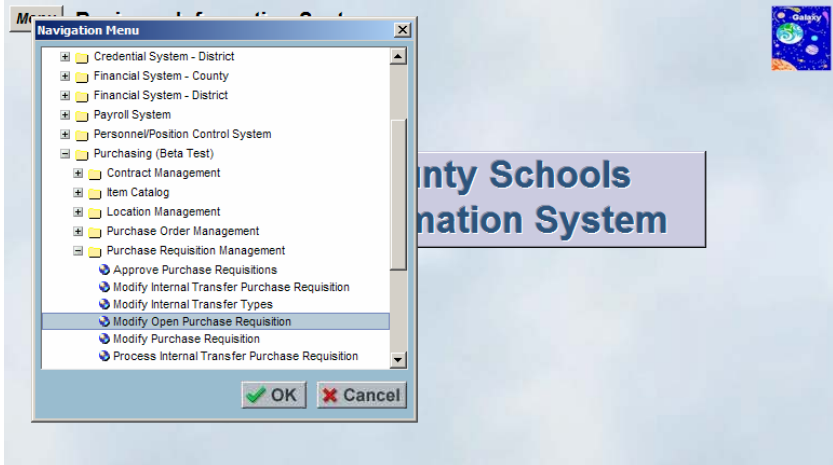
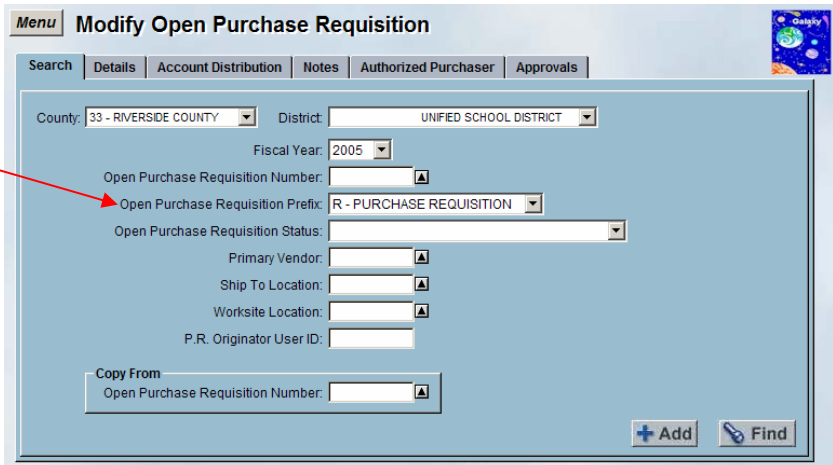
Click **Save**

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

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

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Add a New Open 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 SACS account string(s) to the open purchase requisition

Click **Add Acct.**

Enter SACS account string(s) information.

Fund	School	Resource	FY	Goal	Function	Object	Amount	Percent	Acct. Amount
03	845	0000	0	0000	8200	5856	0.00	1.000000	
Total:							0.00	1.000000	

**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.

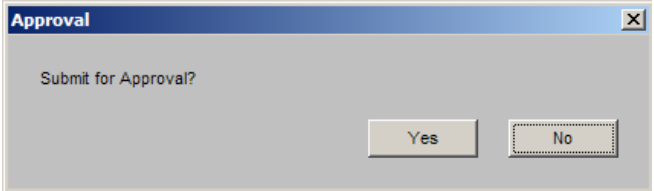
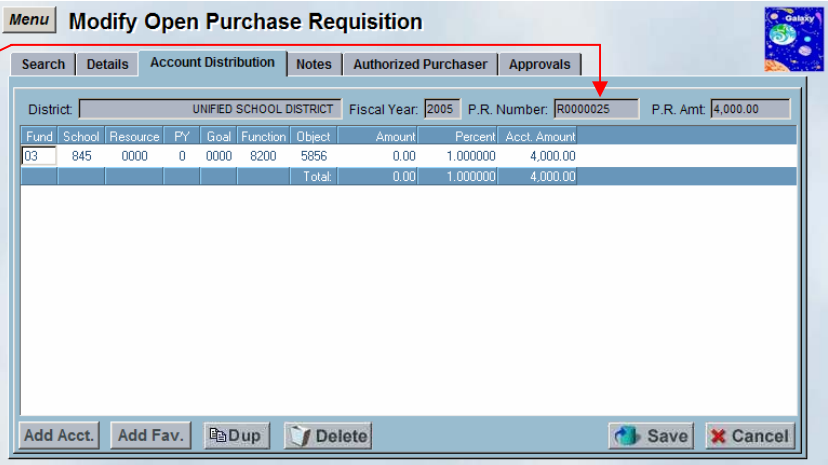
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

### 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><b>No Approvals</b></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 <b>Yes</b>.</p>	
<p>Step System will generate an open purchase requisition number.</p> <p>Click <b>Notes</b> tab</p>	



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Add a New Open Purchase Requisition

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

Click **Attach**,

or

Manually enter Internal or External note(s).

Click **Save**

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

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**

**Step**

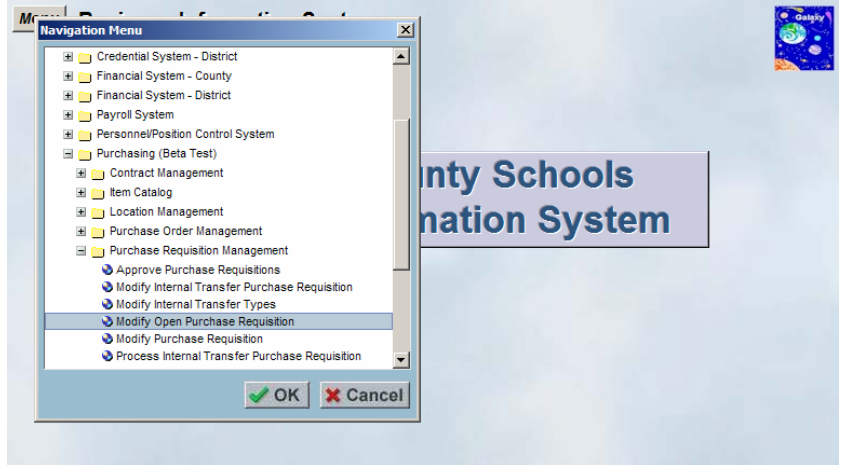
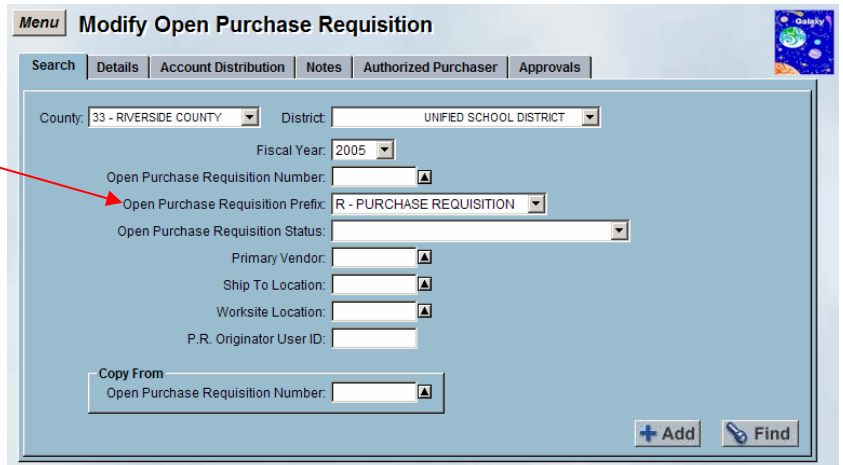
Click the Approvals tab to view the Approvals associated to this open purchase order.

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 the title is a navigation bar with tabs: 'Search', 'Details', 'Account Distribution', 'Notes', 'Authorized Purchaser', and 'Approvals'. The 'Approvals' tab is currently selected. The main content area shows a form with the following fields: 'District' (UNIFIED SCHOOL DISTRICT), 'Fiscal Year' (2005), and 'P.R. Number' (R0000025). Below these fields is a table with the following columns: 'Seq. Nbr.', 'Alias ID', 'User ID', 'Employee Name', 'Approval Status', 'Update Timestamp', and 'Approval Comment'. The table is currently empty.

**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><b>Step 1</b>          From menu select <b>Modify Open Purchase Requisition</b></p> <p>Click <b>OK</b>.</p>	 <p>The screenshot shows a 'Navigation Menu' window with a tree view of system categories. Under 'Purchasing (Beta Test)', the 'Modify Open Purchase Requisition' option is highlighted. The background shows the 'County Schools Information System' logo.</p>
<p><b>Step</b>          To add an open purchase requisition, select <b>Open Purchase Requisition Prefix</b>.</p> <p>If additional fields are selected they will populate the <b>Details</b> tab.</p> <p>Click <b>Add</b></p>	 <p>The screenshot shows the 'Modify Open Purchase Requisition' form with the 'Details' tab selected. Fields include County (33 - RIVERSIDE COUNTY), District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2005), Open Purchase Requisition Number, Open Purchase Requisition Prefix (R - PURCHASE REQUISITION), Open Purchase Requisition Status, Primary Vendor, Ship To Location, Worksite Location, P.R. Originator User ID, and a 'Copy From' section with an Open Purchase Requisition Number field. 'Add' and 'Find' buttons are at the bottom right.</p>

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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.

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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".

Menu **Modify Open Purchase Requisition**

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

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000NEW P.R. Amt: 4,000.00

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Pre Encumber Amt.
03	845	0000	0	0000	6200	5656	0.00	1.000000		0.00
Total:							0.00	1.000000		0.00

Add Acct. Add Fav. Dup Delete Save Cancel

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	845	0000	0	0000	6200	5656	0.00	1.000000	0.00	0.00
Total:							0.00	1.000000		0.00

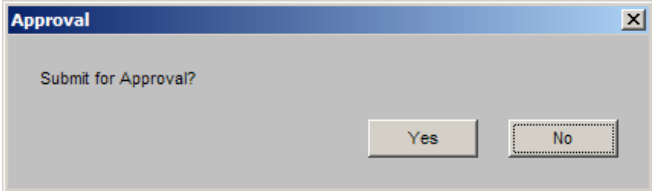
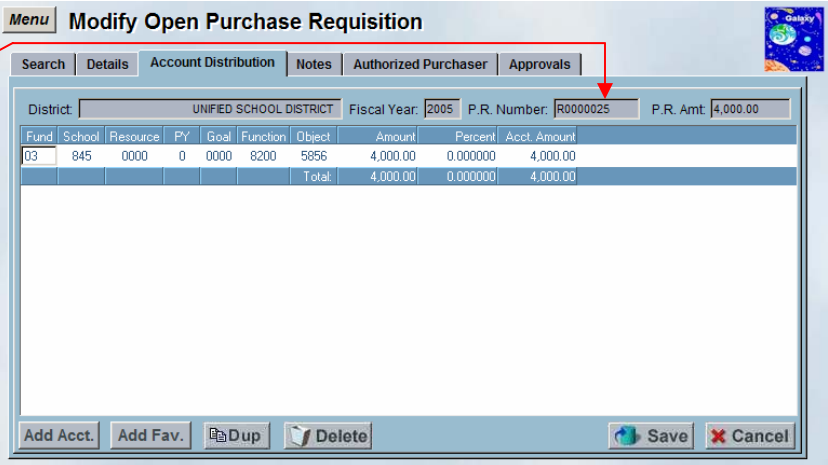
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

### 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><b>No Approvals</b></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 <b>Yes</b>.</p>	
<p>Step System will generate an open purchase requisition number.</p> <p>Click <b>Notes</b> tab</p>	

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Add a New Open Purchase Requisition Copying from a Purchase Requisition

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

Click **Attach**,

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: 2005 P.R. Number: R0000025

Internal

External  
Open purchase order for 2004/2005 for rental of equipment, not to exceed \$4000.00

Attach Attach

Save Cancel

Step  
Click Authorized Purchaser tab to add 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: 2005 P.R. Number: R0000025

Seq. Nbr.	Authorized Purchaser
0001	Jane Doe
0002	Tom Doe
0003	Sally Doe
0004	Paul Doe
0005	Jen Doe

+ Add Dup Delete

Save Cancel



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Add a New Open Purchase Requisition Copying from a Purchase Requisition

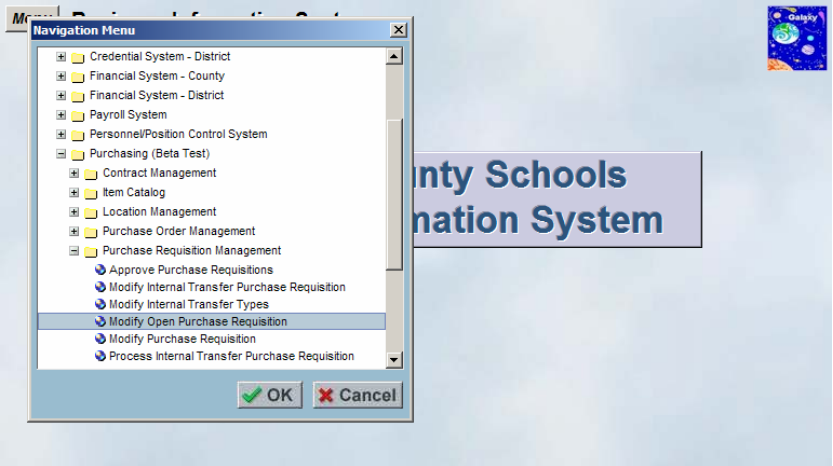
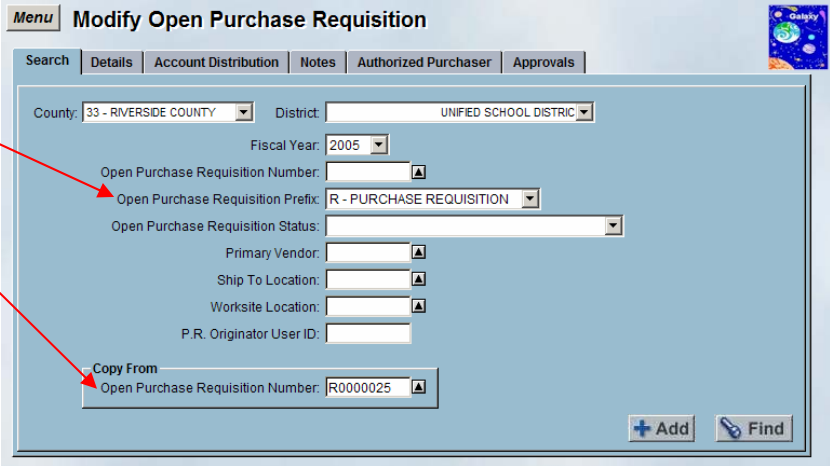
Step

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



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

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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 shows a web-based form titled "Modify Open Purchase Requisition". The form is divided into several tabs: "Search", "Details", "Account Distribution", "Notes", "Authorized Purchaser", and "Approvals". The "Details" tab is currently selected. The form contains various input fields and dropdown menus, including: District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2005), P.R. Number (R0000NEW), P.R. Type (0 - OPEN), Expiration Date (03/13/2005), P.R. Status (N - NEW (NOT SUBMITTED FOR A)), Primary Vendor (29275), P.R. Amount (4,000.00), P.R. Description (ORIGINAL), Vendor Address (1), Open P.O. Nbr., Category (ART EQUIP), Bill To Location (BUSINESS SVC), Ship To Location (WAREHOUSE), P.R. Requestor, Approval List, P.R. Originator User ID, Contact Phone Nbr., Update User ID (02/11/2005 7:46 AM), In Rev (N), and Rev Cmt. There are also 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 contains various input fields and dropdown menus. Key fields include: District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2005), P.R. Number (R0000NEW), P.R. Type (0 - OPEN), P.R. Status (N - NEW (NOT SUBMITTED FOR A)), P.R. Amount (4,000.00), P.R. Description (ORIGINAL), Open P.O. Nbr., Category (ART EQUIP), P.R. Requestor, Approval List, P.R. Originator User ID, Contact Phone Nbr., Update User ID (02/11/2005 7:46 AM), Expiration Date (03/13/2005), Primary Vendor (29275), Vendor Address (1), Bill To Location (BUSINESS SVC), Ship To Location (WAREHOUSE), Worksite Location (085), Board Rpt. Desc., Instructions, Misc. Field 2, 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.

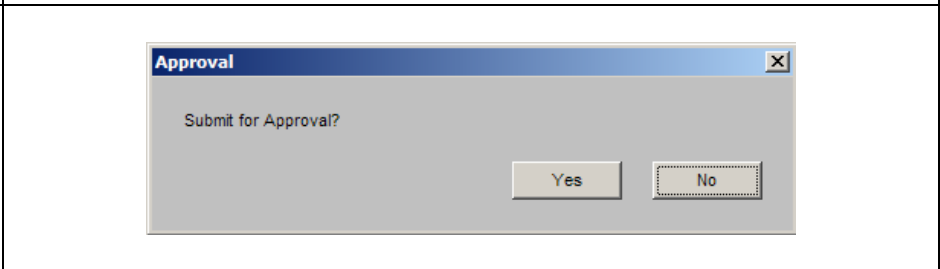
**No Approvals**

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.

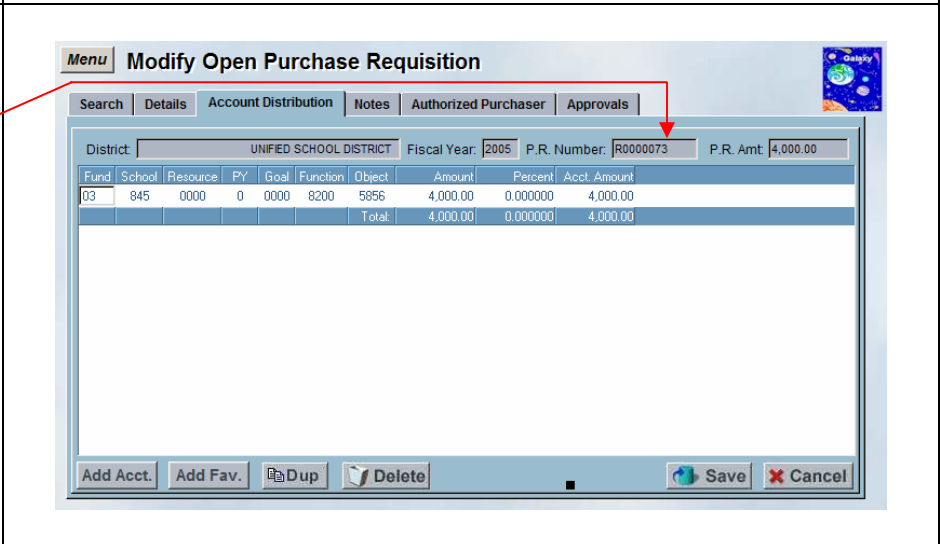
If the user does not have sufficient user security privileges to override the budget check, the purchase requisition status will be set to “B” (approved, but budget override required). Subsequently, a user may use the Modify Purchase Requisition screen to re-save the purchase requisition to perform another 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.



**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**

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

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 Modify an Existing Open 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 for 'UNIFIED SCHOOL DISTRICT' in fiscal year 2005. The 'Items' tab is active. A single line item is displayed: Line Nbr 0001, Item Name PAPER, Description COPY PAPER, Quantity 1.00, Unit Price 5.00, U/M REAM, Amount 5.00, Taxable Y, Tax Amount 0.39, Total Amount 5.39. The SACS account string '03 845 0000 0 0000 8200 5856' is entered in the 'Acct. Amount' column. The 'Discount Amt' is 0.00 and 'Pct' is 0.000000. The 'Add Acct.' button is highlighted with a red arrow.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount						
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39						
						Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
						03	845	0000	0	0000	8200	5856	0.00	1.000000	
						Total:		0.00	1.000000						
						Total:		5.00	0.39						

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 updated to 10.00 and 'Freight Amt' to 2.00. The 'Items' tab is active. Line 0001 is 'PAPER' (COPY PAPER) with a total amount of 5.00. Line 0002 is 'PAPER' (COPY PAPER) with a total amount of 5.00. The 'Discount Amt' is 10.00 and 'Freight Amt' is 2.00. The 'Add Acct.' button is highlighted with a red arrow.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Taxable	Tax Amount	Total Amount				
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	5.00	Y		5.00				
						Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
						03	176	0000	0	0000	3600	5710	0.00	1.000000	
						Total:		0.00	1.000000						
0002	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	5.00	Y		5.00				
						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							

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 Modify an Existing Open Purchase Requisition

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

Click **Save**

**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: 2.00 View Expand Close

Line	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	1.00	Y	0.39	1.39
Goal	Function	Object	Amount	Percent	Acct. Amount						
	0000	3600	5710	0.00	1.000000						
	Total:			0.00	1.000000						
PER	1.00	5.00	REAM	5.00	Y	5.00	Y	1.00	Y	0.39	1.39
Goal	Function	Object	Amount	Percent	Acct. Amount						
	1110	1000	4300	0.00	1.000000						
	Total:			0.00	1.000000						
				Total:	10.00	10.00	2.00	0.78	2.78		

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

NOTE: 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.



**Add a New Purchase Requisition without 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.

Discount and  
Freight are not  
checked.

Click **Save**

The screenshot shows the 'Modify Purchase Requisition' application window. A dialog box titled 'Add a P.R. Line Nbr.' is open, allowing the user to add a new line item. The dialog contains the following fields and options:

- Line Nbr.: 0001
- Item Name: PAPER
- Description: COPY PAPER
- Quantity: 1.00
- Unit Price: 5
- U/M: REAM
- Discount:
- Freight:
- Taxable:

At the bottom of the dialog are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button. The main window has a menu bar with 'Menu' and tabs for 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. A bottom toolbar contains buttons for 'Add Line', 'Add Acct.', 'Add Fav.', 'Dup', 'Delete', 'Save', and 'Cancel'.

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

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 Modify an Existing Open 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: 2005 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	Total Amount
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39		5.39
		Fund: 03 School: 172 Resource: 0001 PY: 0 Goal: 1110 Function: 1000 Object: 4300				0.00		1.000000		
		Total:				0.00		1.000000		
		Total:				5.00		0.39		5.39

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	Total Amount
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	N	0.00	N	
		Fund: 03 School: 172 Resource: 0001 PY: 0 Goal: 1110 Function: 1000 Object: 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: 03 School: 172 Resource: 0001 PY: 0 Goal: 1110 Function: 1000 Object: 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 Open 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 for 'UNIFIED SCHOOL DISTRICT' in fiscal year '2005'. The 'Discount Amt' is set to 10.00 and 'Freight Amt' is 5.00. The table below shows two line items for 'PER' with a quantity of 1.00 and unit price of 5.00. The 'Discount' and 'Freight' columns are currently set to 'N' and '0.00' respectively. Red arrows point to these values.

Line	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	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						
PER	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 same 'Modify Purchase Requisition' window, but now the 'Discount' and 'Freight' columns are set to 'Y'. The 'Discount Amount' is 5.00 and the 'Freight Amount' is 2.50. Red arrows point to these values.

Line	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						
Total:				0.00	1.000000						
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						
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 Open 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

Line	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount
1	PER	1.00	5.00	REAM	5.00	Y	5.00	y	2.50	Y	0.39	2.89
2	PER	1.00	5.00	REAM	5.00	Y	6.00	y	2.50	Y	0.39	1.89
Total:					10.00		11.00		5.00		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

Line	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Taxable	Tax Amount	Total Amount
1	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												
2	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		5.00		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.

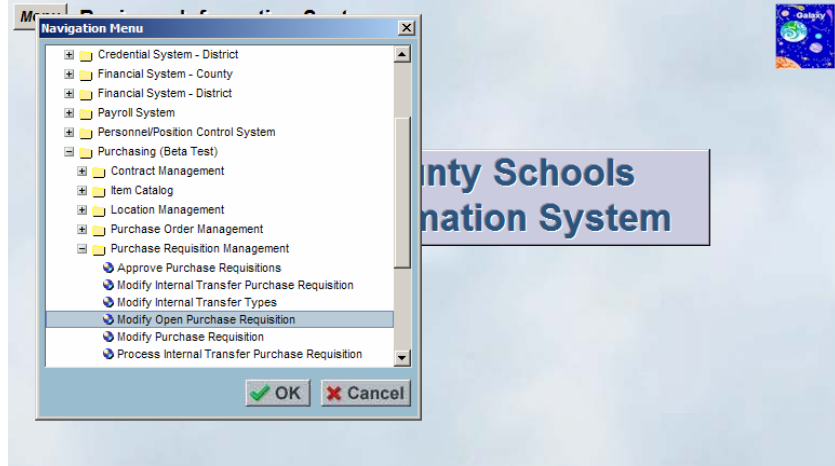
### Modify an Existing Open Purchase Requisition

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

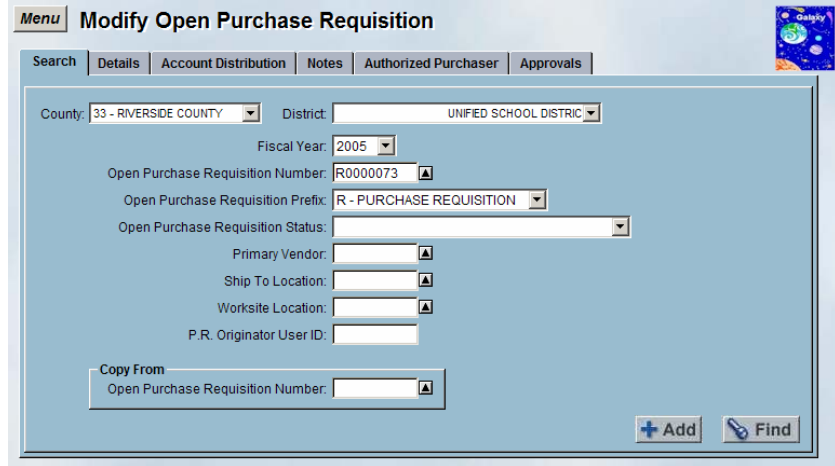
Click **OK**.



#### Step

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

Click **Find**



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

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 menu, there are several input fields and dropdown menus for editing purchase requisition information. The fields include: District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2005), P.R. Number (R0000073), P.R. Type (0 - OPEN), P.R. Status (N - NEW (NOT SUBMITTED FOR APPROVAL)), P.R. Amount (4,000.00), P.R. Description (ORIGINAL), Open P.O. Nbr., Category (ART EQUIP), P.R. Requestor, Approval List, P.R. Originator User ID, Contact Phone Nbr., Update User ID (02/11/2005 9:07 AM), Expiration Date (03/13/2005), Primary Vendor (29275), Vendor Address (UNITED RENTALS), Bill To Location (BUSINESS SVC), Ship To Location (WAREHOUSE), and Worksite Location (085). The interface also includes a 'Delete' button, a 'Print' button, and 'Save' and 'Cancel' buttons at the bottom right.

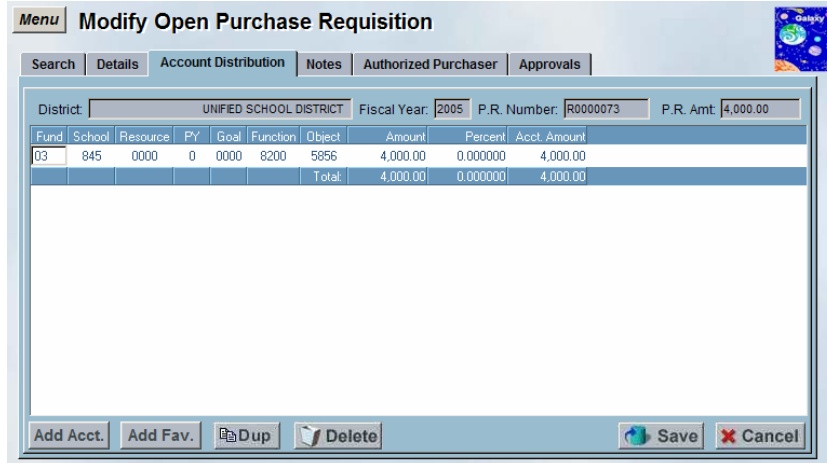
NOTES:

- 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**



**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)

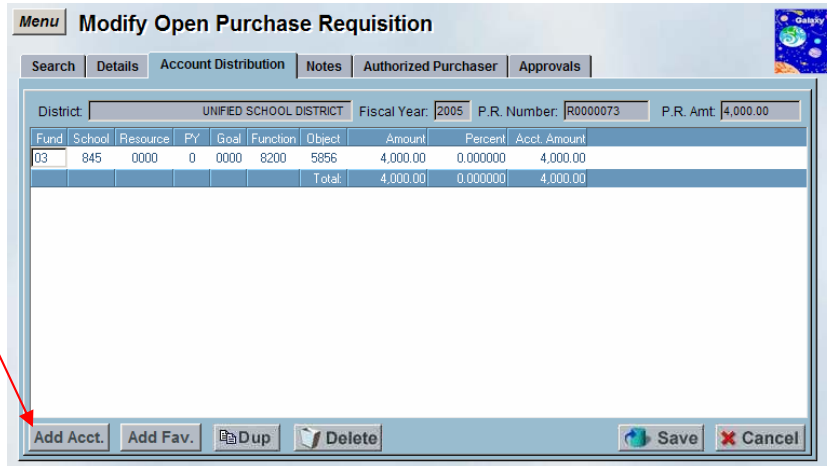
Click **Add Acct.**

**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.**



**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)

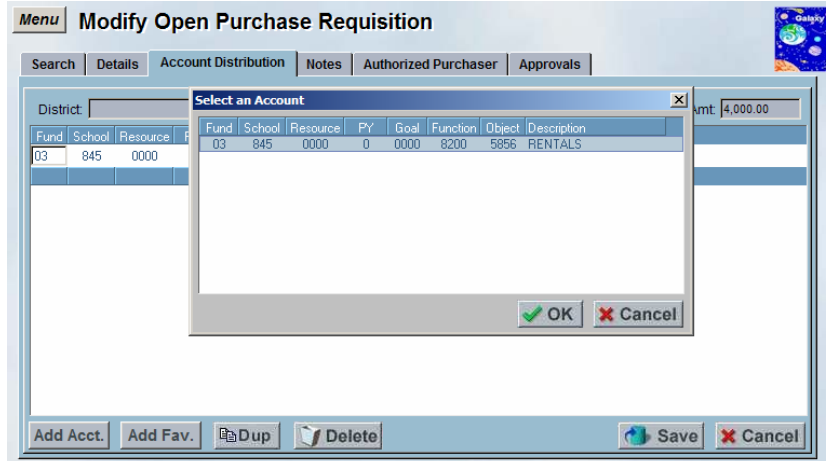
Click **Add Fav.**

Highlight each account string row from the pop up window

Click **OK.**

Or

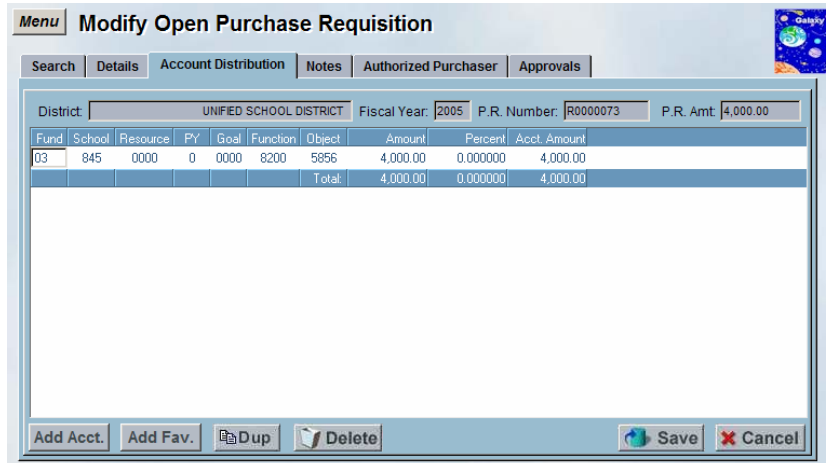
Double clicking on each account string row will automatically add it to the line item.





Step  
Click **Save**

This will start the  
budget check process.




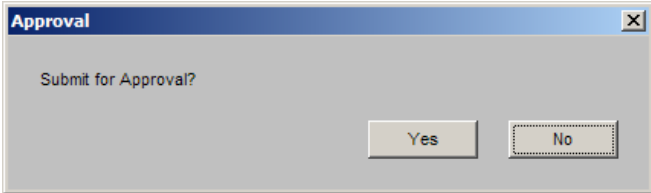
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

### 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><b>No Approvals</b></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><b>Step</b>        If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click <b>Yes</b>.</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><b>Step</b>        “Submit for Approval?” warning message prompts</p> <p>Click <b>Yes</b>.</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 Open Purchase Requisition

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

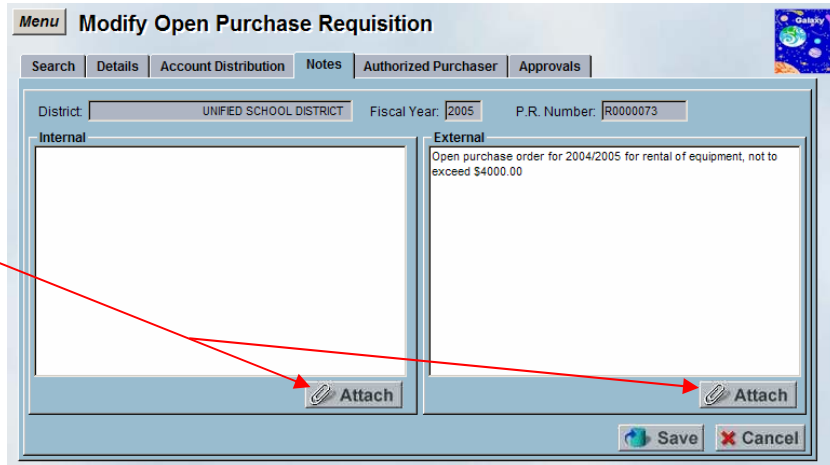
Click **Attach**.

Select from a  
previously defined  
note,

or

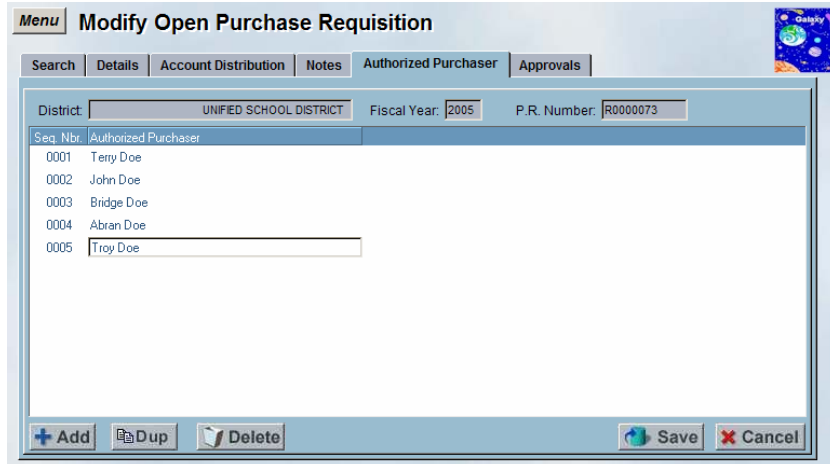
Manually enter  
Internal/External  
note(s).

Click **Save**



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

Click **Save**



**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 a web application interface titled "Modify Open Purchase Requisition". At the top, there is a "Menu" button and a "Galaxy" logo. Below the title, there are several tabs: "Search", "Details", "Account Distribution", "Notes", "Authorized Purchaser", and "Approvals". The "Approvals" tab is currently selected. The main content area shows a form with the following fields: "District" (UNIFIED SCHOOL DISTRICT), "Fiscal Year" (2005), and "P.R. Number" (R0000073). Below these fields is a table with the following columns: "Seq. Nbr.", "Alias ID", "User ID", "Employee Name", "Approval Status", "Update Timestamp", and "Approval Comment". The table is currently empty.

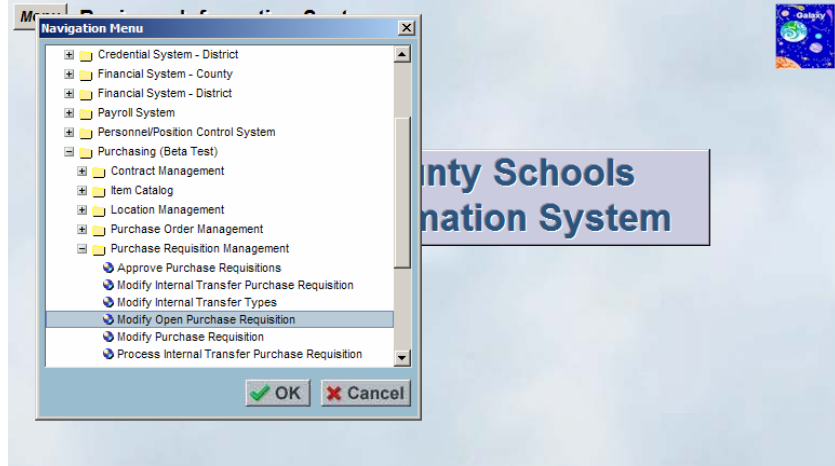
### Delete an Open Purchase Requisition

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

#### Step 1

From menu select  
Modify Open  
Purchase Requisition

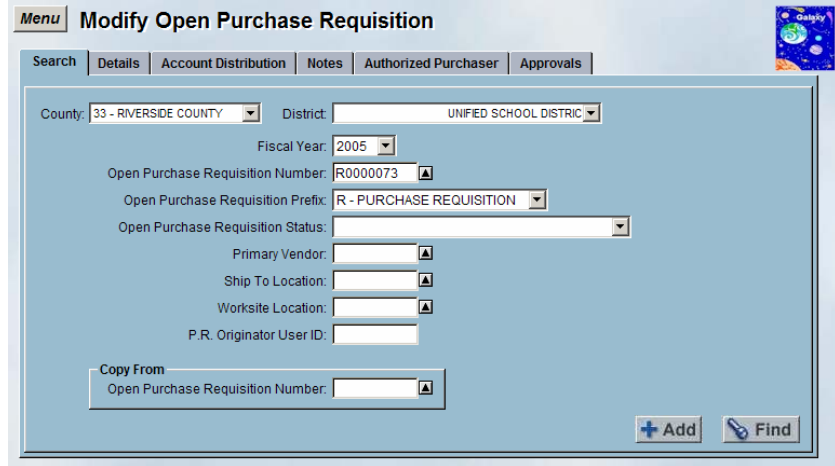
Click **OK**.



#### Step

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

Click **Find**



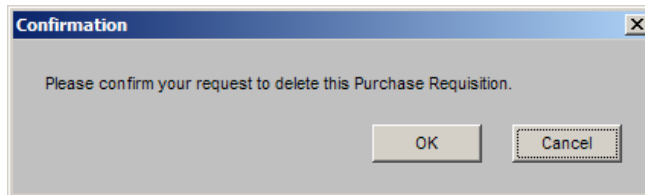
DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0  
Delete an Open Purchase Requisition

Step  
To delete the open purchase requisition

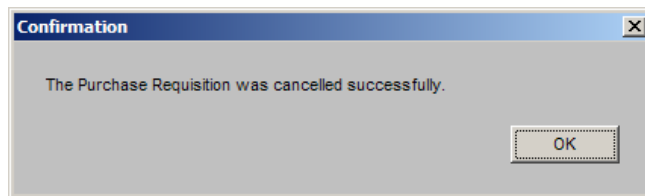
Click **Delete**.

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.

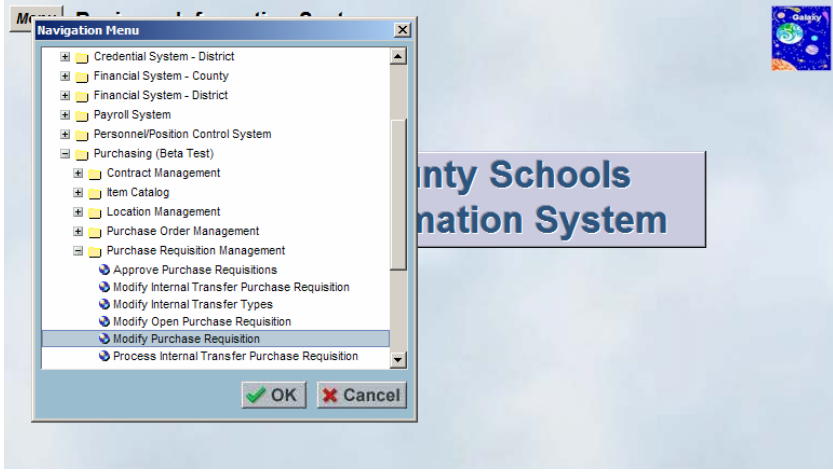
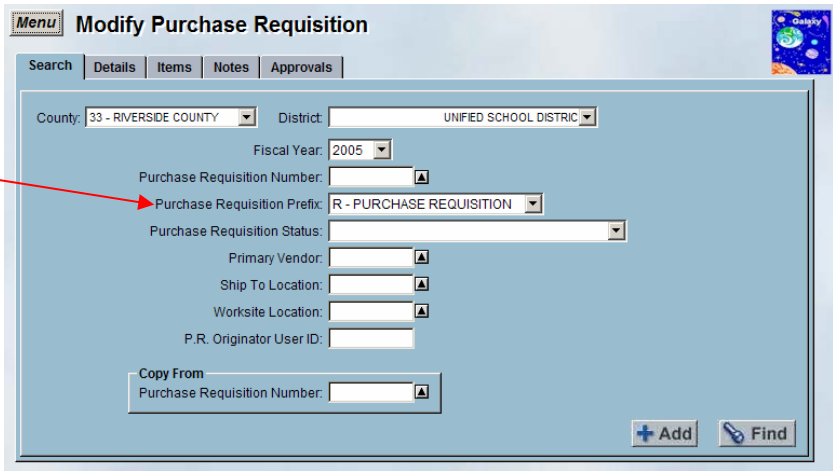


NOTE: The cancelled purchase requisition remains in the database for future reference.

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

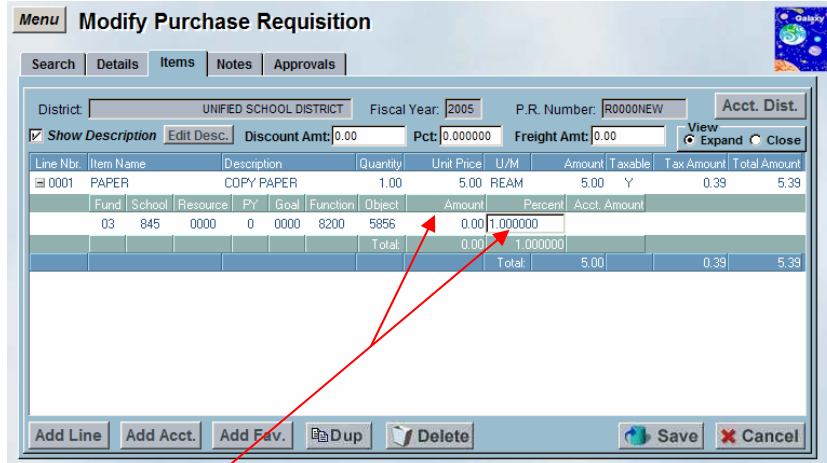
Click **Add Acct.**

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".



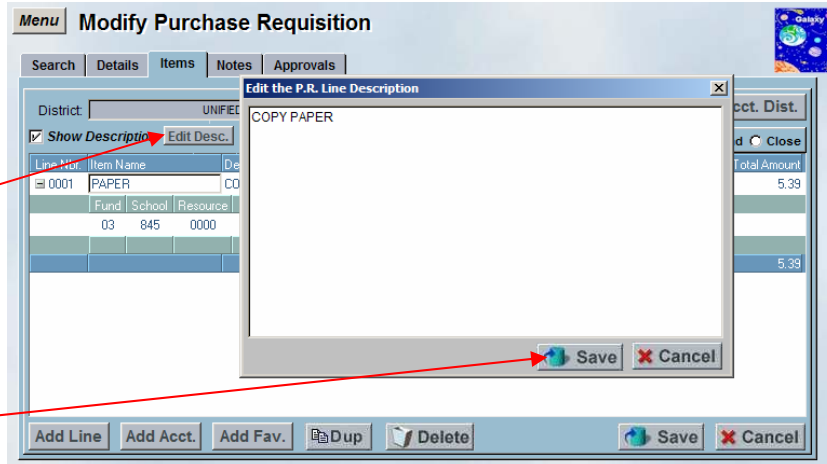
**Step**

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.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39
						Total:		0.39	5.39

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.

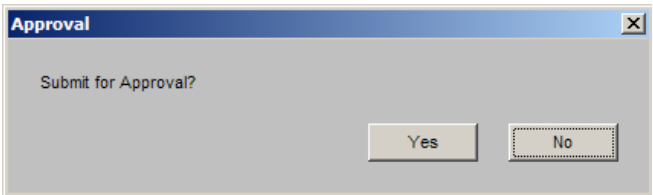
**No Approvals**

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)).

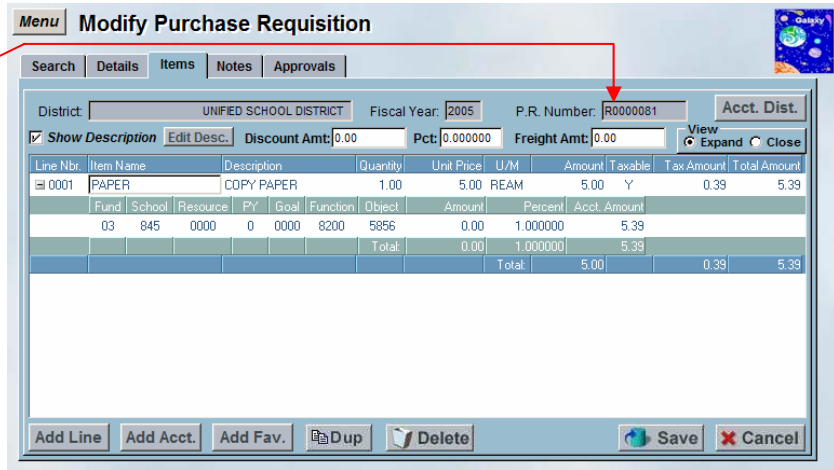
Step  
“Submit for Approval?” warning message prompts

Click **Yes**.



Step  
System will generate a purchase requisition number.

Click **Notes** tab



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

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: 2005 P.R. Number: R0000081

Internal External

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 purchase  
requisition

No changes can be  
made on this tab.

Menu **Modify Purchase Requisition**

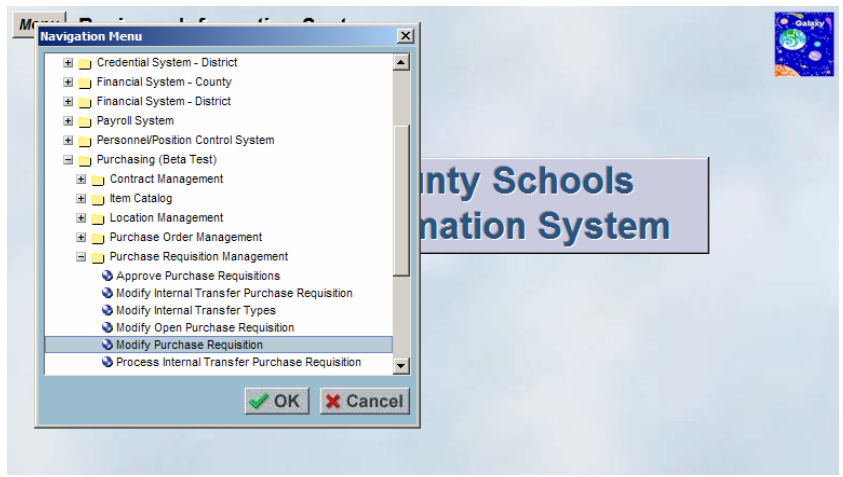
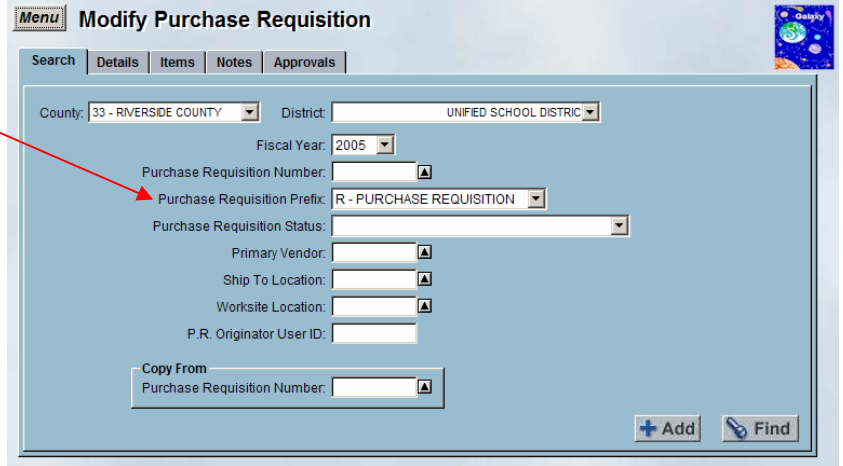
Search Details Items Notes Approvals

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000081

Seq. Nbr.	Alias ID	User ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	DIR_RISK				03/15/2005 10:05 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 <b>OK</b>.</p>	
<p>Step 2 To add a purchase requisition, select Purchase Requisition Prefix.</p> <p>If additional fields are selected they will populate the Details tab.</p> <p>Click <b>Add</b></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.

**Menu** **Modify Purchase Requisition**

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

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

P.R. Type: N - NORMAL Date Due: 04/14/2005

P.R. Status: N - NEW (NOT SUBMITTED FOR A) Primary Vendor: 17430

P.R. Amount: STAPLES

Category: OFFICE Vendor Address: 1

OFFICE SUPPLY DEPT. #601110028004687 P.O. BOX 6722, THE LAKE

P.R. Requestor: Bill To Location: BUSINESS SVC Business Services

Approval List: Ship To Location: WAREHOUSE Warehouse

P.R. Originator User ID: Worksite Location: 091 RISK MANAGEMENT

Contact Phone Nbr: Board Rpt. Desc:

Update User ID: Instructions:

Update Timestamp: 03/15/2005 10:01 AM Misc. Field 2:

In Rev:  Rev Cmt:

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 Purchase Requisition**

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

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

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	Taxable	Tax Amount	Total Amount

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

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**

Fund	School	Resource	PY	Goal	Function	Object	Percent
03	845	0000	0	0000	8200	5856	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.

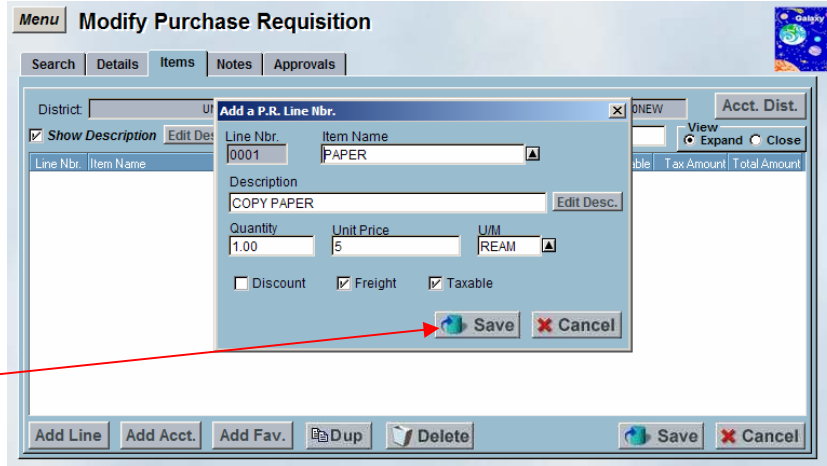
DRAFT Galaxy Purchasing Purchase Requisitions v1.0.0  
Add a New Purchase Requisition using Account Distribution

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

Click **Add Line**.

Enter/Select  
desired information  
on the pop up  
window.

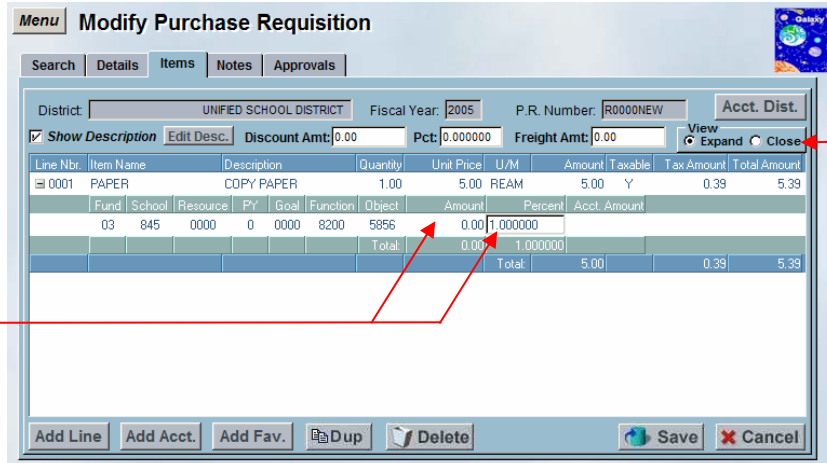
Click **Save**



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".



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

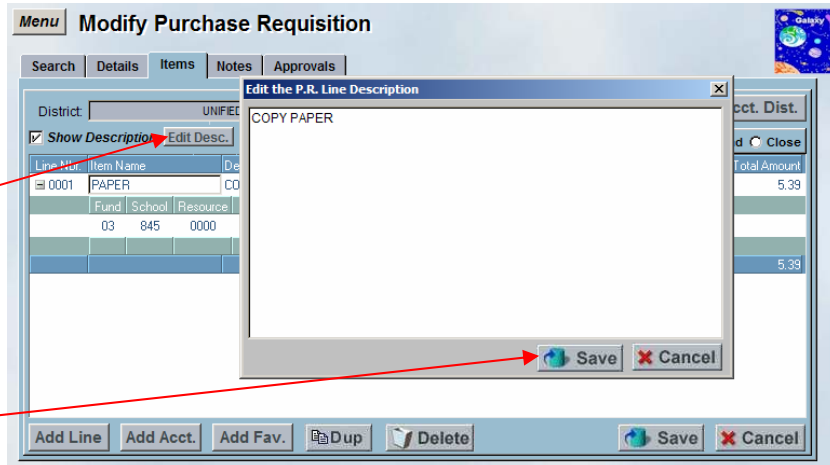
Step

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.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount	
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39	
						0.00	1.000000			
						0.00	1.000000			
						Total:		5.00	0.39	5.39

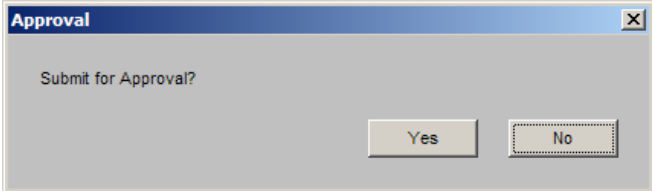
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

**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><b>No Approvals</b></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 <b>Yes</b>.</p>	 <p>The screenshot shows a standard Windows-style dialog box titled "Approval". The main text inside the dialog is "Submit for Approval?". At the bottom right of the dialog, there are two buttons: "Yes" and "No". The "No" button is highlighted with a dashed border, indicating it is the current focus or the default action.</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: 2005 P.R. Number: R0000082 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	Taxable	Tax Amount	Total Amount
0001	PAPER	COFY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39
		Fund School Resource PY Goal Function Object		Amount	Percent	Acct. Amount			
		03 845 0000 0 0000 8200 5856		0.00	1.000000	5.39			
		Total:		0.00	1.000000	5.39			
		Total:				5.00		0.39	5.39

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: 2005 P.R. Number: R0000082

Internal External

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.

**Menu Modify Purchase Requisition**

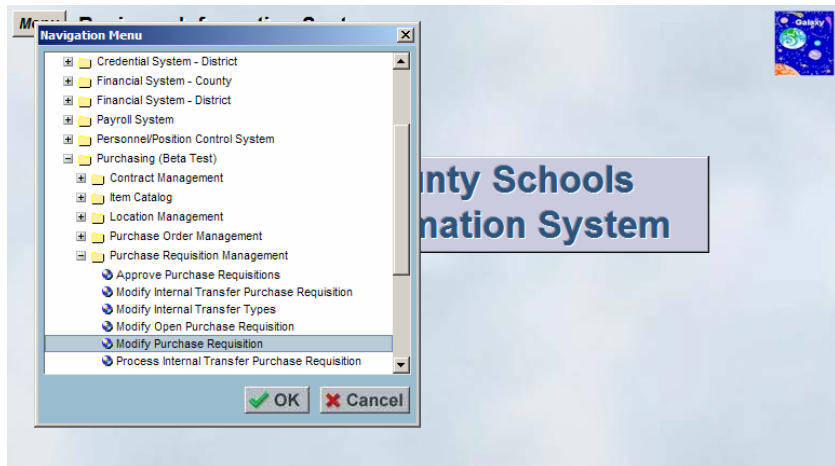
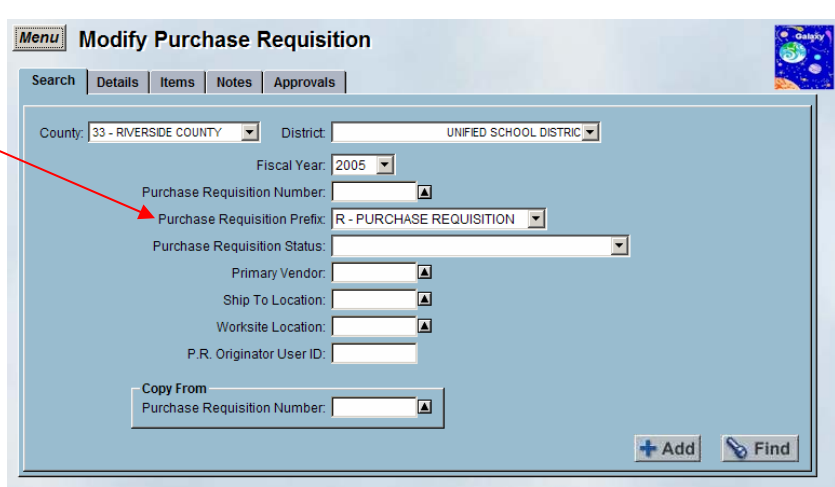
Search | Details | Items | Notes | **Approvals**

District: UNIFIED SCHOOL DISTRICT Fiscal Year: 2005 P.R. Number: R0000082

Seq. Nbr.	Alias ID	User ID	Employee Name	Approval Status	Update Timestamp	Approval Comment
0001	DIR_RISK				03/15/2005 11:26 AM	

**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.

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

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

Step  
 Add detail purchase requisition information.  
  
 After desired information has been entered  
  
 Click **Items** tab.

**Menu** **Modify Purchase Requisition**

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

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

P.R. Type: N - NORMAL Date Due: 04/14/2005

P.R. Status: N - NEW (NOT SUBMITTED FOR A) Primary Vendor: 17430

P.R. Amount: Vendor Address: STAPLES

Category: OFFICE OFFICE SUPPLY

P.R. Requestor: Bill To Location: BUSINESS SVC Business Services

Approval List: Ship To Location: WAREHOUSE Warehouse

P.R. Originator User ID: Worksite Location: 091 RISK MANAGEMENT

Contact Phone Nbr: Board Rpt. Desc:

Update User ID: Instructions:

Update Timestamp: 03/15/2005 10:01 AM Misc. Field 2:

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 Purchase Requisition**

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

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

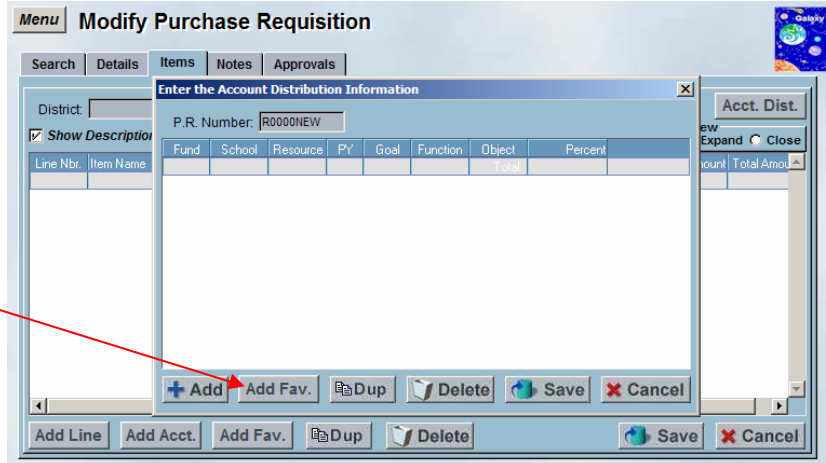
Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View  Expand  Close

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

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

**Step**  
To add default account distribution for all line items using a user's predefined SACS account string(s)

Click **Add Fav.**



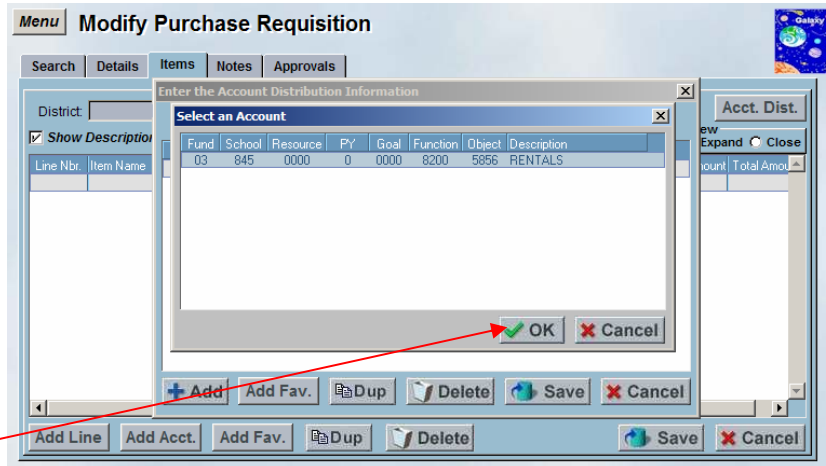
**Step**  
To select the user's predefined SACS account string(s) for the default account distribution,

Highlight each account string row from the pop up window

Click **OK.**

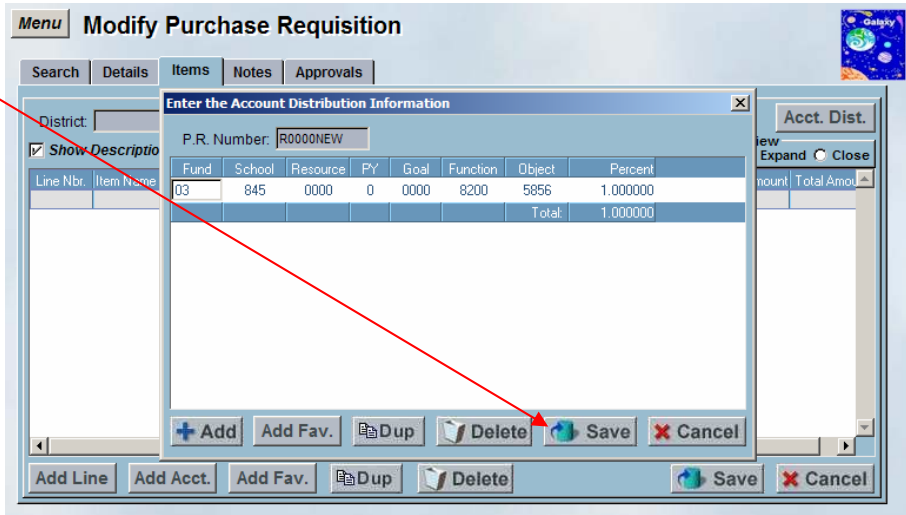
Or

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



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

Step  
 Click **Save**

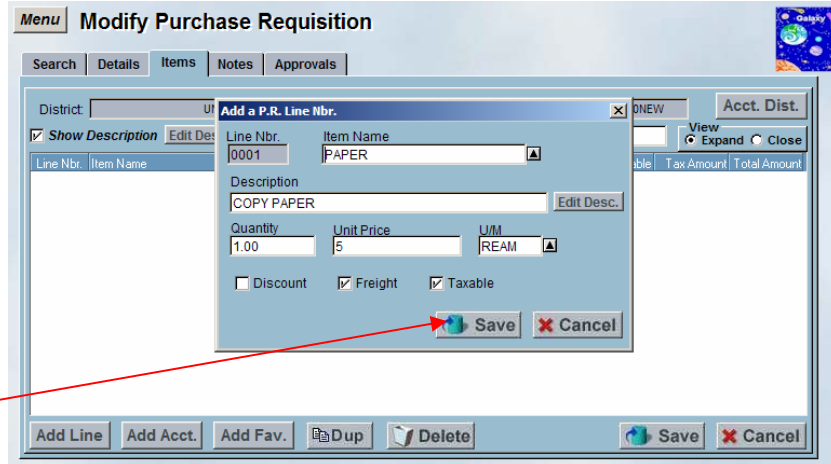


Step  
 To add line item(s)  
 to the purchase  
 requisition

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 for Account Distribution

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



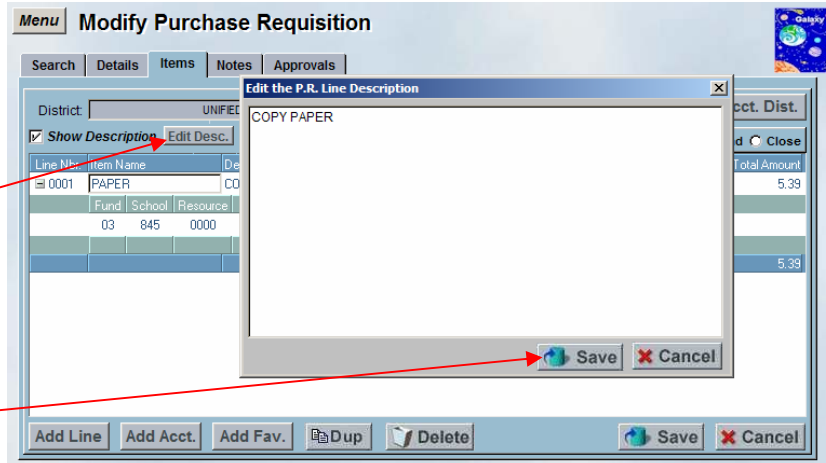
**NOTE:** By default all lines will be shown expanded. Select Close to hide account information for all line items.

**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.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount			
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39			
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount		
	03	845	0000	0	0000	8200	5856	0.00	1.000000			
								Total:	0.00	1.000000		
								Total:		5.00	0.39	5.39

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.

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

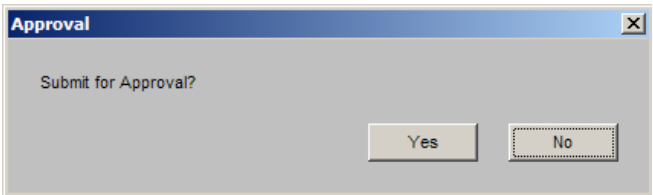
**No Approvals**

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)).

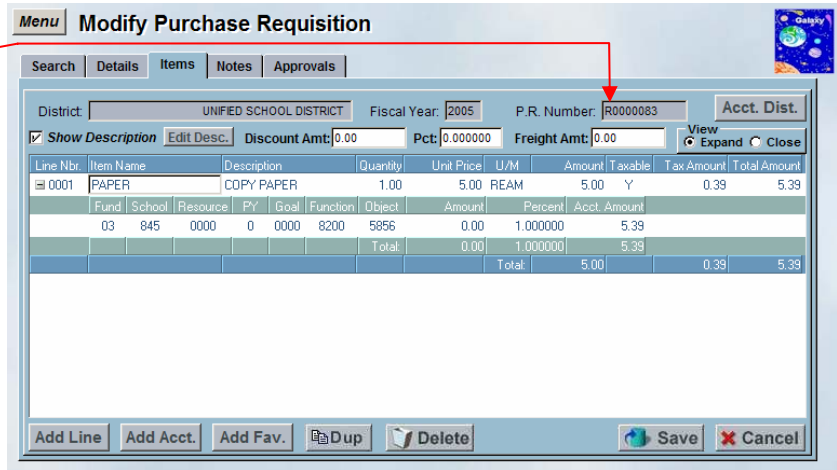
Step  
“Submit for Approval?” warning message prompts

Click **Yes**.



Step  
System will generate a purchase requisition number.

Click **Notes** tab



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

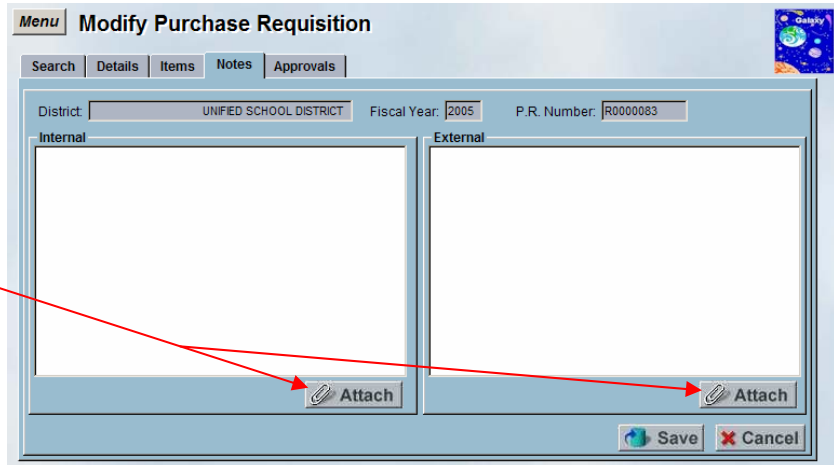
**Step**  
To select a previously defined Internal/External note(s) for the purchase requisition

Click **Attach**,

or

Manually enter Internal/External note(s).

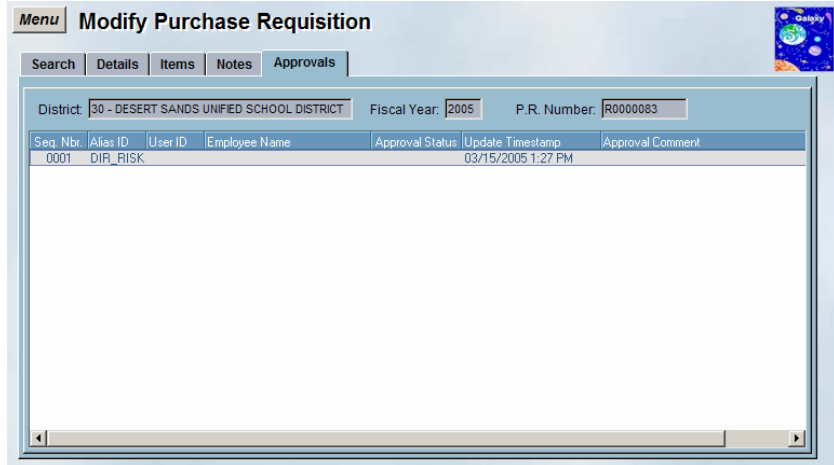
Click **Save**



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

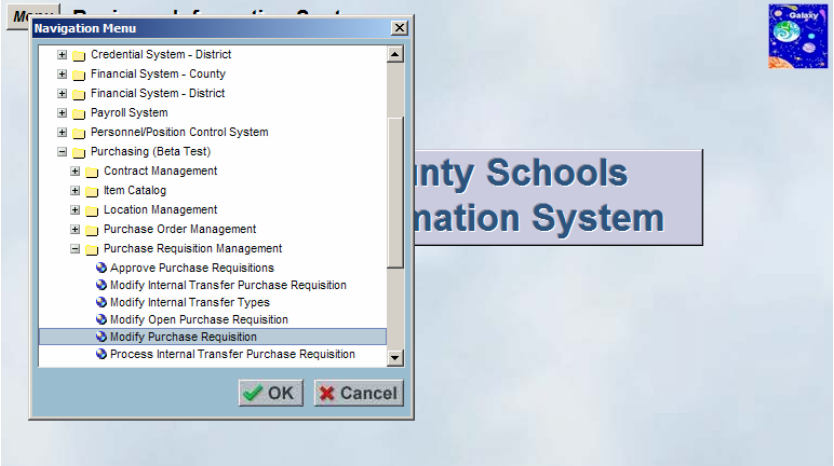
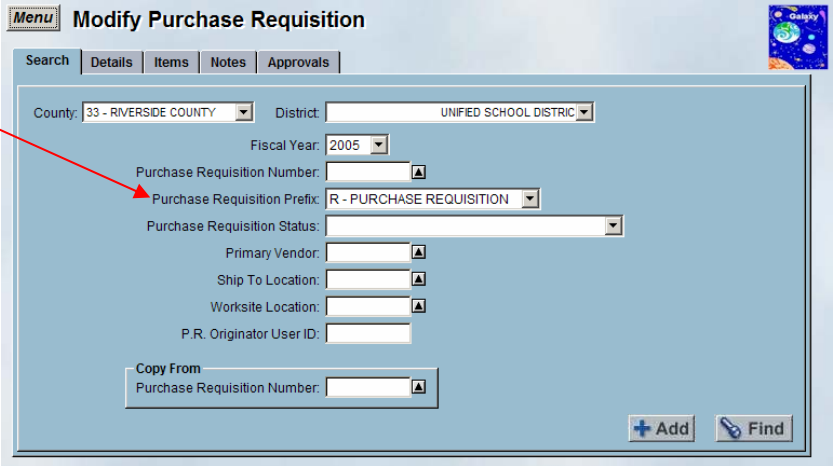
**Step**  
Click the Approvals tab to view approvals associated to this purchase requisition.

No changes can be made on this tab.



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

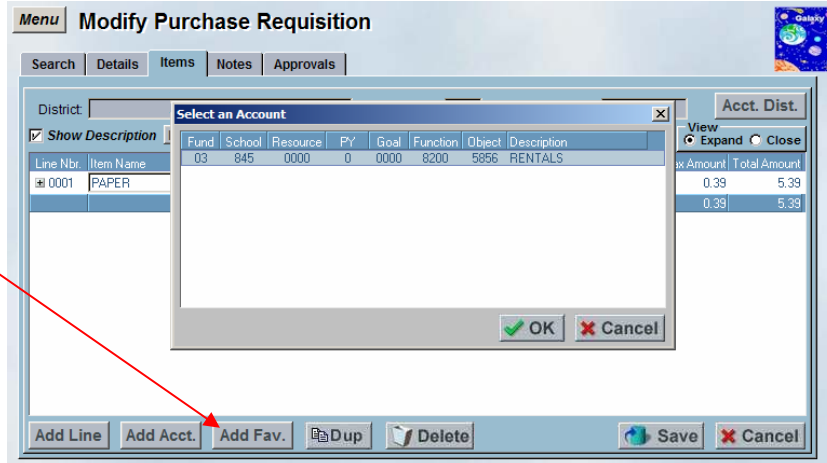
Click **Add Fav.**

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

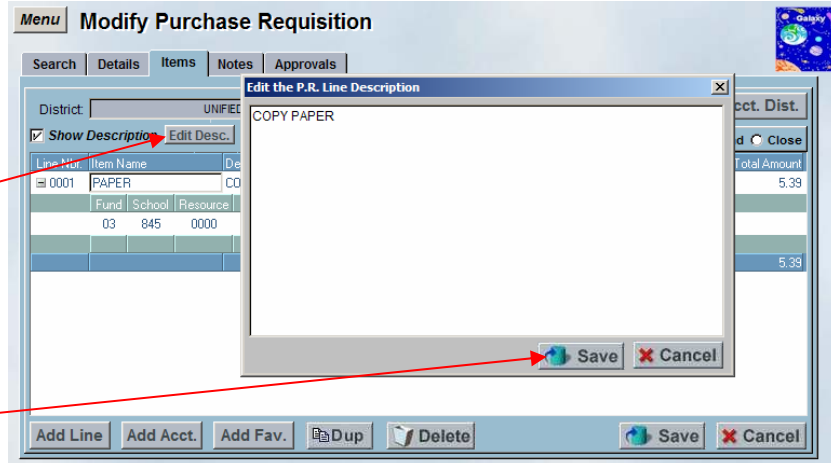
Step

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.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39
						Total:		0.39	5.39

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.



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

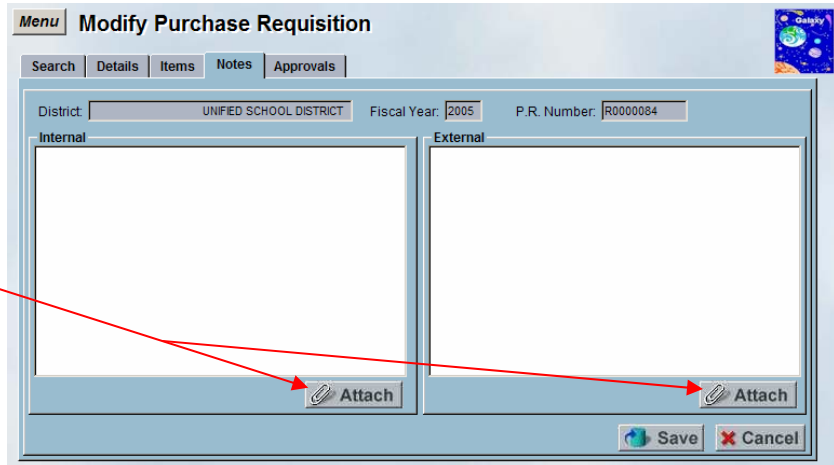
**Step**  
To select previously defined Internal/External note(s) for the purchase requisition

Click **Attach**,

or

Manually enter Internal/External note(s).

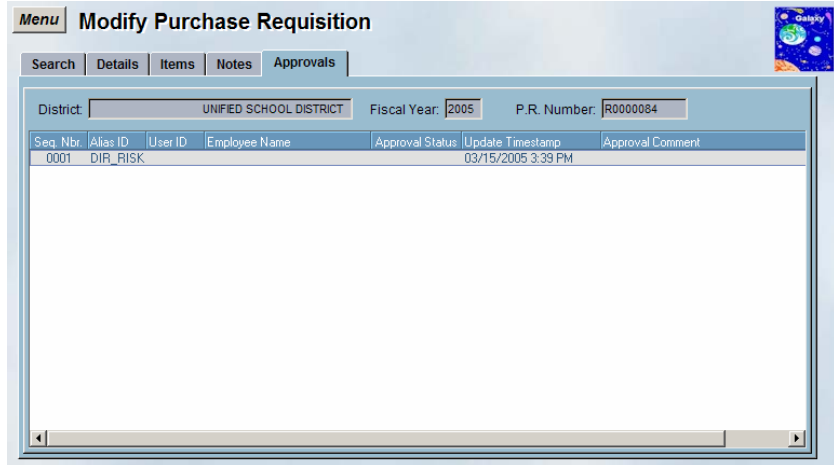
Click **Save**



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

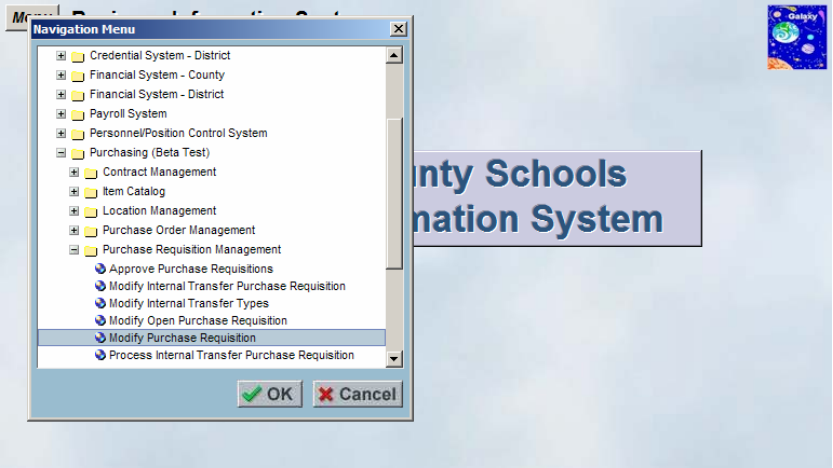
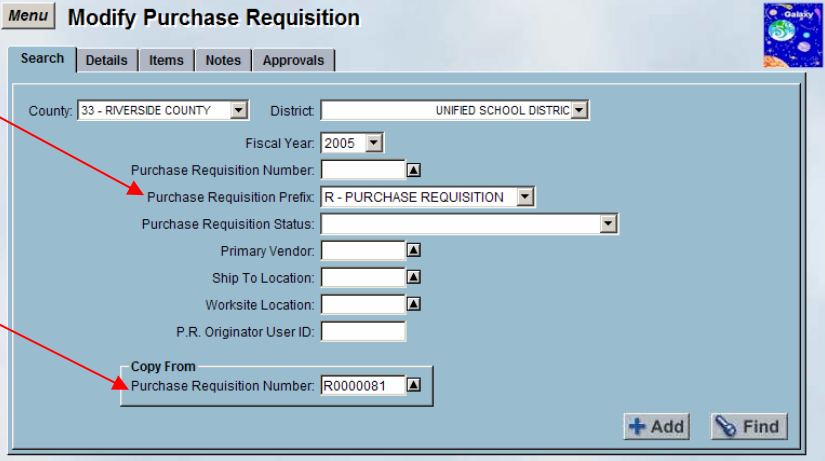
**Step**  
Click the Approvals tab to view approvals associated to this purchase requisition.

No changes can be made on this tab.



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

**Menu** **Modify Purchase Requisition**

Search Details Items Notes Approvals

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

P.R. Type: N - NORMAL Date Due: 04/14/2005

P.R. Status: N - NEW (NOT SUBMITTED FOR A) Primary Vendor: 17430

P.R. Amount: 5.39 Vendor Address: 1

Category: OFFICE OFFICE SUPPLY

Bill To Location: BUSINESS SVC Business Services

Ship To Location: WAREHOUSE Warehouse

P.R. Requestor: Worksite Location: 091 RISK MANAGEMENT

Approval List: Board Rpt. Desc:

P.R. Originator User ID: Instructions:

Contact Phone Nbr: Misc. Field 2:

Update User ID: Update Timestamp: 03/15/2005 4:40 PM In Rev: N Rev Cmt:

Print Save 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.

Line Nbr.	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39
						<b>Total:</b>		5.00	0.39
						<b>Total:</b>		5.00	0.39

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.



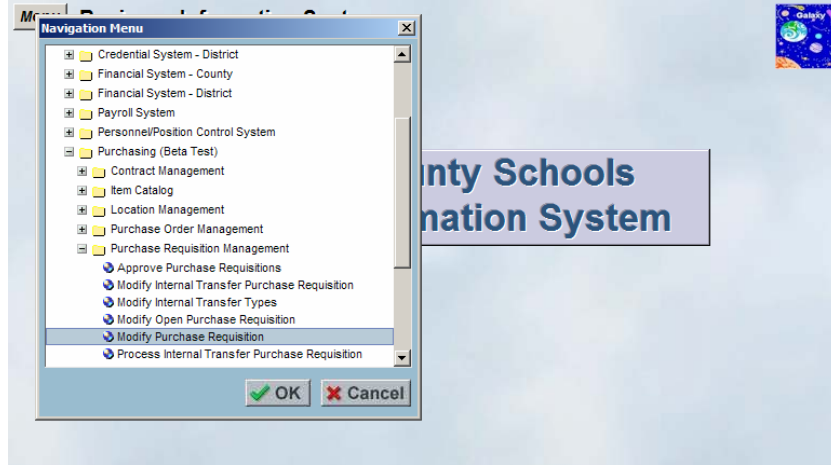
### Modify an Existing Purchase Requisition

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

#### Step 1

From Menu select  
Modify Purchase  
Requisition

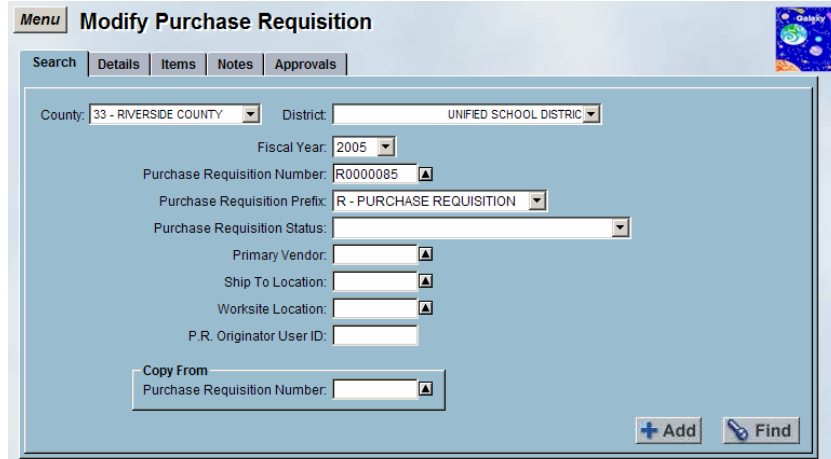
Click **OK**.



#### 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 is organized into a header with a 'Menu' button and a title 'Modify Purchase Requisition'. Below the header is a navigation bar with tabs for 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. The 'Details' tab is currently active. The main content area contains a form with various fields for purchase requisition information. Fields include District (UNIFIED SCHOOL DISTRICT), Fiscal Year (2005), P.R. Number (R0000085), P.R. Type (N - NORMAL), Date Due (04/15/2005), P.R. Status (S - SUBMITTED FOR APPROVAL), Primary Vendor (17430), P.R. Amount (5.39), Category (OFFICE SUPPLY), Vendor Address (STAPLES), P.R. Requestor, Bill To Location (BUSINESS SVC), Ship To Location (WAREHOUSE), P.R. Originator User ID, Worksite Location (091), Contact Phone Nbr, Board Rpt. Desc, Update User ID, Instructions, Update Timestamp (03/16/2005 8:49 AM), Misc. Field 2, In Rev (N), and Rev Cmt. Buttons for Print, Save, and Cancel are visible at the bottom.

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.



Step

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

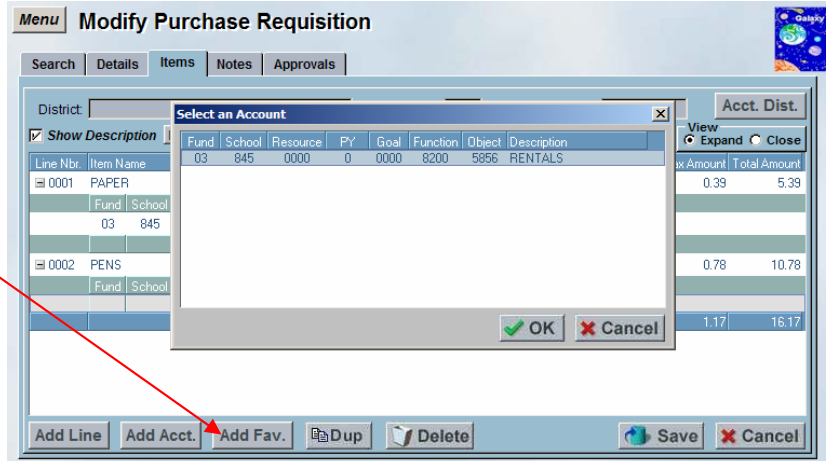
Click **Add Fav.**

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.



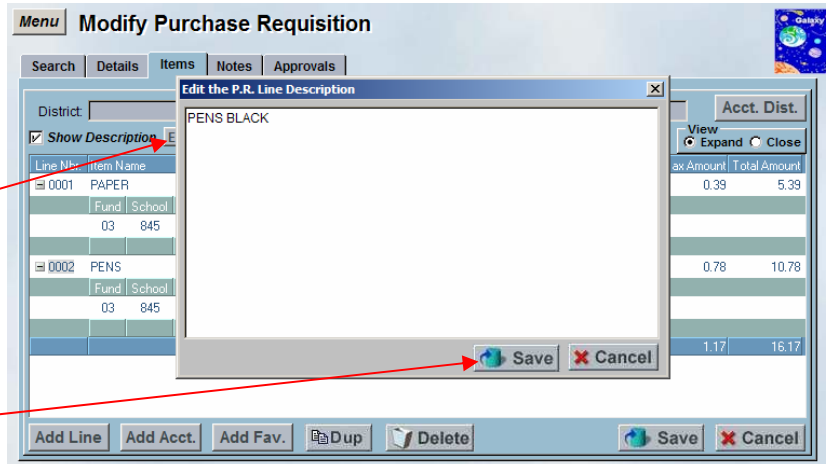
Step

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.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Taxable	Tax Amount	Total Amount
0001	PAPER	COPY PAPER	1.00	5.00	REAM	5.00	Y	0.39	5.39
						Total:	0.00	1.000000	5.39
0002	PENS	PENS BLACK	1.00	10.00	BOX	10.00	Y	0.78	10.78
						Total:	0.00	1.000000	
						Total:	15.00	1.17	16.17

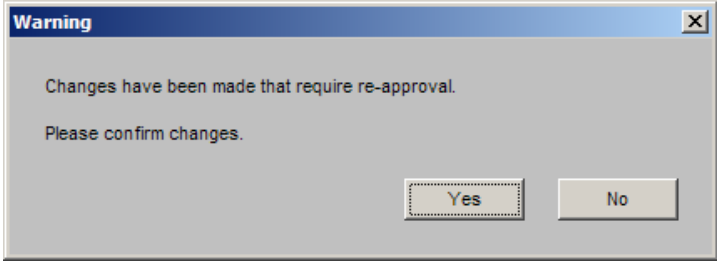
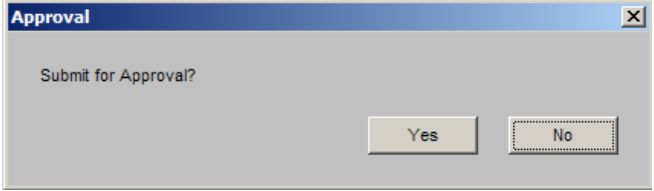
Depending on the Budget Check option chosen on the District Purchasing Options Screen, one of the following processes will go into effect.

**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><b>No Approvals</b></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><b>Step</b>        If any changes that were made require re-approval, a warning message will prompt asking the user to confirm changes.</p> <p>Click <b>Yes</b>.</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><b>Step</b>        “Submit for Approval?” warning message prompts</p> <p>Click <b>Yes</b>.</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>

Step

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

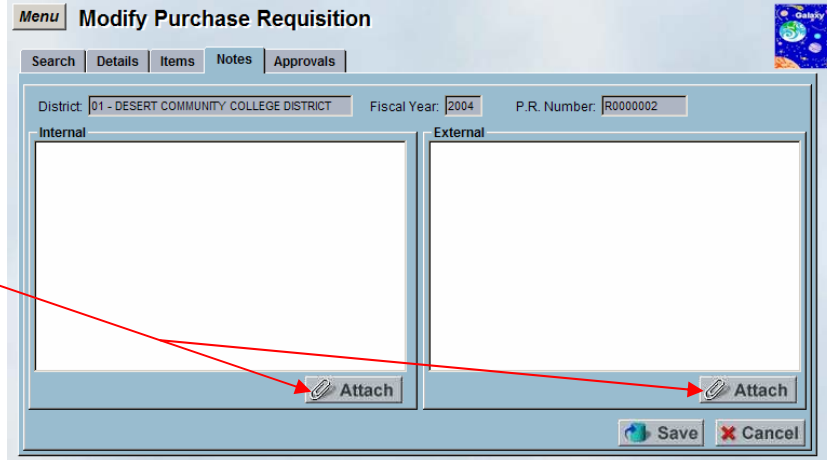
Click **Attach**.

Select from a previously defined note,

or

Manually enter Internal/External note(s).

Click **Save**



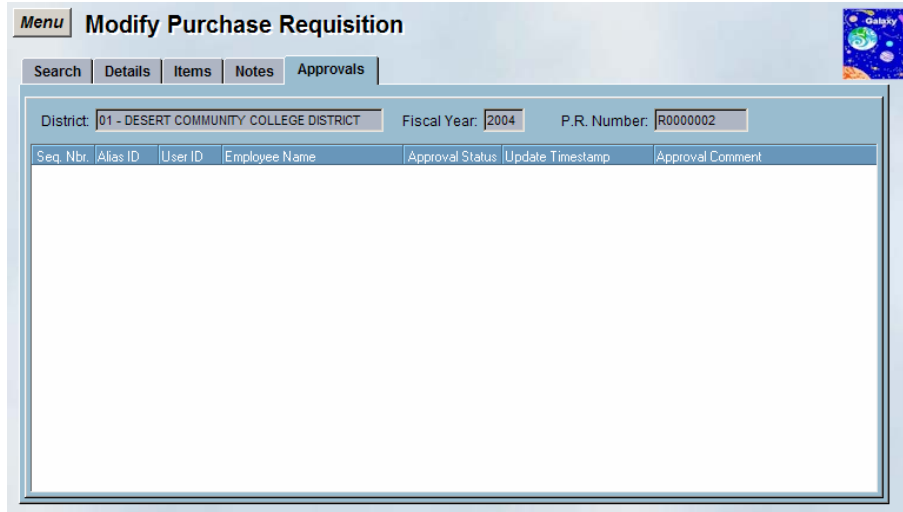
NOTES:

- 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

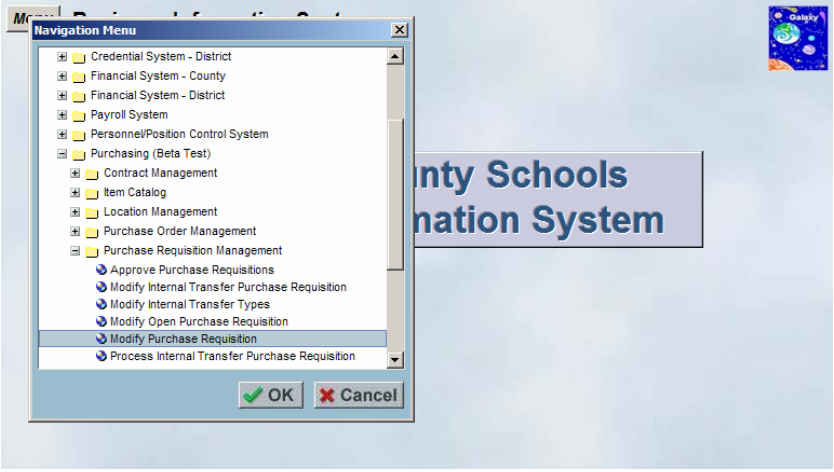
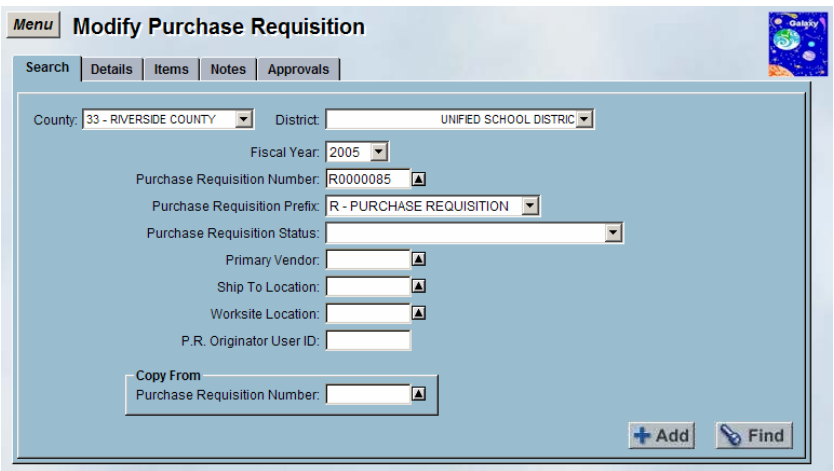
Click the Approvals tab to view approvals associated to this purchase requisition

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 <b>OK</b>.</p>	
<p>Step To edit an existing purchase requisition enter/select information as available.</p> <p>Click <b>Find</b></p>	



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

Step

Edit purchase requisition detail information if necessary.

Click **Items** tab

The screenshot shows the 'Modify Purchase Requisition' web application interface. The 'Details' tab is selected. The form contains the following fields and values:

- District: UNIFIED SCHOOL DISTRICT
- Fiscal Year: 2005
- P.R. Number: R0000085
- P.R. Type: N - NORMAL
- Date Due: 04/15/2005
- P.R. Status: S - SUBMITTED FOR APPROVAL
- Primary Vendor: 17430
- P.R. Amount: 16.17
- Category: OFFICE SUPPLY
- Vendor Address: STAPLES
- Bill To Location: BUSINESS SVC | Business Services
- Ship To Location: WAREHOUSE | Warehouse
- Worksite Location: 091 | RISK MANAGEMENT
- Board Rpt. Desc: (empty)
- Instructions: (empty)
- Misc. Field 2: (empty)
- In Rev: Y
- Rev Cmt: NUMBER OF LINE HAS BEEN CHANG

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

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 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.

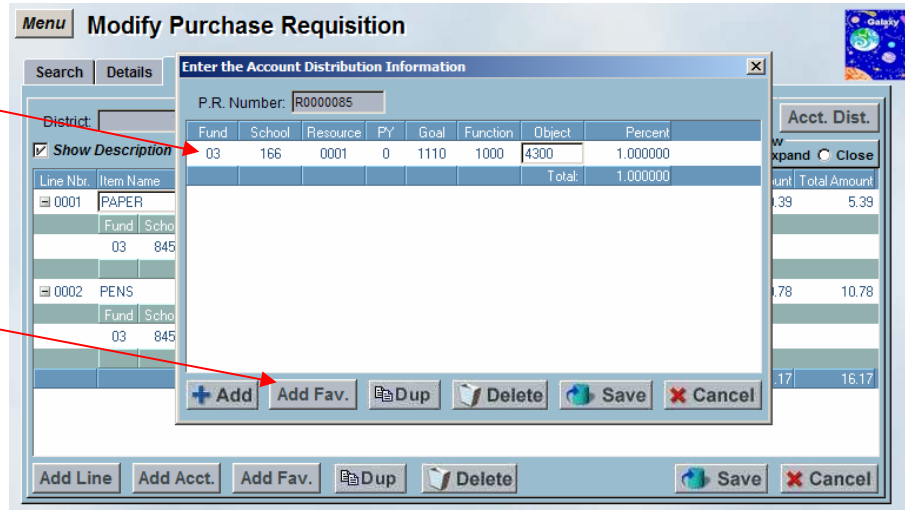
Click **Save**

**Required fields:**

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

**Optional field:**

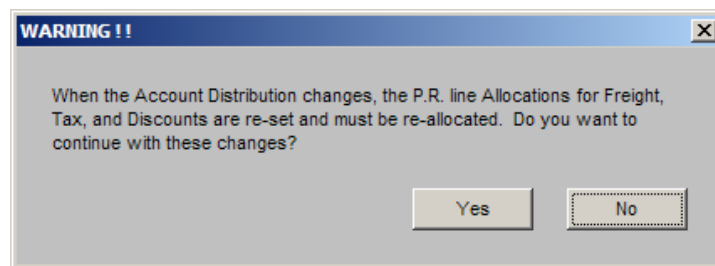
- Percent



**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**



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

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

**No Approvals**

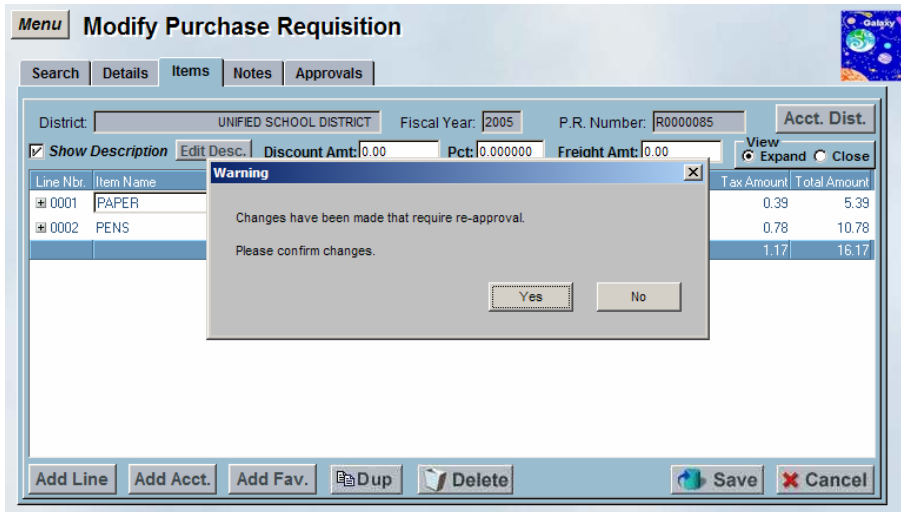
If no approvals are necessary (purchase requisition status will be set to “A” (approved)), the financial ledgers will be checked to determine if there are sufficient funds for all line item account strings. If there are sufficient funds, the account strings will be encumbered. If not, an error message 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)).

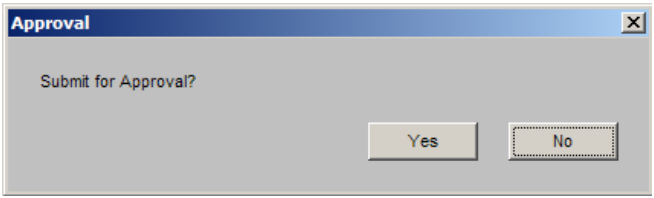
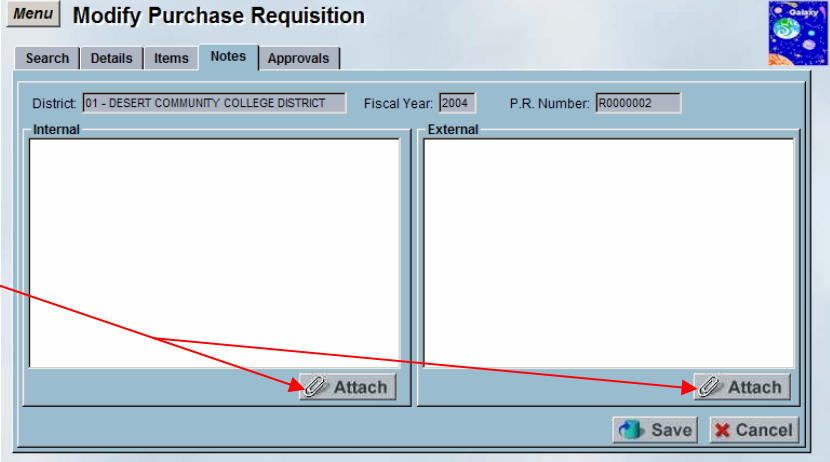
**Step**

If any changes that were made require re-approval, a warning message will prompt asking you to confirm changes.

Click **Yes**.



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 Modify an Existing Purchase Requisition – Reapply Account Distribution

<p>Step          “Submit for Approval?” warning message prompts</p> <p>Click <b>Yes</b>.</p>	
<p>Step          Click the Notes tab to modify the Internal/External note(s) for the purchase requisition</p> <p>Click <b>Attach</b>.</p> <p>Select from a previously defined note,</p> <p>or</p> <p>Manually enter Internal/External note(s).</p> <p>Click <b>Save</b></p>	 <p><b>NOTES:</b></p> <ul style="list-style-type: none"> <li>• External notes will print on purchase requisitions and purchase orders, internal notes will not.</li> <li>• 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.</li> </ul>

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

Step

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

No Changes can be made on this tab.

The screenshot displays the 'Modify Purchase Requisition' application window. At the top, there is a 'Menu' button and the title 'Modify Purchase Requisition'. Below the title, there are several tabs: 'Search', 'Details', 'Items', 'Notes', and 'Approvals'. The 'Approvals' tab is currently selected. The main content area shows a search filter with 'District: 01 - DESERT COMMUNITY COLLEGE DISTRICT', 'Fiscal Year: 2004', and 'P.R. Number: R0000002'. Below the search filter is a table with the following columns: 'Seq. Nbr.', 'Alias ID', 'User ID', 'Employee Name', 'Approval Status', 'Update Timestamp', and 'Approval Comment'. The table is currently empty.



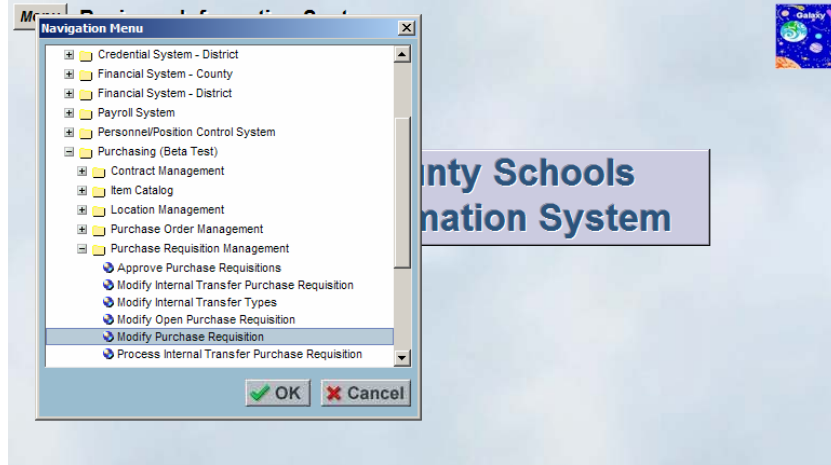
### Delete a Purchase Requisition

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

#### Step 1

From menu select  
Modify Purchase  
Requisition

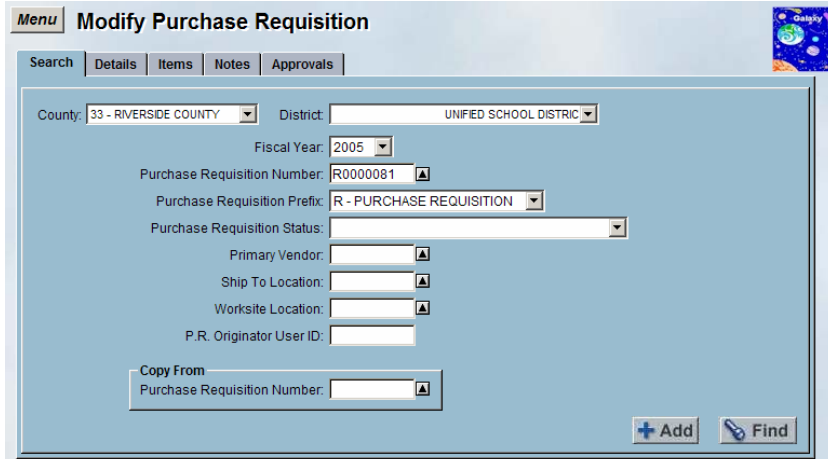
Click **OK**.

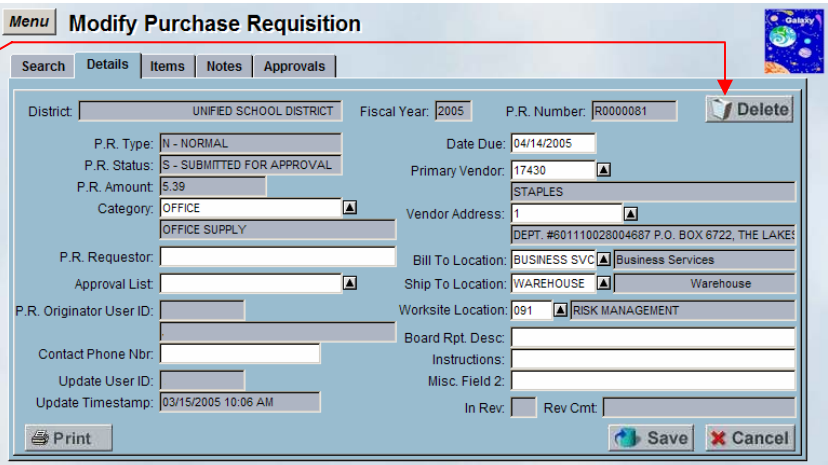
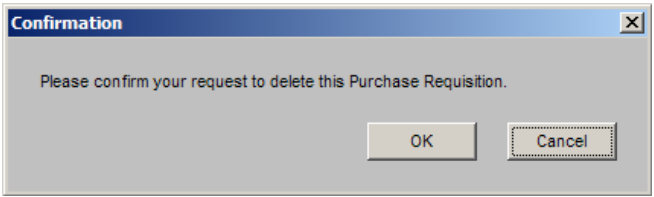
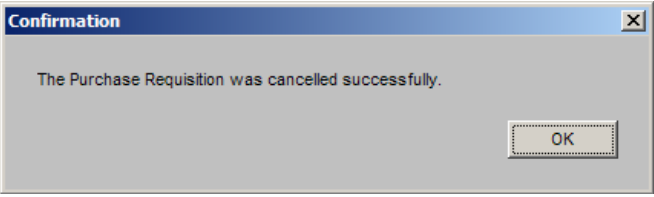


#### Step

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

Click **Find**

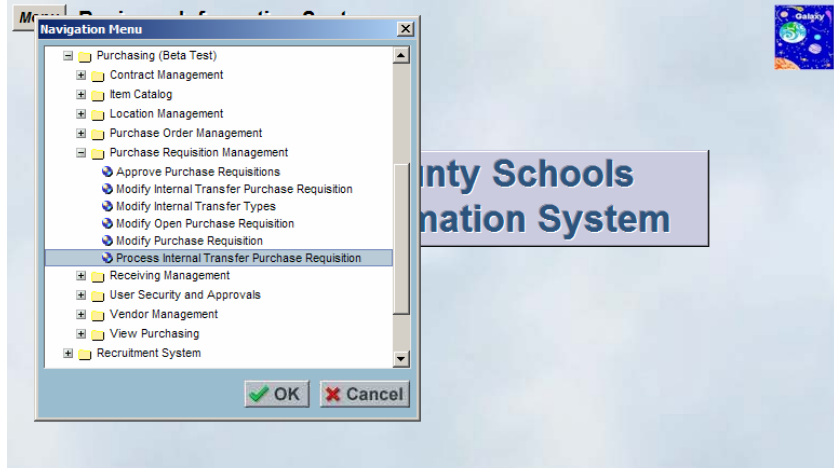


<p>Step To delete the purchase requisition</p> <p>Click <b>Delete</b>.</p>	 <p><b>NOTE:</b> This will cancel the purchase requisition set the purchase requisition status to “C”, cancelled to prevent any further processing of this purchase requisition.</p>
<p>Step Confirmation message prompts to confirm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

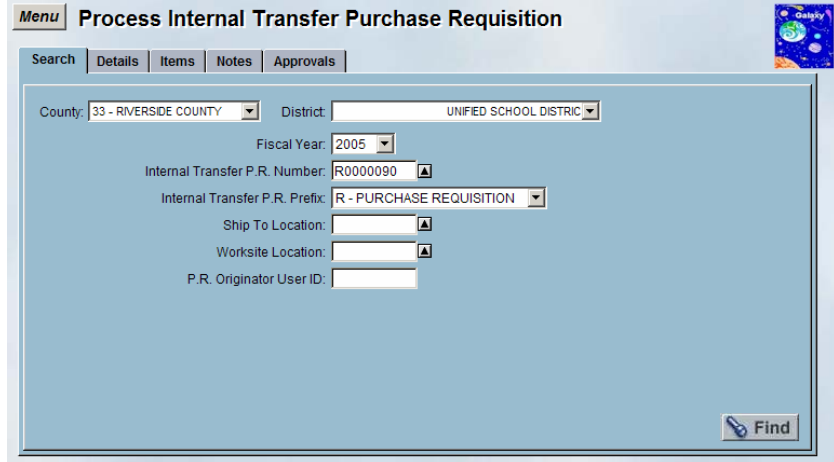
**Process Internal Transfer Purchase Requisition**

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.

Step 1  
From menu select  
Process Internal  
Transfer Purchase  
Requisition  
  
Click **OK**.



Step  
To process an  
existing internal  
transfer purchase  
requisition  
enter/select  
information as  
available.  
  
Click **Find**



**NOTE:** Internal Transfer Purchase Requisitions that have not received final approval, or that have already been processed, may not be modified.

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Process Internal Transfer Purchase Requisition

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 reinitiate 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/M	Amount																																		
0001	PAPER	COLOR COPY PAPER	1.00	5.00	REAM	5.00																																		
<table border="1"> <thead> <tr> <th>Fund</th> <th>School</th> <th>Resource</th> <th>PY</th> <th>Goal</th> <th>Function</th> <th>Object</th> <th>Amount</th> <th>Percent</th> <th>Acct. Amount</th> <th>Revised Amt.</th> </tr> </thead> <tbody> <tr> <td>03</td> <td>845</td> <td>0000</td> <td>0</td> <td>0000</td> <td>8200</td> <td>5856</td> <td>0.00</td> <td>1.000000</td> <td>5.00</td> <td>5.00</td> </tr> <tr> <td colspan="7">Total:</td> <td>0.00</td> <td>1.000000</td> <td>5.00</td> <td></td> <td></td> </tr> </tbody> </table>							Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Revised Amt.	03	845	0000	0	0000	8200	5856	0.00	1.000000	5.00	5.00	Total:							0.00	1.000000	5.00		
Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount	Revised Amt.																														
03	845	0000	0	0000	8200	5856	0.00	1.000000	5.00	5.00																														
Total:							0.00	1.000000	5.00																															
Total:						5.00																																		

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

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.

Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount
0001	PAPER	COLOR COPY PAPER	1.00	5.00	REAM	5.00
						Total: 5.00

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.

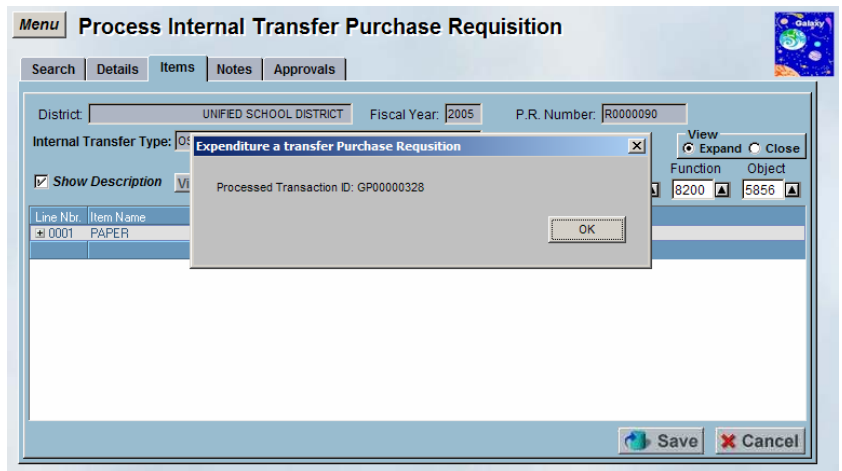
**No Approvals**

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**  
 The Internal Transfer Purchase Requisition is processed and assigned a Processed Transaction ID number.

Click **Ok**



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

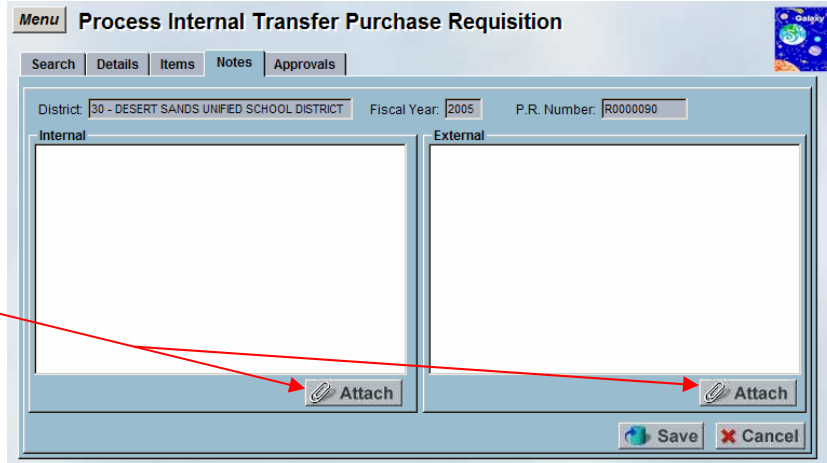
Click **Attach**.

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.

