

## Open PR Example (Maintenance Services)

1. Select Entering Purchasing Requisitions – POUPPR
2. Make sure you are in Add Mode
3. Select vendor
  - a. You can type the vendor # if you know it
  - b. You can look up the vendor using the blue ellipsis (three dot button)
  - c. You can look up using the keyboard (CTRL + L)
- NOTE: \* is the wildcard**  
Example: \*south\* shows all results that have “south” somewhere in the name (beginning, middle or end)  
South\* shows results that have “south” at the beginning of the name only
4. Select the vendor by double clicking on the name or highlighting the option you want and clicking “OK”
5. Click the Ship tab to verify that the site shows the site where the work will be performed or commissioned (eg M&O)
6. Click the Dates tab if there is a specific date that you need the order by (eg must have by 08/01, etc)
7. In the Items tab, select the appropriate account code
  - a. You can type the account code if you know it
  - b. You can look up the account number using the blue ellipsis (three dot button)
  - c. You can look up using the keyboard (CTRL + M)
8. Select the account code you want to use by double clicking on the line or highlighting and pressing enter
9. If you want to split the account codes, use the pie icon
  - a. You can split by amount or percentage
- Note: the system does the math for you so it will always equal the full amount or 100%!**
10. Item Number: This should be sequential – 1, 2, 3, 4, 5, etc
11. Quantity: LOT
12. Units: LT
13. Description: Open Purchase Order for \_\_\_\_\_ (eg HVAC repair services, bus lift repairs, landscaping services, etc)
14. Unit Price: Total Open PO amount
15. Tax Code: Change to “<none>” (the default is the current tax rate – 7.75%)
16. Under the Notes tab, you must include the following information:
  - a. **PR Notes** (Internal messages to CUSD staff that do not show on the PO)
    - i. Funding Source (general fund, deferred maintenance, Prop 39, etc)
  - b. **Print Before** (instructions that show on the PO before the item description)
  - c. **Print After** (instructions that show on the PO after the item description) - **MANDATORY**
    - i. Term: dates of open PO (eg 07/01/2017 – 06/30/2018, 07/01/2017 – 12/31/2017, etc)
    - ii. Authorized personnel: list all CUSD individuals permitted to commission work

### \*\*\*\*Attachments - **MANDATORY**

- Fee schedule for the entire term

After you have entered all the information, you must save your PR by pressing “enter” on the keyboard when in the Items tab to get the “Record Accepted” message. Then submit through workflow to send to the next level approver.