PATERSON PUBLIC SCHOOLS
Preparing All Children for College and Career

Edu-Met Requisition
Training Manual

Purchasing Process

REQUISITION: Item necessary to initiate the procurement of *all* goods and services

PURCHASE ORDER: The result of an approved requisition, the official document/contract with the vendor needed to purchase goods and services.

RECEIVING: The official acknowledgement that goods and/or services were received and payment can be released.

UNAUTHORIZED/CONFIRMING ORDERS: Commitments made without an <u>approved</u> purchase order, via the telephone or in person lack the required approvals and certification of availability of funds. Therefore, a transaction without an approved purchase order excludes the District of any payment responsibility. Furthermore, changes to an issued purchase order without written approval shall void the purchase order and shall subject District employee to the same penalties for unauthorized purchases.

Any Paterson Public Schools employee who orders and receives goods and/or services without going through the proper purchase order process may be held responsible for payment of the order.

Unauthorized purchases are a violation of State Law and District Policy.

Penalties listed on the next slide shall be assigned by the Superintendent of Schools for unauthorized purchases:

List of Offenses

First Offense	Letter in Personnel File	Pay for Purchase
Second Offense	Suspension	Pay for Purchase
Third Offense	Loss of Increment	Pay for Purchase
Fourth Offense	Loss of Employment Tenure Charges	Pay for Purchase

Double click the Edu-Met icon located on your desktop to launch the Edu-met application.
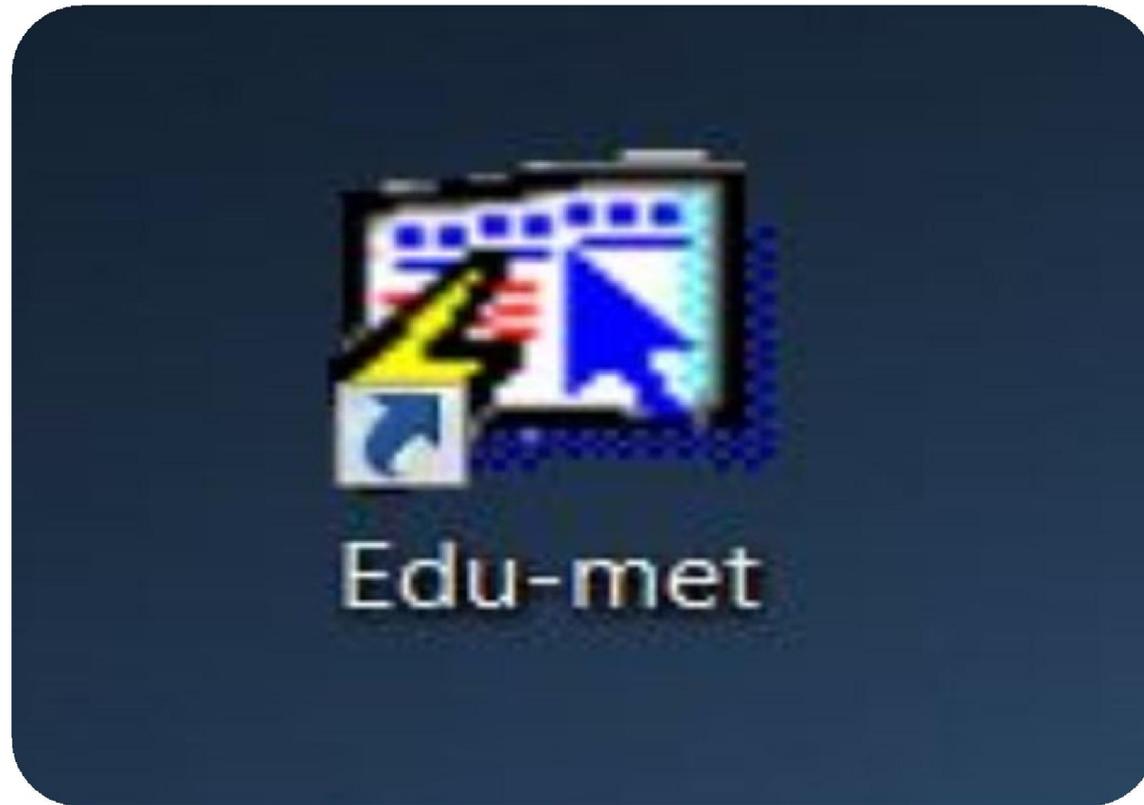
Use your assigned Edu-Met Login Information

Logon

Username: [   ]

Password: [   ]

Database: [   ]

[Connect]   [Cancel]
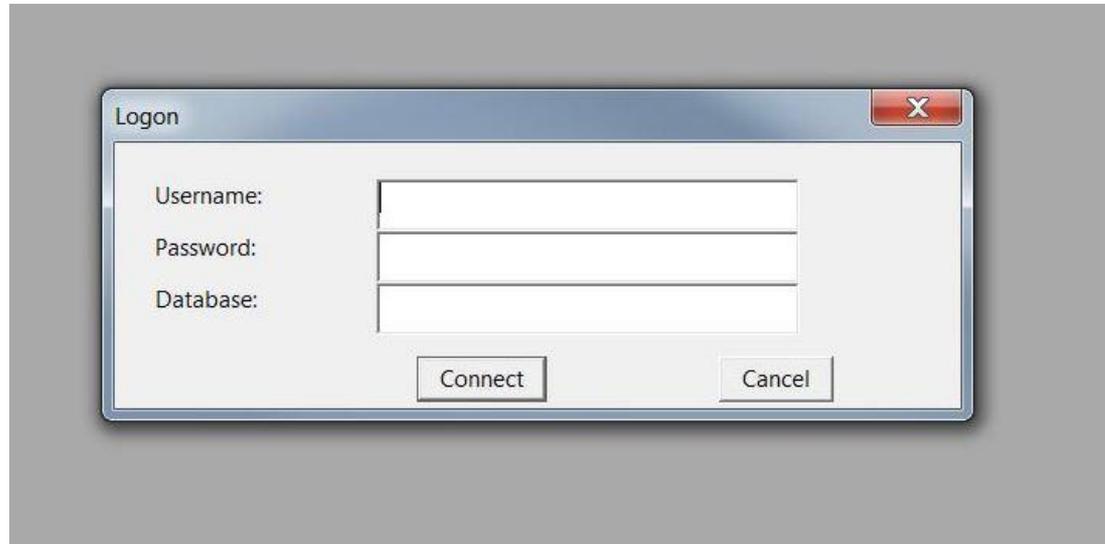
New Employees will need to submit a security clearance form from the link below. http://www.paterson.k12.nj.us/11_departments/technology/forms/pdf/Alio-Edumet-Security-Clearance.pdf and email the form to the Helpdesk@paterson.k12.nj.us so it may by approved. When the form is approved the account will be created and the user credentials will be emailed to their district email address.

If you already have your Edu-Met login credentials but will need a password reset, account access or have any Edu-Met support question, email avictoria@paterson.k12.nj.us and celewis@paterson.k12.nj.us

Single click on the Accounting button

PATERSON PUBLIC SCHOOLS MASTER MENU - [MASTER]

Window

MAIN MENU

HUMAN RESOURCE

PAYROLL

ACCOUNTING

SCHOOL RECORD KEEPING

CALLER TRACKING / WORK ORDER

FIXED ASSETS INVENTORY

| Controller | Manager | Change Password | Enhancements | Log Off System |
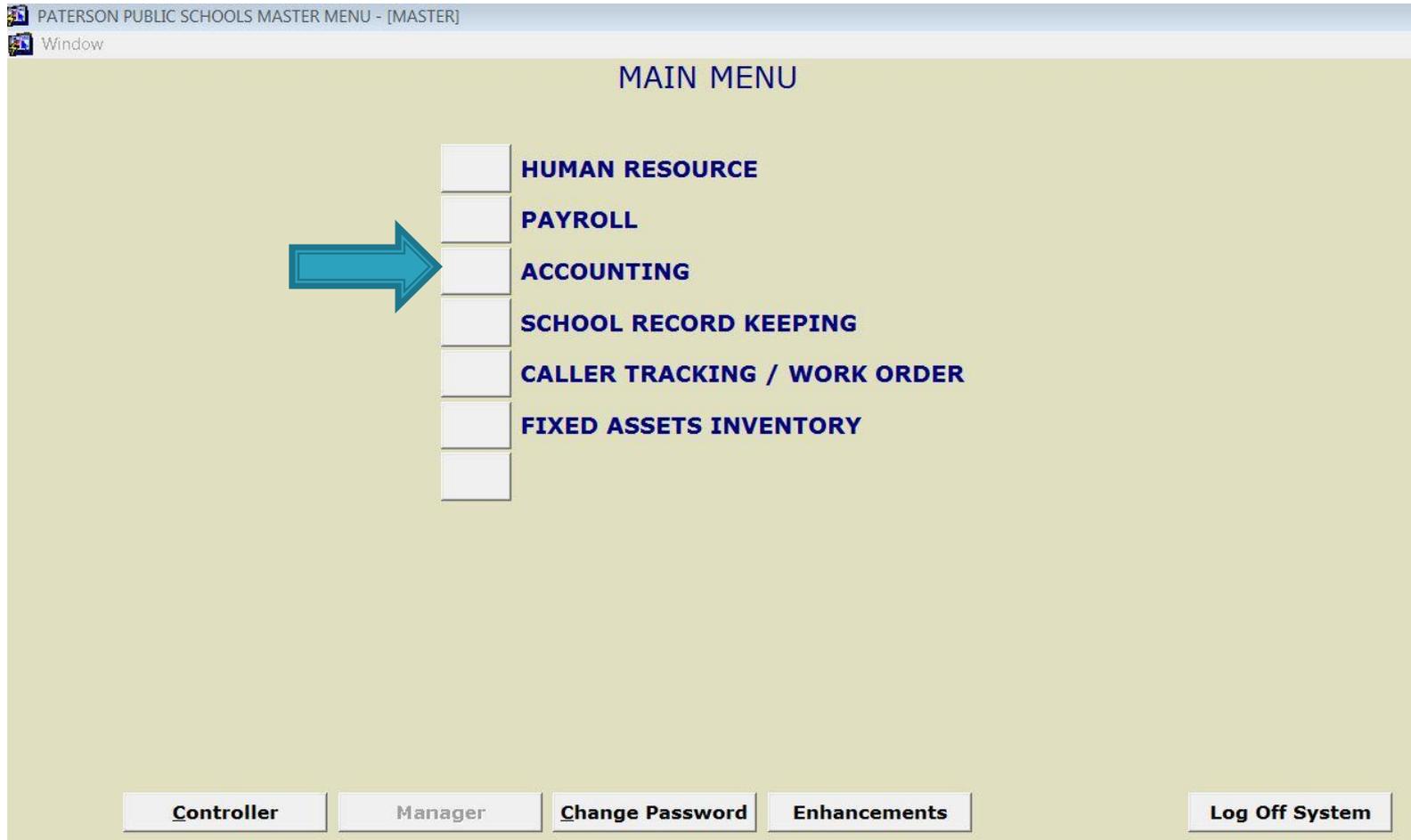
Verify that the year to access is the current fiscal year. If you need to enter a different fiscal year , click on the drop down arrow select the year then click on OK
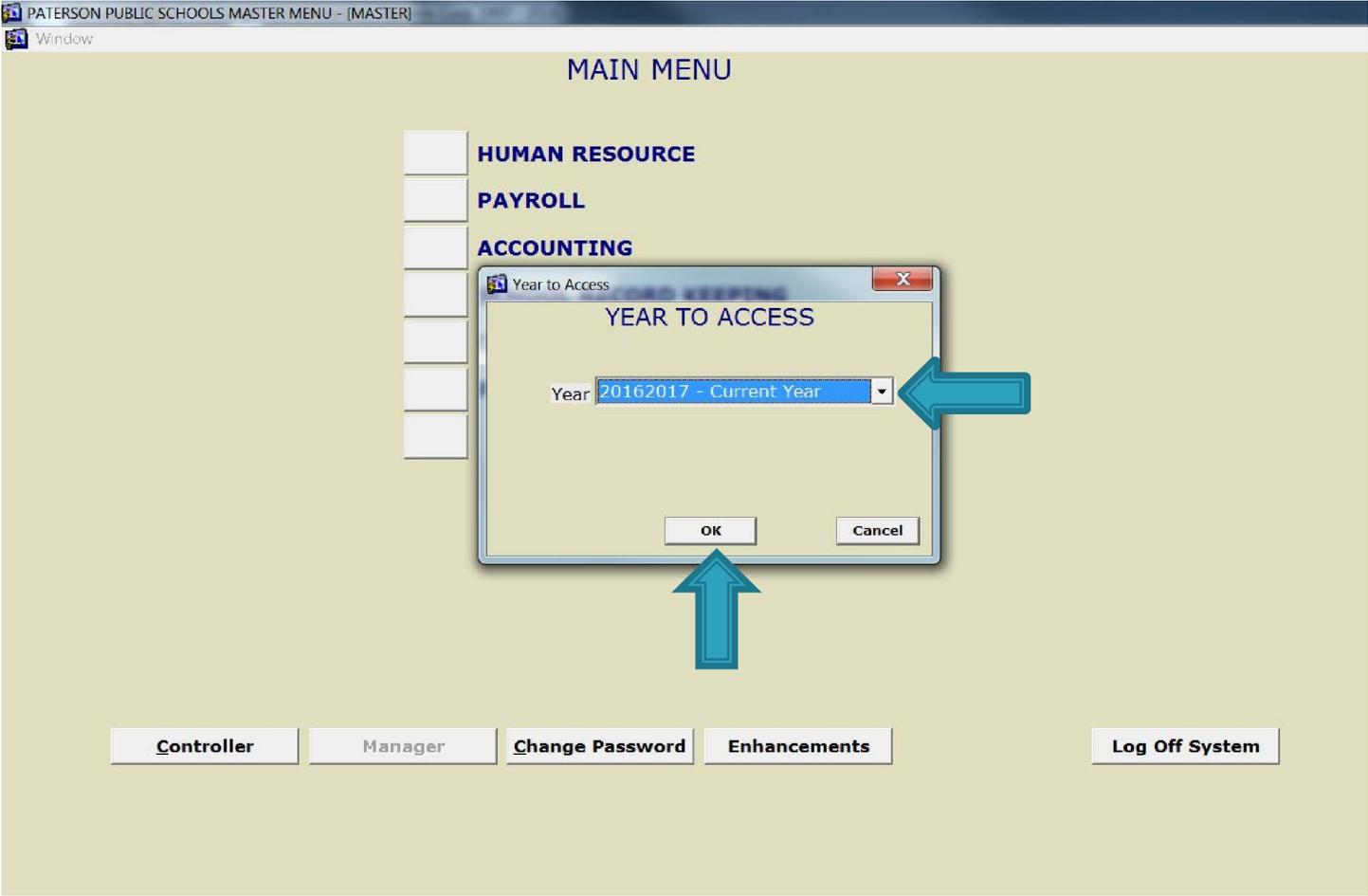
Single click on the Database button
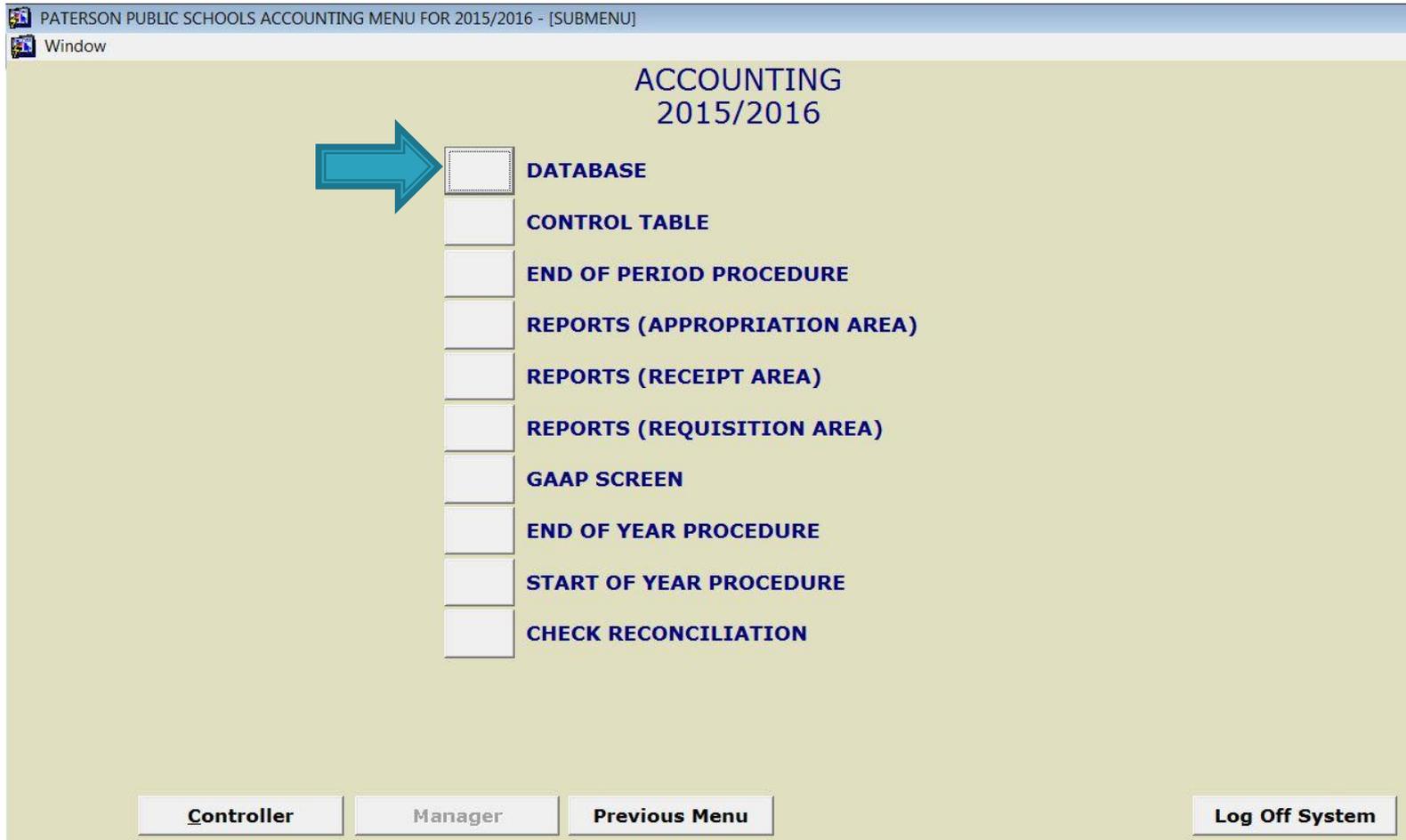
Single click on the Requisitions button

PATERSON PUBLIC SCHOOLS   MAIN MENU - [BUD000]

Today's Date   Apr-15-2016

Working Date   APR-15-2016   Login Year: **20152016**   Checking Account 1 -   v   User Notes   ?

Accounts

Vendors

Purchase Orders

Receipts

Requisitions

Online Check Print

GAAP Closing

General Journal

View Journals and Ledgers

Budget Build

Request for Appropriation Transfe

Remote Payment Entry

Invoice Billing

Control File

Exit

Requisition

1.Start by clicking on the Add button, to generate a REQ number.

Now you can start to enter the body of the requisition.

2.Once the Information has been populated proceed to click on the VENDOR INFO button

Vendor Information

On this screen select the Vendor and Ship to information

Proceed by Clicking on the BID info tab

PATERSON PUBLIC SCHOOLS   REQUISTION - [BUD011]

| Vendor Info | Bid Info | Disbursement | Quotes | Approval Steps | Contracts | Purchase Order | Notes |

VENDOR INFORMATION

Req #   6

Vendor

Attention

Vendor #

Vendor Name

Address 1

Address 2

Address 3

Zip Code

Business Certificate Required

Certificate Number

Phone #   Ext.

Find By Vendor
Vendor Number

Find the vendor by name or number

Ship To Location

Attention

Ship To Location

Location Name

Address 1

Address 2

Address 3

Zip Code

Clear Ship To

Find By Ship To Location
Location Number

Select your location by number

Return

BID Information

In this section, Include the BID or state contract number, if there is one, as supplied by the Purchasing Department

If no bid or state contract number has been supplied by the Purchasing Department, fill in quotes under the "Quotes" tab or the bid exception under the "Contracts" tab.

PATERSON PUBLIC SCHOOLS   REQUISTION - [BUD011]

| Vendor Info | Bid Info | Disbursement | Quotes | Approval Steps | Contracts | Purchase Order | Notes |

BID INFORMATION

Req #   6

Add Bid From Control   Bid ID

Bid Date

Bid Name

Bid Detail

Bid Override

State Contract

Other Contract

User 1

User 2

User 3

User 4

User 5

User 6

User 7

Add Bid   **Delete**   Return

Account allocation

This section will allow you to select the account where the money will be pulled from.

Start by clicking on the add account button

A window will appear and this is where you will search for the account

Quotes

This section is used to enter any quotes you might have received to help select the best vendor for your product

A **minimum of three (3) quotes** should be solicited.

Approval Steps

This section will show the approval chain that will be taken in order to have the Requisition # processed and approved.

During each step as it flows through it will auto populate the approval , approval date .

This will enable you to determine which step your Requisition is located

Contracts: Use this screen for bid exception purchases

Bid exceptions are items that are not required by law to be advertised for bid. ie. "Library/educational goods and services"

Contact the Department of Purchasing, ext. 10726 with any questions pertaining to bid exceptions.

Notes: is used to provide Justification for the requested materials

If a Requisition is denied, the staff member will receive an email indicating the reason for cancellation.

If any requisition is cancelled it can be copied, corrected and resubmitted.

PATERSON PUBLIC SCHOOLS REQUISTION - [BUD011]

| Vendor Info | Bid Info | Disbursement | Quotes | Approval Steps | Contracts | Purchase Order | Notes |

NOTES

Req #   6

Notes

Reason For Canceling Requisition

Return

Finalizing a Requisition

Click on the "Approve" button to move the Req forward.

Purchase Order

The system will generate a Req# and upon final approval a PO number will be generated.

Additional data entry of Purchase Order description will have to be entered by the user ,the system will not generate one.

PATERSON PUBLIC SCHOOLS   REQUISTION - [BUD011]

| Vendor Info | Bid Info | Disbursement | Quotes | Approval Steps | Contracts | Purchase Order | Notes |

PURCHASE ORDER

Req #   6

PO #

PO Description

Return

Receiving a purchase order

Open the requisition in question and click in the received field.

Today's Date   Aug-02-2016   REQUISITION   Checking

Working Date   AUG-02-2016   Login Year: **20162017** **List of Requisition Rep**

Req # 4	Date Created JUL-01-2016			Requested By LAGAINES	
Actual Date MAY-05-2016	Department	V	Batch LAGAINES		
PAGE 1 OF 1					
Quantity	Description	Unit Cost	Total Amount	Received	V
3 PACK OF BLUE PENCILS		$1.250	$3.75		
					IN
					V

If a full order was received, click the "Full order received" button on the bottom.

Click the Add button on the bottom to place the form in edit mode.

Begin to enter the required fields (Received , Date, Quantity)

Drop the menu on Received by and select the person receiving the item

The Notes field is used to enter a brief description of that is being received

Discussion