

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

Username:			
Password:			
Database:			
	Connect	Cancel	

New Employees will need to submit a security clearance form from the link below. <u>http://www.paterson.k12.nj.us/11_departments/technology/forms/pdf/Alio-Edumet-Security-</u> <u>Clearance.pdf</u> and email the form to the <u>Helpdesk@paterson.k12.nj.us</u> 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 <u>avictoria@paterson.k12.nj.us</u> and <u>celewis@paterson.k12.nj.us</u>

Single click on the Accounting button



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

PATERSON PUBLIC SCHOOLS MASTER MENU - [MASTER]	1000	
Window		
	MAIN MENU	
	HUMAN RESOURCE	
	PAYROLL	
	ACCOUNTING	
	Vear to Access	
	YEAR TO ACCESS	
	Year 20162017 - Current Year	
	OK Cancel	
<u>C</u> ontroller Manager	Change Password Enhancements	Log Off System

Single click on the Database button



Single click on the Requisitions button

Today's Date Apr-15-2016 Working Date APR-15-2016	ogin Year: 20152016 Checking	J 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

PATERSON PUBLIC S	CHOOLS REQUISTION - [BUD011]				
Today's Date Apr	-15-2016	REQUIS	ITION	Check	ing Account 1v
Working Date AF	PR-15-2016	Login Year: 2015	2016 List of	Requisition	Reports User Notes ?
Reg # 6	Date Created APR-15-2016		Requested By	AVICTORIA	Adjus
	Actual Date APR-15-2016	Department	V Batch	AVICTORIA	
PAGE 1 OF 1		Department	Duten	1	
Quantity	Description	Unit Cost	Total Amount	Received	Vendor Info
		\$30.000	\$30.00		Vendor Name
3 IESI3		\$10.000	\$30.00		
					Required Method
				<u> </u>	V Delete Go
					PO 60
					Dich Acets \$ 00
					Notes
					Notes
					Approval Steps
					Waiting On AVICTORIA
					Approve PENDING
					Send Back Approve All Pending Req
					Print Req Draft Print PO No
			 		CREATE PDF
1					
Tiund Accord		Page Total	\$00.00		
Pixeu Assets		Red Total	\$00.00	Find ByRe	eq Number
Requisition Previou	us Next Add Cancel Cop	y Page Add Delet	e Previous Next	Image D	Display Scan Audit Exit

Vendor Information

	PATERSON PUBLIC SCHOOLS REQUISTION - [BUD011]	
	Vendor Info Bid Info Disbursement Quotes Approva	Il Steps Contracts Purchase Order Notes
	VEN	DOR INFORMATION ?
On this	Req # 6	
screen select	Vendor	Ship To Location
the Vendor	Attention	Attention Shin To Location
and Ship to	Vendor Name	
information	Address 1	Address 1
	Address 2	Address 2
Proceed by	Address 3	Address 3
Clicking on		Zip Code
the BID info	Certificate Number	Clear Ship To
tab	Phone # Fyt	
	Find By Vendor	Find By Ship To Location
	Eind the wonder by name or number	Select your location by number
	Find the vendor by name of nomber	
		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	CSCHOOLS REQUISTION - [BU	D011]					
Vendor Info	Bid Info Disbursement	Quotes	Approval Steps	Contracts	Purchase Order	Notes	
			BID INF	ORMATI	ON		2
		Req #	6				
	Add Bid From Control						
	Add Did TTolli Colletor	Bid Date					
	В	id Name					
	B	id Detail					
	Bid	Override					
	State	Contract					
	Other	Contract					
		User 1					
		User 2					
		User 3					
		User 4					
		User 5					
		User 6					
		User 7 j					
			Add Bid	Delete			Return

Account allocation

This section will allow you to select the account where the money will be pulled from. 63 62

Start by clicking on the add account button

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

PATERSON PUB	BLIC SCHOOLS REQUISTION - [BUD	011]						
3								
Vendor Info	Bid Info Disbursement	Quotes Approv	al Steps Con	tracts Pur	chase Order	Notes		
		Г	DISBURSE	MENT				-
Req #	6 was added under	Checking Account	1					<u> </u>
	Account		Descriptio	n	Amo	ount		
<u> </u>						\$.00	Budget Requests	
							Budget Requests	
							Budget Requests	
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							Budget Requests	
							Budget Requests	
							Budget Requests	
-							Budget Requests	
							Total Req. Cost	
				Total Disb		\$.00	\$60.00	
				Remaining		\$60.00		
			dd Account	Delete				Return

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.

q # Ad ▲ No.	6			QU					
q # Ad No.									
Ad No.									
No.	a by venc	lor #	Vendor	Name	Quote Am	ount	Notes		
and the second se	Name					\$.00		Address	
No.	Name							Address	
No.	Name							Address	
No.	Name							Address	
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No.	Name							Address	1
No.	Name							Address]
No.	Name							Address	1
No.	Name							Address	1
v No.	Name							Address]
						Prin	t Quote No	•	

Approval Steps

Informational purposes only

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

dor Info	р Віс	I Info Disbursemen	t Quotes	Approval Steps APPRO	VAL STE	Purchase Orde	r Notes		
Req #	Sten	Bequest Approva	i.	Approval	Approval	Date Creat	PO ion Date	Notes	
	1	AVICTORIA			, approval			Hoteo	
	2	CELEWIS					(
	3						ĺ		
	4	KSUMTER							
	5								
	6								
	7	NWILLIAMS							
	8	DAYALA							
-									

Delete

Return

Contracts: Use this screen for bid exception purchases

Ę	PATERSON PUE	LIC SCHOOLS	REQUISTION - [BUD	011]									
	Vendor Info	Bid Info	Disbursement	Quotes	Approva	Steps	Contract	s Purcha	se Order	Notes			
		Did Inio	Diobarocinicite	quoteo	hpprora	CONT	RACT	S		inoteo			2
	Reg #	6											
Bid exceptions are items that		Contract #	De	scription		Start D	ate E	End Date		[Notes		
are not reauired by													
law to be advertised for													
bid.ie. "Library/educa						1/							
tional goods and services"													
	v												
	e				Ad	ld Contract	De	elete				Ret	urn

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

Notes: is used to provide Justification for the requested materials



Finalizing a Requisition

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

DATERSON	PUBLIC SCI	HOOLS REQ	UISTION - [BUD01	1]									
Today's Dat	te Apr-	15-2016				F	REQU	JIS	ITION	Che	cking Account	1 -		v
Working Da	ate API	R-15-201	16			Login Y	'ear: 2	015	2016 List of	Requisition	n Reports		User N	Notes ?
Req # 6	C	ate Creat	ed APR-1	15-20	16				Requested By	AVICTORIA	.			Adjust
		Actual Da	te APR-1	15-20	16 C)epartmei	nt		V Batch	AVICTORIA		Con	firm No	•
PAGE 1 OF	1	D	escriptio	n			Unit C	oet	Total Amount	Received	-	1		
1 TES	ST1		escriptio				\$30	.000	\$30.00		Vendor Info		379255	2
3 TE	ST3						\$10	.000	\$30.00		V I I I I I I I I I I I I I I I I I I I	endor	Name	
						î		ŕ			Regui	red Me	ethod	
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											PO			Go
											Disb. Accts			\$.00
											Notes			
											Approval S	teps		
											Waitin	g On 🖡	VICTORI	4
							5				Approve	F	PENDING	
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												art <u>·</u>		
						/		ŕ			CREATE P	DF		
, ,						Pa	ge Total		\$60.00					
Fixed Asse	ts					F	Req Total		\$60.00	Find By	Req Number			•
Requisition	Previou	5 Next	Add Car	ncel	Сору	Page	Add	Delete	Previous Next	Image	Display Scan		Audit	Exit

Purchase Order

Informational	A ANTERCOM RUDUE COMPANY AND
purpose only:	A PATERSON PUBLIC SCHOOLS REQUISITION - [BUD011]
·	Vendor Info Bid Info Disbursement Quotes Approval Steps Contracts Purchase Order Notes
The system will generate a Req# and upon final approval a PO number will be generated.	PURCHASE ORDER
Additional data entry of Purchase Order description will have to be entered by the user ,the system will not generate one.	Return

Receiving a purchase order

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

Today's Date Working Dat	Aug-02-2016 AUG-02-2016	-	Login Yea	=QUIS ar: 2016 :		Cheo Cheo Cheo	:king Rep
Req #4	Date Created	JUL-01-2016			Requested By	LAGAINES	
PAGE 1 OF 1	Actual Date	MAY-05-2016	Department		V Batch	LAGAINES	
Quantity	Des	cription		Unit Cost	Total Amount	Received	5
3 PAC	K OF BLUE PENCILS			\$1.250	\$3.75		
							<u>\</u>

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

		REC	CEIVED I	INFO		
Req #	Quantity	/		Description		
Received		Date	Quantity	Received By		Notes
PARTIAL	-				V	De
	-				V	De
	-				V	De
[Y				V	De
	-				V	De
	-				V	De
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			,	,		
		Add	Full	Order Received	1	Return

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

Received Info					X			
RECEIVED INFO								
Req #	Quantity		Description					
Received	Date	Quantity	Received By	Note	20			
PARTIAL	•	Quantity		V	Del			
		<u> </u>		V	Del			
	*			Y	Del			
	*			Y	Del			
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	<u> </u>			Ÿ	Del			
	<u></u>	<u> </u>		Y	Del			
	*	<u> </u>		Y	Del			
	<u> </u>			Y	Del			
	<u> </u>	<u> </u>		V	Del			
1	<u></u>	ļ		Y	Del			
	Add	Full	Order Receive	a 🔤	Return			
		10						

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

Received Info	-	-		Requested by	Laine	100	×	
RECEIVED INFO								
Req #	Quantity	Quantity Description						
11]						
Received		Date	Quantity	Received By		Notes		
PARTIAL	•	butto	Quartery	Incontra by	v	Hotes	Del	
FULL					V		Del	
PARTIAL					V		Del	
DISCONTINUED					V		Del	
OUT OF STOCK					V		Del	
-					V		Del	
	-				V		Del	
	-				V		Del	
	-				V		Del	
	-				V		Del	
					V		Del	
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				00 (d)				
		Add	Eull	Order Receiver		Pat	turn	
		Auu		STUEL KELEIVEL		Ke		

Discussion

