SAN MATEO COUNTY OFFICE OF EDUCATION
CECC Financial System

Entering Purchasing 2000 Requisitions

This documentation provides an overview of the steps to enter a Purchasing 2000 requisition. More detailed information is available in the Financial 2000 Purchasing/Stores manual. This manual is posted on the CECC Information page of the San Mateo County Office of Education website:

http://www.smcoe.k12.ca.us

To access the CECC Information page, call 650-802-5516 for the login information.

This document lists the steps to enter a new Purchasing 2000 requisition and should be used in conjunction with the Financial 2000 Purchasing/Stores manual. To go directly to a complete explanation of any of the steps, hold down the [CTRL] key and click on the desired step.

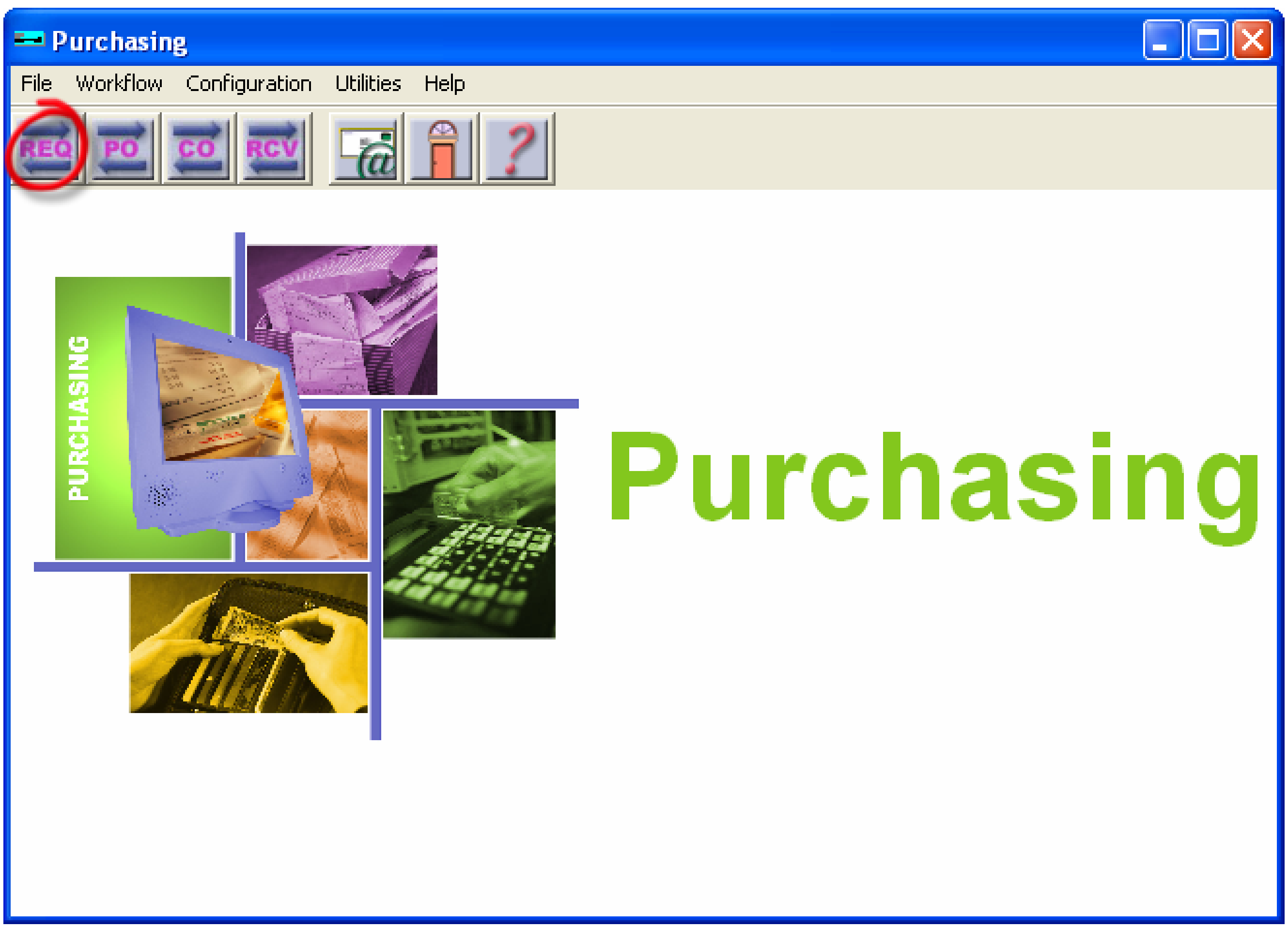
1. Accessing Purchasing 2000

- To launch Financial 2000, click on the **Financial 2000** icon.

- To access Purchasing 2000, click on the **Purchasing** icon in Financial 2000.

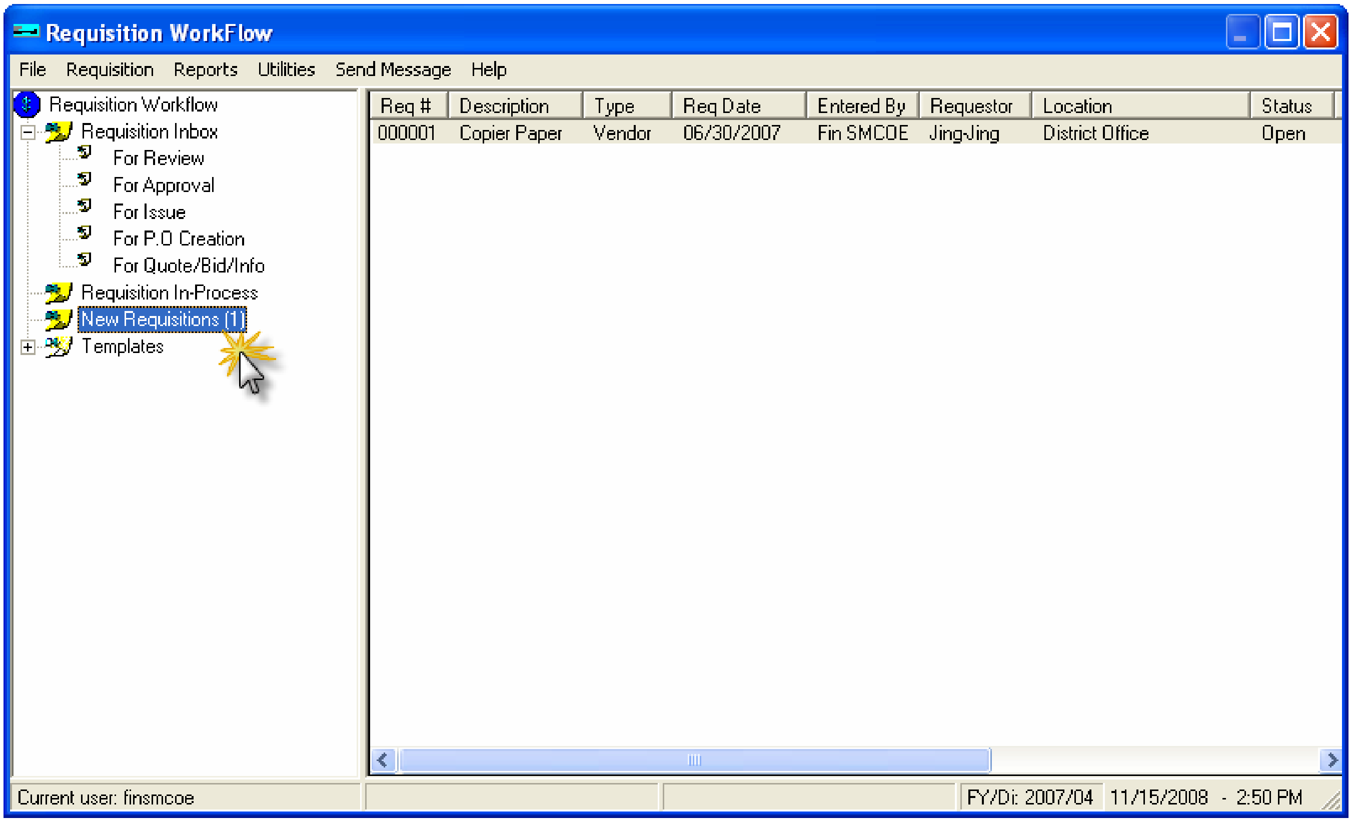
2. Accessing the Requisition Workflow

- To access the Requisition workflow, click on the **[REQ]** icon.

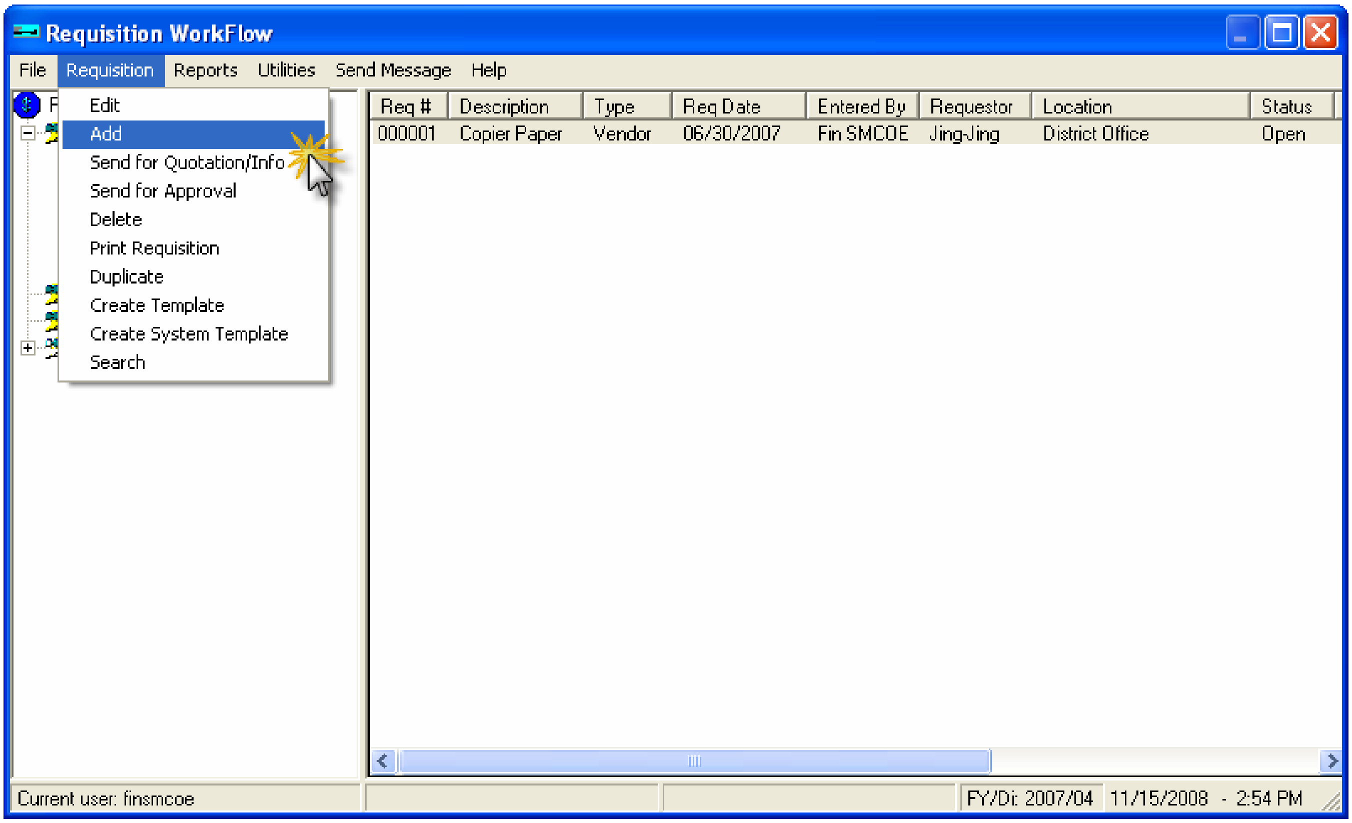


3. Adding a New Requisition

- Click on the **New Requisitions** workflow.



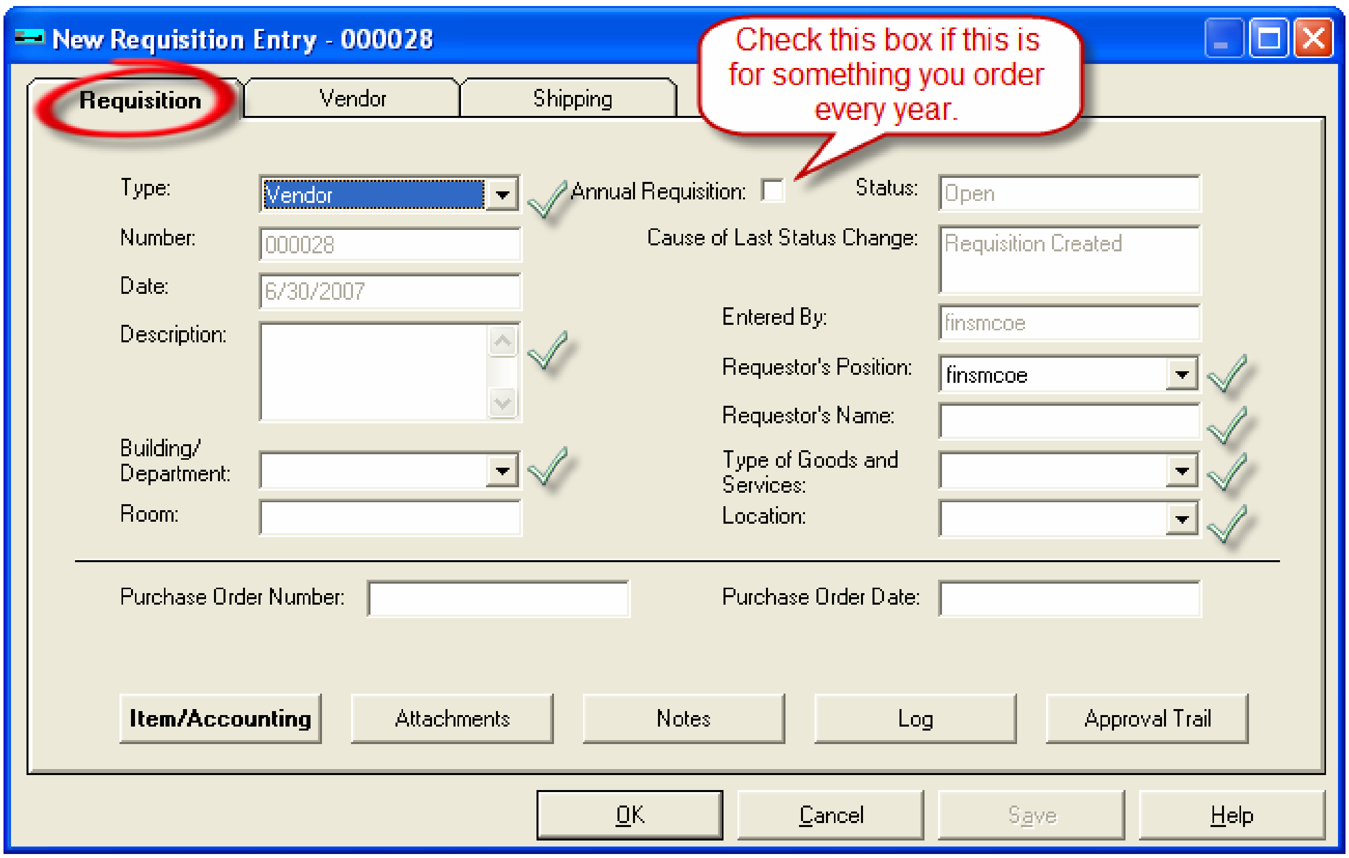
- From the Requisition Menu, click the **Add** option.



4. Completing the Requisition Tab

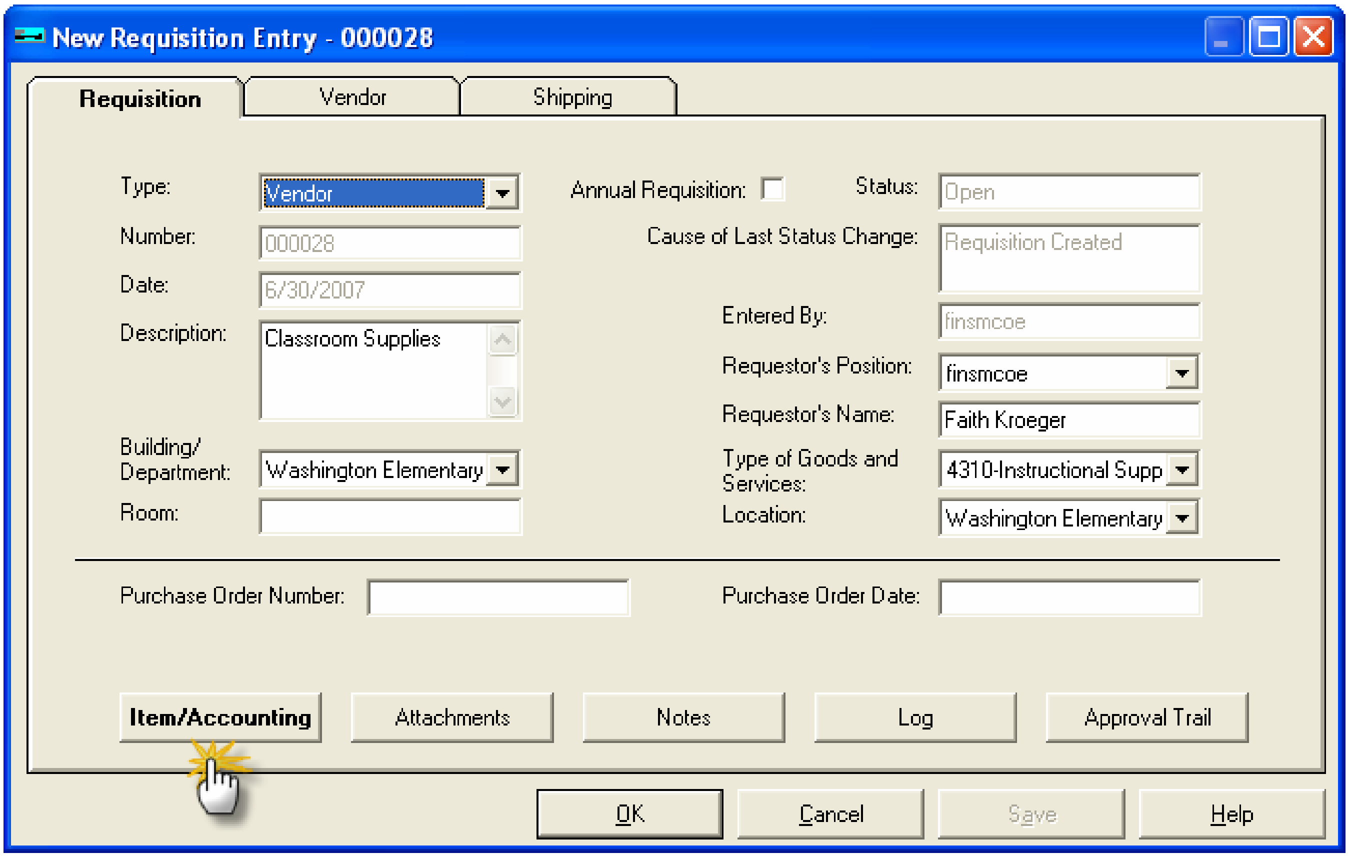
- All the fields with a green checkmark are **required** fields.
- Place a checkmark in the **Annual Requisition** checkbox if you order these items every year. If you do this, you can roll this requisition into the next fiscal year and edit the information as needed.

  This saves you from having to enter all the information from scratch each year.



5. Completing the Item/Accounting Information

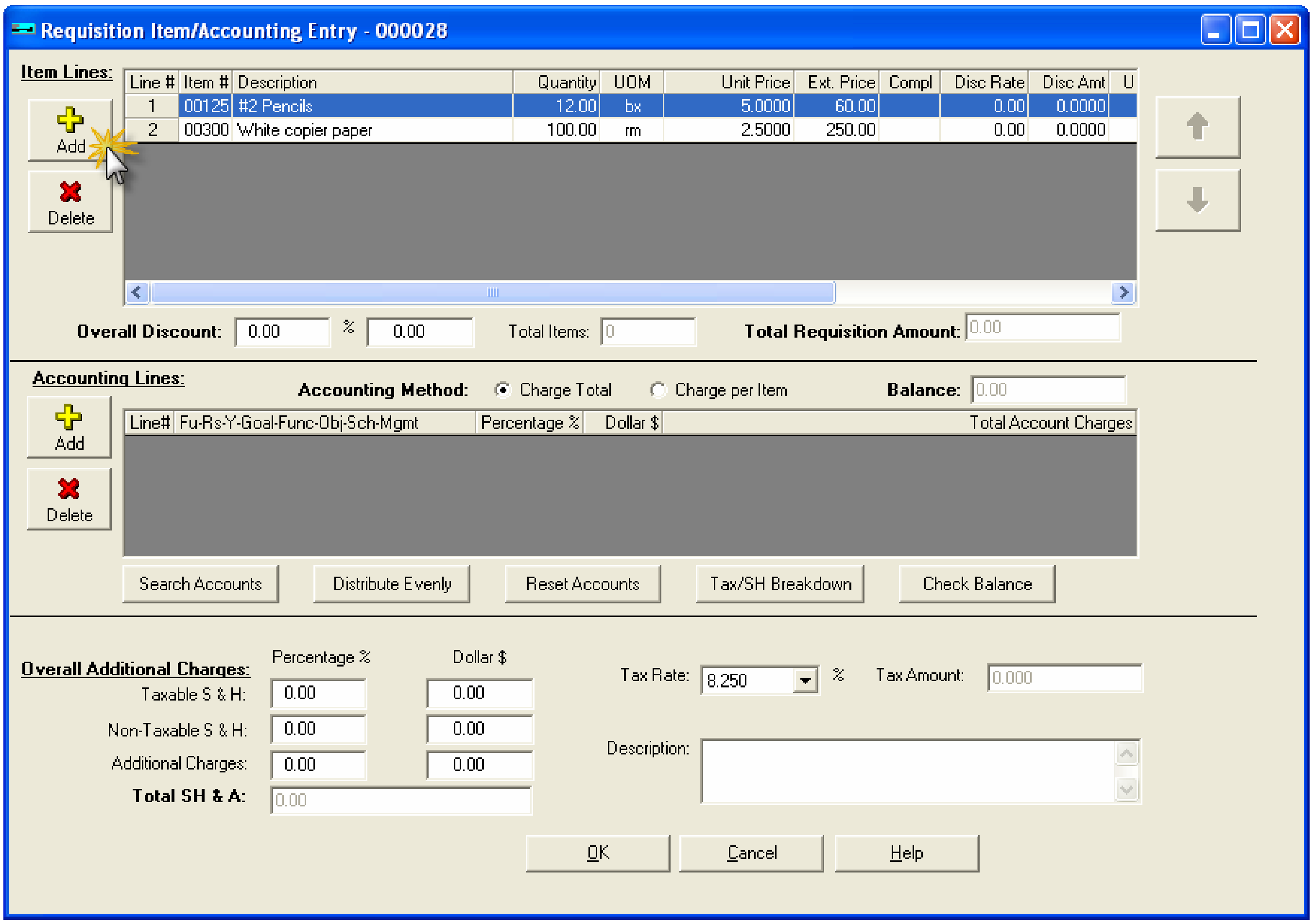
- Click on the **[Item/Accounting]** button



5.1 *Entering the Item Lines*

- Click the 

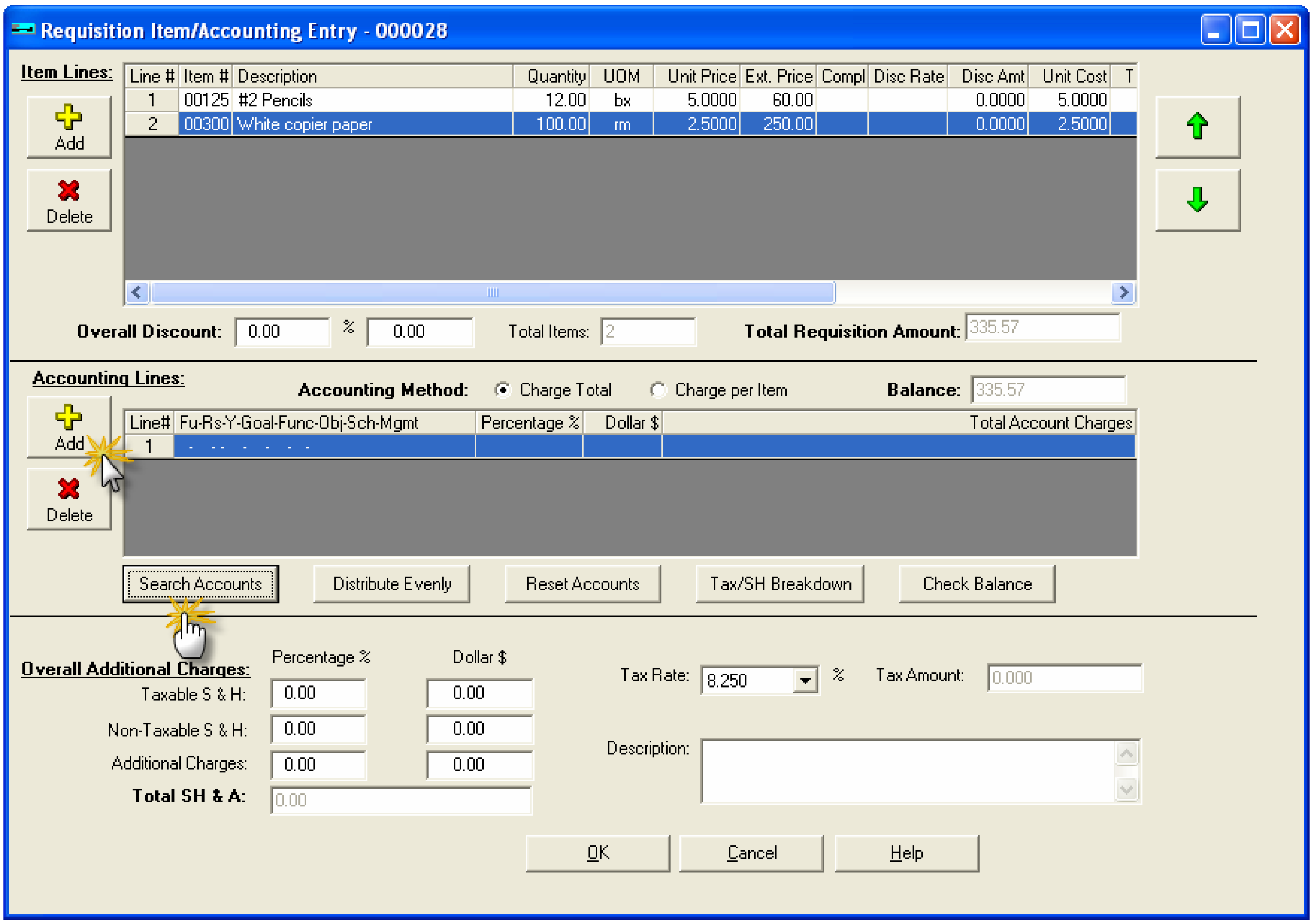
button to add a line for each item you are ordering.
- Fill in all the information for each item you are ordering on each line.



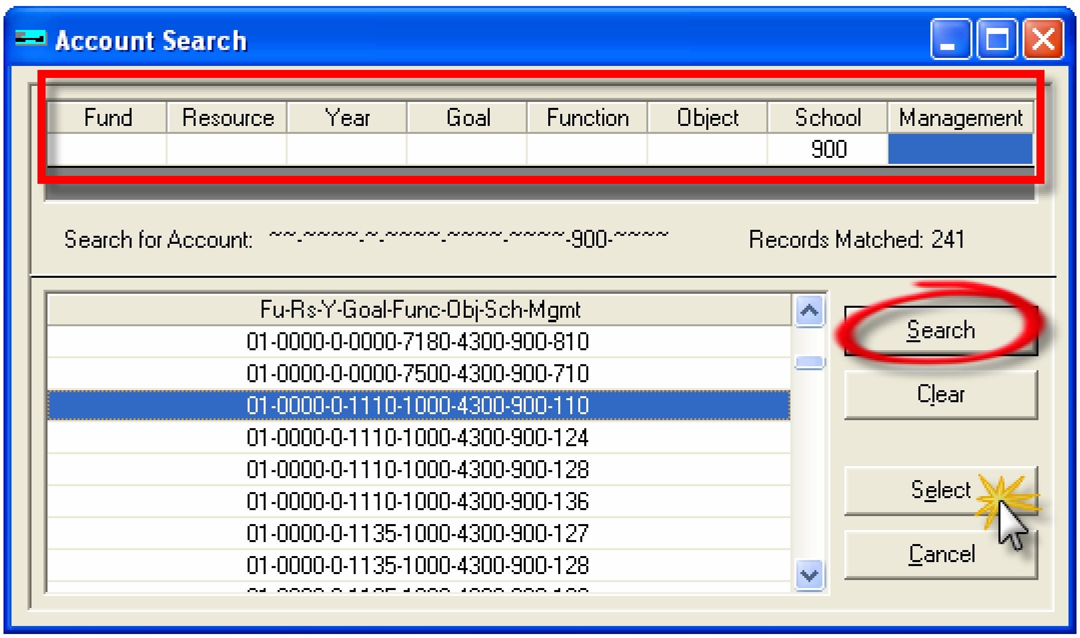
5.2 Entering the Accounting Lines

- Click the 

button to add each accounting line to charge for this order.
- Click the **[Search Accounts]** button for a list of allowable accounts to charge.



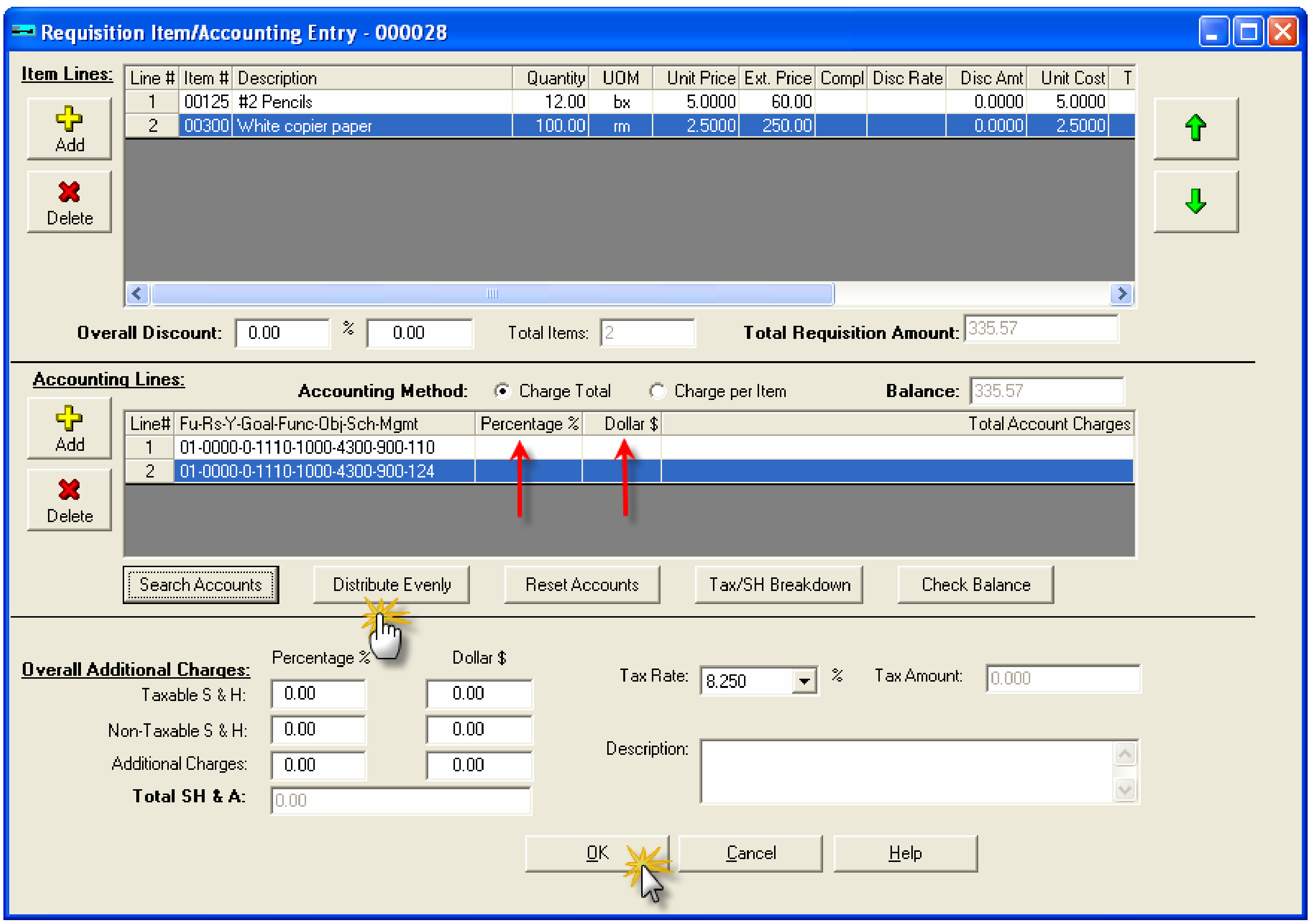
- You can enter parts of the account number to narrow your search in the upper part of the Account Search window.
- Click the **[Search]** button. A list of allowable account numbers will be displayed.
- Highlight the account number you want by clicking on the account.
- Once the account number is highlighted, click the **[Select]** button.



- Once all the account number have been entered, you can
    - Enter a percentage to charge to each account,

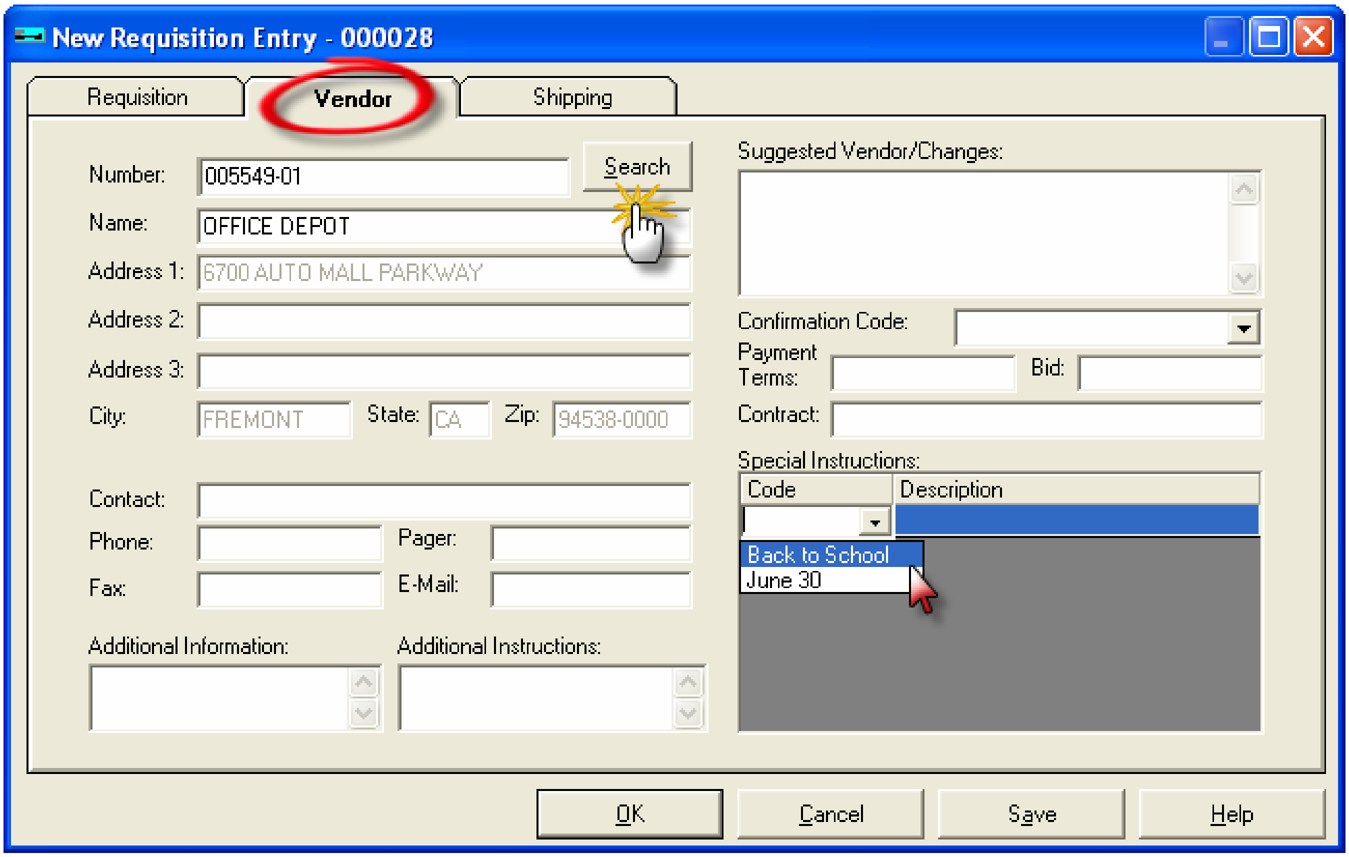
      or
    - Enter the dollar amount to charge to each account,

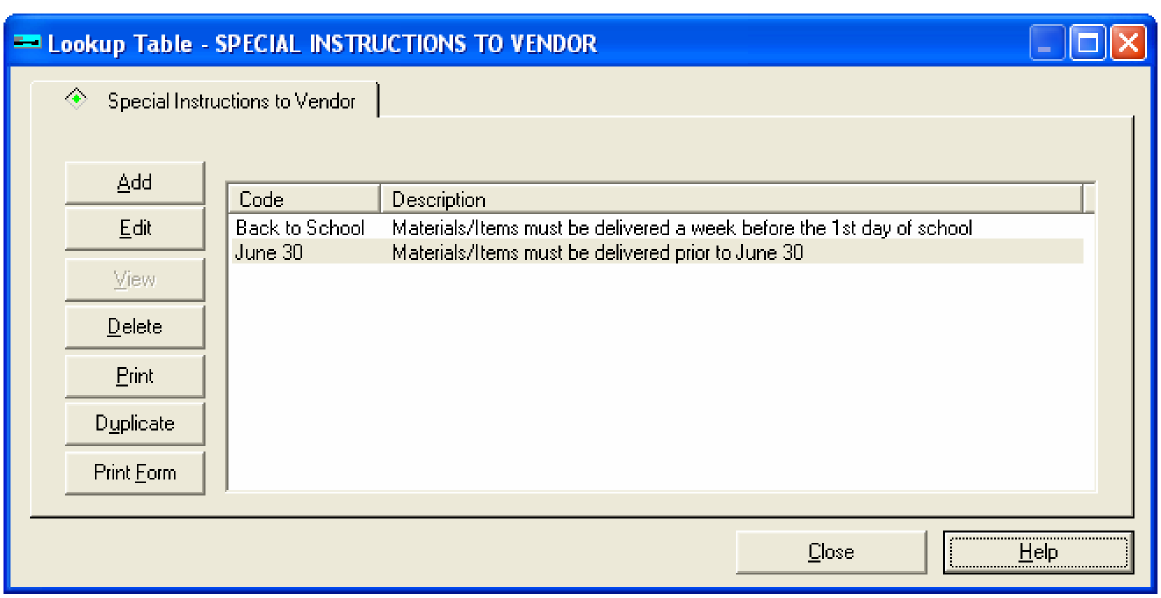
      or
    - Click the **[Distribute Evenly]** button to distribute the cost evenly to all the account lines.
- Click the **[OK]** button once all the costs have been allocated to the proper accounting lines.



6. Completing the Vendor Tab

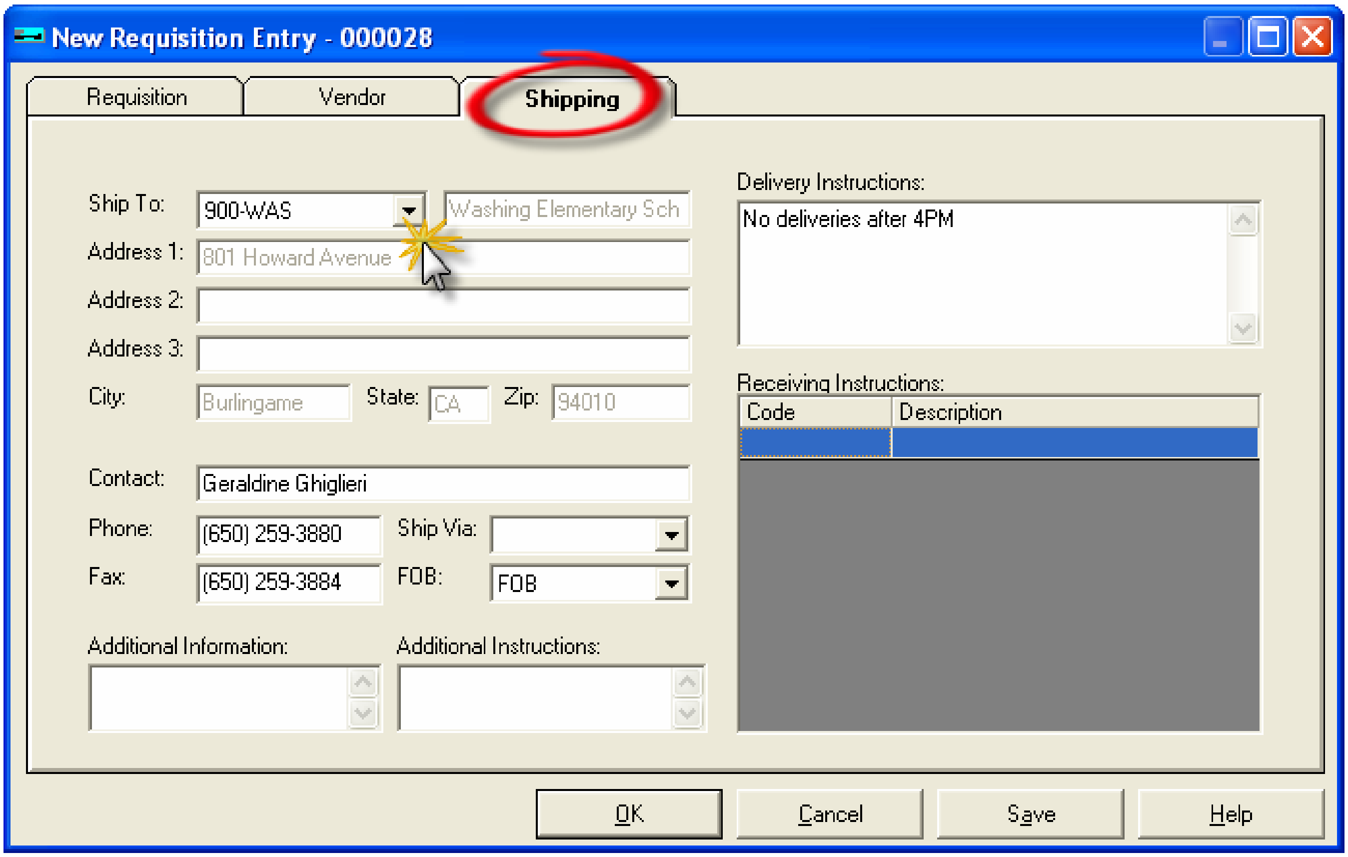
- Click on the **Vendor** tab.
- You can look up vendors by name by clicking on the **[Search]** button.
- You can automatically add special instructions by selecting the appropriate code *(see below)*.





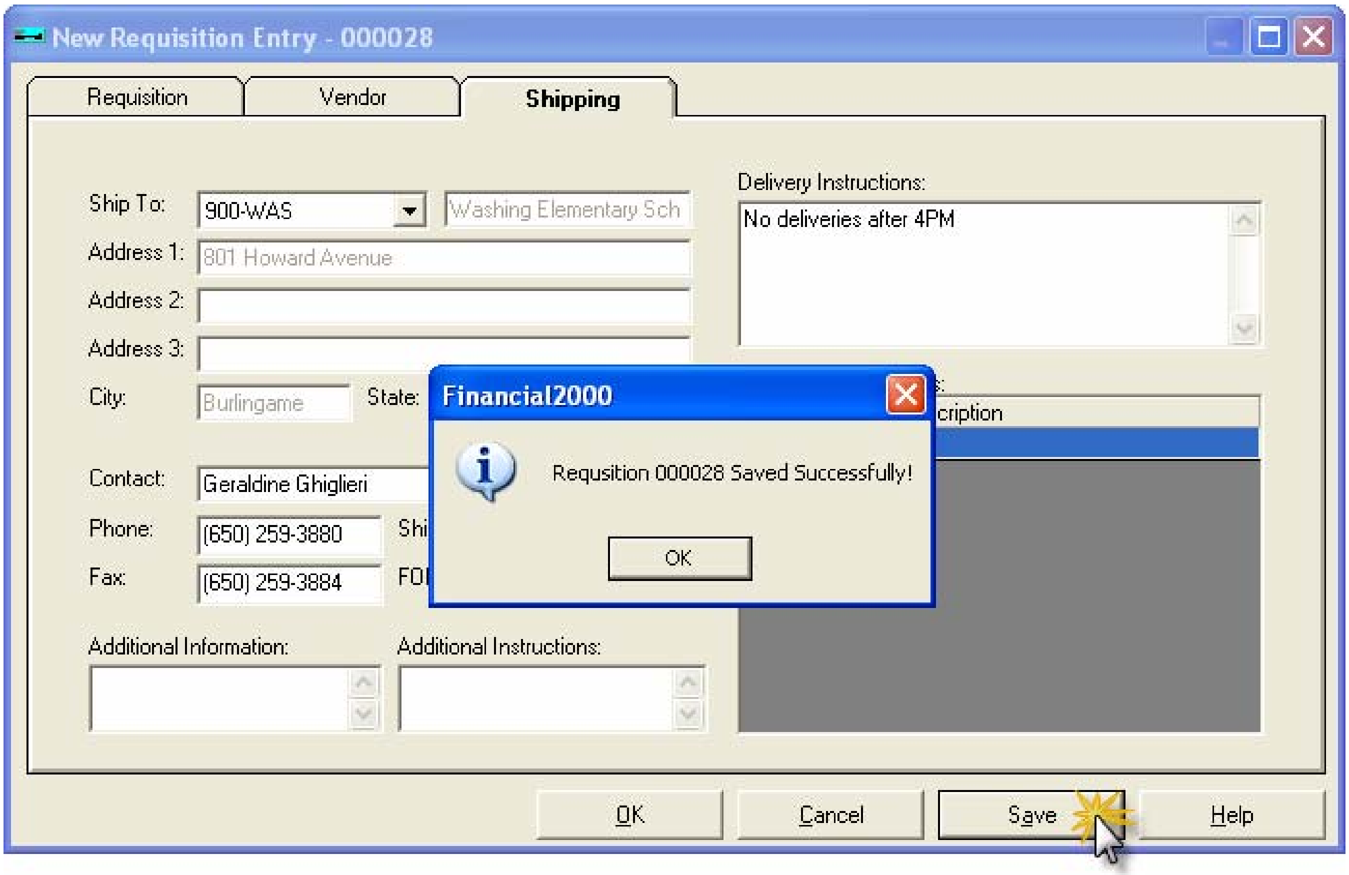
7. Completing the Shipping Tab

- Click on the **Shipping** tab.
- Select the appropriate **Ship To** code from the dropdown box. The corresponding ship to information will automatically be displayed.



8. Saving the Requisition

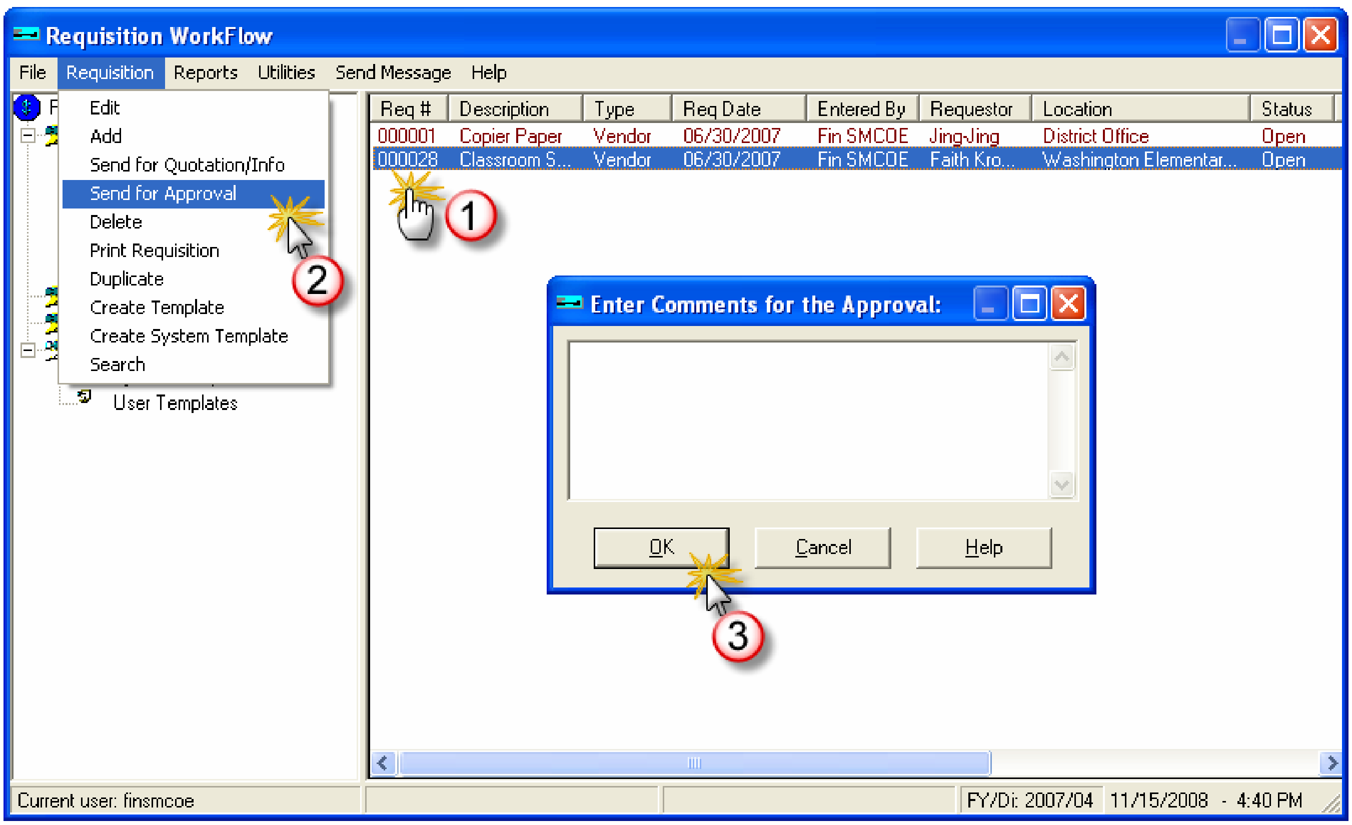
- When you click the **[Save]** button, you will see a message that the requisition was saved.



9. Sending the Requisition for Approval

The newly saved requisition will appear in your New Requisitions workflow.

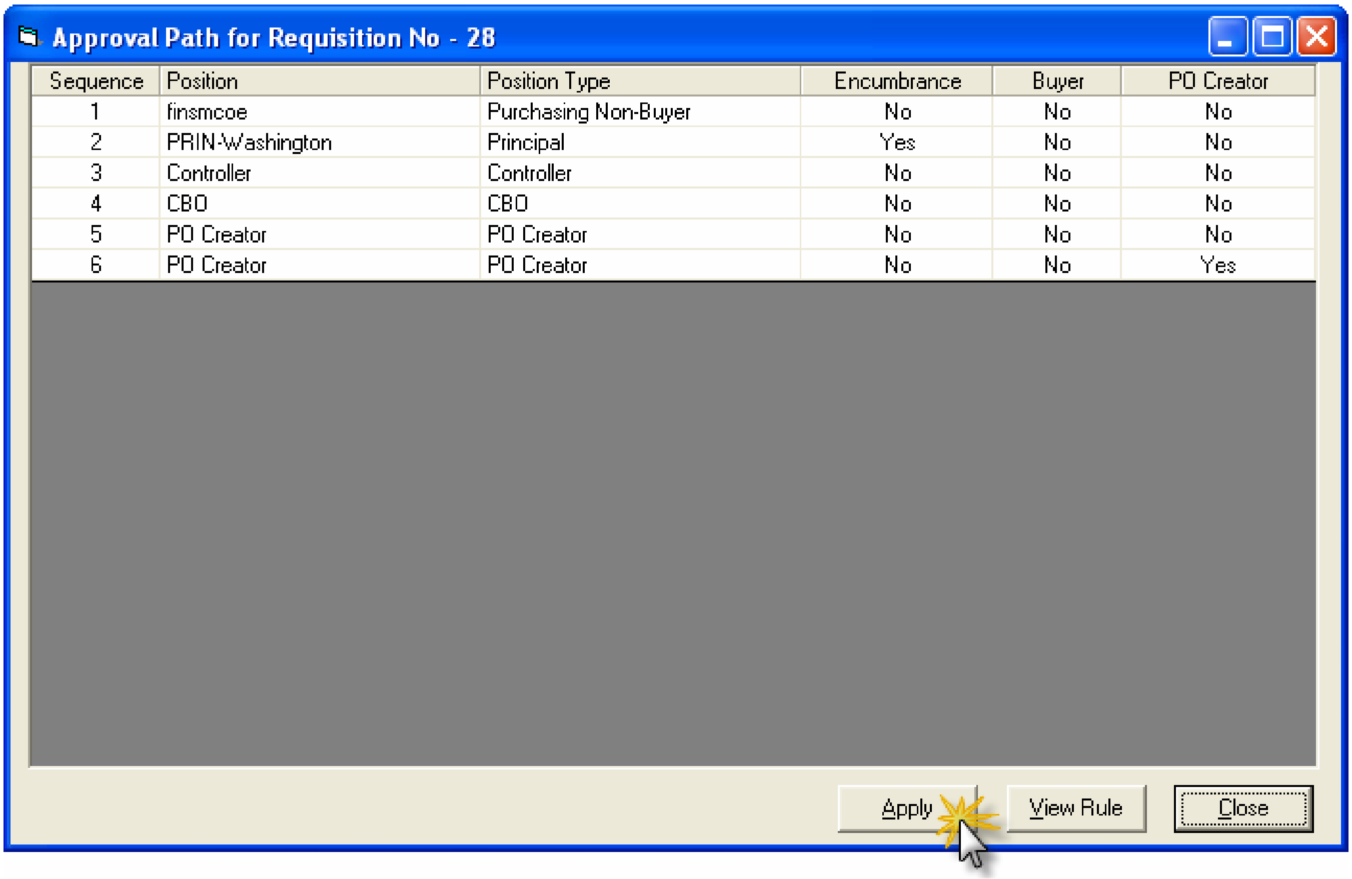
- Highlight the requisition by clicking on it.
- Once the requisition is highlighted, select the **Send for Approval** option from the Requisition Menu.
- You can enter comments or leave the comments blank. Click the **[OK]** button to send the requisition for approval.



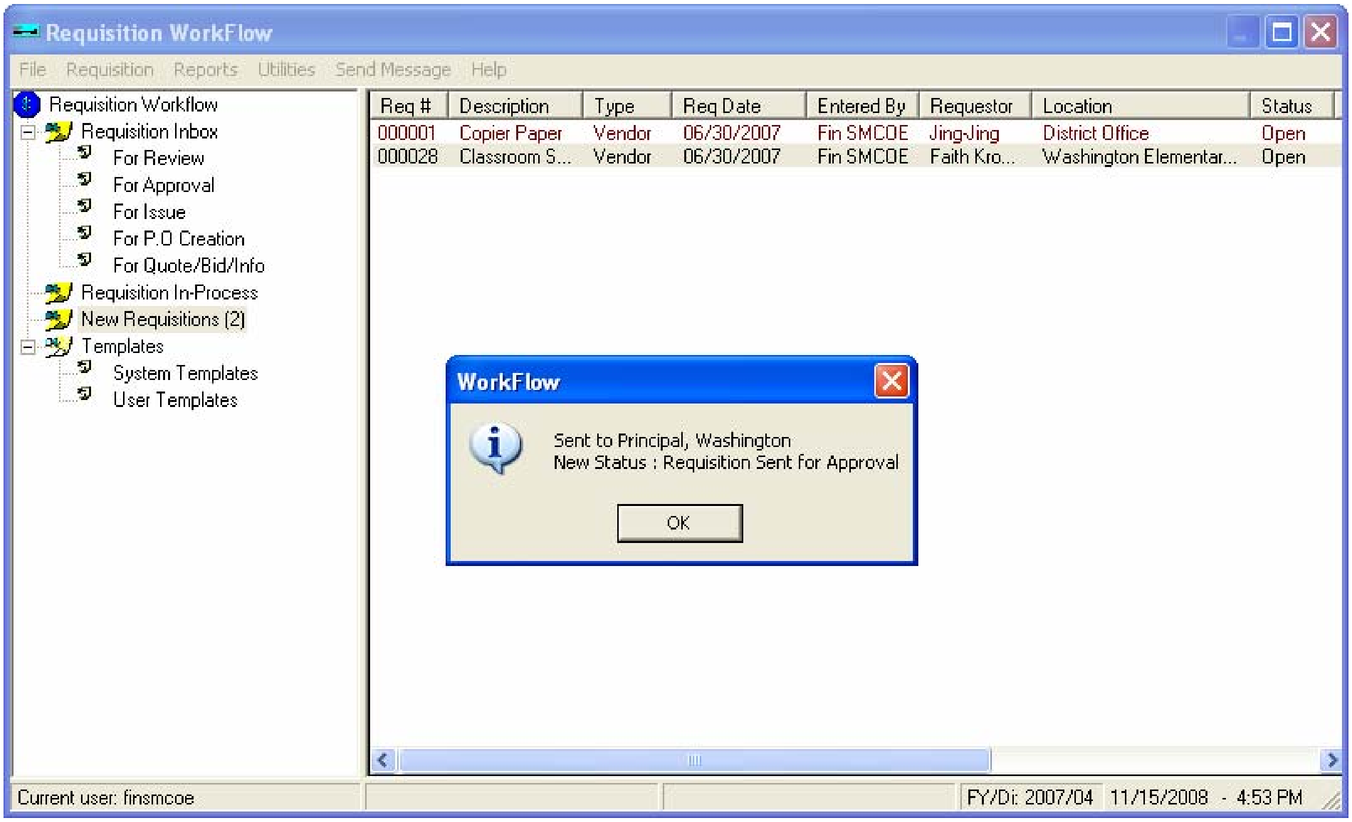
- If the amount on this purchase requisition exceeds the available budget, you will see a warning message notifying you about this situation.

- If you proceed with the approval routing, a screen will be displayed showing you how the requisition will be routed.

- Click the **[Apply]** button to proceed with routing the requisition for approval.



- You will see a confirmation message letting you know where the requisition was sent for approval.

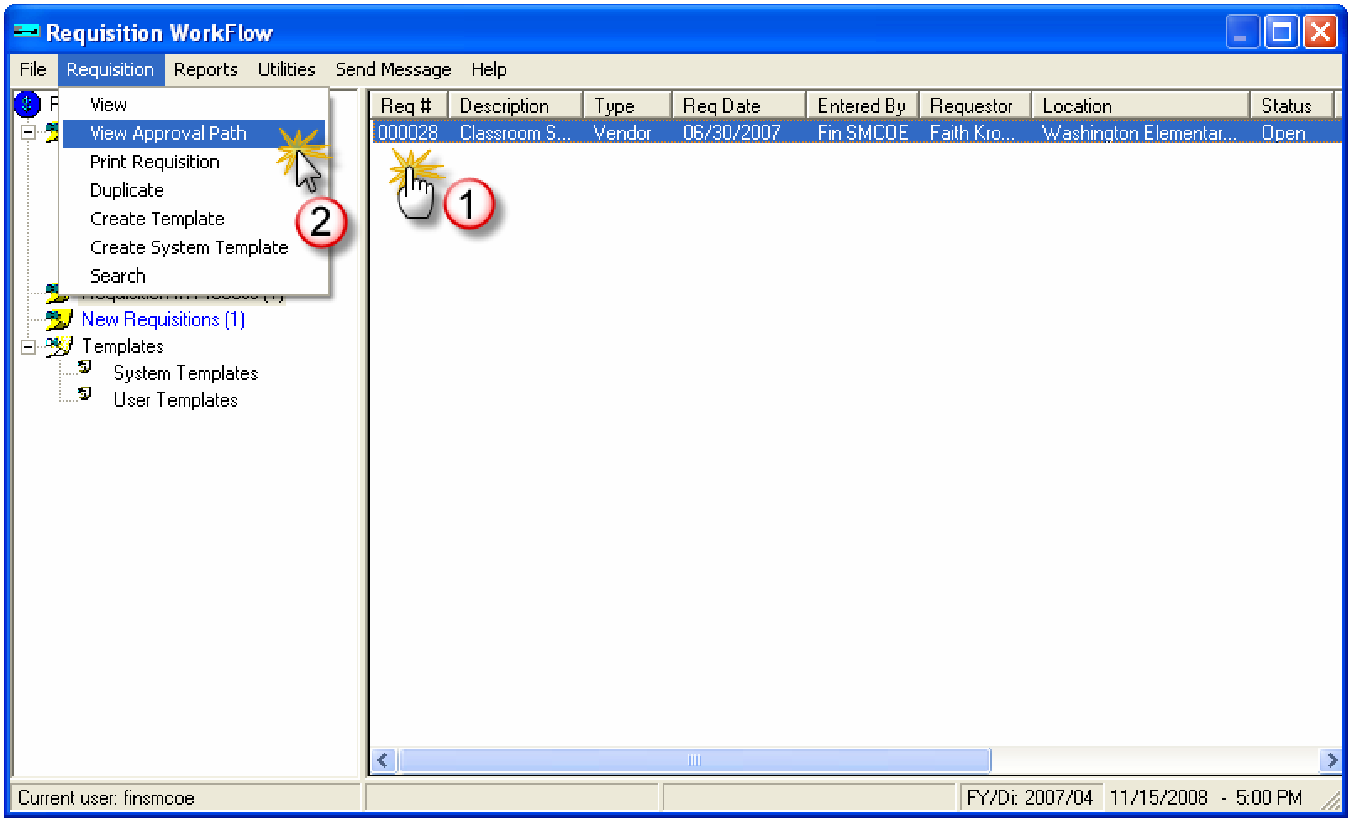


10. Locating a Requisition Sent For Approval

After you have forwarded a requisition for approval, it will move from your New Requisitions workflow to your **Requisitions in Process** workflow.

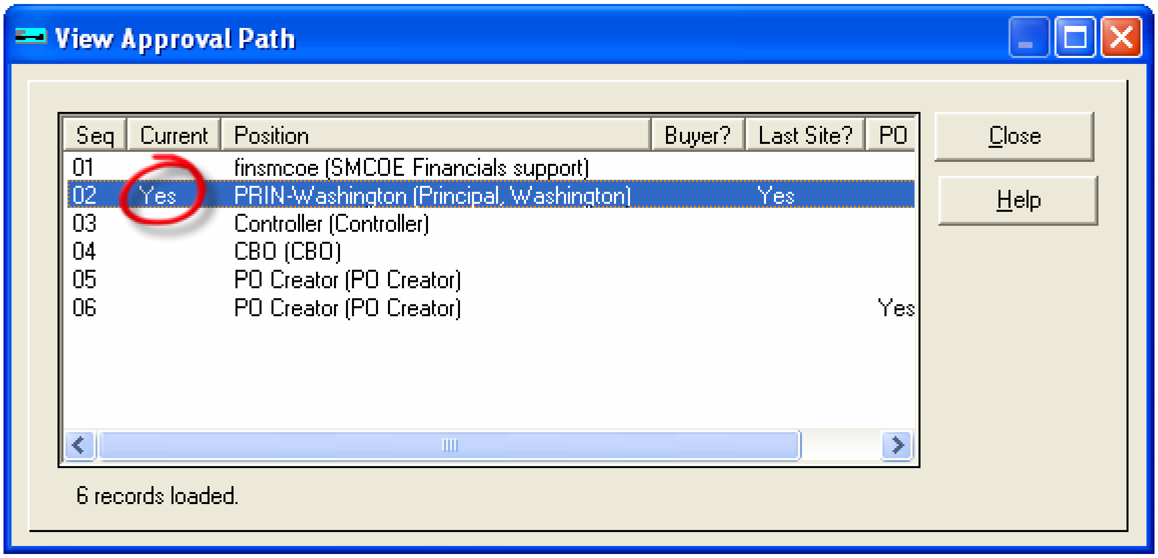
- Highlight the requisition by clicking on the requisition number.

- Click on the **View Approval Path** option on the Requisition Menu.



- You will see the sequential approval path for the requisition.

- The position with a 'Yes' in the "Current" column identifies the position currently holding the requisition.



11. Questions or Need Assistance?

Call 650-802-5678 or submit a Help Desk Ticket to help@smcoe.k12.ca.us for questions or assistance with this documentation.