

Entering a Requisition thru ESS (Employee Self Service) Website

On School website, select District Office, then School Forms, then Employee Self Service link.
Your User ID is your employee number, found on your paystub.
Your password (for first time users) is 0777 plus the last 4 digits of your SSN.
Select Requests and Approvals, then Purchasing.

You have two options:

- 1) Ordering.** Use only for School Specialty, Innovative, Office Max, Frey Scientific.
- 2) Order Request Form.** Use for any vendor not listed in Online Ordering

Choose the appropriate instructions below for which option you need.

Ordering (use for School Specialty, Innovative Office, Office Max, Frey Scientific, MSC Express)

If your vendor is not listed here, skip to instructions for Order Request Form (next section).

Select your vendor for this order. The vendor website should then appear.

Add items to cart until done.

Select Checkout. May be multiple screens to click through.

Select fiscal year for which supplies will be purchased, use school ending year (2017 for 16-17).

No need to enter anything in the account code.

(optional) Enter Vendor Note if something needs to be printed on the PO (quote number, etc.)

(optional) Enter Comment such as staff development, grant funds to be used, etc.

Select Transfer button. You will receive an email within a few seconds confirming your requisition.

If you do not receive a confirmation email, your order is not completed. Do not close ESS window, log into ESS again, press back button repeatedly to get back to your cart if possible. Checkout again.

Your req will be processed by the district, and if approved, converted to a PO.

Once approved, your order will be automatically released online to the vendor for shipment.

When you receive items, verify qty received & correct cost against the invoice.

Contact vendor to correct any discrepancies.

If no errors, sign & date the invoice as ok for payment. Send invoice to Greta Chevalier.

Order Request Form (use for any vendor not listed above in Online Ordering)

Select Start Cart.

Select fiscal year for which supplies will be purchased, use school ending year (2017 for 16-17).

Select Ship To location. No need to enter anything in the account code.

(optional) Enter comment such as Staff Development, grant funds to be used, etc.

(optional) Enter Vendor Note if something needs to be printed on the PO (quote #, confirmation #, etc.)

Vendor Number- Select Find to see alpha list. If a new vendor, send email to Dave Benson with vendor name, address, phone, and fax. Return email will notify you when new vendor is added to database.

Vendor Group- Always leave as 1.

Alternate Address- If vendor has multiple locations, select correct address for this order.

Select Click Save to Enter Items.

Item Description- Type part # and description of item. Use description as worded in catalog.

Units- Qty of item being ordered.

Rate- Price of each item.

Select Save to save this item in your cart.

If more than one item to be ordered, select Add New to add another line.

Select Save to save each line as you go.

When finished with all items, select Transfer button.

You will then see red letters "Your Order Request has been transferred to SMART Finance."

You are now done submitting your order. You should receive a confirmation email immediately.

Your req will be processed by the district, and if approved, converted to a PO.

Once approved, your order will be faxed or mailed to the vendor.

When you receive items, verify qty received & correct cost against the invoice.

Contact vendor to correct any discrepancies.

If no errors, sign & date the invoice as ok for payment. Send invoice to Greta Chevalier.