🖉 Purchase Requisitions - W						_ 7	×			
O v Ø http://maximo.ccsd.net:7001/maximo/ui/?event=loadapp&value=pr&uisessionid=6011					💌 🗟 🐓 🗙 🔕 Google					-
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> o	ools <u>H</u> elp 🛛 🗙 🐑	Ŧ								
🚖 Favorites 🛛 👍 🙋 Free Hotn	nail 🧧 Web Slice Gallery 👻									
O Purchase Requisitions						👌 • 🔊 - 🖬	🛛 🖶 🕶 Page 🕶 S	afety + T <u>o</u> ols	• 🕐 •	>>
Purchase Requisitions				<u>B</u> ulletins: (1	(1) 🛛 🔻 <u>G</u> o To	<u>R</u> eports Start <u>C</u> enter	r <u>P</u> rofile <u>S</u> ign Out	Help	IM.	^
										1
Find:	Select Action		• 🖨 🏒 🔶 🖨	P : •••• : 😜 : 🗒						
List PR PR Lines	Ship To / Bill To Terms and Conditions	Specifications								1
PR: 18031 MAIN	NTENANCE WAREHOUSE CATALOG	Site: MAINT		Status: PRINT		То	otal Cost:	13.52		
PR Lines					C Download	=				
Line 🔶 Item	Description		<u>Quantity</u>	<u>Order Unit</u>	<u>Unit Cost</u>	Line Cost	Tax	Distributed		
✓ 1	>>> Box Steel 4sq 2-1/8" D 1/2 3/4 In	ich KOs 🔁	4.00	Q.	0.49	1.96	0.00		ı Î	
2	>>> Box Outlet Single Gang 3/4 Kos	ter en	4.00	9	1.16	4.64	0.00	- 1	_	
3	Box Steel 4sq Ind Raised Duplex	Cvr 😭	4.00	٩	0.59	2.36	0.00			
4	Device Receptacle Plate 1g Ss D	G.	4.00	9	0.60	2.40	0.00		•	
5	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>		4.00		0.54	2.16	0.00		0	
Line Item										
* Line: 1				Manuf	facturer:	>>				
Line Type: Material Type: Model:										
Item: Box Steel 4sq 2-1/8" D 1/2 3/4 Inch KOs 🔄										
Work Order:										
Remarks:				X		/				
Classification:	»	MAINTENANC	E WAREHOU							
Class Description: Purchase Requisitions, if order is for SHOP STOCK										_
			• •	n next to VENDOR						
Quantity and Costs		NAME. Indicate	<u>CRAFT</u> PR is be	eing requisitioned for	or.					
Quantity:	4.00	If for a MAXIMO		indicate the	// Task:					
Quantity:     4.00       Order Unit:     Q   If for a MAXIMO WORK ORDER indicate th appropriate Work Order number in the Work					r Location:	>>				
Conversion Factor:	1.00	Text Box			Asset:	>				
Unit Cost:	0.49				Account:	9				
* Line Cost:	1.96	Indicate the <u>cata</u>	alog number in	the Catalog # Text B	BOX t Center:	9				
					WBS:					
										~
Done						🗸 Tru	isted sites	- 🖓 👻 🔍 10	JU% 🔻	



## **PURCHASE REQUISITIONS**

**PURPOSE:** The purchase requisition form is used by each department to communicate its needs to the Purchasing Department. An **approved** <u>Purchase Requisition</u> authorizes the Purchasing Department to commit departmental expenditures for supplies, equipment and services.

**NOTE:** A purchase requisition (PR) is **not** a <u>purchase order</u> and the PR number should **not** be used to commit CCSD Maintenance Dept. funds without first submitting a purchase requisition. An approved purchase order from the Purchasing Dept. **must** be in place PRIOR to committing CCSD Maintenance Dept. funds.

- 1. From Start Center, go to Purchasing, then Purchase Requisitions.
- 2. Click once on <u>New Purchase Requisitions Icon</u> (system will assign number to PR)

from the Tool Bar

- 3. Click in the front of the MAXIMO assigned PR number; indicate the two-digit REGION abbreviation, i.e. NW, NE, SW, SE, etc. If Core, indicate three-digit SHOP abbreviation, i.e. OMR, ASP, FAB, etc.
- 4. <u>PR Description Box</u> Fill in with the suggested Vendor Name only. If requisitioning supplies from Warehouse stock, use <u>Warehouse Catalog</u> for Vendor Name
- 5. Fill in <u>Supervisor Box</u>, use drop down menu from gray arrow to select correct supervisor
- 6. Choose <u>Coordinator Group</u>, use drop down menu from gray arrow for correct coordinator

7. Go to <u>Required Date</u> and choose date from calendar-usually one month from date of creation unless request is urgent. If urgent, enter requested date and note accordingly.

8. PR Description Box <u>Long Description</u>— Fill in with information listed below and any additional information that will assist in the processing of the PR.

Long Description information:

- Indicate REGION/Shift and CRAFT or SHOP items are being requisitioned for
- If the purchase is for shop stock, indicate "SHOP STOCK"
- If PR is for a work order, indicate site name
- If there is an attachment, indicate type of attachment, i.e., "QUOTE ATTACHED"
- Indicate vendor information, i.e., vendor address, phone number, and the person's name that you spoke with.

NOTE: Information added into the Long Description Box will print on the final copy of the PR.

**IMPORTANT**\*\*\*\*\*If there is a quote from the suggested vendor, make a copy of the QUOTE, write the PR# in the upper right-hand corner on the QUOTE, and place the copy in the Maintenance Accounting mailbox located in the front office at the time of the creation of the PR.

When you are done adding information, click <u>OK</u> to close the Long Description window.

SAVE and continue to PR Lines Tab (page two)

S:\MNT\Apps\Documentation\F

## Go to PR Lines Tab

9. Click on <u>New Row</u> (lower right hand of screen) to open a row to detail materials being requested.

10. <u>Line Type</u> Box —- from drop down menu choose <u>MATERIAL</u> or <u>SERVICE</u>.

11. <u>Item Description</u> Box (located to the right of the item box) Fill in with the description of the material being requisitioned. Begin description with a NOUN then adjective.

\*\*\* Do not lead with part/manufacture number or brand name with your description.\*\*\*

EXAMPLES: Reed, Oboe, medium soft, part # Latch, case, part # Belt, 100ft X 1/2inch, part #

NOTE: If substitutes will not meet specifications for specific items being requisitioned, include brand names in the Long Description (see Step 15).

12. Fill in <u>Work Order</u> box with work order number associated with this PR (if applicable). If PR created for specific work order, the work order number must be entered in this field.

If for shop stock, do not fill in Work Order box, see Step 7 to indicate "Shop Stock"

Enter or tab to go to the next field.

13. Fill in <u>Quantity</u> with the amount. How many items? Box will automatically add a decimal and 2 places after you tab or hit the enter key. Example: Enter 2 and then tab or enter and the box will populate with a 2.00.

14. Fill in <u>Unit Cost</u> with price for each unit. Tab or enter after information has been added, and the Line Cost will be calculated, i.e. unit cost times quantity.

15. Item Description Box <u>Long Description</u> - Use for additional text if needed. Fill in the Long Description Box with pertinent detailed information on the item being requisitioned.

Examples:

- Size, color, style, etc.
- If brand name items are necessary, include essential characteristics not found in items from other manufacturers.
- If purchase is a part to repair a unit, indicate Make and Model of the unit the part will be used for
- If applicable, indicate justification for item being requisitioned

NOTE: Information added into the Long Description Box will print on the final copy of the PR.

16. After reviewing all information entered, <u>SAVE</u> the record by clicking on the <u>computer</u> <u>disk</u> icon on the tool bar.

17. Click on the <u>Work Flow</u> icon on the tool bar to workflow the PR.

See Maintenance Accounting, if you have a question or a concern regarding a PR that you have already work flowed.