

How to ESCAPE when you'd rather RUN 🤪

- *How to Enter a Requisition*
- *How to Attach Quotes, etc.*
- *How to Search for your PR/PO*
- *How to Copy PO's*
- *How to Print Snapshots*
- *How to make changes after you thought it was perfect!*

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Revised 8/8/18

ENTERING NEW ORDERS

How to Create an ESCAPE Requisition:

Open Escape. Go to Finance – Requisitions – Vendor Requisitions

Click New and choose Purchasing or Technology in correct school year

(All computer and software purchases should be on Technology PR's)

Requisition Tab:

Requisitioner – Should default to your name. Ok to change to the end-user, if desired

Order Location – Should default to your location

Delivery Location – Your location, WHNP (Warehouse), or another District site, if applicable

Comment Line – ***Required** - a description of what the PO is for. The Board sees this info on their PO report.

Order Type: “PO with Receiving” is for receiving actual goods

“Blanket PO” is for open P.O.’s, (subscriptions, licenses, field trips, workshops, construction, etc)

“Direct Payment” is for employee reimbursements only

Vendor ID# - Enter Vendor ID # or search for vendor by first two letters of name. **If you can't find the vendor, use PUR (Purchasing Choice) and contact Purchasing with vendor info – at least name, phone & contact email.**

Shipping – If your quote doesn't specify an amount or state that it will be included, please enter at least 10% shipping. If shipping or freight charges need to be added after the PO has printed, it could delay your order because the PO may need to be sent back through approvals.

Finance - Requisitions - Vendor Requisitions

Search | List | Form

Delete | Prev | Next | Save/Close | Cancel | Tasks

New Vendor Requisition - FY 2019 {2018/2019}

Requisition | Items | Accounts | Payments | Quotes | Approvals | Assets | Attachments | Notes | History

1 - Requisition Information

Dept Id: PURCH (PURCHASING - FISCAL SERVICES)

Academic Department

Requisitioner: Kelly Gilbertson

Request Date: 8/7/2018

Order Location: ✗

Delivery Location: ✗

Room: ✗

Comment: ✗

Responsibility

Category

Goods and Services Category

2 - Vendor Information

Order Type: PO with Receiving

Online Order:

Online Order Contact

Vendor Category

Vendor Id:

Vendor Address Id

Vendor Name

Street Address

City State Zip

Phone / Fax

Allows Emailing POs

Quote Number

3 - PO Information

PO Date

Buyer

Delivery Date

Change Notice Date

Change Notice Count

Change/Cancel Msg

Ship Via

Terms Via

FOB

4 - Order Cost Information

Non Taxable Amount

Taxable Amount

Sub Total

Tax Rate: 7.250

Sales Tax

Shipping Pct: 0.00

Shipping Amount

Tax on Shipping: No

Total Cost: 0.00

Adjustment Amount

5 - Summary/Status Information

On Hold: No

Status Comment

Date Approved

Board Date

PO Print Date

Line Item Cnt

Line Items Fully Rcvd

Total Qty Ordered

Total Qty Rcvd

Amount Received

Date Completed

Days to Complete

Fixed Asset Count

6 - Accounting Information

Account Distribution Option

Acct Distributed Amt

Acct Undistributed Amt

Amount Encumbered

Amount Expensed

Amount Liability: 0.00

7 - Add/Update Information

Account Distribution Option

Code	Description
0	Account Manual
1	Account Percentage
2	Line Item Manual
3	Line Item Percentage

Items Tab:

Click

Enter Quantity

Description – Please do not just say “See Quote.” Per Board policy, items must be listed separately. Please include item and/or ISBN #'s before your description:

71040 DISNEY LEGO CASTLE
9781683303800 FROM MICKEY TO THE MAGIC KINGDOM, PAPERBACK

Blanket PO's – Please do not just say “Open PO.” Per Board policy, more information is required. Please enter:
“OPEN PO FOR SUPPLIES (INSTRUCTIONAL MATERIALS, WATER, ETC) FOR THE 20XX/20XX SCHOOL YEAR ENDING JUNE 30, 20XX”.

AUTHORIZED PURCHASER(S): _____

Unit Price – Please enter price per item before tax.

If you need to enter a discount, figure the amount and enter it with “-” in front of it. (ie: -5.00)

Taxable – Y or N “P” orders are most always taxable – we are not tax exempt. Tax does not apply to “B” orders.

If you have more items – click

After the last item – use the Message After line to enter any quote info you may have.

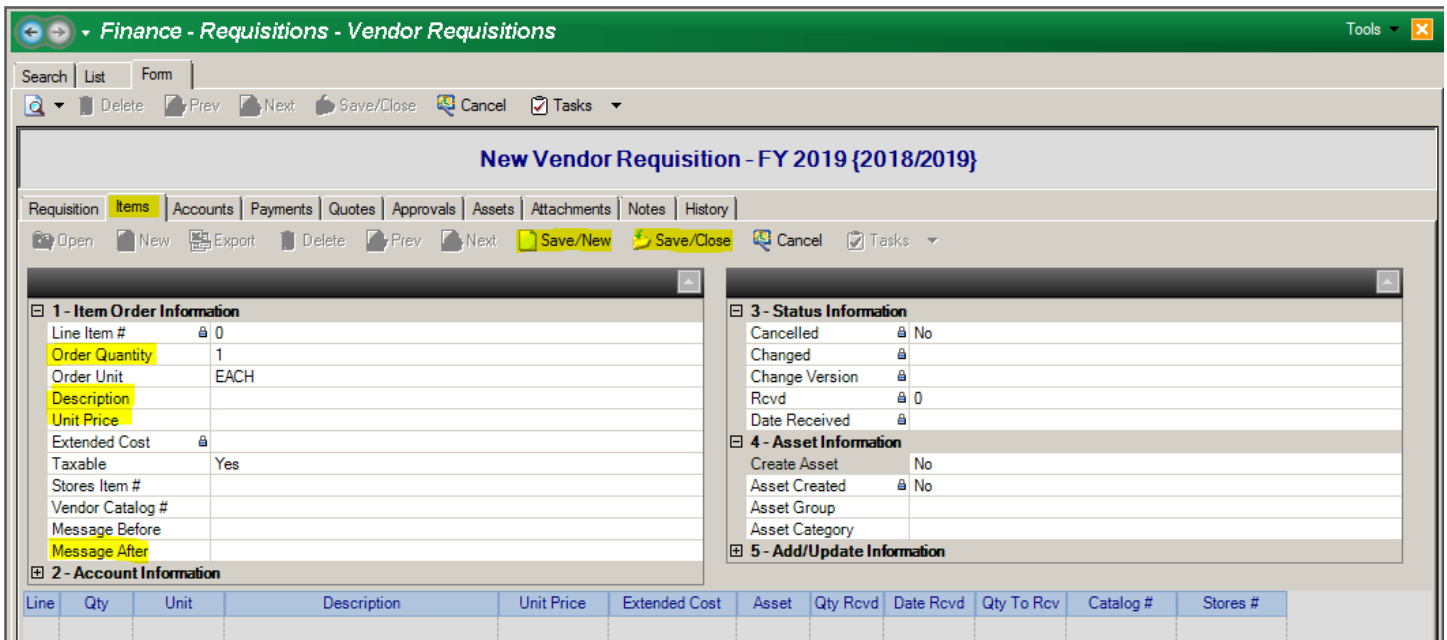
“Price(s) and Shipping per Quote # _____”

Or

“Price per Quote # _____”

Price includes shipping”

– click



Accounts Tab (Enter Account Number to be billed)

Click **NEW** – Type the full account code (no dashes or spaces) or the shortcut code

Type the amount. Click enter or New for more accounts

Fnd-Objt-Rsrc-Y-Goal-Func-Loc-Mgt-Opt-B	Amount	Percentage	Fiscal	Encumbered	Paid	Liability	Avail Bal
	\$0.00	0.0000	2019	\$0.00	\$0.00	\$0.00	\$0.00

If the code won't enter – delete it, tab or click the Amount box (Escape will protest that the account cannot be blank but click OK, it will get over it 😊), enter 0 for the amount then click Save/Close. This will save the PR in “Open” status and give you a requisition number.

If it's a code you should be able to enter – contact Chris Charles, 805.497.9511 x-272

If it's a special code you don't usually use – contact the Department the code belongs to or Kelly, 805.498.4557 x-162
I can enter it for you, with permission.

Fnd-Objt-Rsrc-Y-Goal-Func-Loc-Mgt-Opt-B	Amount	Percentage	Fiscal	Encumbered	Paid	Liability	Avail Bal
	\$0.00	0.0000	2019	\$0.00	\$0.00	\$0.00	\$0.00

TASKS AND SUBMIT:

If it's okay to submit, click **Tasks** and Submit. You will be taken back to the previous search screen and an ESCAPE Requisition # will be listed.

Record your PR # somewhere for future reference (for tracking) before the PO prints.

If there's a problem with the Account Number: click **Save & Close** & contact Chris Charles in Accounting for help.

Record your PR # somewhere for future reference.

That's it! Now it's ready for approvals! 😊

IF ESCAPE WON'T LET YOU SAVE OR SUBMIT THE PR

It's usually one of three things . . .

Check the Requisition Tab – make sure you have a description in the Comment field

Check the Items tab – open and Save/Close each line item

Check the Accounts Tab – make sure the account is entered and valid (no red dot)

YOU CAN HOVER YOUR MOUSE OVER THE SAVE/CLOSE BUTTON AND IT WILL TELL YOU WHY IT WON'T CLOSE

If all else fails, call or email Kelly – I'm happy to help! 😊

Conejo Valley Unified School District

PURCHASE ORDER

NO: B19-00190

DATE 07/09/2018

(805) 498-4557 x162 FAX (000) 000-0000

EMAIL: KGILBERTSON@CONEJOUSD.ORG

SHIP TO:

PURCHASING
750 MITCHELL ROAD
NEWBURY PARK, CA 91320

Vendor Phone: (888) 375-6648 Vendor Fax: {VendorFax}

Vendor Email: GOV@LDPRODUCTS.COM

LD PRODUCTS
3700 COVER ST.
LONG BEACH, CA 90808

BILL TO:

PURCHASING - FISCAL SERVICES
1400 EAST JANSS ROAD
THOUSAND OAKS, CA 91362-2198

Customer #: ORDER ONLINE

ORDER LOCATION			VENDOR #	REQUISITIONER	REQUISITION #
46D - PURCHASING			061190/1	KELLY GILBERTSON	R19-00860
DATE REQUIRED	F.O.B. DESTINATION	TERMS OF PAYMENT	SHIP VIA	BUYER	RPQ #
				KELLY GILBERTSON	
ITEM	QTY	UNIT	DESCRIPTION	UNIT COST	EXTENSION
1	1	EACH	BLACK AND COLOR TONER CARTRIDGES AS NEEDED BY THE PURCHASING DEPT FOR THE 2018-2019 SCHOOL YEAR ENDING JUNE 30, 2019	2,000.00	\$2,000.00
			AUTHORIZED PURCHASERS:		
			JON AASTED		
			LINDA BERTEA		
			KELLY GILBERTSON		
			NO SINGLE ITEM OR EQUIPMENT/ASSET OVER \$500		
			ALL INVOICES MUST BE SIGNED "OK TO PAY", MUST REFERENCE THE PO NUMBER AND BE SENT TO FISCAL SERVICES WITHIN 2 DAYS OF RECEIVING YOUR ORDER		
			Order Sub-Total		\$2,000.00
			Sales Tax		.00
			Shipping		.00
			Adjustment		.00
			Order Total		\$2,000.00
ACCOUNT DISTRIBUTION				AMOUNT	
(112841) 010- 4300- 0000- 0- 0000- 7530- 000- 680- 0460- 0				\$2,000.00	
**** End of Order ****					
AUTHORIZED BY:					

ATTACHING SCANNED QUOTES, BOOK LISTS, CONTRACTS, ETC. TO ESCAPE

Step 1 – Scan Quotes, etc.:

Use copy machine/scanner.

Scan – Scan document and save it on your desktop or in a folder on your desktop – wherever you can find it later.

Please note – Escape does not like “shortcut” folders.



If your copier/scanner automatically puts your scans in a shortcut folder (with the arrow, as above), the document will need to be moved to another folder or onto your desktop so Escape can find it.

OPEN YOUR REQUISITION or PO IN ESCAPE

Step 2 – Save to ESCAPE:

Vendor Requisition

In Reference # field – type PR # or PO #

Attachments TAB:

Click on to find document

Network – Client – Client H (my desk) – Desktop – double click to choose the document
(OR if document is on the G:Drive: Network – Client – Client G – (Dept folder) – Document)

Description: Quote, Invoice, Agreement, etc.

Include w/Emailed PO: It defaults to No, which is appropriate for invoices and paper PR's. Please change it to Yes for quotes, agreements and anything that needs to be sent with the PO.

***Please scan things that should not go to the vendor separate from things that needs to be sent**

Once to save the attachment and then Save/Close or Tasks/Submit to save the PR

You can do this before you submit your PR or any time after but as soon as possible please!

Please note – if for some reason you can NOT attach your quote, contract, invoice, etc., into Escape please either **scan & email** or **inter-district mail** the document(s) to Purchasing as soon as possible. We send quotes, contracts, etc., to the vendor with the PO or invoices to Fiscal with their PO copy.

If you have any questions, just let me know!

I'm happy to walk you through it! 😊

ALREADY ENTERED Requisitions/Purchase Orders

To SEARCH for a Specific PR/PO

Requisitions – Vendor Requisitions

Reference # = Enter PO or Requisition # (enter)

---displays as a line on the list tab. Double click to open or click OPEN

To SEARCH for Multiple PR's/PO's

Requisitions – Vendor Requisitions

Fiscal Year – 19 (enter)

Order Location – 46D (enter)

Order Type – B (enter), click

The list will display on the LIST tab. You need to scroll to the right to see the vendor names. You can click on any of the light blue headings and drag them to change your view, if desired

To COPY your PO's into the Next Year

Run your multiple PO search as above.

From the List, click once on a PO

Click

Select the appropriate school year.

Complete your PR as usual. Remember to change the dates in the line item description. Click and SUBMIT

To PRINT a Snapshot

*In Forms Tab, click 1st icon (“preview item”)



OPENS up a Report Tab & Auto opens the “Doc Viewer”

Click PRINTER, Print

Close Doc Viewer & Report Tab & when done

To CHANGE or ADD TO already entered Requisitions or Purchase Orders

**IF PR IS IN “SUBMITTED” STATUS:

Open the PR, click on – Return to Open - Kicks you out of PR back to the LIST – double click to go back in and make your changes. When finished, click on and SUBMIT

****IF PO HAS PRINTED CONTACT PURCHASING**