

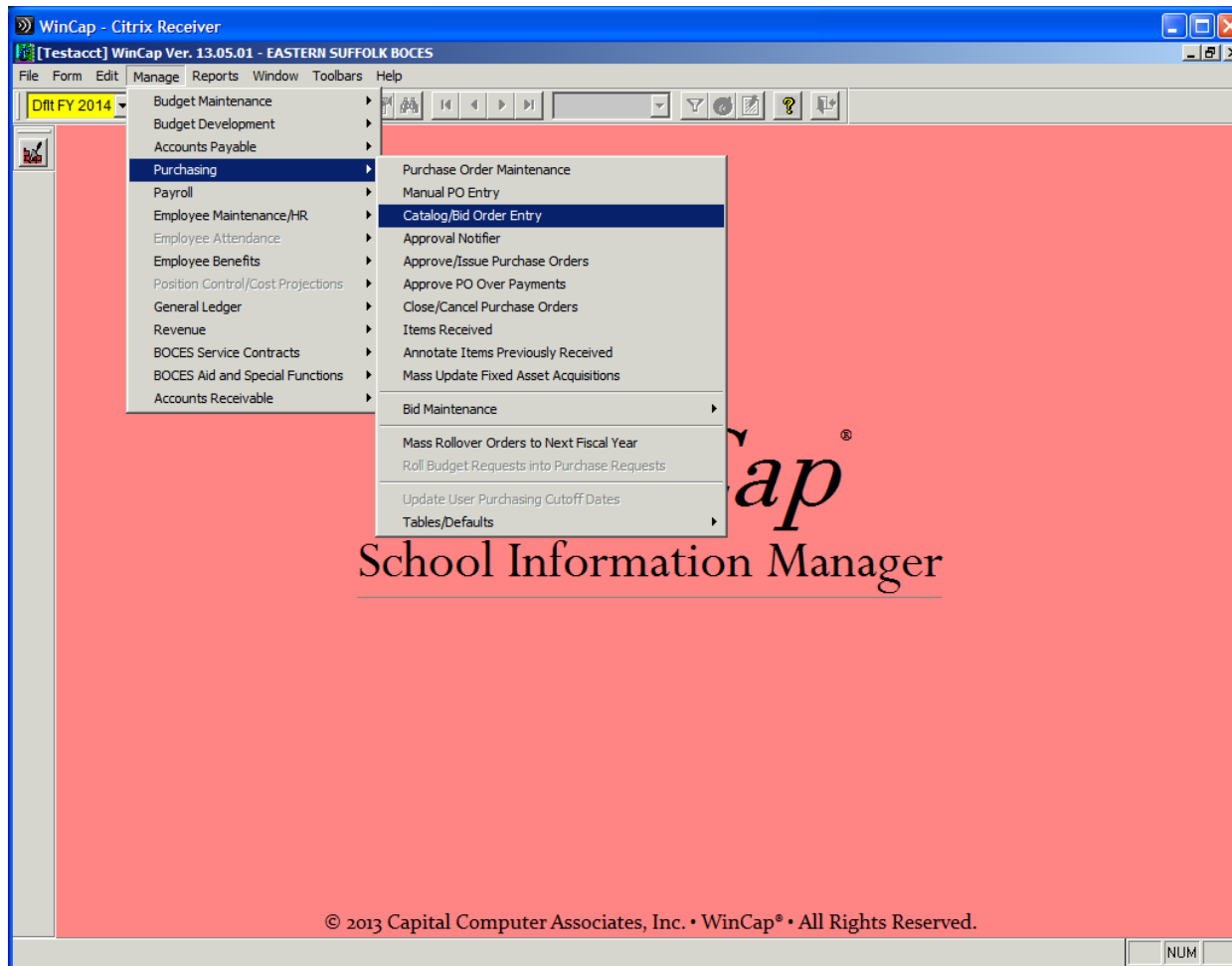


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# Catalog or Bid Purchase Requisitions

2013 Training Session

Bid Catalog orders may be entered by using the *Catalog/Bid Order Entry (Manage/Purchasing/Catalog/Bid Order Entry)* form.



In order to begin with a blank form, click the **Add** button as shown below:



Select the Magnifying lens to look for the Catalog/Bid desired for the items to be ordered.

2013 Catalog/Bid ID  Show Ordered Items Only

Requisitioner  Requestor  Ship To

**Bid Search**

Bid  Search By

Bid	Description	Category	Awarded	Effective	Expires	BidReq Closing
13-14 WAREHOUSE	CLASSROOM/OFFICE & CUSTODIAL 2012-2013	WAREHOUSE	03/06/2013	03/06/2013	12/31/2013	03/01/2013
2014 PURCHASE REQSTS	2014 Purchase Requests		/ /	/ /	/ /	05/01/2013
4/29/13 TESTING BID	4/29/13 Testing	429TESTING	04/29/2013	04/29/2013	04/29/2014	04/19/2013
4/5/13 BID TESTING	4/5 Testing	45TESTING	04/05/2013	04/05/2013	06/30/2013	04/01/2013
CAFETERIA 12-13	CAFETERIA SUPPLIES 2012-2013	CAFETERIA	08/21/2012	08/21/2012	06/30/2013	04/24/2012
COSMETOLOGY	Cosmetology Catalog	COSMETOLOG	/ /	02/21/2013	06/30/2013	/ /
DISTRICT 12-13	ART, ATHLETICS, NURSE, PHYSED, SCIENCE, TECH	DISTRICT	06/12/2012	07/01/2012	06/30/2013	03/20/2012
NOBID	No Bid Required		/ /	07/01/2007	/ /	/ /
PAPER 408	Paper Testing 04/08/2013	PAP0408	04/08/2013	04/08/2013	04/08/2014	04/07/2013

Item  Subcategory  Vendor

Quantity  Unit Cost  UOM  = Extended Cost

Budget Account: Fund  Available Balance

Buttons: OK, Cancel, Approve

Once the appropriate bid is selected hit "OK".

This will populate the appropriate items associated with this bid in the grid. Select the appropriate Requisitioner, Request, etc as well as the Fund and Budget code. If all, or most, of the items for the order are going to be assigned to a single budget account, enter that as the default account. Even if a default account has been entered, different accounts can still be entered for specific items.

The screenshot shows the WinCap software interface. At the top, it displays 'WinCap - Citrix Receiver' and 'WinCap Ver. 13.05.07 - EASTERH/ SUFFOLK BOCES'. The main window is titled 'Catalog/Bid Order Entry [Add]'. It includes a menu bar (File, Fgrm, Edit, Manage, Reports, Window, Toolbars, Help) and a toolbar with various icons. The interface is divided into several sections:

- Form Fields:** Includes 'Catalog/Bid ID' (2011-011-0802), 'Requisitioner' (12654), 'Requestor' (ASMS), 'Department' (BSS), 'Buyer' (KPLA), 'Ship To' (0001), and 'Default Budget Account' (Fund[A] 202-4220-300-0001-00).
- Table:** A table with columns: Item ID, Quantity, Item Description, Fund, Budget Account, Unit Cost, Extended Cost, UOM Code, and Item ID. The table lists various items such as Amplifiers, Audio Card Readers, Batteries, and Camcorders.
- Search By:** A dropdown menu set to 'Item ID'.
- Summary:** Fields for 'Item ID' (00011), 'Subcategory', 'Vendor' (030619), 'Quantity' (0.00), 'Unit Cost' (0.7100), 'UOM' (EA), 'Extended Cost' (0.00), 'Budget Account' (Fund[A] 202-4220-300-0001-00), and 'Available Balance' (34,635.00).

The Search By allows the user to change the order in which the catalog items are displayed. For Example selecting Item Description will then sort and display the items in Alphabetical order according to the item description.

The user can now begin entering the quantities for the items they wish to order.

2014 Catalog/Bid ID 2011-011-0802 Show Ordered Items Only Awarded Bid Catalog Order  
Requisitioner 12654 Kaelin\Maureen Ship To 0001  
Requestor ASMS Assoc Supt for Management Srvc  
Department BSS Business Services  
Buyer KPLA Kristen Plantamura  
Default Budget Account: Fund A 202-4220-300-0001-00

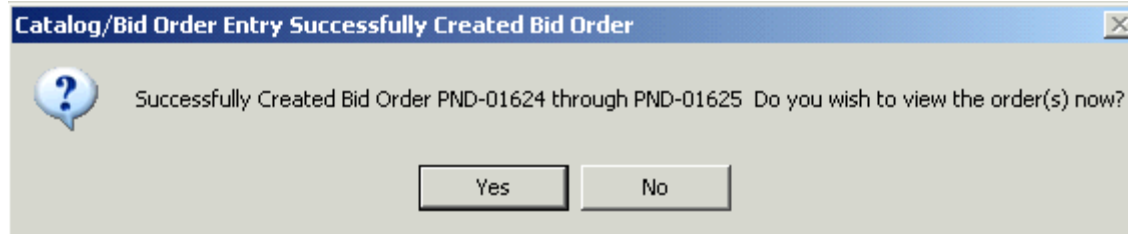
Item ID	Quantity	Item Description	Fund	Budget Account	Unit Cost	Extended Cost	UOM Code	UOM Desc	Avail
00003	1.00	Amplifier, VGA Input, 2 VGA Output, AVTB-201P	A	202-4220-300-0001-00	60.2300	60.23	EA	Each	5.00
00004	0.00	Amplifier, VGA Input, 4 VGA Output, AVTB-4214	A	202-4220-300-0001-00	62.5700		EA	Each	5.00
00008	0.00	Audio, Card Reader (Language Master), Dual Speed, 2	A	202-4220-300-0001-00	166.3500		EA	Each	5.00
00010	10.00	Battery, Alkaline Duracell C	A	202-4220-300-0001-00	0.5500	5.50	EA	Each	5.00
00011	0.00	Battery, Alkaline Duracell D Battery	A	202-4220-300-0001-00	0.7100		EA	Each	5.00
00012	0.00	Battery, Alkaline Duracell 9V	A	202-4220-300-0001-00	1.0200		EA	Each	5.00
00013	0.00	Battery, Alkaline Duracell AA	A	202-4220-300-0001-00	0.2700		EA	Each	5.00
00014	0.00	Battery, Alkaline Duracell AAA	A	202-4220-300-0001-00	0.2700		EA	Each	5.00
00015	0.00	Battery, Panasonic Camcorder AG-160/170	A	202-4220-300-0001-00	21.9900		EA	Each	5.00
00016	0.00	Battery, Panasonic Camcorder AG180 2 hours	A	202-4220-300-0001-00	21.9900		EA	Each	5.00
00017	0.00	Battery, Panasonic Camcorder AG-195MP	A	202-4220-300-0001-00	23.1700		EA	Each	5.00
00018	0.00	Battery, Panasonic Camcorder AG-450	A	202-4220-300-0001-00	21.9900		EA	Each	5.00
00019	0.00	Battery, Panasonic Camcorder Model AG-188U - AG-BP	A	202-4220-300-0001-00	23.1700		EA	Each	5.00
00021	0.00	Battery, RCA BP 96FL Pro Wonder CG310	A	202-4220-300-0001-00	27.1100		EA	Each	5.00
00022	0.00	Belt, Safety, Webbed, 1 IN Wide X 12 Ft. Long, w/Ratc	A	202-4220-300-0001-00	15.1300		EA	Each	5.00
00024	0.00	Camcorder, Sony PMW-350K XDCAM EX HD Camcorde	A	202-4220-300-0001-00	17,100.0000		EA	Each	5.00
00025	0.00	Camcorder, Sony PMW-EX3 XDCAM EX	A	202-4220-300-0001-00	7,400.0000		EA	Each	5.00
00030	0.00	Camera, Digital, Zoom w/USB Out to PC, True XGA, Cla	A	202-4220-300-0001-00	1,934.0700		EA	Each	5.00

Item ID 00010 Battery, Alkaline Duracell C Total Order Amount 65.73  
Subcategory  
Vendor 030619 Pyramid School Products Approve  
Quantity 10.00 Unit Cost 0.5500 UOM EA = Extended Cost 5.50  
Budget Account: Fund A 202-4220-300-0001-00 Available Balance 34,635.00

Enter your default budget code, if you need to change budget code it must be done in the requisition screen

The bottom of the form displays the order total as items are ordered as well as the available balance in the code. Also displayed is the Vendor from which the item(s) will be ordered.

When this is completed, the order can be approved by clicking the “Approve” option. This will display the pending order number(s) that were created for the items requested on the entry form.



If desired, these orders can now be viewed on the Purchase Order Maintenance Screen (*Manage\Purchasing\Purchase Order Maintenance*).

