



Approving Purchase Requisitions in Purchasing



Purchase Requisition (PR) – A purchase requisition document is an internal approval process for requesting to purchase goods or services, and is used to establish pre-authorization for a designated activity.

Purchase Order (PO) – A purchase order is created once a purchase requisition is fully approved. A purchase order is the final authorization to proceed with the purchase of goods or services. This document is used for external purposes of establishing an obligation and guarantee of payment to a designated vendor.

Accessing COMPASSedu

COMPASSedu is a web-based system developed and maintained by the San Bernardino County Superintendent of Schools (SBCSS). The Business Services Office of Copper Mountain College is the district administrator for creating users, approval rules, and assigning account access privileges, in addition to processing Requisitions into Purchase Orders.

To access the system, a user account must be established through the Business Services Office.

[COMPASSedu Sign In](#)

Accessing COMPASSedu (IE Mode)

Since June 15, 2022, Internet Explorer is no longer supported. The COMPASSedu system is only operated using Internet Explorer (IE), so Microsoft has come up with a temporary solution to this issue by allowing Microsoft Edge to be run in “IE Mode” for certain websites. You will need to setup the COMPASSedu login link to run in IE Mode for it to work.

To setup COMPASSedu in IE Mode:

- Open Microsoft Edge 
- In the top right corner click on the “...” menu button and select “Settings”.
- In the Settings menu, select “Default Browser”.
- “Allow sites to be reloaded in Internet Explorer mode (IE Mode)” – Change dropdown setting to “Allow”.

Accessing COMPASSedu (IE Mode)

- Under “Internet Explorer mode pages” select the Add button.
- Copy the link to COMPASSedu, paste that link into the box provided and click Add.
 - LINK: [COMPASSedu Sign In](#)
- The link should now appear on the list of allowed pages, referencing the expiration date*.

*NOTE: The IE Mode license is only allowed for up to 30 days. Microsoft Edge will show a message banner when the page expires and ask if you wish to renew it. Select “Add Back” then click “Done” and it will be extended for another 30 days.

Accessing COMPASSedu (IE Mode)

OPTIONAL STEP: If Microsoft Edge is not your primary/default browser, it is recommended that you also save the page as a favorite or set it up as the default page when opening the Edge browser. To save as a favorite, simply click the star to the right of the address and save to the desired location.

To setup the login screen as the default page:

- In “Settings”, select the “Start, home, and new tabs” menu option.
- Under “When Edge starts” select “open these pages”.
- Click the “Add a new page” and paste the link in the box provided.

Add as Home Page:

- Under “Home button” enable the “show home button on the toolbar”.
- Click the option to add a specific page, paste the link in the box provided.

The Edge browser may need to be closed and reopened to refresh these settings.

Logon to COMPASSedu



The image shows a login form for COMPASSedu. At the top is the COMPASSedu logo, which consists of a blue sun-like icon with rays, followed by the text "COMPASSedu" in a blue serif font. Below the logo is the text "Comprehensive Organizational Management Personnel and Accounting System for Schools" in a smaller, black sans-serif font. The form has three input fields: "Username" with an empty text box, "Password" with an empty text box and a small eye icon to its right, and "District #" with a text box containing the number "79". At the bottom right of the form is a blue button with the text "Sign In" in white.

COMPASSedu
Comprehensive Organizational Management
Personnel and Accounting System for Schools

Username

Password

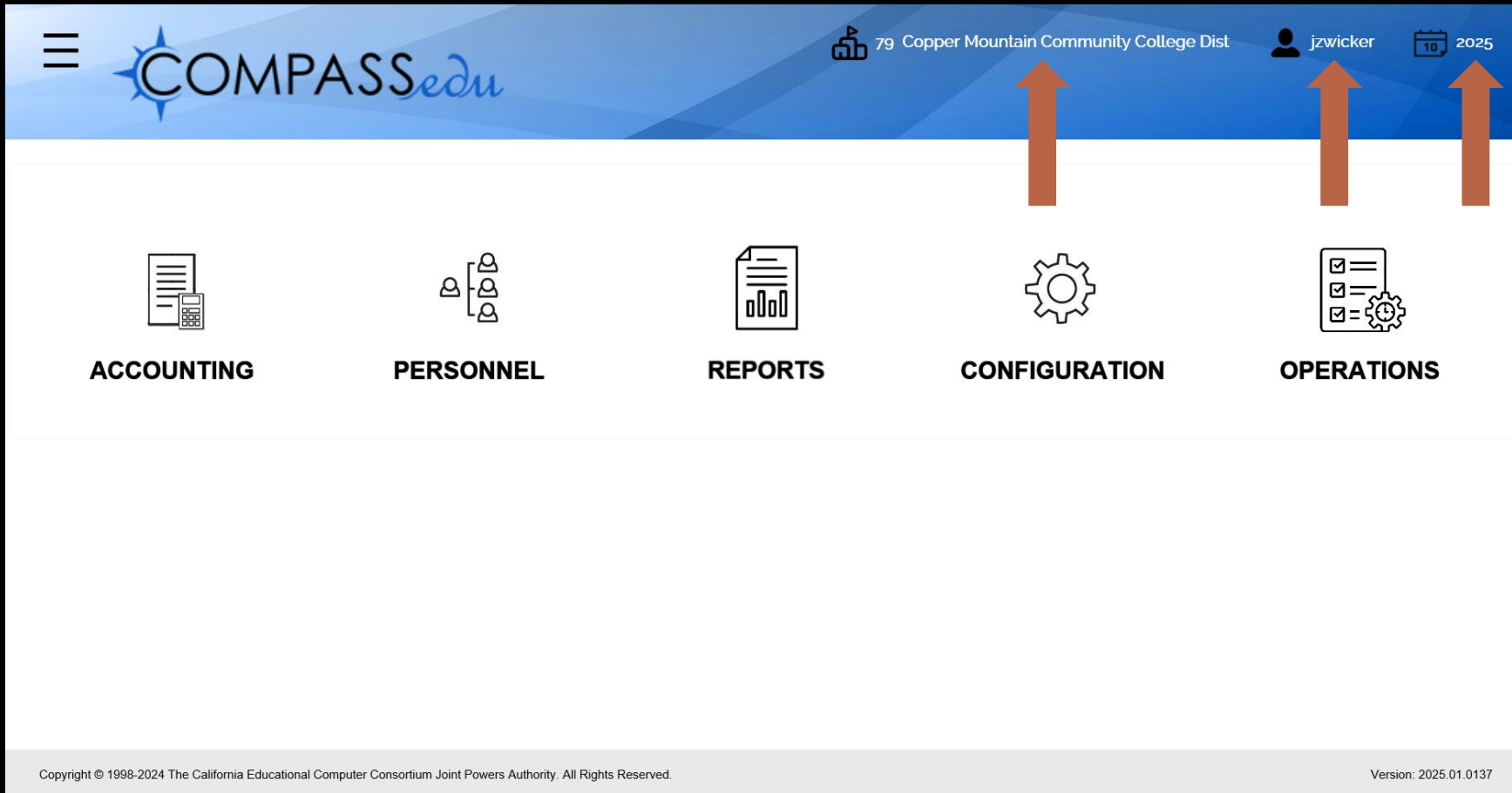
District #

79

Sign In

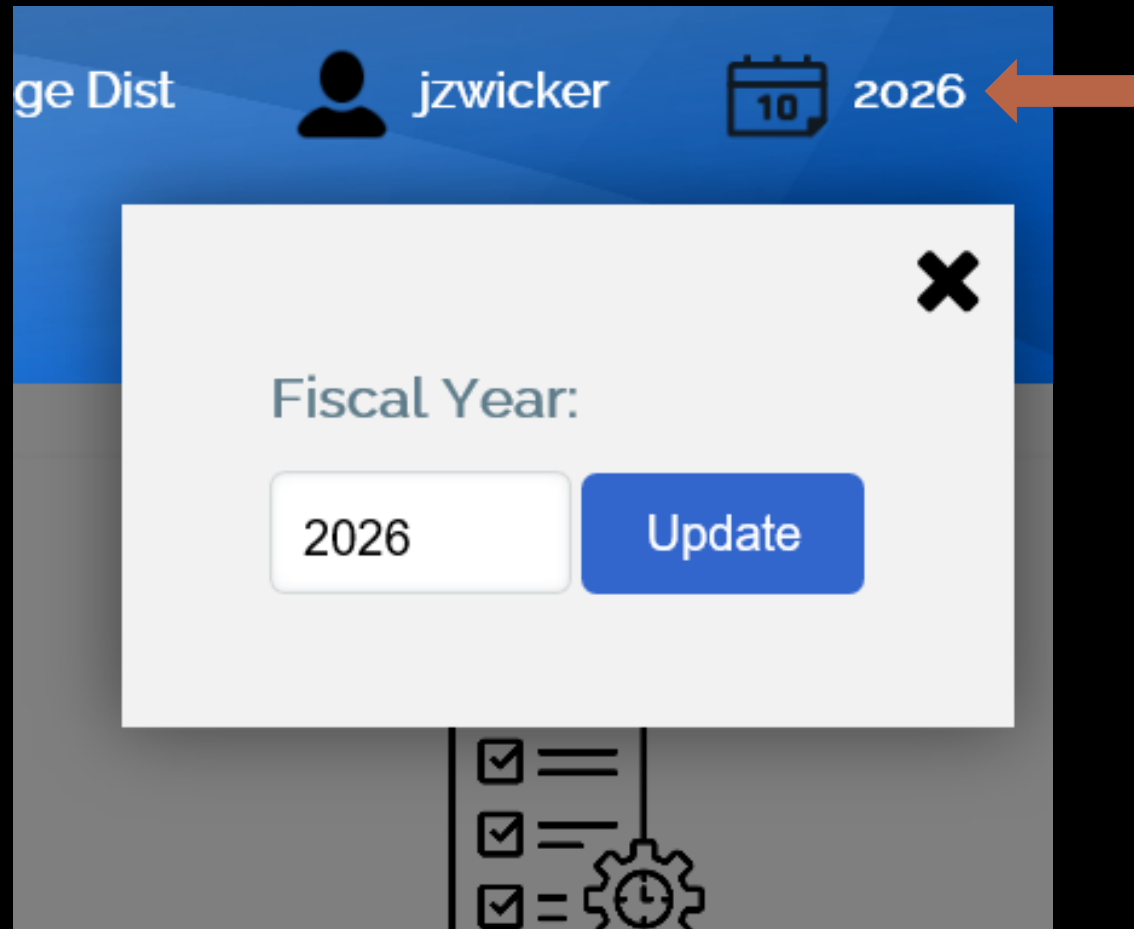
To logon to COMPASSedu, you will need:

1. Username
2. Password
3. District Number (CMC = 79)



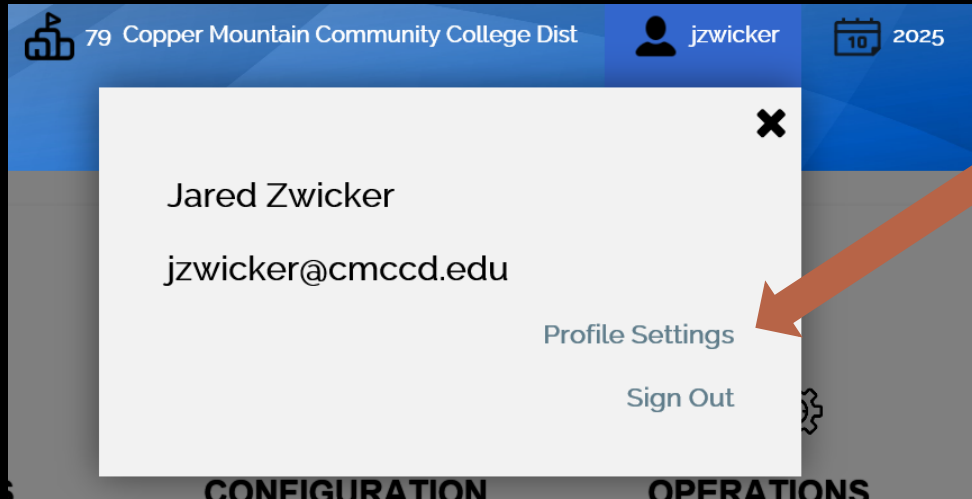
This is the Applications Home Screen. Applications are categorized into different menus. The number of menus and applications visible is based on access granted to the user.

Before continuing, verify that the logon, district, and fiscal year are correct.



To change the fiscal year, click on the calendar icon in the top right corner of the applications menu screen. In the window, enter the correct fiscal year and click “Update”. Contact the Business Office if you are uncertain of the correct fiscal year.

Change Password



A screenshot of the "Change Password" form. The form is titled "Change Password" and has a close button (X) in the top right corner. On the left, there is a sidebar with two options: "General" (with a person icon) and "Password" (with a lock icon). The "Password" option is selected. The main area contains the following instructions: "Password must contain:" followed by a list of requirements: "At least 8 characters", "At least 1 upper Case letter(s) (A-Z)", "At least 1 lower Case letter(s) (a-z)", "At least 1 number(s) (0-1)", and "At most 2 consecutive characters". To the right of these instructions are three input fields: "Current Password", "New Password", and "Retype Password". Each field has a toggle icon (an eye) to the right of it. At the bottom right of the form is an "Update" button.

To change a user password, click on the user name in the top corner of the applications menu screen, then click "Profile Settings". Follow the on-screen instructions for creating a password.

Note: If you have forgotten your password or your account is locked, contact the District Administrator in the Business Office.

Purchasing Application Overview



ACCOUNTING

To access the Purchasing application, click on the “Accounting” menu icon on the Applications Menu Home Screen. In the menu options, select “Purchasing”.

ACCOUNTS PAYABLE

ACCOUNTS RECEIVABLE

BUDGET DEVELOPMENT

COMPENSATION ANALYSIS

FINANCIAL CONTROL

FIXED ASSETS

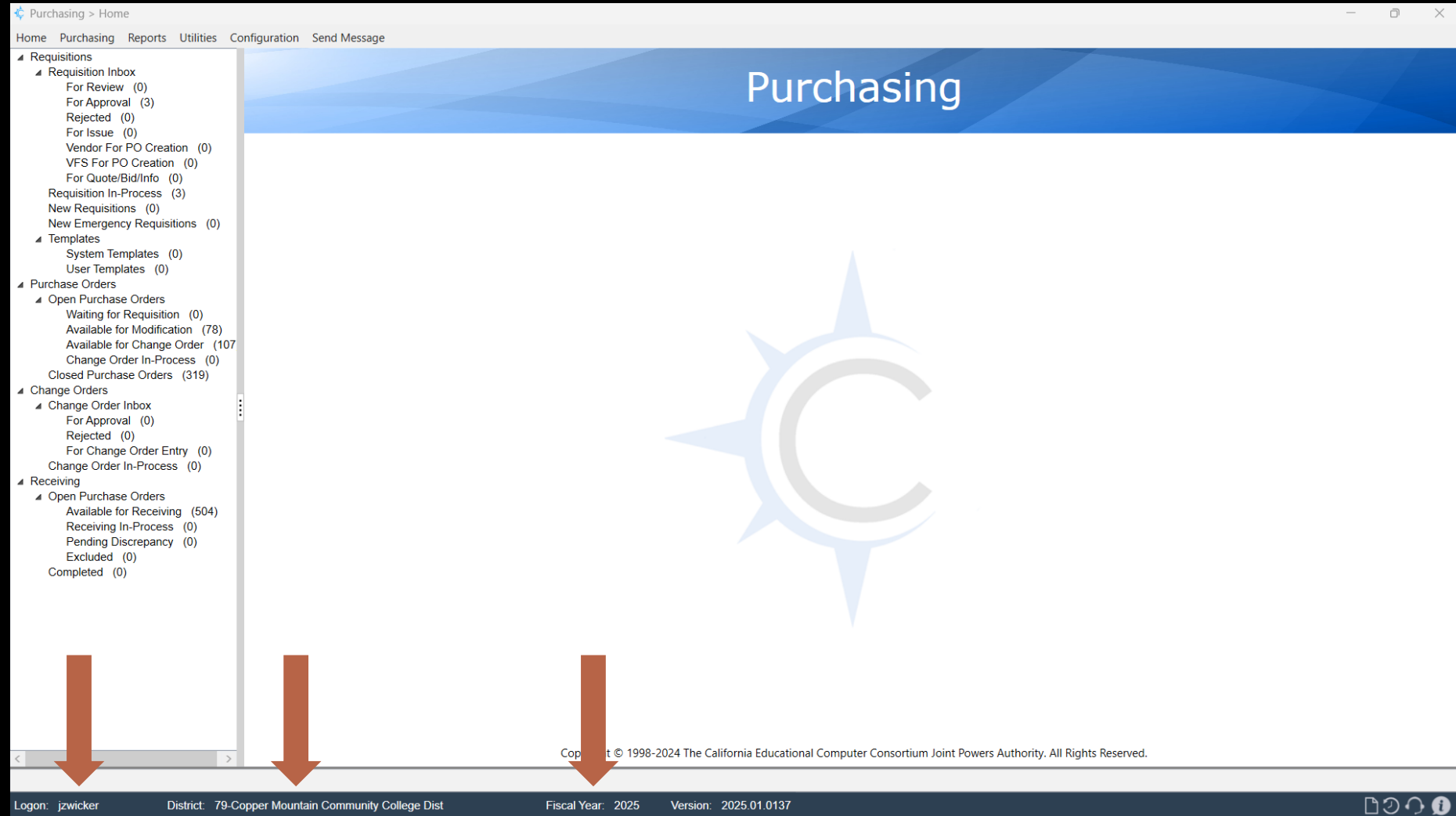
GENERAL LEDGER

PURCHASING

VENDORS



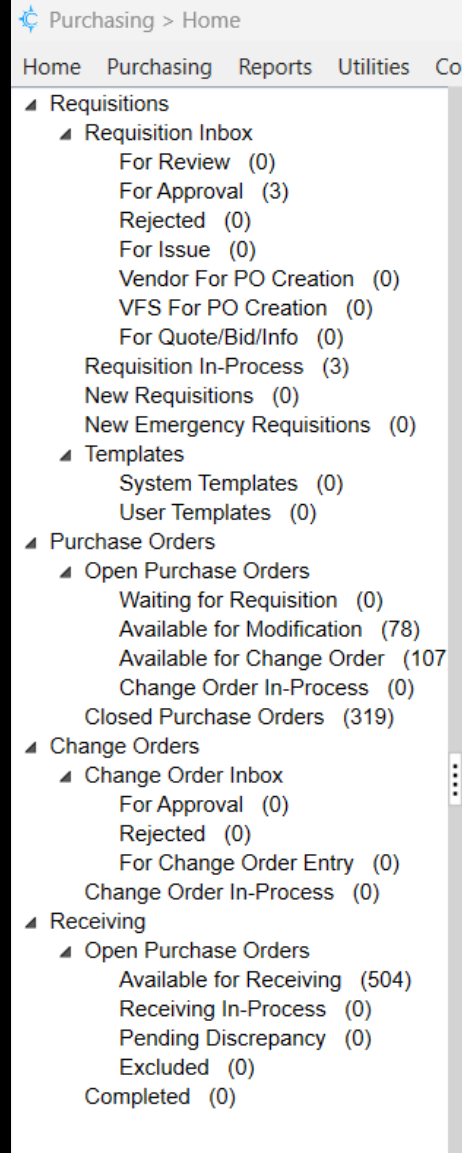
Purchasing Application Overview



The screenshot displays the 'Purchasing > Home' interface. The top navigation bar includes links for Home, Purchasing, Reports, Utilities, Configuration, and Send Message. A left-hand sidebar lists various categories with counts: Requisitions (For Review: 0, For Approval: 3, Rejected: 0, For Issue: 0, Vendor For PO Creation: 0, VFS For PO Creation: 0, For Quote/Bid/Info: 0, Requisition In-Process: 3, New Requisitions: 0, New Emergency Requisitions: 0), Templates (System: 0, User: 0), Purchase Orders (Open: Waiting for Requisition: 0, Available for Modification: 78, Available for Change Order: 107, Change Order In-Process: 0, Closed: 319), Change Orders (Change Order In-Process: 0), and Receiving (Open: Available for Receiving: 504, Receiving In-Process: 0, Pending Discrepancy: 0, Excluded: 0, Completed: 0). The main content area features a large blue header with the word 'Purchasing' and a large, faint 'C' logo. At the bottom, a footer contains the text 'Copyright © 1998-2024 The California Educational Computer Consortium Joint Powers Authority. All Rights Reserved.' and a status bar with 'Logon: jzwicker', 'District: 79-Copper Mountain Community College Dist', 'Fiscal Year: 2025', and 'Version: 2025.01.0137'. Three red arrows point to the 'Logon', 'District', and 'Fiscal Year' fields in the status bar.

Purchasing Home Screen – Before proceeding, verify that the logon, district, and fiscal year are correct.

Purchasing Application Overview



The section to the left of the window is the called the “Purchasing Tree”. This section contains all the menu options available to users based upon access permissions.

Categories:

- Requisitions
- Purchase Orders
- Change Orders
- Receiving

Most Requestors and Approvers will have access to the Requisitions category only.

Approving Requisitions

Purchasing > Home

HomePurchasingReportsUtilitiesCor

Requisitions

Requisition Inbox

For Review (0)

For Approval (3)

Rejected (0)

For Issue (0)

Vendor For PO Creat (0)

VFS For PO Creation

For Quote/Bid/Info (0)

Requisition In-Process (3)

New Requisitions (0)

New Emergency Requisitions (0)

Templates

System Templates (0)

User Templates (0)

Purchase Orders

Open Purchase Orders

Waiting for Requisition (0)

Available for Modification (78)

Available for Change Order (107)

Change Order In-Process (0)

Closed Purchase Orders (319)

Change Orders

Change Order Inbox

For Approval (0)

Rejected (0)

For Change Order Entry (0)

Change Order In-Process (0)

Receiving

Open Purchase Orders

Available for Receiving (504)

Receiving In-Process (0)

Pending Discrepancy (0)

Excluded (0)

Completed (0)

For Approval – On the Purchasing Tree, select the item “For Approval”. This will populate to the right a list of all requisitions in the approvers workflow. The “Currently With” column will indicate the approver’s position.

SearchAddEditWorkflowHistory

Type: (ALL)

Requisition #:

To:

Requisition Date: Select a date 15

To: Select a date 15

Requestor:

Fiscal Year: 2026

Goods/Service: (ALL)

Location: (ALL)

Entered By: (ALL)

Description:

Annual: (ALL)

Advanced Search

	Type	Req#	PO/Issue#	Description	Entered By	Requisition Date	Currently With	Requestor	
▶	VENDOR	260383		Diversified Heating and Air	79FACILITIESOI	09/25/2025	Director of Fiscal	Crysa Ferro	Facilities & Op
▶	VENDOR	260381		Putterman Athletics	79FACILITIESOI	09/25/2025	Director of Fiscal	Crysa ferro	Facilities & Op
▶	VENDOR	260073		ACHRO/EEO Renewal Membership	79DJACKSON	07/02/2025	Senior Fiscal Serv	Danielle Jackson	Human Resour

Approving Requisitions

The search list will display overview information about the requisition such as:

- Requisition #
- Description
- Creator & Requestor
- Vendor
- Cost

SearchAddEditWorkflowHistory

Type: (ALL)Requisition #:To:Requisition Date: Select a date 15To: Select a date 15Requestor:Fiscal Year: 2026

Goods/Services: (ALL)Location: (ALL)Entered By: (ALL)Description:Annual: (ALL)

SearchReset

Advanced Search

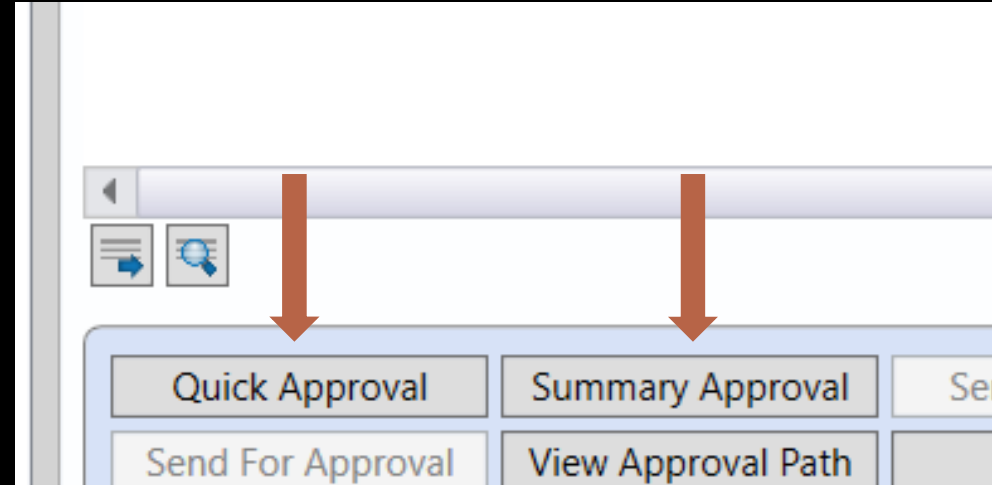
	☐	Type	Req#	PO/Issue#	Description	Entered By	Requisition Date	Currently With	Requestor	Location	Status
▶		VENDOR	260383		Diversified Heating and Air	79FACILITIESOI	09/25/2025	Director of Fiscal	Crysa Ferro	Facilities & Operations	FOR APPROV
▶		VENDOR	260381		Putterman Athletics	79FACILITIESOI	09/25/2025	Director of Fiscal	Crysa ferro	Facilities & Operations	FOR APPROV
▶		VENDOR	260073		ACHRO/EEO Renewal Membership	79DJACKSON	07/02/2025	Senior Fiscal Sen	Danielle Jackson	Human Resources Office	FOR APPROV

Use the horizontal scroll bar to see more information.

Approving Requisitions (Quick Approval)

There are two options for approving requisitions:

- Quick Approval
- Summary Approval

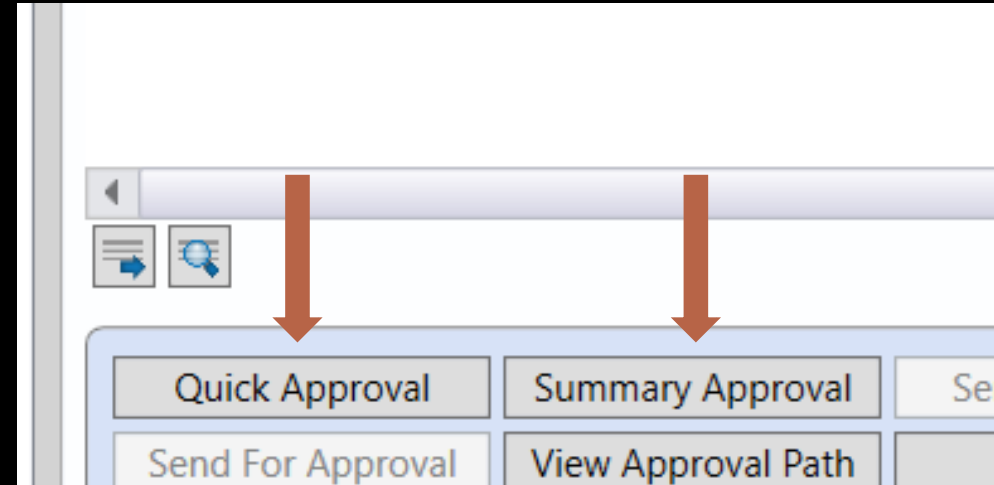


Quick Approval – allows approver to approve the requisition based on the overview information provided on the Requisitions Search screen.

Click on the desired requisition to highlight it. The “Quick Approval” button will become available. The “Enter Comments for Approval” pop-up box will appear. Enter any comments, if any, or simply click “OK” to approve the requisition.

Repeat this process, if desired, with the next requisition on the list.

Approving Requisitions (Summary Approval)



Summary Approval – takes the approver into the details of the Requisition Entry screen to review the complete information on the Requisition.

Summary approval also gives the approver the ability to review each requisition in sequence, as long as the highlighted requisition is the first on the list.

Highlight the first requisition on the list, click “Summary Approval”. This will open the first requisition’s detailed information for review.

Approving Requisitions (Summary Approval)

All

Requisition

Vendor

Shipping

Item Detail

Attachments

Requisition

260383

Diversified Heating and Air

Document #

260383

Annual:

☐

* Description:

Diversified Heating and Air

Entered By:

79FACILITIESOPERATIONS

Requisition Date:

09/25/2025

Notes

No Errors

Type:

VENDOR REQUISITION

Status:

FOR APPROVAL

* Requestor Name:

Crysa Ferro

* Requestor Position:

FACILITIESOPERATIONS

* Building/Dept:

NOT APPLICABLE

* Type Goods/Services:

61**/62** - SITE/BLDG IMPROVEMENTS

Room:

Cafe

* Location:

FACILITIES & OPERATIONS

Purchase Order #:

Purchase Order Date:

Reason For Last Status Change:

REQUISITION APPROVED - SENT TO NEXT APPROVER

Vendor

030914-02

DIVERSIFIED HEATING & COOLING

Shipping

BUSINESS

Copper Mountain College

Item Details

Item Count:1

Account Count:1

Total:\$4,392.00

Balance:\$0.00

Attachments

(1)

Section 1 – Requisition: Displays the overview information about the requisition (number, description, requestor, department, type of goods/services).

Section 2 – Vendor: Displays the desired vendor for this requisition. If the vendor is not entered, check the “Suggested Vendor/Changes” box in this section. Vendor may be new to the system.

Section 3 – Shipping: Populates once a vendor is selected, typically does not require additional entry.

Section 4 – Item Details: Displays the goods/services requested and the accounting information to fund the requisition.

Section 5 – Attachments: Additional supporting documentation for the requisition.

Approving Requisitions (Summary Approval)

The screenshot displays a web-based requisition approval interface. At the top, there is a navigation bar with tabs: All, Requisition, Vendor, Shipping, Item Detail, and Attachments. The 'Requisition' tab is selected, showing details for requisition 260383, 'Diversified Heating and Air'. The main form contains several sections: Document # (260383), Annual (checkbox), Description (Diversified Heating and Air), Entered By (79FACILITIESOPERATIONS), Requisition Date (09/25/2025), Notes, and No Errors. Below these are fields for Type (VENDOR REQUISITION), Status (FOR APPROVAL), Requestor Name (Crysa Ferro), Requestor Position (FACILITIESOPERATIONS), Building/Dept (NOT APPLICABLE), Type Goods/Services (61**/62** - SITE/BLDG IMPROVEMENTS), Room (Cafe), Location (FACILITIES & OPERATIONS), Purchase Order #, and Purchase Order Date. At the bottom, there is a summary section showing Vendor (030914-02 DIVERSIFIED HEATING & COOLING), Shipping (BUSINESS Copper Mountain College), Item Details (Item Count:1, Account Count:1, Total:\$4,392.00, Balance:\$0.00), and Attachments (1).

Document #	Annual:	* Description:	Entered By:	Requisition Date:	Notes	No Errors
260383	☐	Diversified Heating and Air	79FACILITIESOPERATIONS	09/25/2025		
Type:		Status:	* Requestor Name:	* Requestor Position:		
VENDOR REQUISITION		FOR APPROVAL	Crysa Ferro	FACILITIESOPERATIONS		
* Building/Dept:		* Type Goods/Services:	Room:	* Location:		
NOT APPLICABLE		61**/62** - SITE/BLDG IMPROVEMENTS	Cafe	FACILITIES & OPERATIONS		
Purchase Order #:		Purchase Order Date:	Reason For Last Status Change:			
			REQUISITION APPROVED - SENT TO NEXT APPROVER			

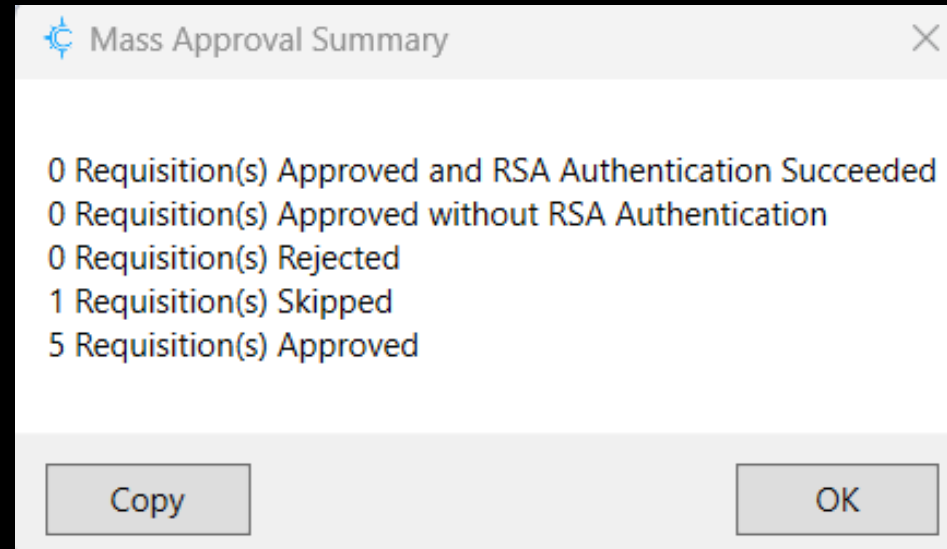
Vendor 030914-02 DIVERSIFIED HEATING & COOLING
Shipping BUSINESS Copper Mountain College
Item Details Item Count:1 Account Count:1 Total:\$4,392.00 Balance:\$0.00
Attachments (1)

Approver may make any necessary changes to the requisition, then click “Save” at the bottom right corner of the screen.

Approval of requisitions is occurring in sequence. Approver may skip the currently displayed requisition if they wish to address anything later by clicking “skip”. This will allow the approver to move on to the next requisition in sequence and keep the skipped requisition in their workflow for later.

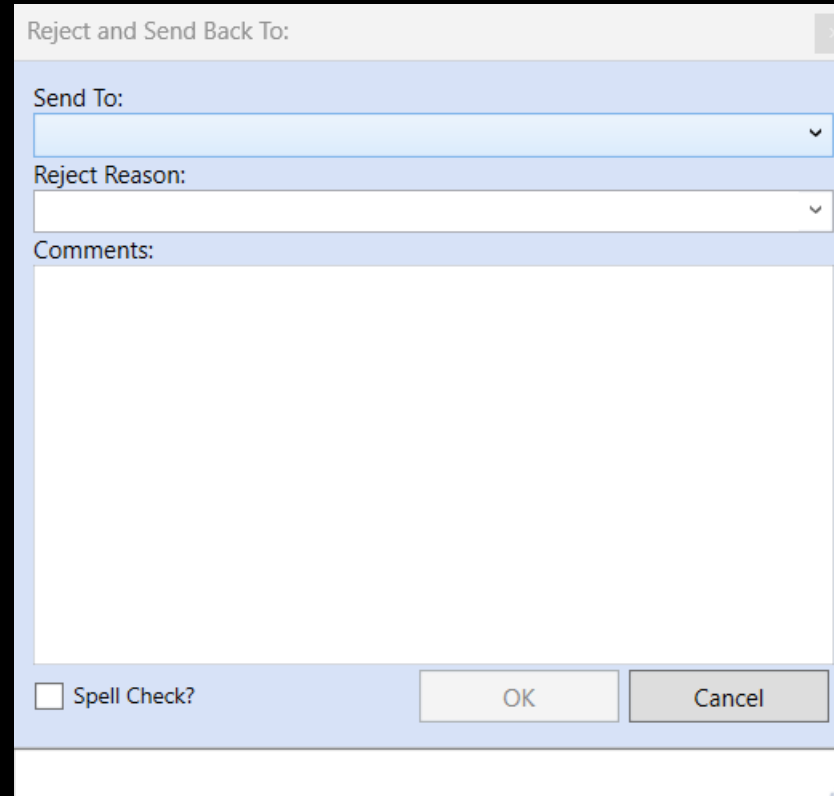
Once reviewed, click “Approve”. The system will then automatically move to the next requisition on the list. Continue reviewing and approving requisitions.

Approving Requisitions (Summary Approval)



Once all requisitions on the list have been reviewed and approved using the Summary Approval method, a pop-up summary box will appear, displaying the activity performed.

Approving Requisitions (Rejecting Requisitions)



The image shows a software dialog box titled "Reject and Send Back To:". It contains three main input areas: a "Send To:" dropdown menu, a "Reject Reason:" dropdown menu, and a large "Comments:" text area. At the bottom left, there is a checkbox labeled "Spell Check?". At the bottom right, there are two buttons: "OK" and "Cancel".

Approvers also have the option to reject a requisition. Click the “Reject” button at the bottom of the screen. A “Reject and Send Back To” pop-up box will appear. Select the “Send To” position from the drop-down menu. Enter reason in the “Comments” box and click “OK”.

Once a requestor has addressed the reason for the rejected requisition, it can then be resent for approval.

Approving Requisitions (Workflow Forwarding)

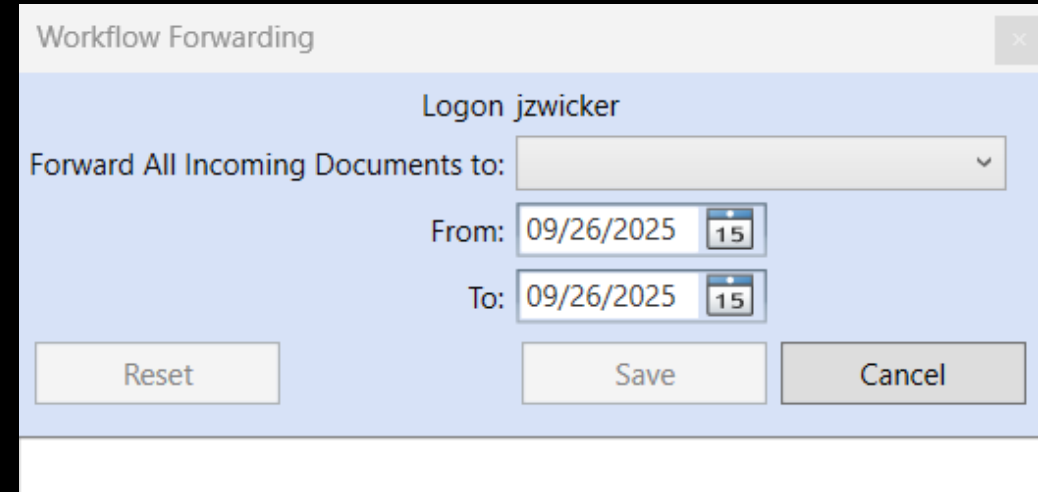
Workflow Forwarding is used when an approver will be out of the office for a period of time. It ensures that requisitions can still be reviewed and approved on their behalf in their absence.

- An approval workflow can only be forwarded to other approvers.**
- Once a requisition has been sent for approval, unless workflow forwarding is active, it will go to the primary designated approver. Workflow forwarding must be active for requisitions to be re-routed to an alternate approver. Otherwise the requisition will remain with the primary approver until their return.**
- Workflow forwarding may also be activated by the District Administrator in the Business Office.**

Approving Requisitions (Workflow Forwarding)

To activate Workflow Forwarding:

1. In Purchasing click on the “Utilities” menu.
2. Select “Purchasing Workflow Forwarding”.
3. A Workflow Forwarding setup box will appear.
4. Under “Forward All Incoming Documents to:” select from the drop-down list to whom the approver’s workflow will be forwarded to.
5. Determine the date range that Workflow Forwarding will remain active. Please note that the end date is included in the forwarding. It will cease to forward on the following date.
6. Click “Save”. All requisitions sent for approval within those dates will be forwarded to the designated alternate approver.



The screenshot shows a window titled "Workflow Forwarding" with a close button in the top right corner. The window has a light blue header bar with the text "Logon jzwicker". Below the header, there is a label "Forward All Incoming Documents to:" followed by a drop-down menu. Below the drop-down menu, there are two date pickers: "From:" and "To:". Both date pickers show the date "09/26/2025" and a calendar icon with the number "15". At the bottom of the window, there are three buttons: "Reset", "Save", and "Cancel".

Using the Search Options (In Requisitions)

Search	Add	Edit	Workflow	History
Type: (ALL) Requisition #: Requisition Date: Select a date 15 To: Select a date 15 Requestor: Fiscal Year: 2025 Goods/Services: (ALL) Location: (ALL) Entered By: (ALL) Description: Annual: (ALL) Search Reset				
^ Advanced Search				
Contract: Fu Ls Si Pgm SubP Obj Type Vendor #: Vendor Name: ... Status: ☐ My Reason: (ALL) ☐ Rolled From Previous Year Only ☐ Emergency POs Only ☐ Rolled To Next Year Only				

Standard Search:

- Requisition #
- Requisition Date
- Requestor
- Fiscal Year
- Location
- Entered By (login)
- Description

Advanced Search:

- Account Code (by whole or section)
- Vendor (use query box to search)
- Status

Using the Search Options (In Purchase Orders)

The screenshot displays a software interface for searching purchase orders. At the top, there are four tabs: 'Search', 'Edit', 'Workflow', and 'History'. The 'Search' tab is active. Below the tabs, there are two main search sections. The first section, labeled 'Standard Search', contains fields for 'Type:' (a dropdown menu with 'PO Number' selected), 'From:' (a date field), 'To:' (a date field), 'PO Date:' (a date field with a calendar icon), 'To:' (a date field with a calendar icon), 'Fiscal Year:' (a dropdown menu with '2025' selected), 'Goods/Services:' (a dropdown menu with '(ALL)' selected), 'Location:' (a dropdown menu with '(ALL)' selected), 'Entered By:' (a dropdown menu with '(ALL)' selected), 'PO/Board Description:' (a dropdown menu), and 'Requestor:' (a text field). There are 'Search' and 'Reset' buttons to the right of these fields. The second section, labeled 'Advanced Search', is expanded and shows more detailed filters. It includes 'Contract:' (a text field), 'Fu Ls Si Pgm SubP Obj Type' (a row of small dropdown menus), 'Vendor #:' (a text field), 'Vendor Name:' (a text field with a search icon), 'Status:' (a dropdown menu with '(ALL)' selected and a 'My' checkbox), 'Reason:' (a dropdown menu with '(ALL)' selected), 'PO Type:' (a dropdown menu with '(ALL)' selected), and several checkboxes for 'Rolled From Previous Year Only', 'No Receipts', 'Excluded From Receiving Only', 'Rolled To Next Year Only', 'Emergency POs Only', 'No Payments', and 'Available For CO Only'. There are also fields for 'Due Date:', 'To:', 'With CO:', 'PO Creator:', and 'Buyer', each with a dropdown menu or date field.

Search Edit Workflow History

Type: PO Number From: To: PO Date: Select a date 15 To: Select a date 15 Fiscal Year: 2025 Search Reset

Goods/Services: (ALL) Location: (ALL) Entered By: (ALL) PO/Board Description: Requestor:

Advanced Search

Contract: Fu Ls Si Pgm SubP Obj Type Vendor #: Vendor Name: ...

Status: ☐ My Reason: (ALL) PO Type: (ALL) ☐ Rolled From Previous Year Only ☐ Emergency POs Only ☐ No Receipts ☐ No Payments ☐ Excluded From Receiving Only ☐ Available For CO Only ☐ Rolled To Next Year Only

Due Date: Select a date 15 To: Select a date 15 With CO: (ALL) PO Creator: (ALL) Buyer: (ALL)

Standard Search:

- PO Number
- PO Date
- Fiscal Year
- Location
- Description
- Requestor

Advanced Search:

- Account number (by whole or section)
- Vendor (use query box to search)
- Status

For further assistance, please contact the
Business Services Office

Chelsie Hayes, Purchaser
Ext. 5306
chayes@cmccd.edu

Jared Zwicker, Director of Fiscal Services
COMPASSedu District Administrator
Ext. 5309
jzwicker@cmccd.edu