Copper Mountain College

Creating Purchase Requisitions in Purchasing

COMPASSedu

Version _ Summer 2025

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:

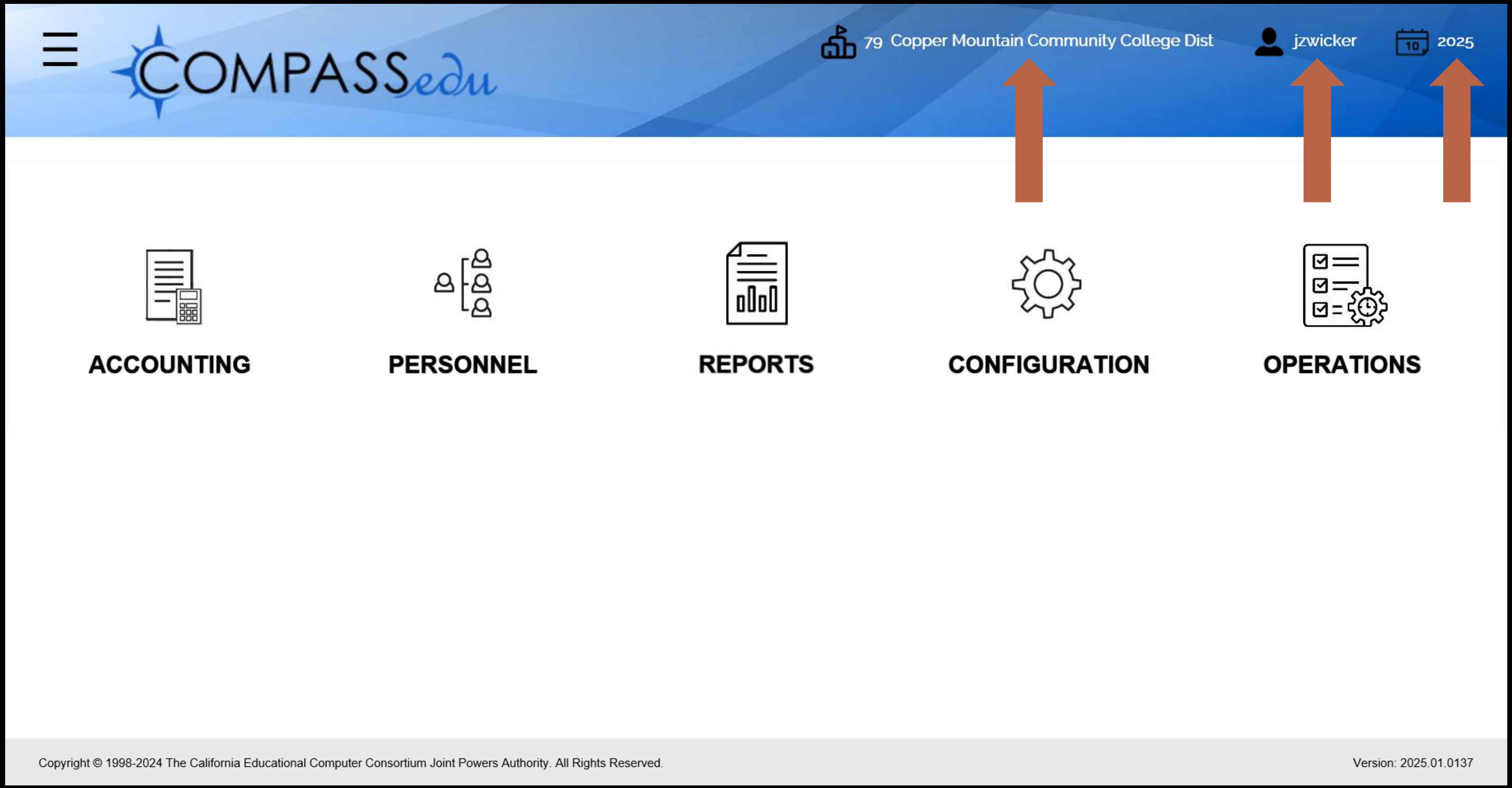
- Under “Home button” enable the “show home button on the toolbar”.
- Click the option to add a specific page, paste the link in the box provided.

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

Logon to COMPASSedu

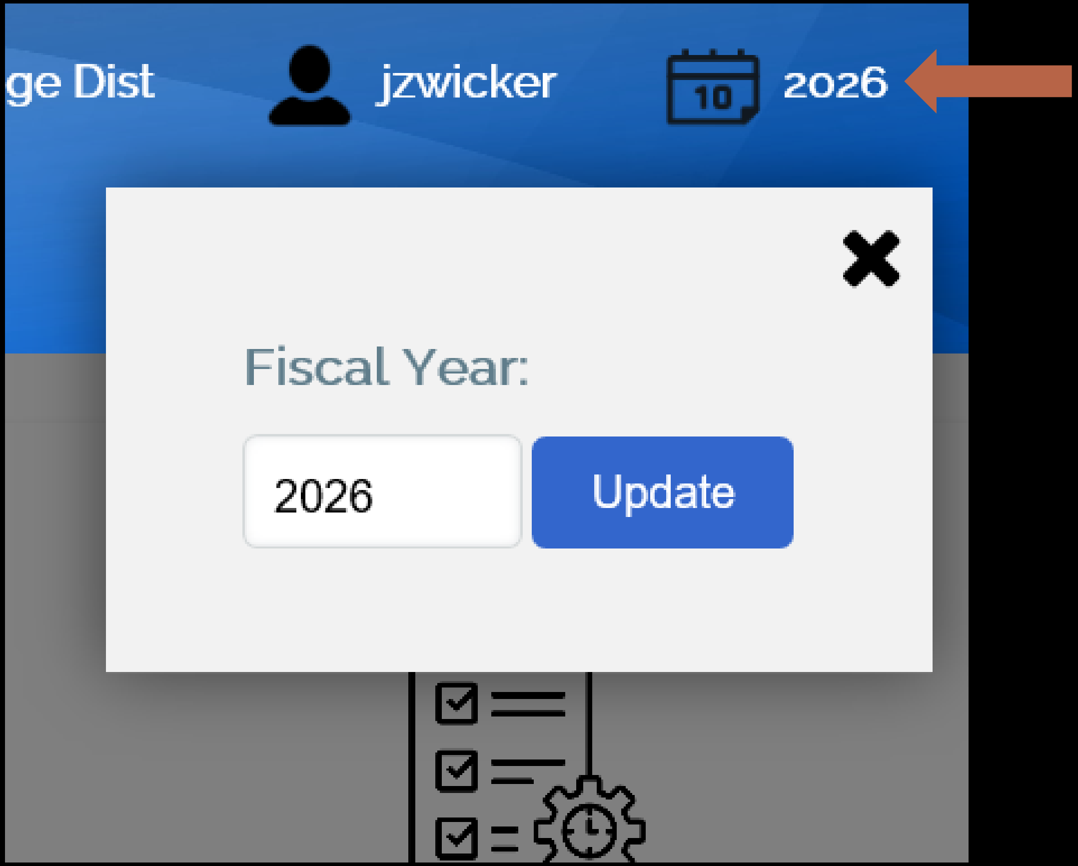
To logon to COMPASSedu, you will need:

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



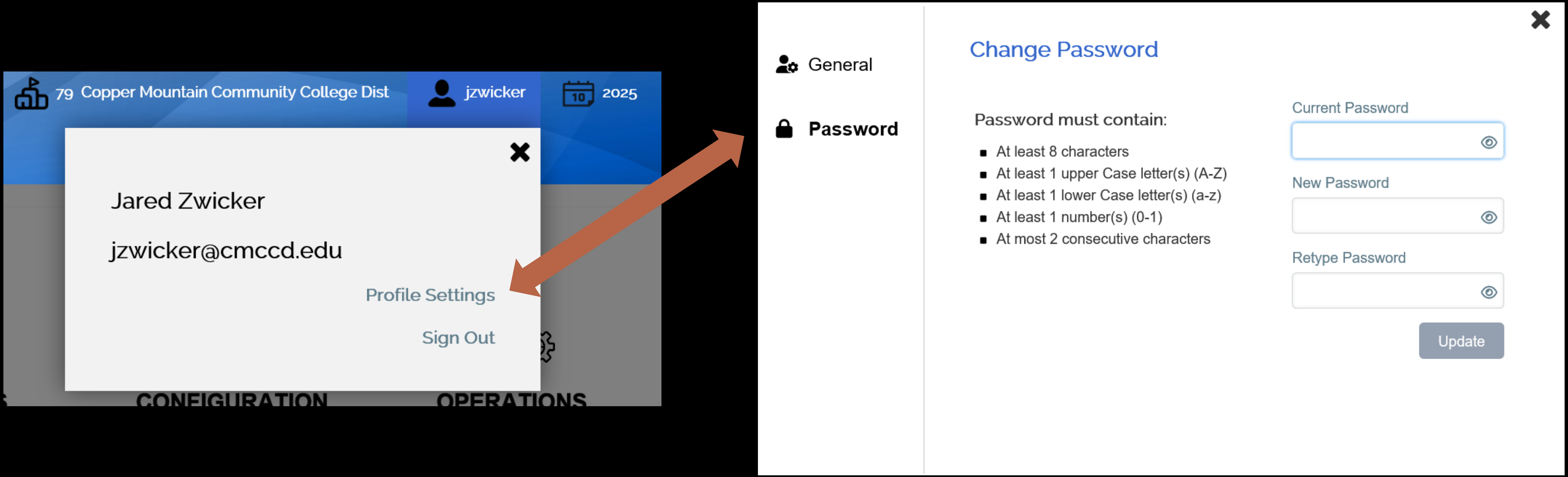
This is the Applications Home Screen. Applications are categorized into different menus. The number of menus and applications visible is based on access granted to the user.

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



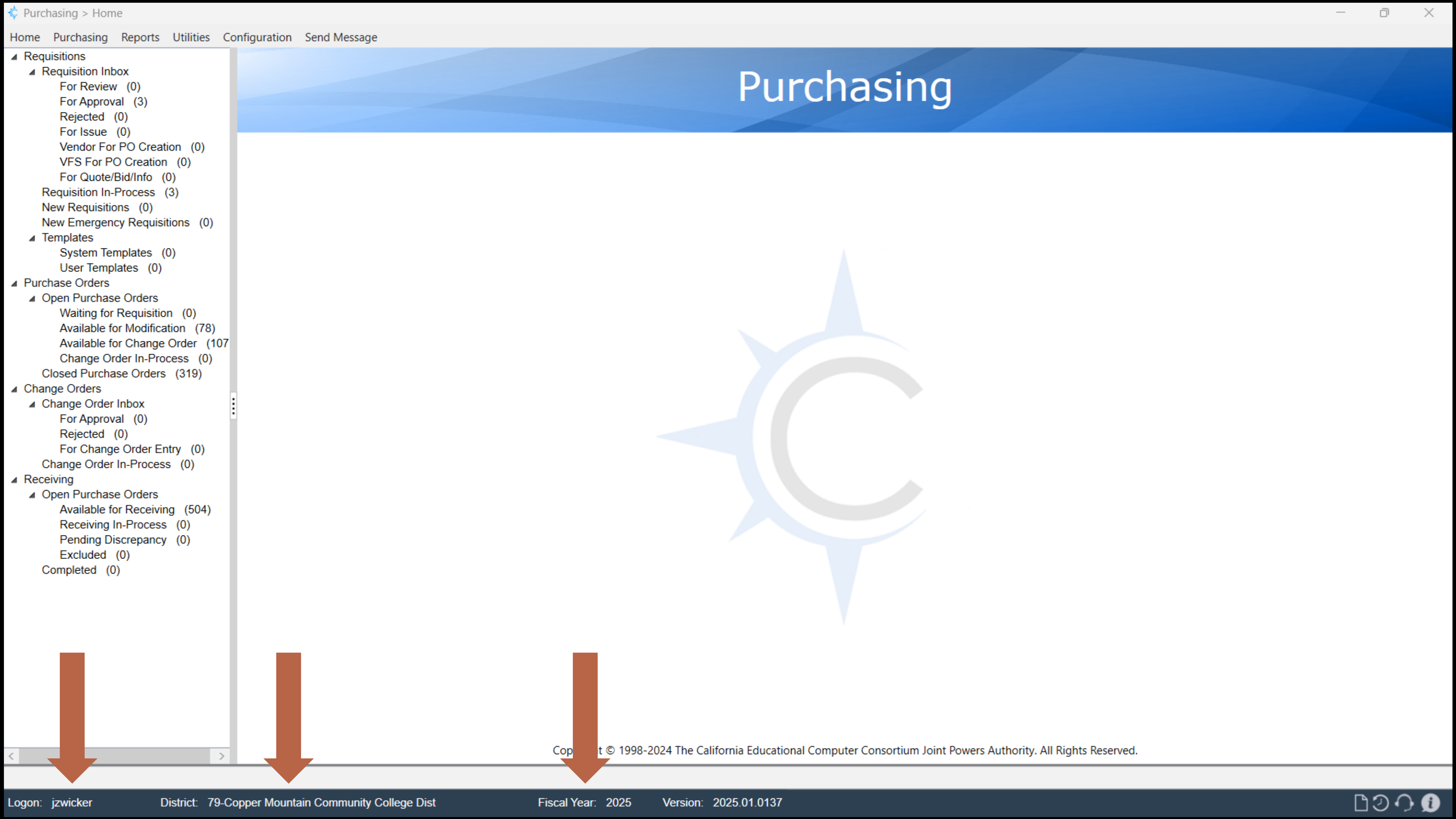
To change a user password, click on the user name in the top corner of the applications menu screen, then click “Profile Settings”. Follow the on-screen instructions for creating a password.

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

Purchasing Application Overview

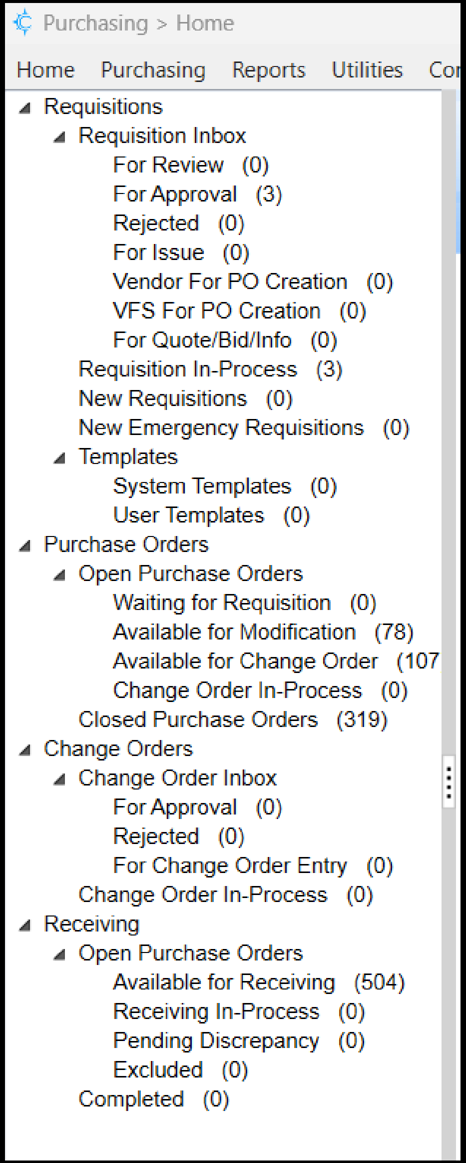
To access the Purchasing application, click on the “Accounting” menu icon on the Applications Menu Home Screen. In the menu options, select “Purchasing”.

Purchasing Application Overview



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

Purchasing Application Overview



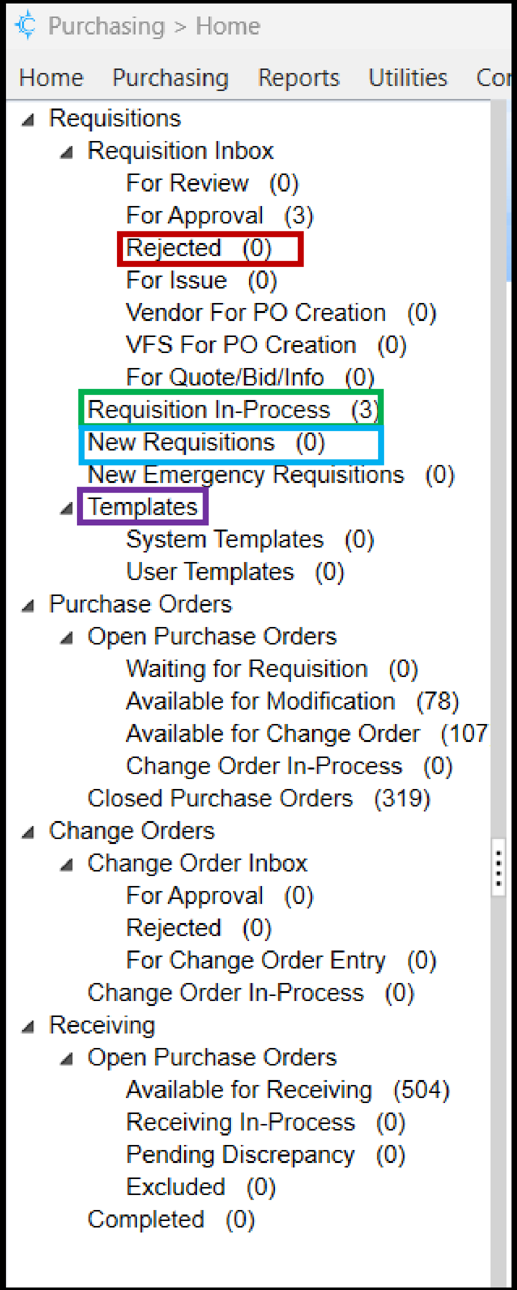
The section to the left of the window is the called the "Purchasing Tree". This section contains all the menu options available to users based upon access permissions.

Categories:

- Requisitions
- Purchase Orders
- Change Orders
- Receiving

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

Purchasing Application Overview



New Requisitions – Create requisitions and send them for approval.

Requisitions In-Process – Track requisitions on the approval path until they become Purchase Orders.

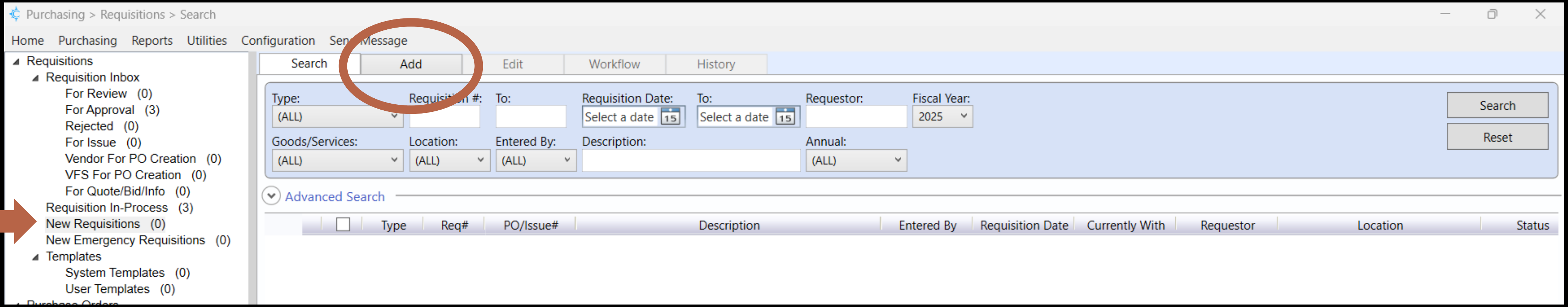
Rejected – Approvers may reject requisitions for various reasons. Rejected requisitions are stored in this folder to be addressed by the Requestor.

Templates – Save regularly used requisition data for easy access and frequent use.

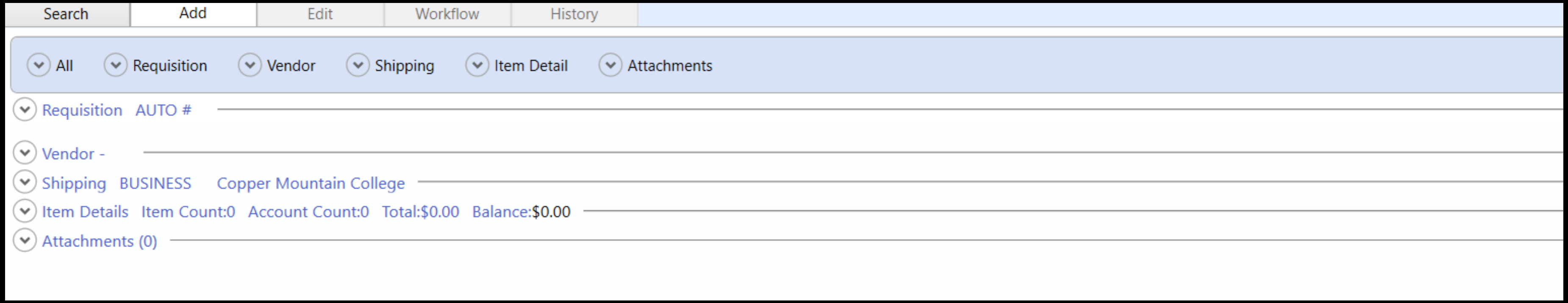
Template Options:

1. System Templates are available to multiple users.
2. User Templates are setup by individual users.

Creating a Requisition



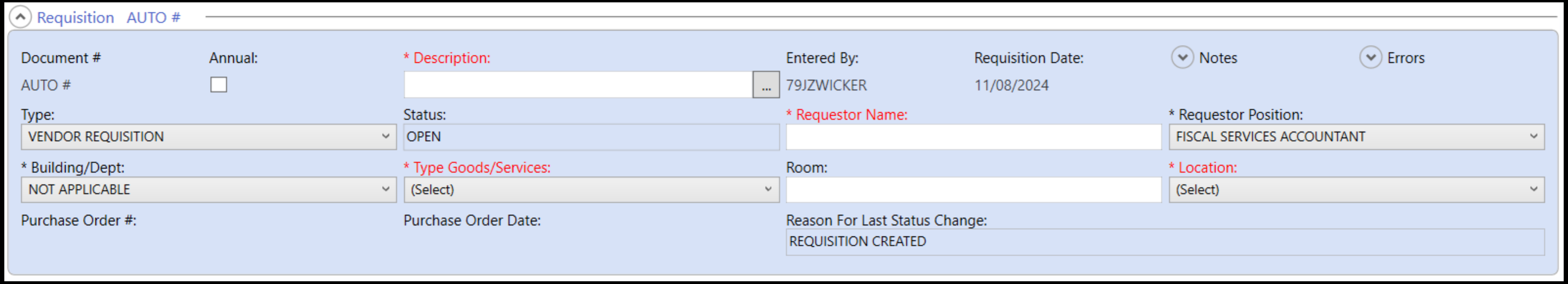
Begin creating a new requisitions by clicking on the “New Requisitions” line under the Requisitions tree category. Then click the “Add” tab at the top of the window. This will open the “Requisitions (Add)” window:



Each section will be addressed in detail…

NOTE: It is recommended to save periodically during the requisition creation process so information is not lost.

Creating a Requisition (Requisition Section)



Document # = Requisition number will be assigned after it is saved for the first time.

Annual (check box) = Check here if requisition is a regularly reoccurring activity on an annual basis (ie contracts, agreements, blanket purchase orders). Contact the Business Office for clarification.

Description = Basic explanation of the purpose of the requisition.

Entered By = Corresponds with user logon.

Type = Vendor Requisition is prefilled.

Status = Open is prefilled for a new requisition. This will update as the requisition travels through the process.

Requestor Name = Enter the name of the requestor. It can be a different name than your own if you are preparing a requisition on behalf of another. Note: Be consistent with how you enter the name for searching purposes later.

Requestor Position = The default position corresponds with the position assigned to the user logon. This also corresponds with the account access permissions granted the position.

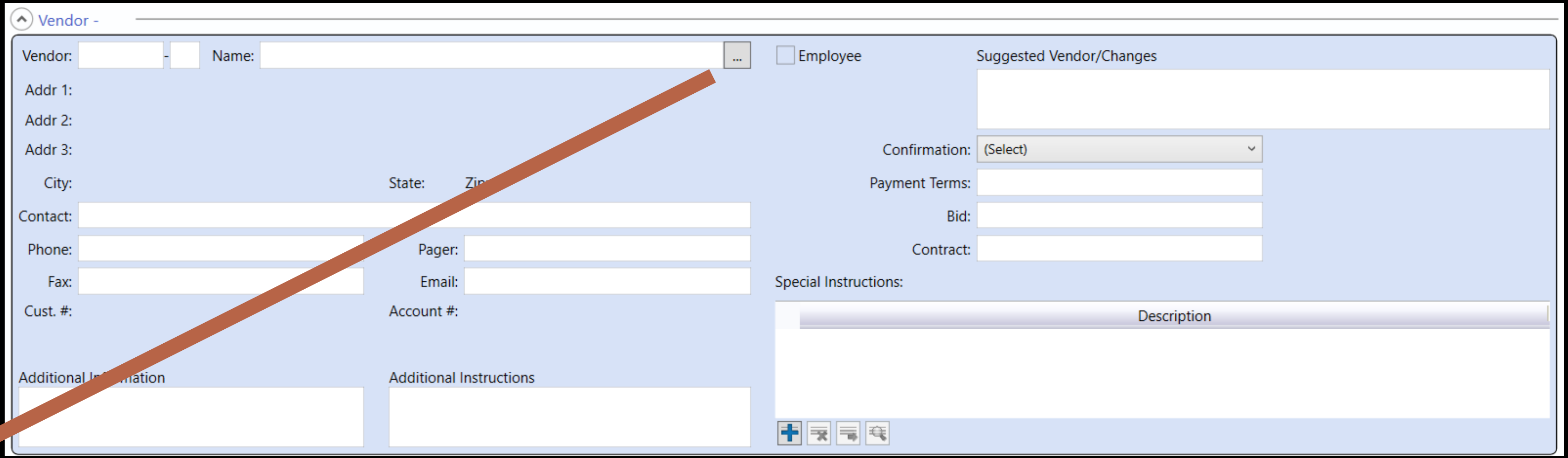
Building/Dept = Not used at this time.

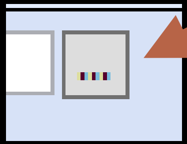
Type Goods/Services = Overview of type of expense related to requisition (Account Object Code and Description).

Room = Not used at this time.

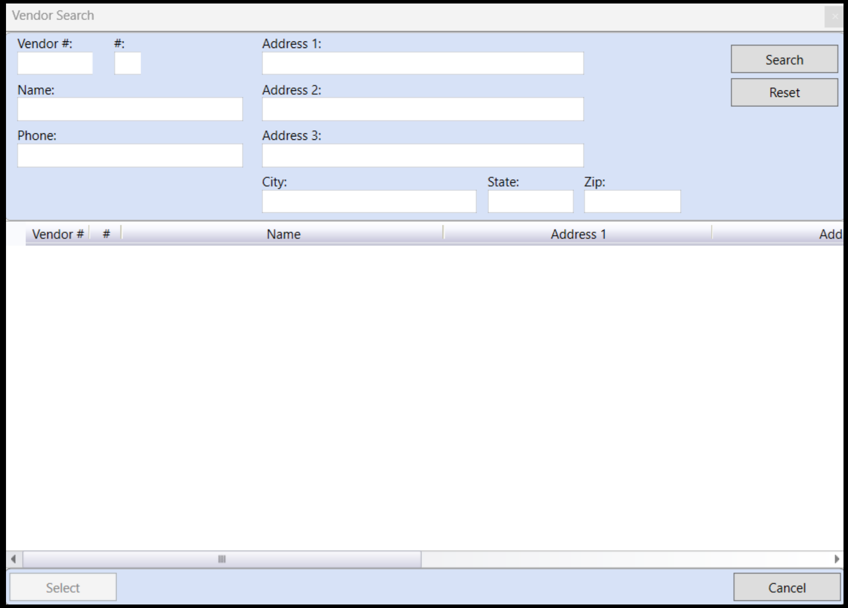
Location = Select the department or office where the requisition originates (if missing contact the Business Office).

Creating a Requisition (Vendor Section)





This box is a query box. Clicking on it will open the “Vendor Search” window to locate and select the vendor.

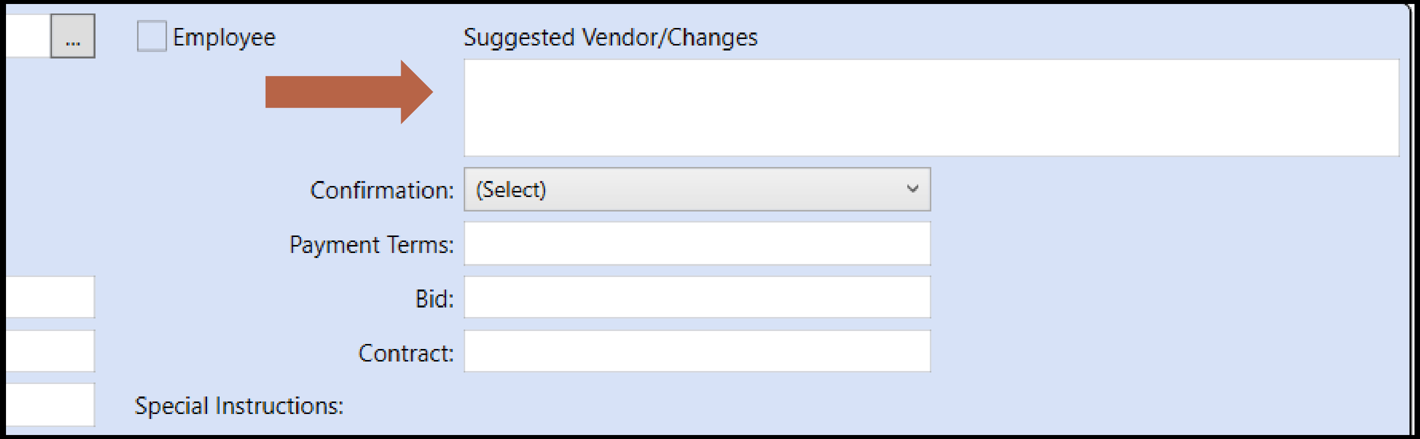


Search Options:

- Vender #
- Name
- Address and Phone Information

Common method: Enter the name of the vendor (can be partial name or any portion of the name), then click search. Choices will populate in list form in the window. Locate the correct vendor information, either double click on the desired vendor, or click to highlight and click “Select”. This information will fill in the Vendor Section of the Requisition.

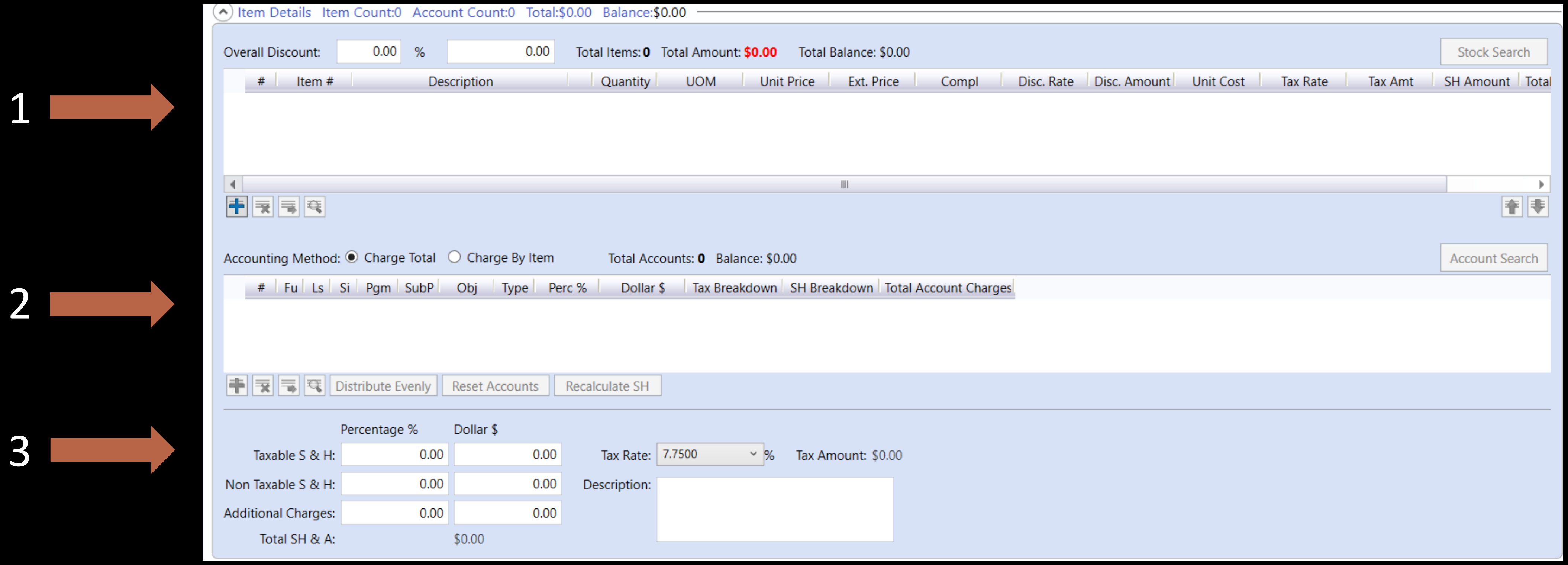
Creating a Requisition (Vendor Section)



If the desired vendor is not found or doesn’t exist, or information is incorrect, enter the desired vendor information or changes in the “Suggested Vendor/Changes” box. Include as much information as possible (i.e. Name, Address, Phone, Fax, Email, etc.). Purchasing will create the vendor once requisition is received. The requisition can be sent for approval without a vendor. If possible, request a W-9 from the vendor and include with requisition.

NOTE: the next requisition section is the “Shipping” section. This portion of the requisition is prefilled once a vendor is selected and does not normally require any additional information from the requestor.

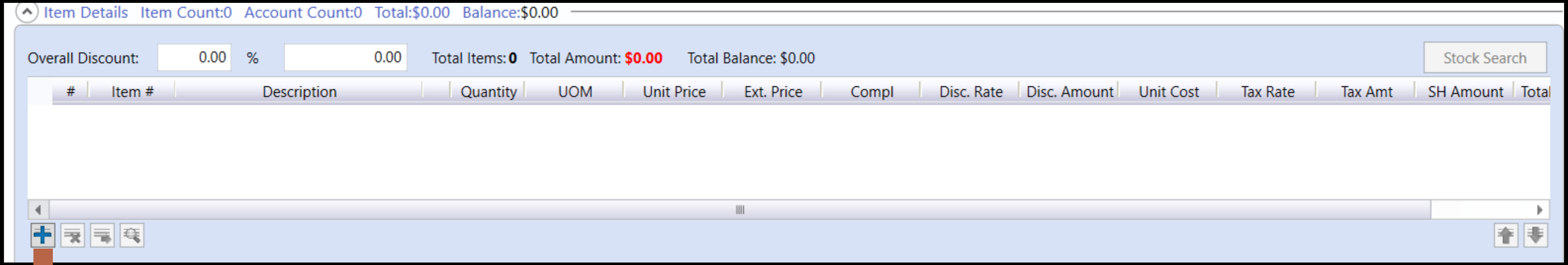
Creating a Requisition (Item Details Section)



There are three sections in the Item Details screen:

1. The Item section records what is being purchased.
2. The Accounting section records the funding source and corresponding account number associated with the requisition.
3. The third section is for Other Fees (shipping & handling, and additional charges).

Creating a Requisition (Item Details Section - Items)



Click “+” to begin adding items to the requisition and for additional items.

Item # = Enter the part number (if applicable).

Description = Use ... for extended description box). Description should match vendor description.

Quantity = Quantity of item desired

UOM = Unit of Measure (ie Box, Dozen, Each, Package, Ream, etc.)

Unit Price = Cost per Unit of Measure (Ext. Price = Unit of Measure x Unit Price)

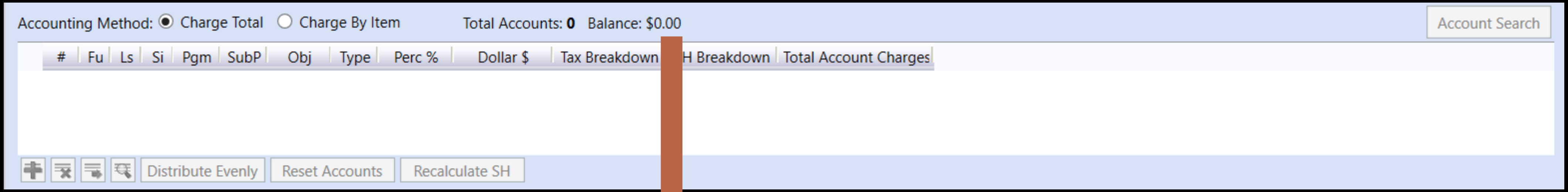
Disc. Rate & Disc. Amount = Discount Rate (%) or Discount Amount ($)

Tax Rate = The current tax rate prefills. If the item is non-taxable, change rate to “Ntx” using drop-down menu.

As items and amounts are added, the Total Amount in red will increase.

To delete lines, highlight desired line and click the “x” button.

Creating a Requisition (Item Details Section - Accounts)



Account Charge Method:

- Charge Total = Assign account(s) to total order
- Charge By Item = Select individual items and charge to specific accounts

Click "+" to begin adding budget account numbers (see *Understanding Accounts* guide). Multiple accounts may be added and charged.

Enter each section of account number

Account Line Charge Method:

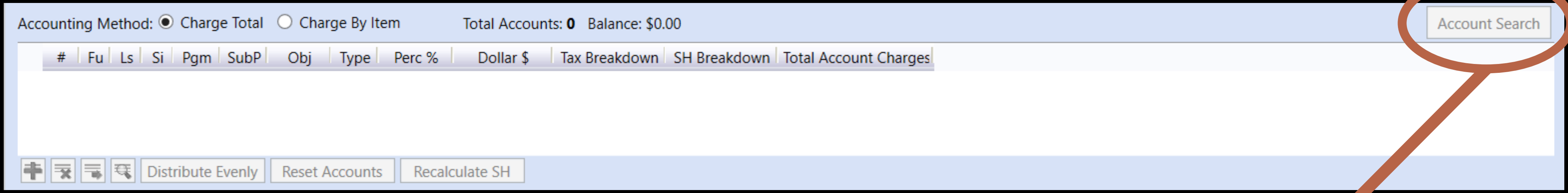
- Perc % = Assign a percentage of order or item total to account.
- Dollar $ = Assign a dollar amount of order or item total to account.
- Qty = Assign specific quantities of an item to accounts (Charge By Item Method Only)

When total of order is fully accounted for, the balance will equal ZERO.

Distribute Evenly = Distributes total order equally to account(s).

Reset Accounts = Resets the charged amounts to all accounts.

Creating a Requisition (Item Details Section - Accounts)

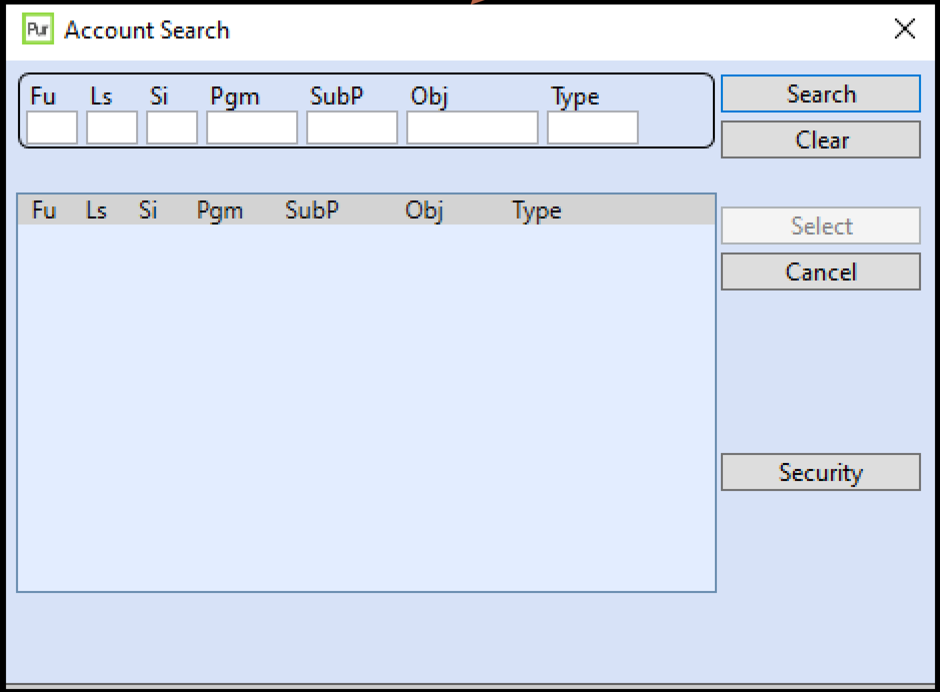


The ability to search for the correct account is also available. Click “Account Search” and the box to the right will appear.

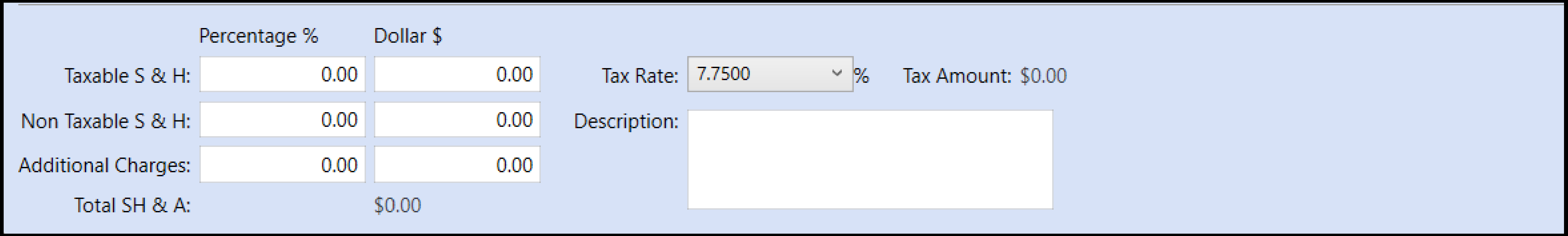
You have the ability to search any portion of the Account Number by entering into the search parameters in the appropriate box.

Once the correct account has been identified, click to highlight that account, then click “Select”. That account will populate in the Account section of the Item Details tab.

Please consult with the Business Office should you need assistance with available accounts.



Creating a Requisition (Item Details Section - Other)



Assign Shipping and Handling fees, whether Taxable or Non-Taxable, to the order.

Charge by Percentage (%) of order or a Dollar ($) amount.

Additional Charges = Designate any additional fees related to the order and provide a description in the box to the right.

Creating a Requisition (Attachments)

Examples of Attachments:

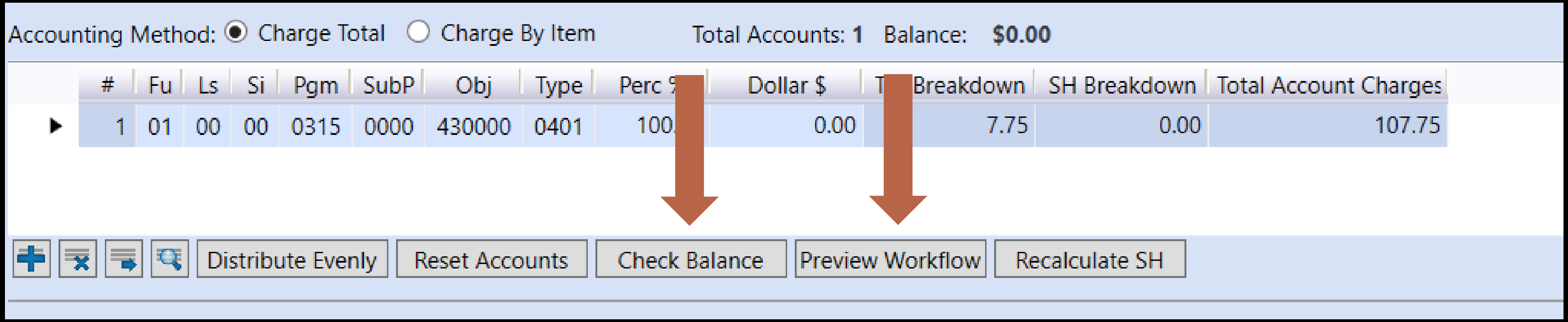
- Sales Quotes/Estimates
- Service Proposals
- Emails (conversations to support order)
- Invoices (in some cases)
- Contracts or Agreements

The preferred format of attachments is PDF. Attachments will stay with the requisition and when it is converted to a Purchase Order as backup.

Click “+” to select files from your computer to include with the requisition.

Sending For Approval (Review & Verify Approval Path)

Before sending the requisition for approval, it is recommended that the Budget be reviewed and the approval path verified (once a requisition is sent the approval path cannot be altered).

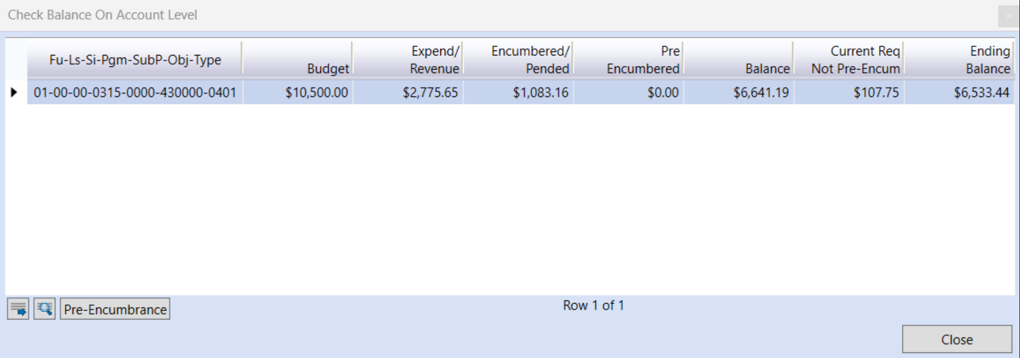


Accounting Method: Charge Total / Charge By Item — Total Accounts: 1 Balance: $0.00

#	Fu	Ls	Si	Pgm	SubP	Obj	Type	Perc	Dollar $	T Breakdown	SH Breakdown	Total Account Charges
1	01	00	00	0315	0000	430000	0401	100	0.00	7.75	0.00	107.75

In the Accounting section of the Item Details tab, once the account(s) has been assigned and the requisition saved, two additional buttons will appear:

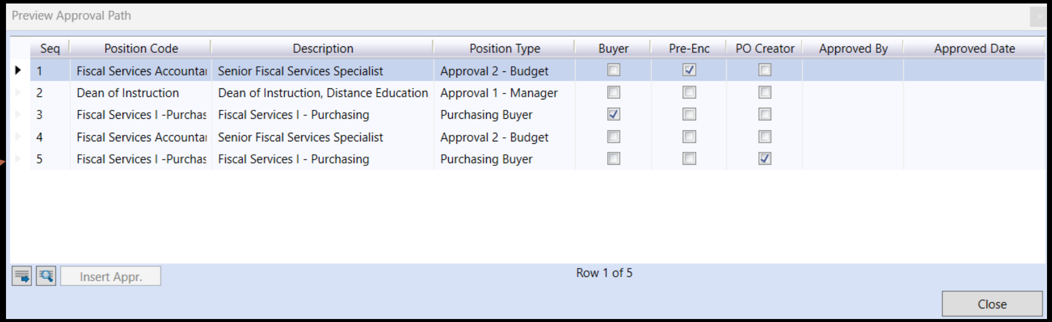
Check Balance – allows requestor and approver to verify the budget and balance of funds available in that budget, including the impacts of requisition.



Check Balance On Account Level

Fu-Ls-Si-Pgm-SubP-Obj-Type	Budget	Expend/ Revenue	Encumbered/ Pended	Pre Encumbered	Balance	Current Req Not Pre-Encum	Ending Balance
01-00-00-0315-0000-430000-0401	$10,500.00	$2,775.65	$1,083.16	$0.00	$6,641.19	$107.75	$6,533.44

Preview Workflow – verify that the requisition will be going to the correct approvers (based on the account/budget selected). NOTE: if the approval path is incorrect or you are uncertain, do not send requisition for approval; instead contact Business Services for assistance.

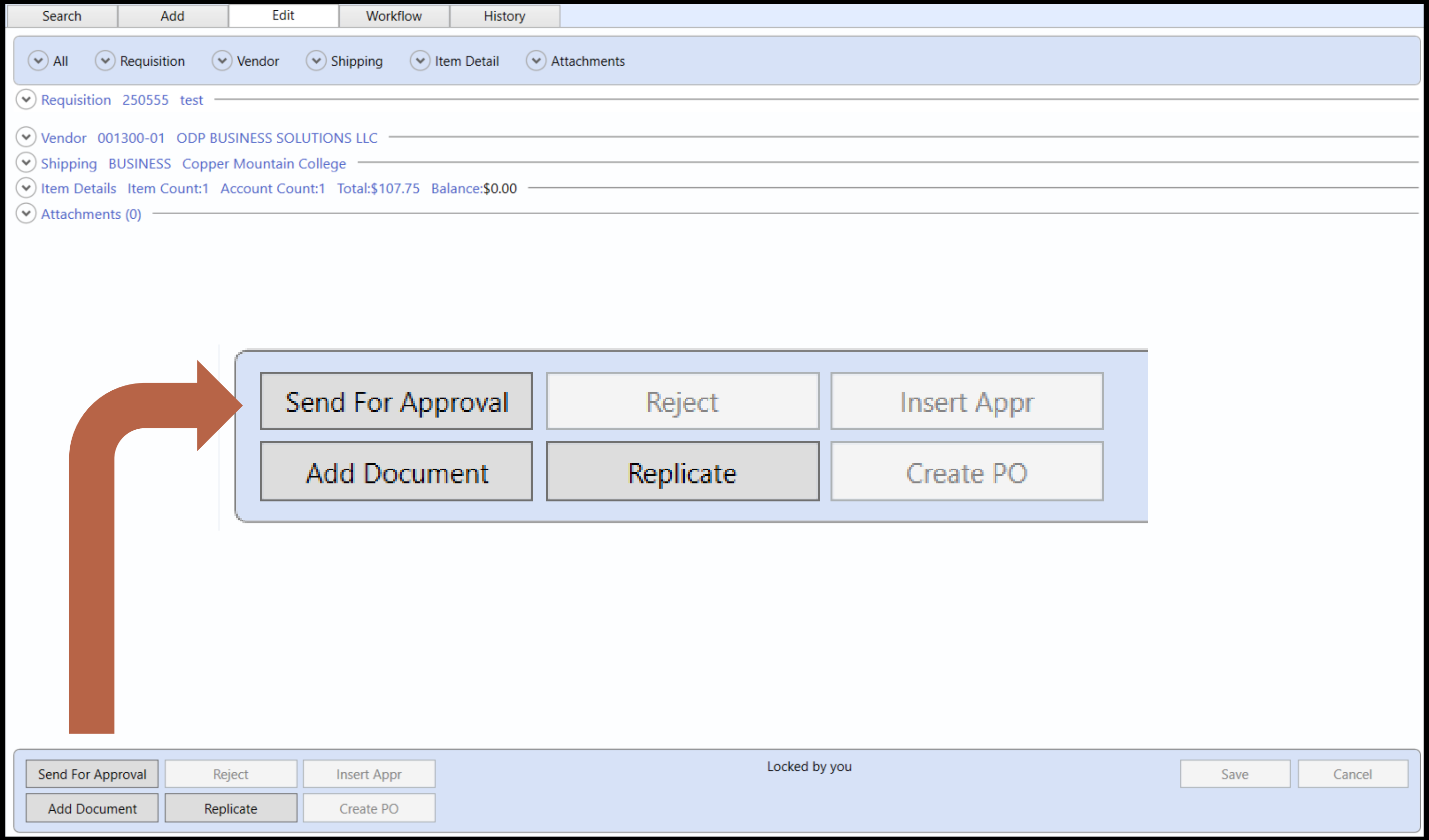


Preview Approval Path

Seq	Position Code	Description	Position Type	Buyer	Pre-Enc	PO Creator	Approved By	Approved Date
1	Fiscal Services Accountai	Senior Fiscal Services Specialist	Approval 2 - Budget	☐	☑	☐		
2	Dean of Instruction	Dean of Instruction, Distance Education	Approval 1 - Manager	☐	☐	☐		
3	Fiscal Services I -Purchas	Fiscal Services I - Purchasing	Purchasing Buyer	☑	☐	☐		
4	Fiscal Services Accountai	Senior Fiscal Services Specialist	Approval 2 - Budget	☐	☐	☐		
5	Fiscal Services I -Purchas	Fiscal Services I - Purchasing	Purchasing Buyer	☐	☐	☑		

Sending For Approval

Once the requisition is completed, verified, and saved, it can now be sent for approval.



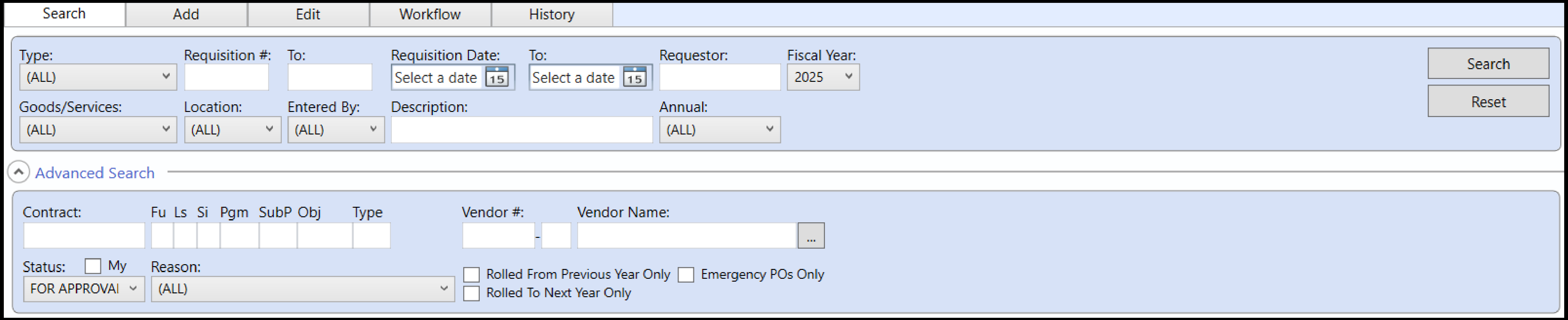
The requestor will be prompted to add comments (optional).

Once requisition is sent for approval, the requisition will transfer from "New Requisitions" to "Requisition In-Process".

The requestor can now track the status of the requisition up to Purchase Order creation. Once a PO has been created, the requisition may be searched for but will no longer appear in the "Requisition In-Process" window.

The requisition has now been created and sent for approval.

Using the Search Options (In Requisitions)



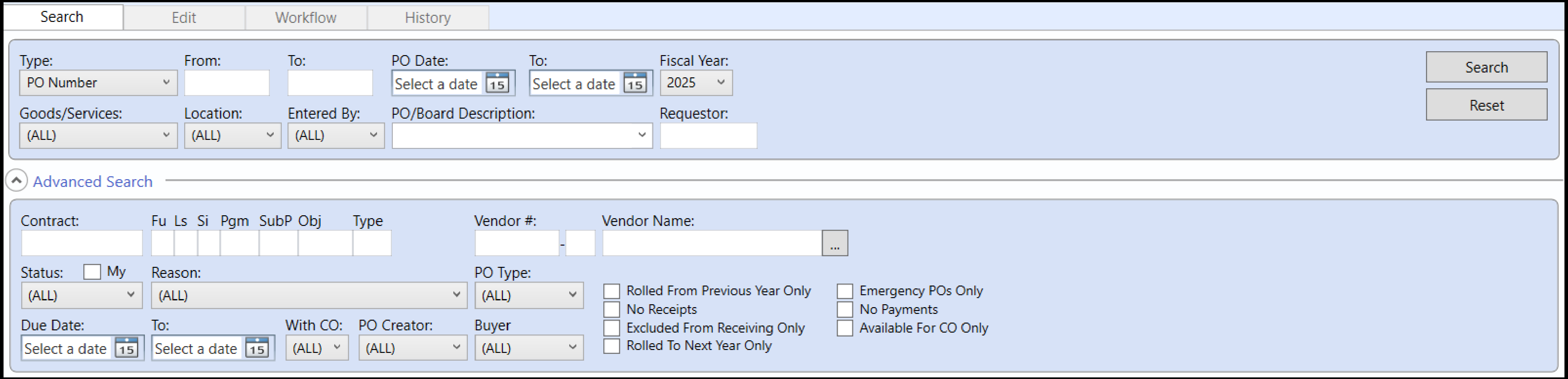
Standard Search:

- 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)



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

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Jared Zwicker, Director of Fiscal Services
District Administrator for COMPASSedu
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