



Galaxy Requisition User's Guide



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Introduction

The purpose of this user's guide is to provide step-by-step instructions for submitting purchase requisitions in the Galaxy System.

Purchasing Process

The District's purchasing policies and procedures are contained in the [Purchasing Handbook](#). Understanding the policies and procedures will assure timely procurement of goods and services.

Additional Helpful Resources

Below are additional helpful resources when submitting a purchase requisition. Click on the links for quick access.

- [Object Codes](#)
- [Purchasing, Accounting, and Accounts Payable Forms](#)

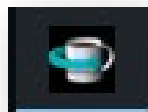
Galaxy Access

The Purchasing Services Specialist is responsible for granting access in the Galaxy System. Access is granted from an employee's supervisor. Once access is granted, contact Information Technology to install Galaxy on your computer (if the system is not already installed).

Login

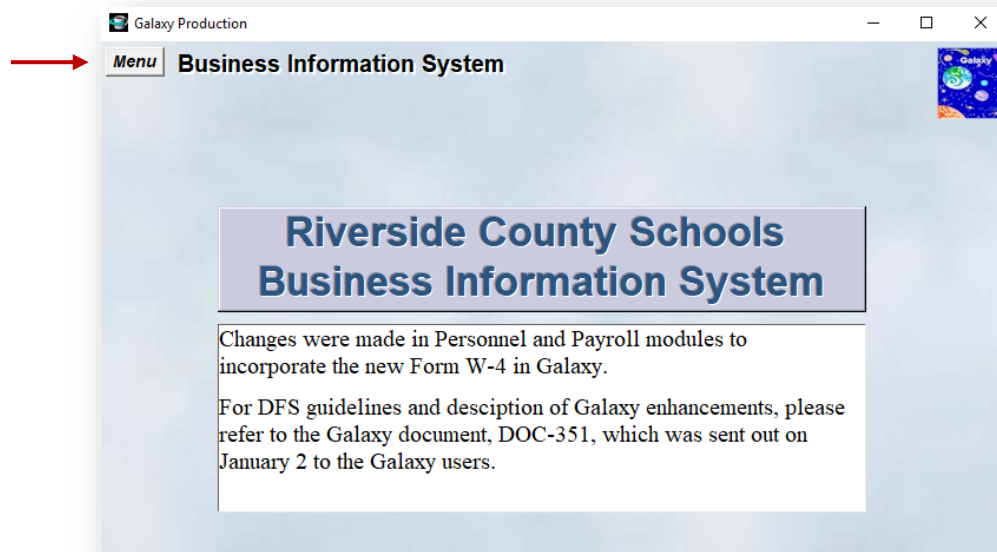
Step 1

Double-click on Galaxy icon on your computer.



Step 2

From the Galaxy Production screen, select "Menu", on the top left corner to login.



Step 3

A login window will appear requesting your login information. Enter your login credentials.

- County 33 – RIVERSIDE COUNTY
- User ID = Employee Number
- Password = Given in training and changed by user when first logged in

Please note: After three (3) failed attempts with the wrong password, the system will lock you out and you will need to contact the Riverside County Office of Education (RCOE) Service Desk to reset your password.

- RCOE Service Desk phone number: 951-826-6600
- Email: ServiceDesk@RCOE.US

Galaxy Login

County: 33 - RIVERSIDE COUNTY

User ID: 123456

Password:

Change Password

OK Cancel

Hints and Shortcuts for Galaxy Access

- Don't want to get locked out of Galaxy? Close the Galaxy Login window by clicking on the "X" on the top right-hand corner before your third login attempt.
- Multiple Galaxy screens can be open simultaneously. Each screen will require a separate login.

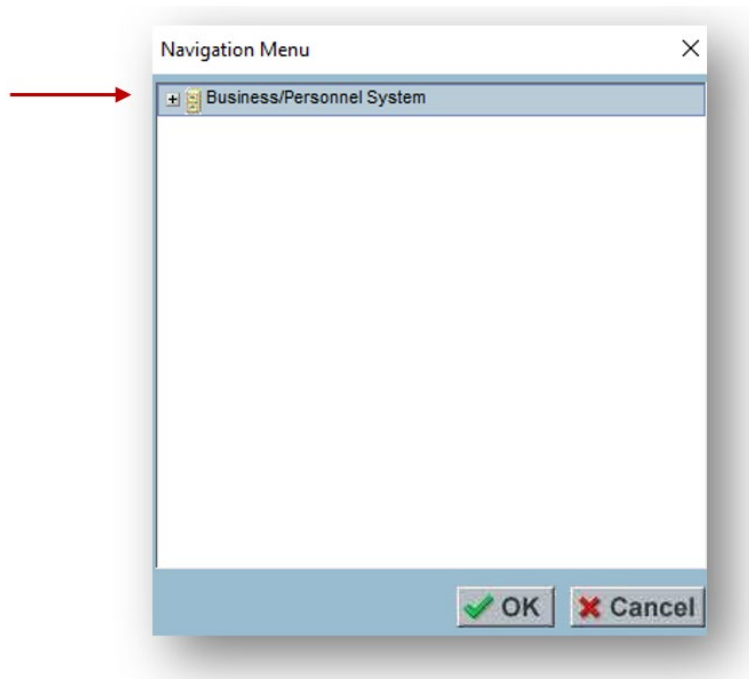
Submit a New Purchase Requisition

Step 1

Check the account budget to ensure sufficient funds are available prior to submitting a requisition (go to [Appendix A](#) for instructions).

Step 2

Double-click to expand the "Business/Personnel System" in the Navigation Menu.

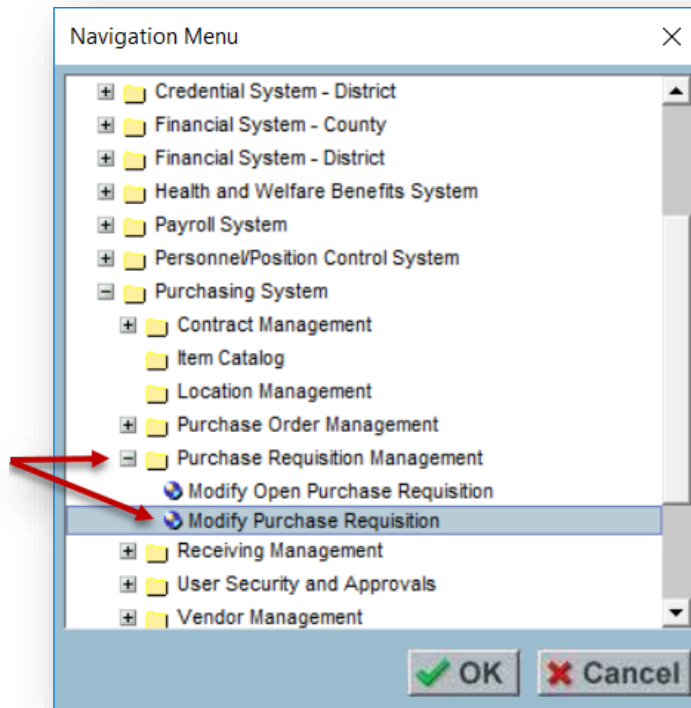


Step 3

Double-click to expand the "Purchasing System" folder.

Step 4

Double-click to expand the "Purchase Requisition Management" folder then select the "Modify Purchase Requisition" screen.



Step 5

Select the appropriate fiscal year. After July 1st the system will default to the current fiscal year. If entering for the next fiscal year, before July 1st, you must choose the correct year.

Click "+ Add" button on the bottom right hand screen to start a new requisition.

Modify Purchase Requisition - Galaxy Production

Menu **Modify Purchase Requisition**

Search Details Items Notes Approvals Cost Distribution

County: 33 - RIVERSIDE COUNTY District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Purchase Requisition Number:

Purchase Requisition Prefix: R - PURCHASE REQUISITION

Purchase Requisition Status:

Primary Vendor:

Vendor Name:

Ship To Location:

Worksite Location:

P.R. Originator User ID:

Copy From
Purchase Requisition Number:

Show Previous Year Purchase Requisitions

Step 6

Details tab: Enter the information in the white fields.

Menu **Modify Purchase Requisition**

Search **Details** Items Notes Approvals Cost Distribution

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.R. Number: R0000NEW

P.R. Type: N - NORMAL Date Due: 01/04/2020 Primary Vendor

P.R. Status: N - NEW (NOT SUBMITTED FOR APPROVAL) Vendor Name Search:

P.R. Amount: Multi. Yr. P.R. Vendor Address:

Category:

Vendor Phone Nbr: Fax Nbr:

P.R. Requestor:

DIR Public Works Contractor Registration Number:

Approval List:

CSLB License Number:

P.R. Originator User ID: 289784 Bill To Location: ACCT PAY ACCOUNTS PAYABLE

CLIFFORD, ELLEN Ship To Location: WHSE WAREHOUSE

Contact Phone Nbr: Worksite Location: AUX AUXILIARY SERVICES

Update User ID: 289784 Tax Rate: 0.0775

Update Timestamp: 12/20/2019 11:33 AM Board Rpt. Desc:

In Rev: Rev Cmt:

- **Category:** There are various categories to choose from. Please check the drop-down menu and make your choice. After a Category is chosen, Select OK.
 - Please note: the buyer listed on the category is the staff member to send your backup paperwork to.
- **P.R. Requestor:** Person requesting the order, such as a Faculty, Staff or Administrator.
- **Approval List:** Leave blank.
- **Contact Phone Number:** Site or Contact person's phone number to address follow-up questions regarding the purchase requisition.
- **Due Date:** Estimated due date for items to arrive in Warehouse. This is manually calculated in the system at 14 days.
- **Vendor Name Search:** Select the drop-down box and select a vendor name from the list. Another way to find a vendor is to type vendor name in the "Vendor Name Search" box, click on the drop-down arrow and select a vendor from the narrowed list. The asterisk symbol (*) is a wild card and can be used at the beginning and/or end of a word in a search. Select OK.
 - If your vendor is not listed, email Purchasing with new vendor information. Please allow extra time for processing new vendors.
 - **New Vendor Information:** The department must request a completed [W-9 form](#) from a new vendor and obtain the remit contact information including phone number, fax number, email for sales, and email for accounting.
- **Primary Vendor:** This is the vendor number. If you know the vendor number you may enter it instead of using the name search.
- **Vendor Address:** The system will fill in the default address. Sometimes vendors have multiple addresses. It is important to have the remit to address in this field. The vendor name and address are what will appear on the check.
- **Bill to:** Is always ACCT PAY (Accounts Payable).
- **Ship to:** Is always the Warehouse.
- **Worksite Location:** Is assigned according to the Purchase Requisition Requestor's worksite.
- **Board Report Description:** A brief description of 45 characters or less. This description will be presented to the Board Members. Be sure

to use professional language and no acronyms. Examples: Instructional Supplies, Media Equipment, etc.

- **Delivery Location:** Enter the internal department or person the purchase will be delivered to. Example: Maintenance and Operations/John Doe.

Step 7

- **Items tab:** Select the “Add Line” button on the bottom left of the screen to add a line. Lines must be added to match the items listed on the quote. Once all the information is entered, click the Save button.

Modify Purchase Requisition - Galaxy Production

Menu **Modify Purchase Requisition**

Search Details **Items** Notes Approvals Cost Distribution

Vendor: [] Fiscal Year: 2020 P.R. Number: R0000NEW Acct. Dist. []

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View Expand Close

Line Nbr.	P.R. Line	Fiscal Year	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Tax
							Total						

Add Line Add Acct. Add Fav. Dup Delete Save Cancel

- A separate “Add a P.R. Line Nbr.” pop-up window will appear. Enter the information in the white fields.
- The Purchase Requisition should follow the format of the quote and be itemized; separating each product, quantity and tax on each line when appropriate.
- If the quote exceeds 25 line items it is acceptable to place all information on one line.
- **Item Name:** The general description of the item or service being performed. Do not use Quote or Invoice Numbers--put that information in the Description section if necessary. This field is limited to 25 characters. Examples: Instructional Supply, Computer Equipment, etc.
- **Description:** Include the full description of the item, including make, model, size, dimensions, color choice, date range, etc. (more is better here). The description must match the information on the quote. This section does not have limited characters. Avoid using acronyms or abbreviations. If the following services/materials are for an event, state the event name and date, i.e., FLEX Week September 20-25, 2019.

Hints and Shortcuts: Enlarging Description Field

Enlarge the Description field by clicking on the “Edit Description” button.

- **Quantity:** Number of item(s) being ordered. If quantity is included on the quote.

- **Unit Price:** Price of item (not including shipping and taxes). If Unit Price is included on the quote, include it!
- **Unit of Measure (U/M):** Choose the Unit of Measure from the drop-down box. The following are the most commonly used unit of measure:
 - Each = Each
 - ANNU = Annually
 - S/A = Semi-Annually
 - NTE = Not to Exceed
 - MILE = Mile
- **Discount:** Check box if there is going to be a discount on the item. This has to manually be entered.
- **Freight:** By default, this box is checked and freight charges will be applied. Un-check freight box if no freight will be charged. If the vendor usually charges freight, but it is not included on the quote times 5% by the subtotal to manually calculate the freight charge. This has to be manually entered. Freight charges only need to be included on one line. (IE Line 1)
- **Taxable:** By default, this box is checked and sales tax will be applied. Tax is applied to all goods purchased including items purchased from out of state vendors. Items that are NOT taxable are services and labor. If tax is not included on the quote, still include it. The District is not tax exempt.
- **Delivery Instructions:** This section can be used to indicate an internal note including deadline for the check, "Need Check by October 3rd" or check pick-up, "Please call John Does at extension 1234" or "Mail out check". If the item is an asset and charged to the 6400 object code, the delivery instructions must include the exact location of where the asset will be permanently located. Example: Indio Campus, Room 211.
- **Asset Location Code:** Only required if the item being purchased has a total cost of \$500. Please refer to [School Code Crosswalk](#) for Asset Location Code.
- **P.R. Line Fiscal Year:** Will automatically default to the current Fiscal Year.

Select "Save" to return to the Items tab.

Step 8

Select the "Add Acct" button. Each Line Item must have an account. The "Amount" on the Account String must match the "Total Amount" of the line. If you leave the Amount Zero the Percent has to be 1.00 (100%). The Amount cannot be filled in while the Percent is 1.00. The Account String line either has to have the Total Amount filled in or the Percent at 1.00 or 100%. It cannot be both. See examples below.

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
11	A50	0000	0	6750	0300	4500	0.00	1.000000	
Total:							0.00	1.000000	
Total:									0.00

or

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
11	A50	0000	0	6750	0300	4500	50.00	0.000000	
Total:							50.00	0.000000	
Total:									0.00

Select "Save" to return to the Items tab.

- **Note:** You can add multiple accounts to one line. Amount or percentage is split by the total amount for that line. See examples:

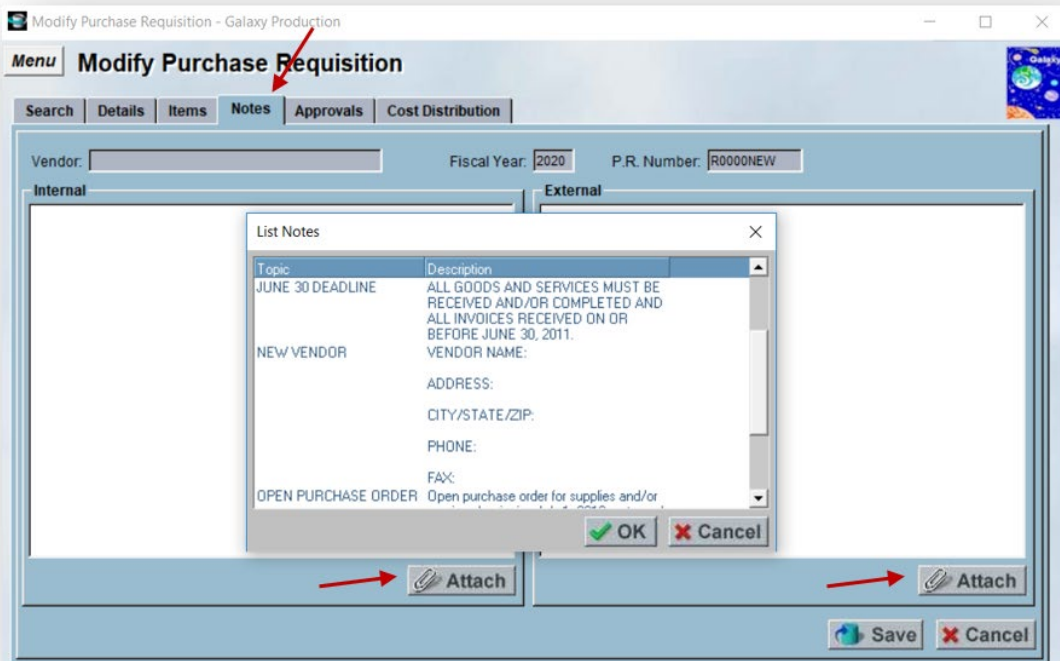
Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
11	A50	0000	0	6750	0300	4300	294.37	0.000000	294.37
11	A50	0000	0	6750	0300	4500	294.38	0.000000	294.38
Total:							588.75	0.000000	588.75
Total:									500.00

or

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
11	A50	0000	0	6750	0300	4500	0.00	0.500000	
11	A50	0000	0	6750	0300	4300	0.00	0.500000	
Total:							0.00	1.000000	
Total:									500.00

Step 9

- **Notes tab:** This section should include additional notes about what the vendor is requiring for their services or items being purchased. Attachments Button: Pre-constructed verbiage that can be placed in the "Internal" or "External" notes as the department sees fit.



Step 10

You must save your Purchase Requisition to submit the request. Click on "Save" on the bottom right of the screen. You do not have to save your requisition on each tab. You only need to save the requisition when all tabs are complete.

A saved Purchase Requisition will assign a Purchase Requisition number and sends the Purchase Requisition for approval(s).

Step 11

Backup paperwork is sent to the buyer based on the Category field.

- **Purchasing Services Specialist:** Email electronic copies of all backup paperwork (quote, W9, insurance, etc.) with the requisition number in the subject line of the email.
- **Accounts Payable:** Send original hard copies via campus mail or hand delivery. Invoices must be signed by the authorized manager.

Step 12

Monitor and reach out to the authorized approver(s) in the Purchase Requisition approval queue. A fully approved purchase requisition will be converted to a Purchase Order.

Printing a Purchase Requisition

Once all information has been entered and the following steps above have been completed, write the Purchase Requisition number on the quote and scan to the assigned Buyer based on the category.

Step 1

Select the "Details" tab.




The screenshot shows a web application interface for "Modify Purchase Requisition". At the top left, there is a "Menu" button. The main title is "Modify Purchase Requisition". Below the title is a navigation bar with five tabs: "Search", "Details", "Items", "Notes", and "Approvals", and "Cost Distribution". A red arrow points to the "Details" tab, indicating it should be selected. Below the navigation bar, there are three input fields: "District: 01 - DESERT COMMUNITY COLLEGE DISTRICT", "Fiscal Year: 2020", and "P.R. Number: R0000NEW".

Step 2

Select the "Print" button located on the bottom left of the screen. A PDF print preview will open in an internet browser.

Menu **Modify Purchase Requisition**

Search Details Items Notes Approvals Cost Distribution

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.R. Number: R0000NEW 

P.R. Type: N - NORMAL Date Due: 01/25/2020 Primary Vendor

P.R. Status: N - NEW (NOT SUBMITTED FOR APPROVAL) Vendor Name Search:

P.R. Amount: Multi. Yr. P.R. Vendor Address:

Category:

P.R. Requestor: Vendor Phone Nbr: Fax Nbr:

Approval List: DIR Public Works Contractor Registration Number:

P.R. Originator User ID: 289784 CSLB License Number:

Contact Phone Nbr: Bill To Location: ACCT PAY ACCOUNTS PAYABLE

Update User ID: 289784 Ship To Location: WHSE WAREHOUSE


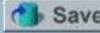
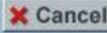
Update Timestamp: 01/10/2020 1:46 PM Worksite Location: AUX AUXILIARY SERVICES

Tax Rate: 0.0775 Board Rpt. Desc:

Delivery Location:

Delivery Location:

In Rev: Rev Cmt:

 Print  Save  Cancel

The purchase requisition cover page will appear in a separate internet browser. Select the print option in your browser.

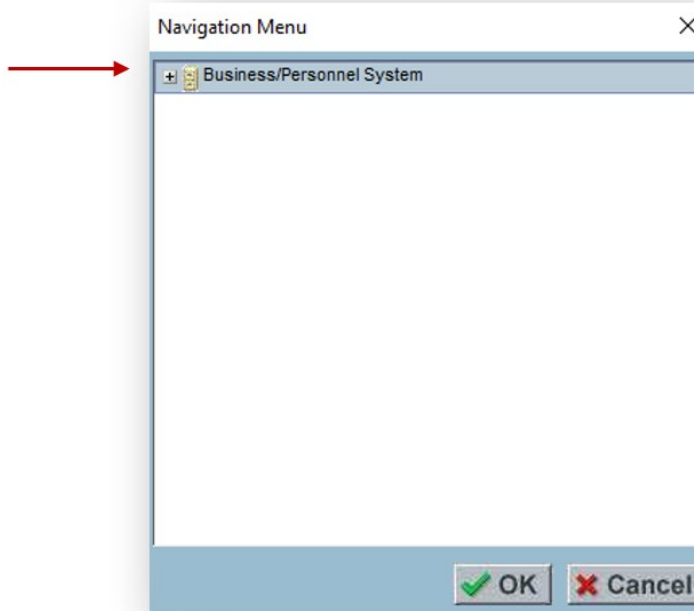
Submit a new Open (Blanket) Purchase Requisition

Step 1

Check the account budget to ensure sufficient funds are available (see [Appendix A](#) for instructions).

Step 2

Double-click to expand the "Business/Personnel System" in the Navigation Menu.

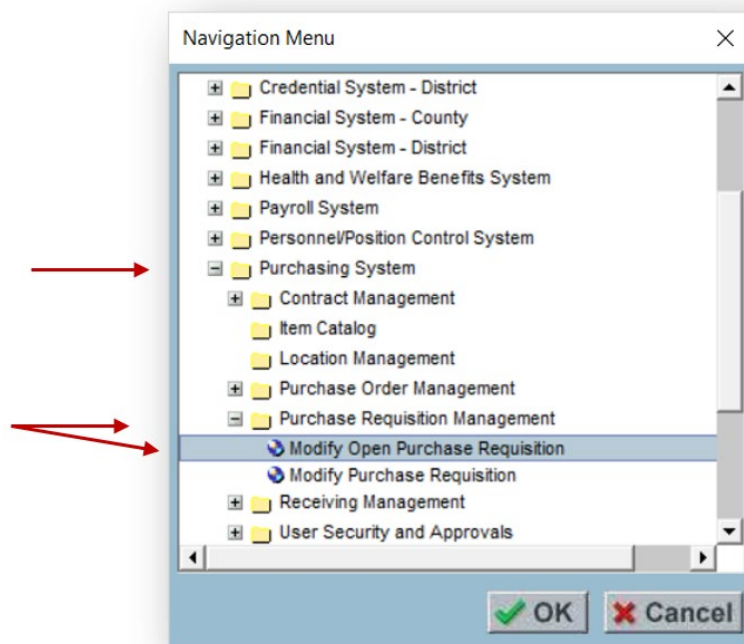


Step 3

Double-click to expand the "Purchasing System" folder.

Step 4

Double-click to expand the "Purchase Requisition Management" folder then select the "Modify Open Purchase Requisition" screen.



Step 5

Select the appropriate fiscal year. After July 1st the system will default to the current fiscal year. If entering for the next fiscal year, before July 1st, you must choose the correct year.

Select the "+ Add" button on the bottom right hand screen to start a new requisition.

Modify Open Purchase Requisition - Galaxy Production

Menu **Modify Open Purchase Requisition**

Search Details Account Distribution Notes Authorized Purchaser Approvals

County: 33 - RIVERSIDE COUNTY District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Open Purchase Requisition Number: []

Open Purchase Requisition Prefix: R - PURCHASE REQUISITION

Open Purchase Requisition Status: []

Primary Vendor: []

Vendor Name: []

Ship To Location: []

Worksite Location: []

P.R. Originator User ID: []

Copy From

Open Purchase Requisition Number: []

Show Previous Year Purchase Requisitions

+ Add Find

Step 6

- **Details tab:** Enter the information in the white fields:

- **P.R. Amount:** Amount to encumbered for the fiscal year, for the following vendor (must be a whole number).
- **P.R. Description:** There are three options, for submitting a new open purchase requisition, select "Original".
- **Open P.O. Nbr.:** Leave blank at this time.
- **Category:** Select "Open Purchase Order".
- **P.R. Requestor:** Person requesting the order, such as a Faculty, Staff or Administrator.
- **Approval List:** Leave blank.
- **Contact Phone Nbr:** Site or Contact person's phone number to address follow-up questions regarding the purchase requisition.
- **Vendor Name Search:** Select the drop-down box and select a vendor name from the list. Another way to find a vendor is to type vendor name in the "Vendor Name Search" box, click on the drop-down arrow and select a vendor from the narrowed list. The asterisk symbol (*) is a wild card and can be used at the beginning and/or end of a word in a search. Select OK.
 - If your vendor is not listed, email Purchasing with new vendor information. Please allow extra time for processing new vendors.

- **New Vendor Information:** The department must request a completed [W-9 form](#) from a new vendor and obtain the remit contact information including phone number, fax number, email for sales, and email for accounting.
- **Primary Vendor:** This is the vendor number. If you know the vendor number you may enter it instead of using the name search.
- **Vendor Address:** The system will fill in the default address. Sometimes vendors have multiple addresses. It is important to have the remit to address in this field. The vendor name and address are what will appear on the check.
- **Bill to:** Is always ACCT PAY (Accounts Payable).
- **Ship to:** Is always the Warehouse.
- **Worksite Location:** Is generated based on the Purchase Requisition Requestor worksite.
- **Board Report Description:** A brief description 45 characters or less. This description will be presented to the Board Members. Be sure to use professional language and no acronyms. Examples: Instructional Supplies, Media Equipment, etc.
- **Delivery Location:** Fill in with department or person the purchase will be delivered to. Example: Maintenance and Operations/John Doe.

Step 7

- **Account Distribution Tab:** enter the account string information. Required Fields: The user may enter an Amount or a Percent, but not both. You may add multiple accounts.

Modify Open Purchase Requisition - Galaxy Production

Menu **Modify Open Purchase Requisition**

Search Details **Account Distribution** Notes Authorized Purchaser Approvals

Vendor: Fiscal Year: P.R. Number: P.R. Amt:

Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount
							0.00	1.000000	
Total:							0.00	1.000000	



Step 8

- **Notes Tab:** This section should include additional notes about what the vendor is requiring for their services or items. External notes are displayed on the Purchase Requisition/Purchase Order. Internal notes can only be visible in Galaxy. Attachments Button: Pre-constructed verbiage that can be placed in the "Internal" or "External" notes as the department sees fit.

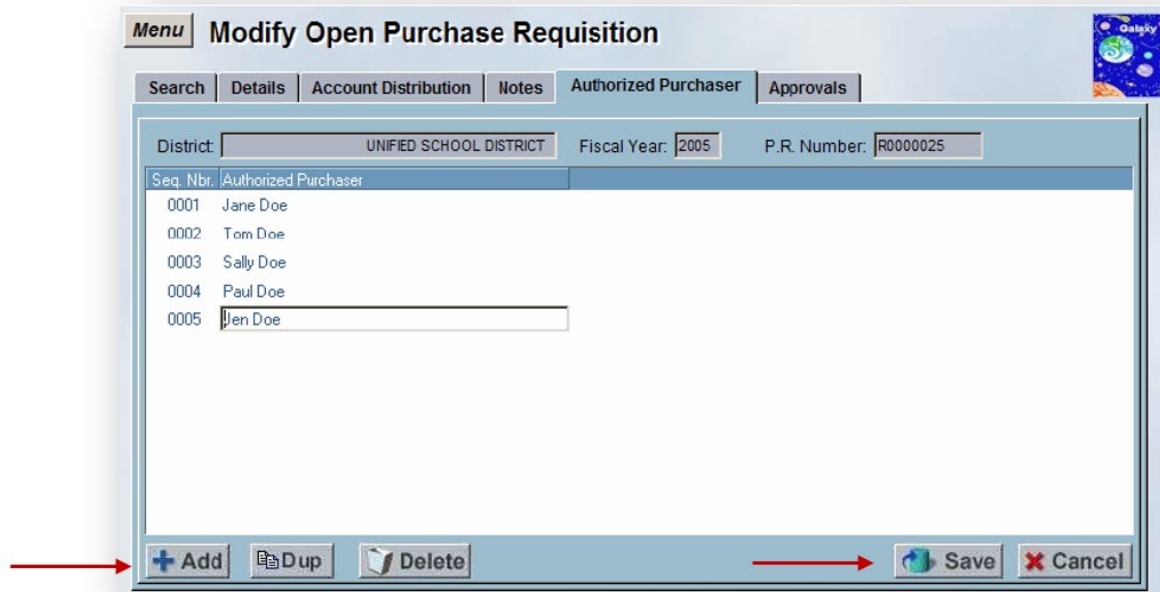
In the External notes section of an Open Purchase Requisition include the vendor account number. This is referenced whenever placing orders and a brief description of goods or services to be purchased on the Open Purchase Order. For example, Sparkletts.

The screenshot displays the 'Modify Open Purchase Order' interface in the Galaxy system. The 'Notes' tab is active, showing two text areas: 'Internal' and 'External'. The 'External' notes area contains the following text: 'Open purchase order for supplies and/or services beginning July 1, 2019 up to and including June 30, 2020. ACCOUNT NO. 668677615013633 Water Supplies and Services NOT TO EXCEED \$650.00'. Two red arrows point to the 'Attach' buttons located at the bottom of each notes section. The window title is 'Modify Open Purchase Order - Galaxy Production' and the top navigation bar includes 'Menu', 'Search', 'Details', 'Items', 'Notes', 'Authorized Purchaser', 'Approvals', 'Payment History', and 'Open P.O.'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Step 9

Select the Authorized Purchaser tab to add an authorized purchaser(s) associated to this open purchase requisition. An Authorized Purchaser is the individual who is allowed to pick up the item and order items on the Open Purchase Order. Select Add to enter multiple individuals.

If an authorized Purchaser is no longer with the District or needs to be removed, please contact Purchasing.



Step 10

You must save your Open Purchase Requisition to submit the request. Click on "Save" on the bottom right of the screen. You do not have to save your requisition on each tab. You only need to save the requisition when all tabs are complete.

A saved Open Purchase Requisition will assign a requisition number and sends the requisition for approval(s).

Step 11

Backup paperwork is sent to the Purchasing Services Specialist: Email electronic copies of all backup paperwork (rate sheet, contract, proposal, or reference to a piggyback contract (IE CollegeBuys), W9, insurance, etc.) with the requisition number in the subject line of the email.

Step 12

Monitor and reach out to the authorized approver(s) in the Open Purchase Requisition approval queue. A fully approved open purchase requisition will be converted to an Open Purchase Order.

Increase/Decrease Open Purchase Orders

Step 1

Check the account budget to ensure sufficient funds are available (see [Appendix A](#) for instructions).

Step 2

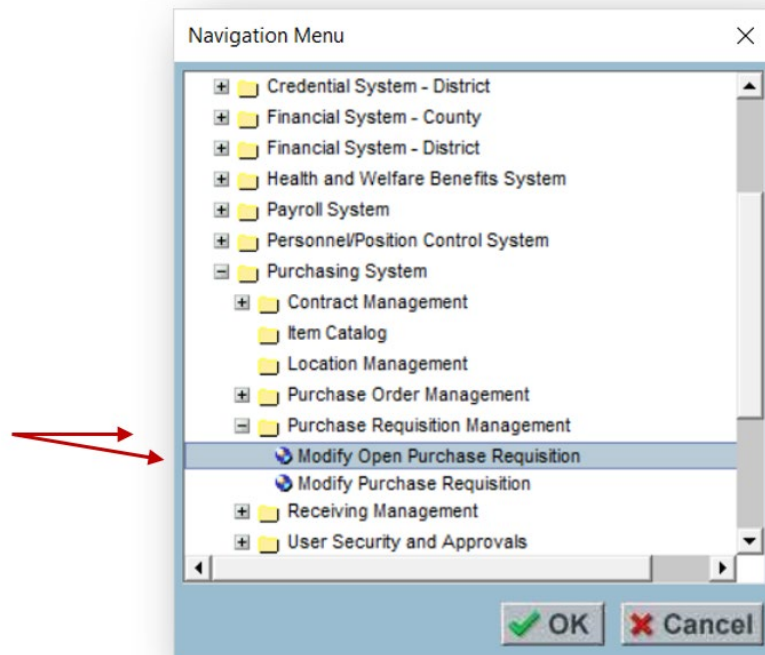
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 3

Double-click to expand the "Purchasing System" folder.

Step 4

Double-click to expand the "Purchase Requisition Management" folder then select the "Modify Open Purchase Requisition" screen.



Step 5

Select the appropriate fiscal year. After July 1st the system will default to the current fiscal year. If entering for the next fiscal year, before July 1st, you must choose the correct year.

Select "+ Add" button on the bottom right hand screen to start a new requisition.

Modify Open Purchase Requisition - Galaxy Production

Modify Open Purchase Requisition

Search | Details | Account Distribution | Notes | Authorized Purchaser | Approvals

County: 33 - RIVERSIDE COUNTY | District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Open Purchase Requisition Number: []

Open Purchase Requisition Prefix: R - PURCHASE REQUISITION

Open Purchase Requisition Status: []

Primary Vendor: []

Vendor Name: []

Ship To Location: []

Worksite Location: []

P.R. Originator User ID: []

Copy From

Open Purchase Requisition Number: []

Show Previous Year Purchase Requisitions

+ Add | Find

Step 6

- **Details tab:** Enter the information in the white fields:

Modify Open Purchase Requisition - Galaxy Production

Menu **Modify Open Purchase Requisition**

Search Details Account Distribution Notes Authorized Purchaser Approvals

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.R. Number: R0000NEW Delete

P.R. Type: O - OPEN Expiration Date: 06/30/2020 Primary Vendor

P.R. Status: N - NEW (NOT SUBMITTED FOR A) Vendor Name Search:

P.R. Amount: Vendor Address:

P.R. Description: Vendor Phone Nbr: Fax:

Open P.O. Nbr. Category: Bill To Location: ACCT PAY ACCOUNTS PAYABLE

P.R. Requestor: Ship To Location: WHSE WAREHOUSE

Approval List: Worksite Location: AUX AUXILIARY SERVICES

P.R. Originator User ID: 289784 CLIFFORD, ELLEN Board Rpt. Desc:

Contact Phone Nbr: Delivery Location:

Update User ID: 289784 02/13/2020 12:12 PM In Rev: Rev Cmt:

Print Save Cancel

- **P.R. Amount:** Amount to Increase or Decrease for the Open Purchase Order. Please note that when decreasing an Open Purchase Order, the number must have a negative in front. For Example: -500.00.
- **P.R. Description:** Choose Increase or Decrease.
- **Open P.O. Nbr.:** The existing Open Purchase Order to be increased/decreased. You can type in the number or use the search button (black triangle) to find the Open Purchase Order. Once the Open Purchase Order is found, select the Open Purchase Order and select OK.
- Don't know your Open Purchase Order Number? See [View Purchase Requisition](#) instruction to find your Open/Purchase Order.
- **Category:** Select Open Purchase Order.
- **P.R. Requestor:** Person requesting the order, such as Faculty, Staff or Administrator.
- **Approval List:** Leave blank.

- **Contact Phone Nbr:** Site or Contact person's phone number to address follow-up questions regarding the purchase requisition.
- **Vendor Name Search/Primary Vendor/Vendor Address:** When an Open Purchase Order number is selected. This field is automatically generated.
- **Bill to:** Is always ACCT PAY (Accounts Payable).
- **Ship to:** Is always the Warehouse.
- **Worksite Location:** Is generated based on the Purchase Requisition Requestor worksite.
- **Board Report Description:** A brief description 45 characters or less. This description will be presented to the Board Members. Be sure to use professional language and no acronyms. Examples: Instructional Supplies, Media Equipment, etc.
- **Delivery Location:** Enter the internal department or person the purchase will be delivered to. Example: Maintenance and Operations/John Doe.

Example of an Open Purchase Order Increase

The screenshot shows a software window titled "Modify Open Purchase Requisition - Galaxy Production". The window has a menu bar with "Menu" and "Modify Open Purchase Requisition". Below the menu bar are tabs for "Search", "Details", "Account Distribution", "Notes", "Authorized Purchaser", and "Approvals". The "Details" tab is active, showing a form with the following fields:

District:	01 - DESERT COMMUNITY COLLEGE DISTRICT	Fiscal Year:	2020	P.R. Number:	R0000NEW	
P.R. Type:	O - OPEN	Expiration Date:	06/30/2020	Primary Vendor		
P.R. Status:	N - NEW (NOT SUBMITTED FOR A)	Vendor Name Search:		25815		
P.R. Amount:	500.00	Vendor Address:	LOWE'S BUSINESS ACCOUNT			
P.R. Description:	INCREASE	Vendor Address:	1	PO BOX 530970, ATLANTA, GA 303530970 USA		
Open P.O. Nbr:	B0003704	Vendor Phone Nbr:	800-444-1408	Fax:		
Category:	OPEN PURCHASE ORDER	Bill To Location:	ACCT PAY	ACCOUNTS PAYABLE		
Open PO		Ship To Location:	WHSE	WAREHOUSE		
P.R. Requestor:	JOHN DOE	Worksite Location:	AUX	AUXILIARY SERVICES		
Approval List:		Board Rpt. Desc:	INSTRUCTIONAL SUPPLIES			
P.R. Originator User ID:	289784	CLIFFORD, ELLEN	Delivery Location:	ROOM 112/MATH		
Contact Phone Nbr:		Delivery Location:	JOHN DOE			
Update User ID:	289784	01/30/2020 3:43 PM	In Rev:		Rev Cmt:	

At the bottom of the form, there are buttons for "Print", "Save", and "Cancel".

Example of an Open Purchase Order Decrease

Modify Open Purchase Requisition - Galaxy Production

Modify Open Purchase Requisition

Search Details Account Distribution Notes Authorized Purchaser Approvals

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.R. Number: R0000NEW Delete

P.R. Type: O - OPEN Expiration Date: 06/30/2020 Primary Vendor

P.R. Status: N - NEW (NOT SUBMITTED FOR A) Vendor Name Search: 25815

P.R. Amount: -500.00 Vendor Address: 1

P.R. Description: DECREASE Vendor Phone Nbr: 800-444-1408 Fax:

Open P.O. Nbr: B0003704 Category: OPEN PURCHASE ORDER

Bill To Location: ACCT PAY ACCOUNTS PAYABLE

Ship To Location: WHSE WAREHOUSE

Worksite Location: AUX AUXILIARY SERVICES

Board Rpt. Desc: INSTRUCTIONAL SUPPLIES

P.R. Requestor: JOHN DOE Delivery Location: ROOM 112/MATH

Approval List: Delivery Location: JOHN DOE

P.R. Originator User ID: 289784 CLIFFORD, ELLEN

Contact Phone Nbr:

Update User ID: 289784 01/30/2020 3:43 PM In Rev: Rev Cmt:

Print Save Cancel

Step 7

Account Distribution Tab: enter the account string information. Required Fields: The user may enter an Amount or a Percent, but not both. You may add multiple accounts.

Step 8

Notes tab: For Increases or Decrease select the Change Order attachment and fill in the increase or decrease amount.

Step 9

You must save your Open Purchase Requisition to submit the request. Click on "Save" on the bottom right of the screen. You do not have to save your requisition on each tab. You only need to save the requisition when all tabs are complete.

- A saved Open Purchase Requisition will assign a requisition number and sends the requisition for approval(s).
- Whenever submitting a Purchase Requisition please monitor approvals so that the Purchase Requisition is approved in a timely fashion. Once the Increase or Decrease is approved it will

automatically be added to the existing Open Purchase Order to be increased/decreased.

Approve a Purchase Requisition

Step 1

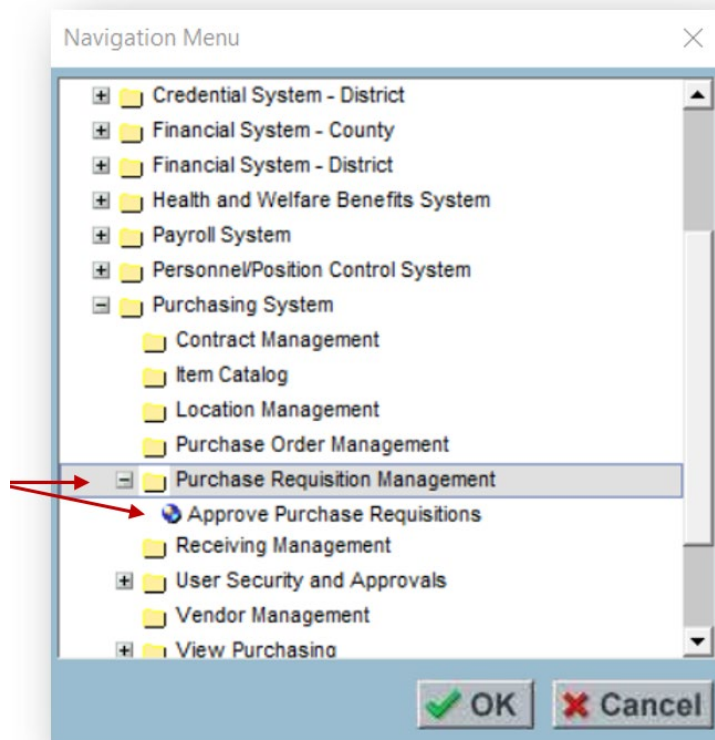
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 2

Double-click to expand the "Purchasing System" folder.

Step 3

Double-click to expand the "Purchase Requisition Management" folder then select the "Approve Purchase Requisitions" screen.



Step 4

To generate a list of Purchase Requisitions to approve select the “find” button located on the bottom right of the screen.

Approve Purchase Requisitions - Galaxy Production

Menu **Approve Purchase Requisitions**

Search **Purchase Requisition Data**

County: 33 - RIVERSIDE COUNTY District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Purchase Requisition Number:

Purchase Requisition Prefix:

Primary Vendor:

Vendor Name:

Ship To Location:

Worksite Location:

P.R. Originator User ID:

Step 5

To approve specific Purchase Requisitions, enter “Y” in the Approve Field. To not approve specific Purchase Requisitions, enter “N” in the Approve Field. To approve all Purchase Requisitions, check the “Approve All” Checkbox. Select “Save”.

Approve Purchase Requisitions - Galaxy Production

Menu Approve Purchase Requisitions

Search Purchase Requisition Data

Approve?	Comment	P.R. Number	Multi. Yr.	P.R. Type	P.R. Requestor	Worksite	P.R. A
<input type="checkbox"/>		R0057107	N	N	ELLEN CLIFFORD	AUX - AUXILIARY SERVICES	5

Approve All District: 01 - DESERT COMMUNITY COLLE Fiscal Year: 2020 P.R. Nbr: R0057107

Details Items Account Distribution Notes Authorized Purchaser Approvals Cost Distribution

P.R. Type: N - NORMAL P.R. Created Date: 02/13/2020 Tax Rate: 0.0775 Date Due: 02/28/2020

Open P.O. Nbr: Primary Vendor: 11201 - FISHER SCIENTIFIC COMPANY, LLC

P.R. Status: S - SUBMITTED FOR APPROVAL Vendor Address: 1 - 4500 TURNBERRY DRIVE, HANOVER PARK, IL 601335491 USA

P.R. Amount: 588.75 Multi. Yr. P.R. Vendor Phone Nbr: 800-768-7000 Fax Nbr: 800-928-1166

Category: INSTRUCTIONAL SUPPLIES DIR Contractor Registration Nbr: CSLB License Nbr:

P.R. Requestor: ELLEN CLIFFORD Bill To Location: ACCT PAY - ACCOUNTS PAYABLE

Approval List: Ship To Location: WHSE - WAREHOUSE

P.R. Originator User ID: 289784 CLIFFORD, ELLEN Worksite Location: AUX - AUXILIARY SERVICES

Contact Phone Nbr: Board Rpt. Desc: Instructional Supplies

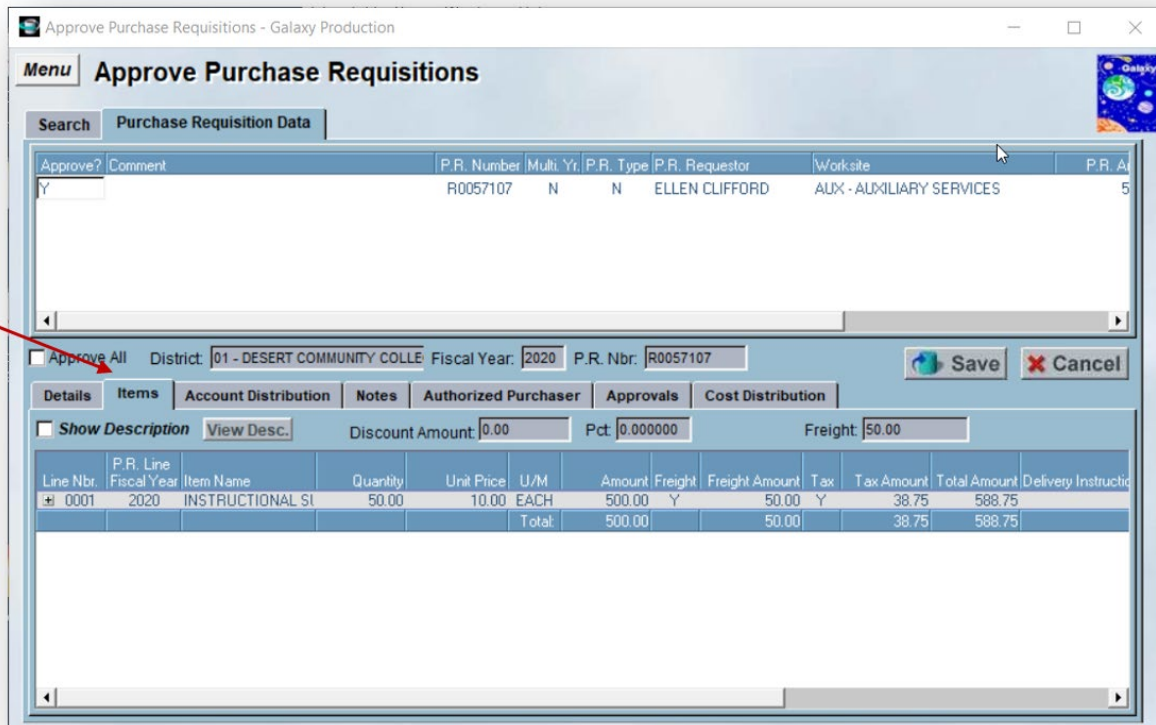
Update User ID: 289784 02/13/2020 2:34 PM Delivery Location: Classroom 200

Override User ID: 289784 02/13/2020 2:34 PM Delivery Location: Math and Science

In Rev: Rev Cmt:

Step 6

Click the Purchase Requisition sub tab(s) to view more information regarding the Purchase Requisition.



Step 7

Once approved it will go to the next approver or to Purchasing to be converted into a Purchase Order.

- **Note:** Increases or Decreases for an Open Purchase Requisitions are immediately available to the Open Purchase Order, after it has been "approved".

View/Monitor Purchase Requisition Status & Approvals

Step 1

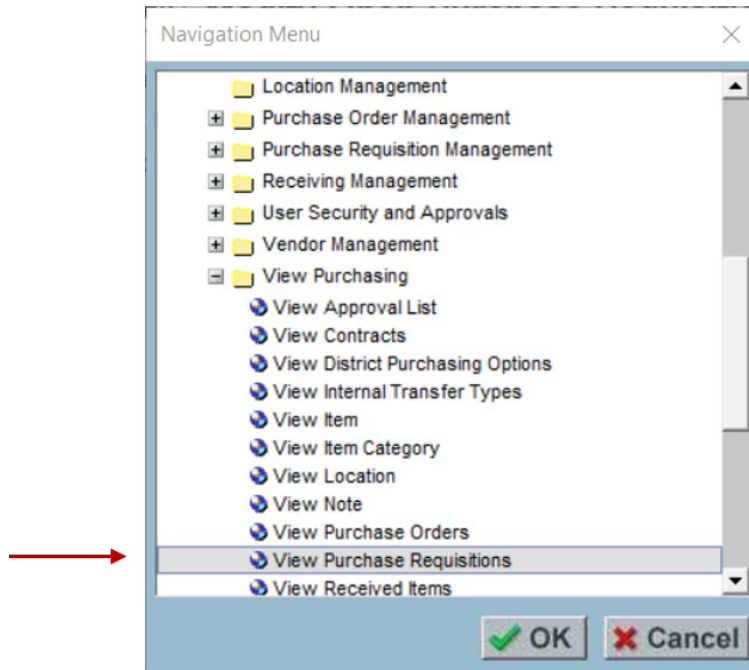
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 2

Double-click to expand the "Purchasing System" folder.

Step 3

Double-click to expand the "View Purchasing" folder then select the "View Purchase Requisition" screen.



Step 4

In the View Purchasing Requisition Screen, you may search for a purchase requisition in multiple ways.

- If Purchase Requisition Number is known, enter the number in the Purchase Requisition Number Field and select the "Find" button on the bottom right hand of the screen.
- If Purchase Requisition Number is unknown, enter one or all known fields to search the requisition and select the "Find" button on the bottom right hand of the screen.

Step 5

Double-click on the Purchase Requisition to reveal the P.R. Status located under the details tab.

The following are the different Purchase Requisition Status and description:

- **A – Approved:** The Purchase Requisition has been approved by listed approvers.
- **B - Approved (Budget Override Required):** The Purchase Requisition has been approved by a designated approver but does not have enough funds to pay for the expense.
- **C – Cancelled:** The Purchase Requisition has been canceled.
- **F- Finalized:** The Purchase Requisition has been approved by Purchasing and assigned a Purchase Order number.
- **I - Insufficient Funds:** The Purchase Requisition has been submitted but does not have enough funds to pay for the expense.
- **N - New (Not Submitted for Approval):** The Purchase Requisition has been entered by the submitter, but it has not been submitted for approval.
- **P – Printed:** The Purchase Requisition has been printed.

View Purchase Requisitions - Galaxy Production

Menu View Purchase Requisitions

Search **Purchase Requisition Data**

Fiscal Yr	P.R. Number	P.R. Type	P.R. Status	Multi. Yr.	Vendor/Vendor Name	P.R. Amount	P.R. Requestor	Worksite
2020	R0052921	N	F	N	11307-SCANTRON CORP	1,050.00	LARSON-SCANTRON	INS - INSTRUCTIO

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.R. Number: R0052921 Print

Details Items Account Distribution Notes Authorized Purchaser Approvals Cost Distribution

P.R. Type: N - NORMAL P.R. Created Date: 05/08/2019 Tax Rate: 0.0775 Date Due: 05/23/2019

Incr/Decr to Open P.O. Nbr: P.R. Status: F - FINALIZED Primary Vendor: 11307 - SCANTRON CORP

P.R. Amount: 1,050.00 Multi. Yr. P.R. Vendor Address: 1 - PO BOX 93038, CHICAGO, IL 60673 USA

Category: SOFTWARE - All software Vendor Phone Nbr: 800-722-8876 Fax Nbr: 800-776-8644

P.R. Requestor: LARSON-SCANTRON DIR Contractor Registration Nbr: CSLB License Nbr:

Approval List: Bill To Location: ACCT PAY - ACCOUNTS PAYABLE

P.R. Originator User ID: 255232 LARSON, JEFFREY Ship To Location: WHSE - WAREHOUSE

Contact Phone Nbr: Worksite Location: INS - INSTRUCTION

Update User ID: 289784 05/10/2019 8:25 AM Board Rpt. Desc:

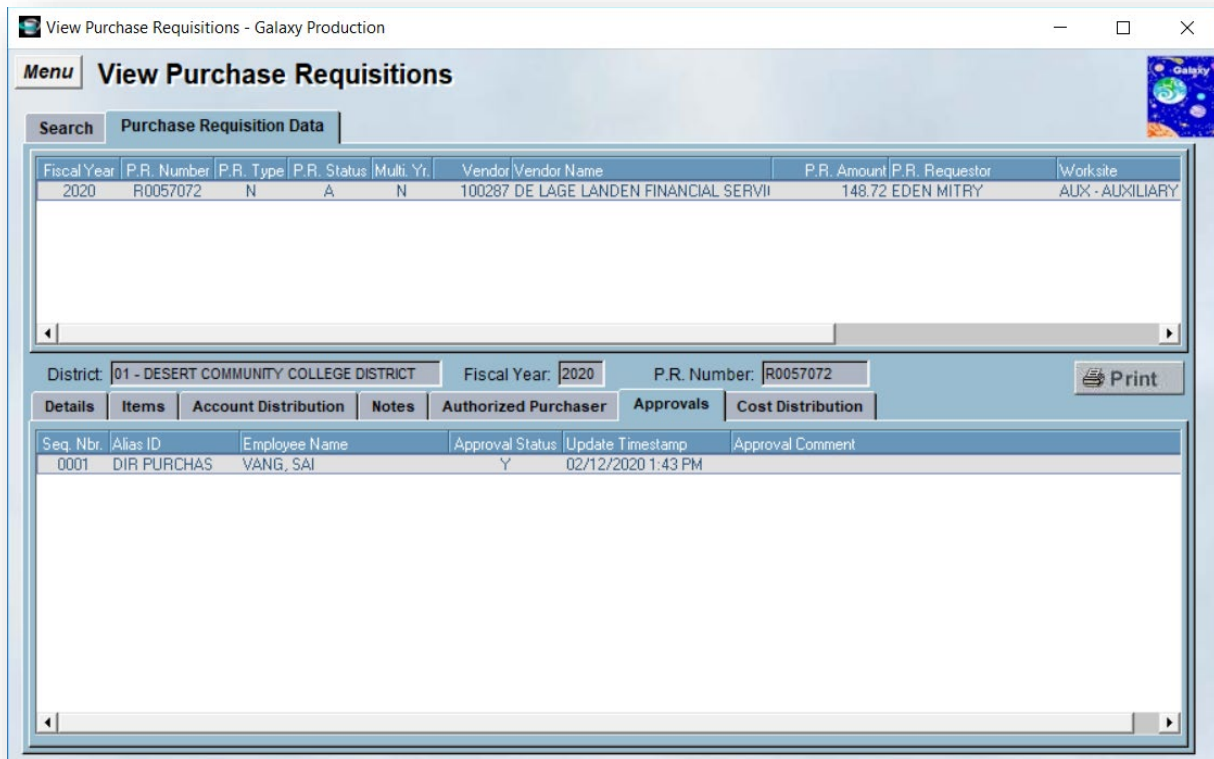
Override User ID: Delivery Location: Delivery Location:

Print HTML Report Print In Rev: Rev Cmt:

Step 6

Select the "Approvals" tab to review the authorized approvers on the Purchase Requisition. It is the responsibility of the department to monitor the approvals queue and contact the appropriate individual to approve the requisition.

The following example below shows Purchase Requisition, R0057072 was approved by the Director of Purchasing with a "Y" (Yes) and on the date of 2/12/20.



Deleting a Purchase Requisition

A Purchase Requisition can only delete prior to approval. After a Purchase Requisition is approve it cannot be deleted or modified.

Step 1

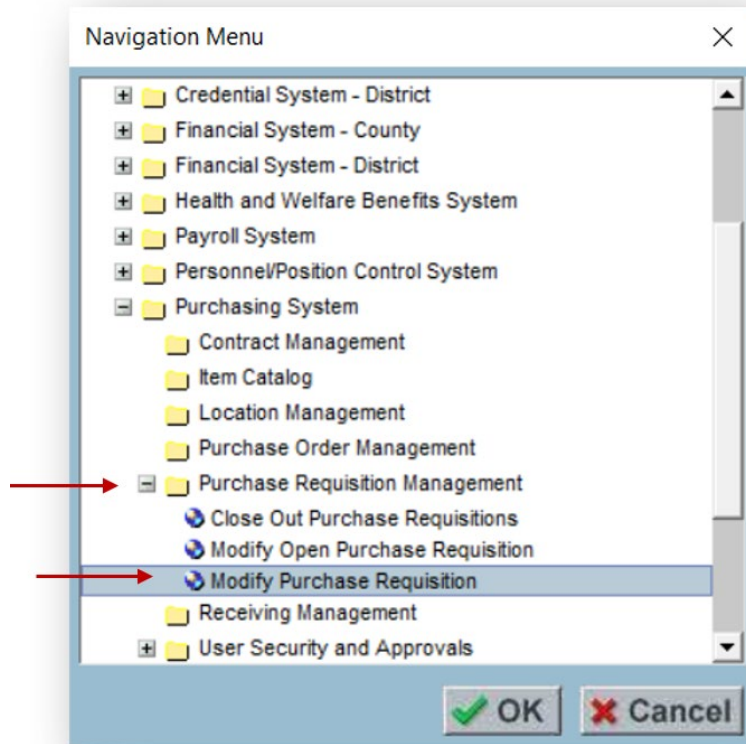
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 2

Double-click to expand the "Purchasing System" folder.

Step 3

Double-click to expand the "Purchase Requisition Management" folder then select the "Modify Purchase Requisition" screen. Select Ok.

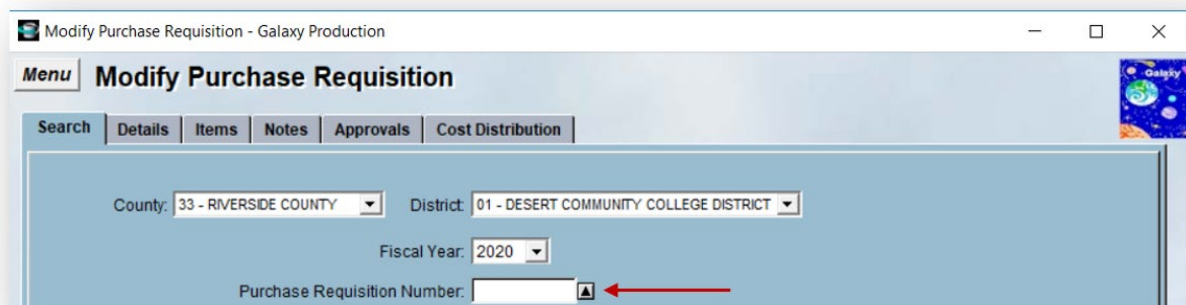


Step 4

Enter the Purchase Requisition Number under the Line labeled "Purchase Requisition Number". A Purchase Requisition is assigned an "R" number after a Purchase Requisition is saved. An "R" number is located in the window of the top right.

Step 5

Select find once the Purchase Requisition number has been typed into the Purchase Requisition Number line.



This number can also be searched by selecting the grey box located next to the line labeled "Purchase Requisition Number". A list showing all Purchase

Requisitions entered into Galaxy are viewable. Use the scroll to find the Purchase Requisition that needs to be deleted. Highlight Purchase Requisition number, select Ok. Select Find.

Step 6

Select the Notes tab. Before deleting a Purchase Requisition, indicate the reason for deleting the Purchase Requisition in the "internal notes".

Step 7

Select the details tab. The delete button is located on the top right corner of the screen.



- **Note:** If the Purchase Requisition has been approved, and assigned a Purchase Order number please contact the Purchasing department to delete the Purchase Order. In this case, communicate with Purchasing and or Accounts Payable via email to authorized the deletion of the PR. You will need to provide the Purchase Order number, the reason for deleting the Purchase Order and approval from the department supervisor.

These steps can be applied to Open Purchase Requisition deletion as well.

Creating a Purchase Requisition Change Order

Step 1

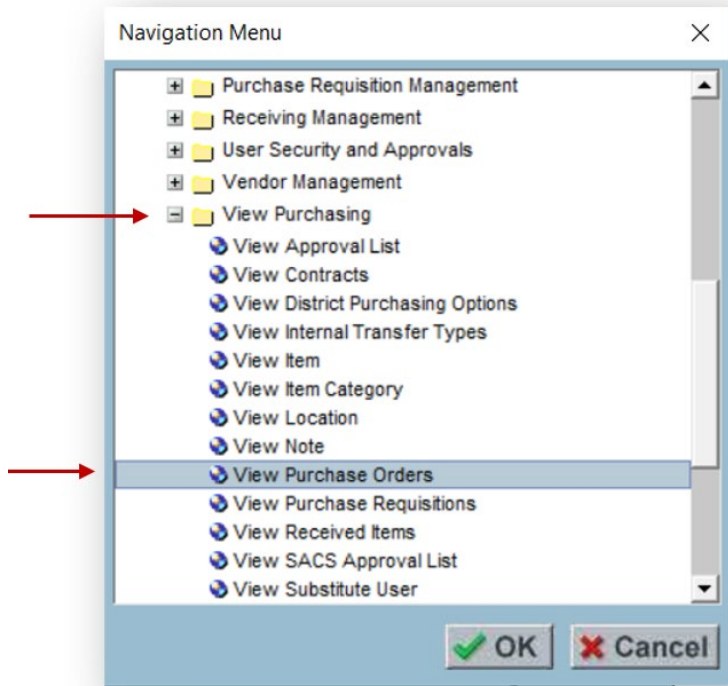
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 2

Double-click to expand the "Purchasing System" folder.

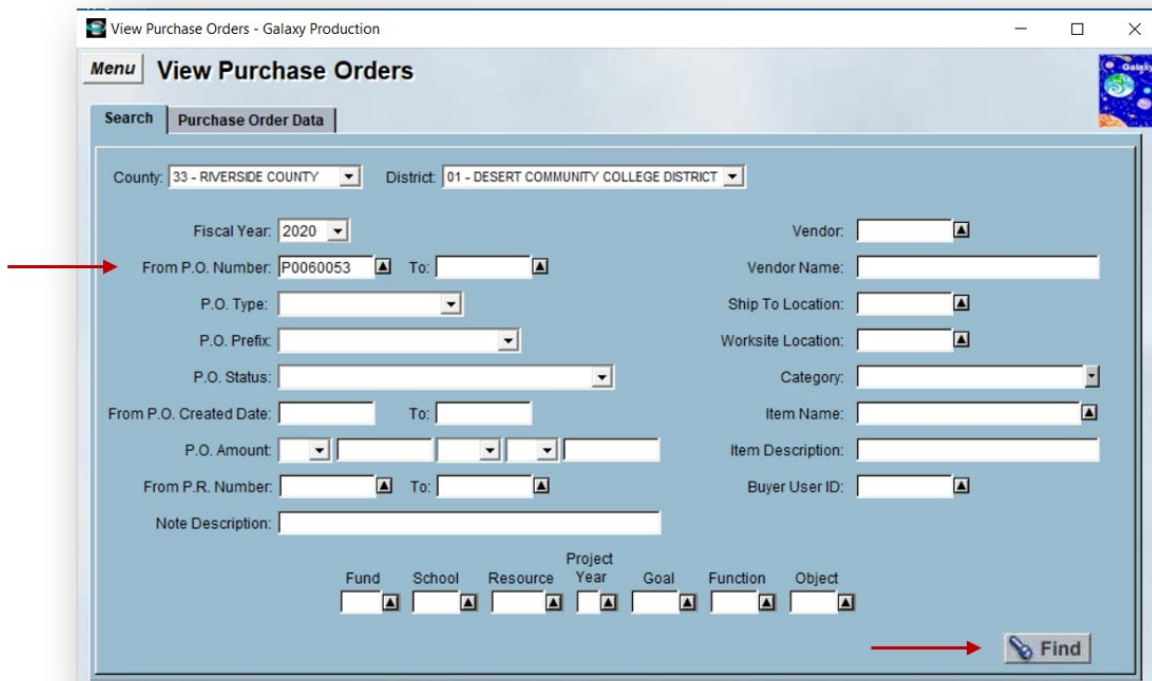
Step 3

Double-click to expand the "View Purchasing" folder then select the "View Purchase Orders" screen. Select Ok.



Step 4

In the "From P.O. Number" field enter the number of the Purchase Order that needs to be increased. Select Find.



Step 5

Select the items tab and locate the Purchase Requisition number under the P.R. NBR. Section. Write that number down. Go back to the main menu by selecting the menu button.

View Purchase Orders - Galaxy Production

Menu **View Purchase Orders**

Search Purchase Order Data

P.O. Number	P.O. Type	P.O. Status	P.O. Amount	Vendor Number	Vendor Name	Worksite	Remaining Balance	P.R. Num
P0060053	N	A	167,649.84	102917	KRUEGER INTERNATIONAL	200	167,649.84	R0055282

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.O. Number: P0060053 Print

Details **Items** Acct Distribution Notes Authorized Purchaser Approvals Payment History Open P.O. Cost Distribution

Show Description View Desc. Discount Amount: 0.00 Pct: 0.00000 Freight: 0.00

Line Nbr	P.R. Nbr	P.R. Line Nbr	Item Name	Description	Quantity	Unit Price	U/M	Amount	Tax	Tax Amount	Total Amount
0001	R0055282	0001	HILB LIBRARY FURNITURE	QUOTE: 19LW-414232/C. CM/	1.00	131,841.50	EACH	131,841.50	Y	10,217.72	142,059.22
0002	R0055282	0002	PREVAILING WAGE INSTALL	QUOTE NO: 19LW-414232/C	1.00	21,075.00	EACH	21,075.00	Y	1,633.31	22,708.31
0003	R0056565	0001	INCREASE P0060053	Additional cost to carry furniture	1.00	2,675.00	EACH	2,675.00	Y	207.31	2,882.31
Total:								155,591.50		12,058.34	167,649.84

Step 6

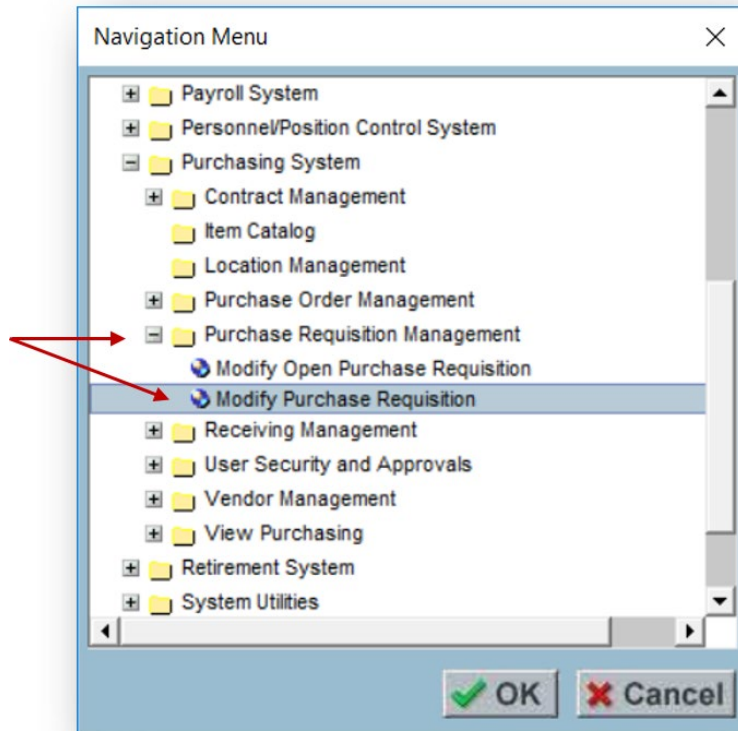
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 7

Double-click to expand the "Purchasing System" folder.

Step 8

Double-click to expand the "Purchase Requisition Management" folder then select the "Modify Purchase Requisition" screen. Select Ok.



Step 9

Enter the Purchase Requisition number that you wrote down in the "Copy from Purchase Requisition Number" field. Select Add.

Whenever you "Copy From" an old Purchase Requisition, all the information from the previous Purchase Requisition is copied to the new Purchase Requisition. This is a helpful short cut for Purchase Orders Change Orders/ Open Purchase Orders / Purchase Orders.

Note: When copying Purchase Requisitions

A Purchase Requisition can only be copied from another Purchase Requisition. An Open Purchase Requisition can only be copied from another Open Purchase Requisition.

Modify Purchase Requisition - Galaxy Production

Menu **Modify Purchase Requisition**

Search | **Details** | Items | Notes | Approvals | Cost Distribution

County: 33 - RIVERSIDE COUNTY | District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Purchase Requisition Number:

Purchase Requisition Prefix: R - PURCHASE REQUISITION

Purchase Requisition Status:

Primary Vendor:

Vendor Name:

Ship To Location:

Worksite Location:

P.R. Originator User ID:

Copy From

Purchase Requisition Number: R0056565

Show Previous Year Purchase Requisitions


Step 10

Leave all the same information in the Details tab.

Modify Purchase Requisition - Galaxy Production

Menu **Modify Purchase Requisition**

Search Details **Items** Notes Approvals Cost Distribution

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT Fiscal Year: 2020 P.R. Number: R0000NEW 

P.R. Type: N - NORMAL Date Due: 01/31/2020 Primary Vendor: 102917

P.R. Status: N - NEW (NOT SUBMITTED FOR APPROVAL) Vendor Name Search: KRUEGER INTERNATIONAL

P.R. Amount: 2,882.31 Multi. Yr. P.R. Vendor Address: 1
C/O SYSTEMS SOURCE 1330 BELLEVUE STREET, GREEN BAY, V

Category: BOND - FURNITURE
Furniture purchases for bond projects Vendor Phone Nbr: 800-424-2432 Fax Nbr:

P.R. Requestor: SAM VAN GALDER DIR Public Works Contractor Registration Number:
CSLB License Number:

Approval List: P.R. Originator User ID: 289784
CLIFFORD, ELLEN

Contact Phone Nbr: X 6737 Bill To Location: ACCT PAY ACCOUNTS PAYABLE

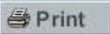
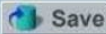
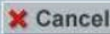
Update User ID: 289784 Ship To Location: WHSE WAREHOUSE

Update Timestamp: 01/16/2020 3:01 PM Worksite Location: 200 CHIEF BUSINESS OFFIC

Tax Rate: 0.0775 Board Rpt. Desc:

Delivery Location: BOND/DAVE HALL/CCR
Delivery Location: HILB AND C BUILDING

In Rev: N Rev Cmt:

Step 11

The changes for a Purchase Order Change Order will occur under the items tab. Modify the lines to say the following:

- **Item Name** must say "Change Order 'Purchase Order Number'". For example, Change Order P0060053.
- **Description:** the reason for the increase.
- **Account String:** Can stay the same from the previous Purchase Requisition or changed at the Department's discretion.

Example of a Purchase Order Change Order Entry

Modify Purchase Requisition - Galaxy Production

Menu **Modify Purchase Requisition**

Search | **Details** | Items | Notes | Approvals | Cost Distribution

Vendor: KRUEGER INTERNATIONAL Fiscal Year: 2020 P.R. Number: R0000NEW Acct. Dist.

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View Expand Close

Line Nbr.	P.R. Line Fiscal Year	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Tax
0001	2020	INCREASE P0060053	Additional cost to carry fu	1.00	2,675.00	EACH	2,675.00	N	0.00	Y	0.00	Y
		Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Accl. Amount	
		43	98P	0500	0	7100	0012	6400	0.00	1.000000	2,882.31	
									Total:		0.00	
									Total:		2,675.00	
											0.00	
											0.00	

Add Line | Add Acct. | Add Fav. | Dup | Delete | Save | Cancel

Step 12

Go to the Details tab and select the save button. Print the Purchase Requisition and attach documentation supporting the Purchase Order Change Order and scan via email to Purchasing.

Once the Purchase Requisition has been approved, Purchasing will attach the Purchase Requisition to the Purchase Order referenced in the Item Name, and the change order will be saved to that Purchase Order.

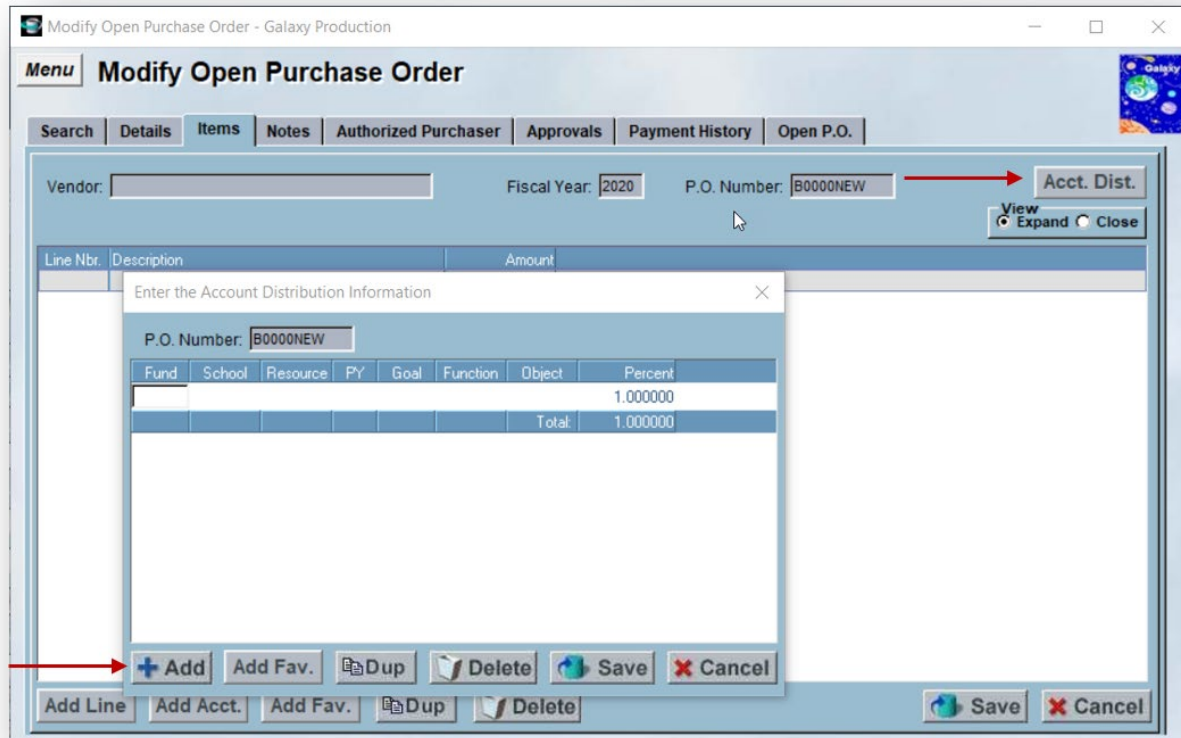
Shortcuts/Tips or Tricks

Account Distribution

Account Distribution can only be used if the entire Purchase Requisition or Open Purchase Requisition is funded by the same budget code(s).

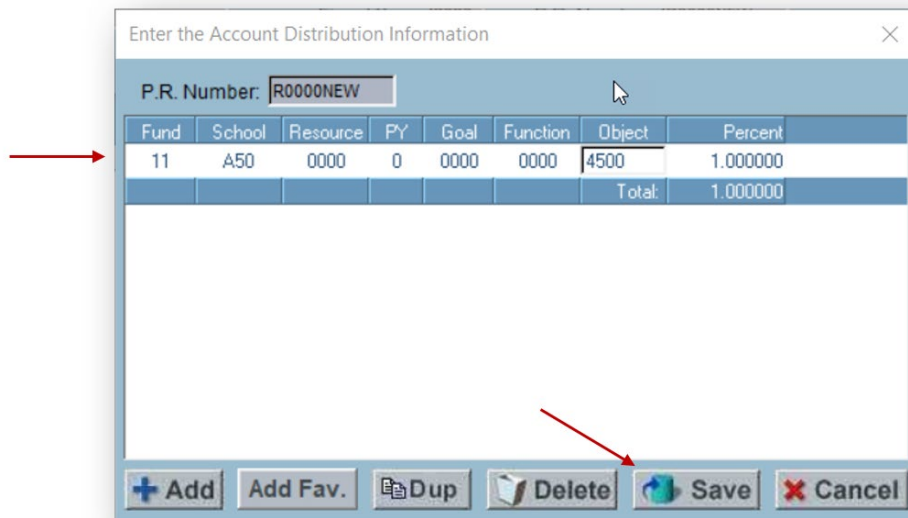
Step 1

Select the Account Distribution button, which is located on the top right corner of the screen under the items tab and must be entered before entering the Line Number/Items.



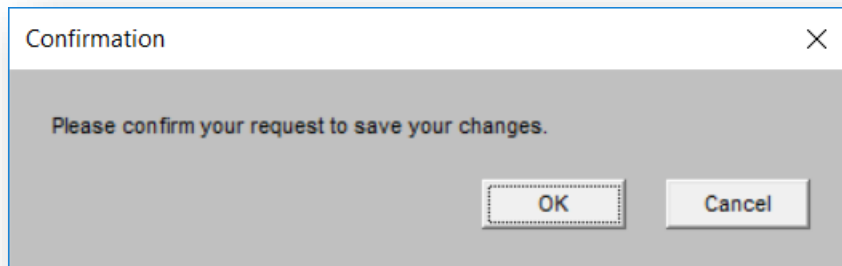
Step 2

A box will appear. Select the + Add button to enter the Account String. (use the "tab" key to move from one budget code field to the next. Select Save.



Step 3

A box will appear to "Please confirm your request to save your changes". Select ok.

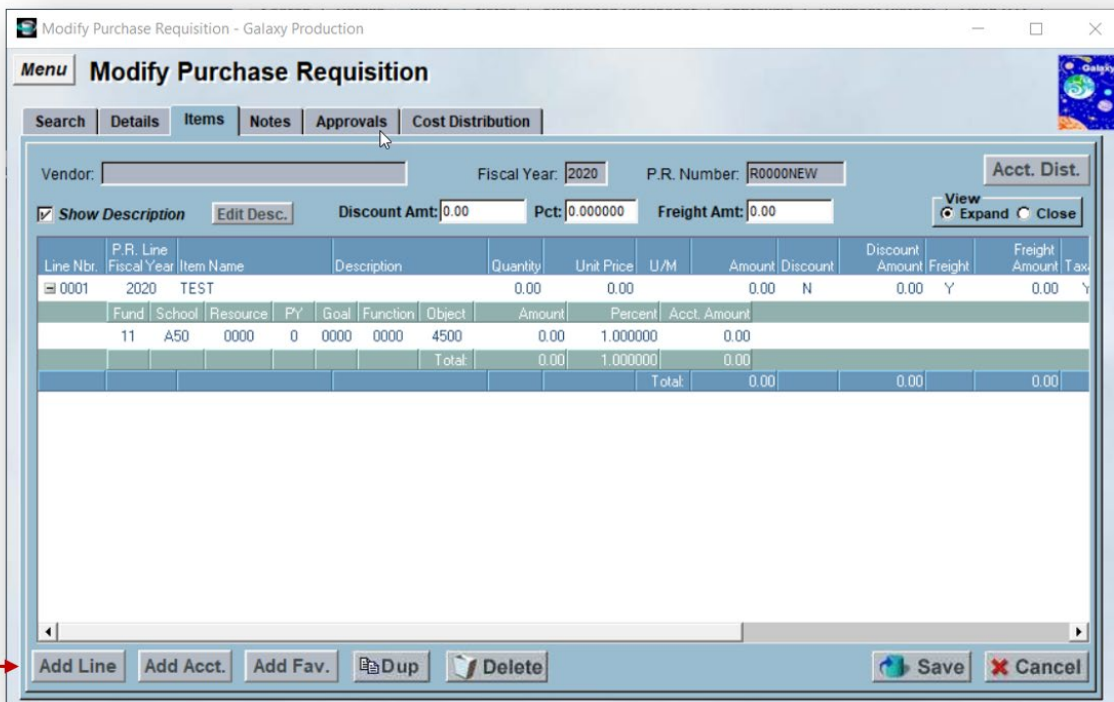


Step 4

Requisition is now ready to enter Line Items.

Step 5

Select "Add Line" to add a line item. The account string will automatically be added to the Line item.



Duplicate

The Duplicate button is used to Duplicate the information from one line by adding the same information to a whole new line.

Step 1

Select any window from Line 1. For example, the column Line Nbr. 001 has been selected.

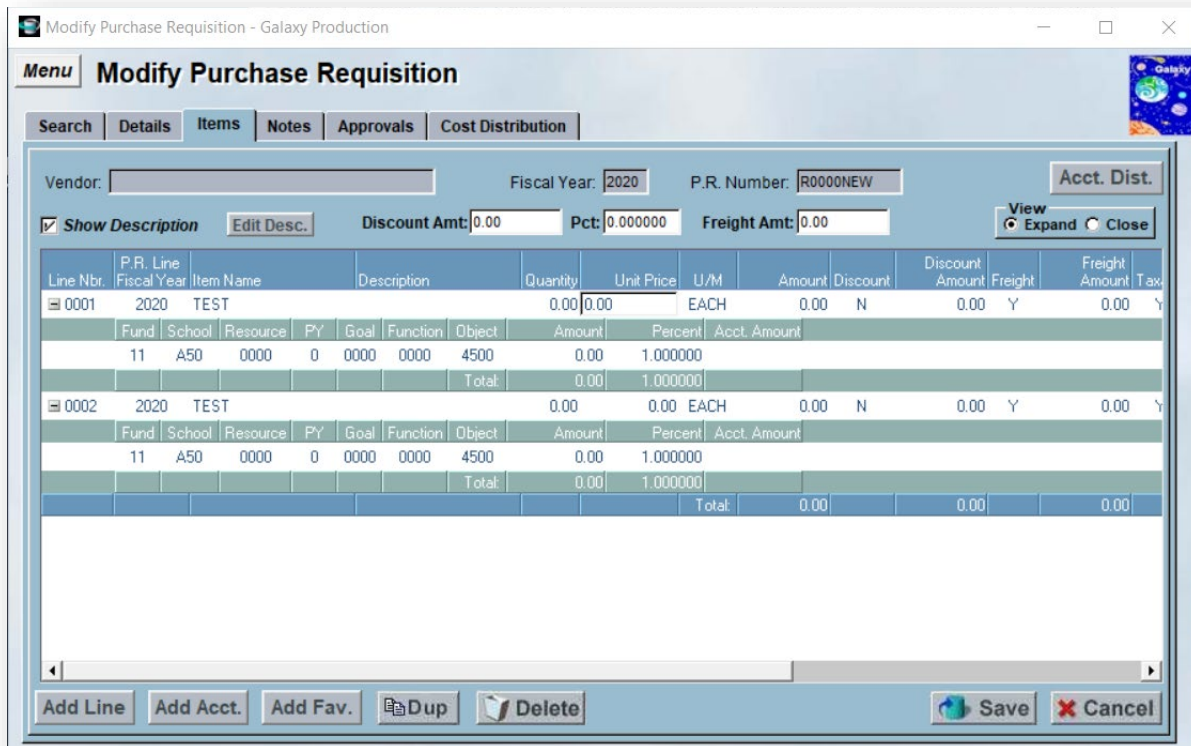
The screenshot shows the 'Modify Purchase Requisition' window for 'Galaxy Production'. The window title is 'Modify Purchase Requisition - Galaxy Production'. The menu bar includes 'Menu', 'Search', 'Details', 'Items', 'Notes', 'Approvals', and 'Cost Distribution'. The main form area contains fields for 'Vendor', 'Fiscal Year' (2020), 'P.R. Number' (R0000NEW), and 'Acct. Dist.'. There are also fields for 'Discount Amt' (0.00), 'Pct' (0.000000), and 'Freight Amt' (0.00). A 'Show Description' checkbox is checked, and an 'Edit Desc.' button is visible. A 'View' section has 'Expand' and 'Close' options. Below these fields is a table with the following data:

Line Nbr.	P.R. Line Fiscal Year	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Tax
0001	2020	TEST		0.00	0.00		0.00	N	0.00	Y	0.00	Y
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount		
	11	A50	0000	0	0000	0000	4500	0.00	1.000000	0.00		
							Total:	0.00	1.000000	0.00		
							Total:	0.00	0.00	0.00		

At the bottom of the window, there are buttons for 'Add Line', 'Add Acct.', 'Add Fav.', 'Dup', and 'Delete'. A red arrow points to the 'Dup' button. Another red arrow points to the 'Line Nbr.' column header in the table.

Step 2

Select the Dup (Duplicate button). In the example below, everything from Line Nbr. 001 has now been duplicated to Line Nbr. 002.



Add Favorites

Submitters can save SACS budget code strings in Galaxy to be used when creating requisitions.

Step 1

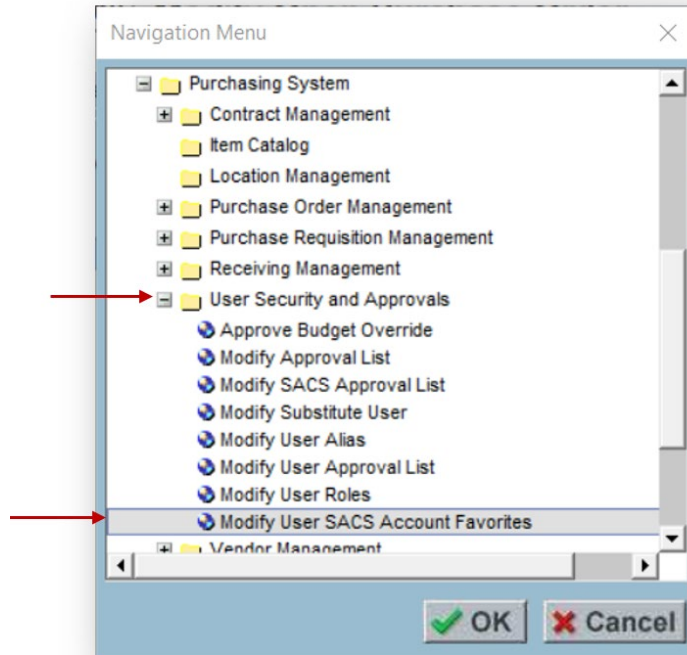
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 2

Double-click to expand the "Purchasing System" folder.

Step 3

Double-click to expand the "User Security and Approvals" folder then select the "Modify User SACS Account Favorites" screen. Select Ok.



Step 4

Enter your Employee Number and Select Find.

Modify User SACS Account Favorites - Galaxy Production

Menu **Modify User SACS Account Favorites**

Search Details

County: 33 - RIVERSIDE COUNTY District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

User ID:

Employee Number:

Last Name:

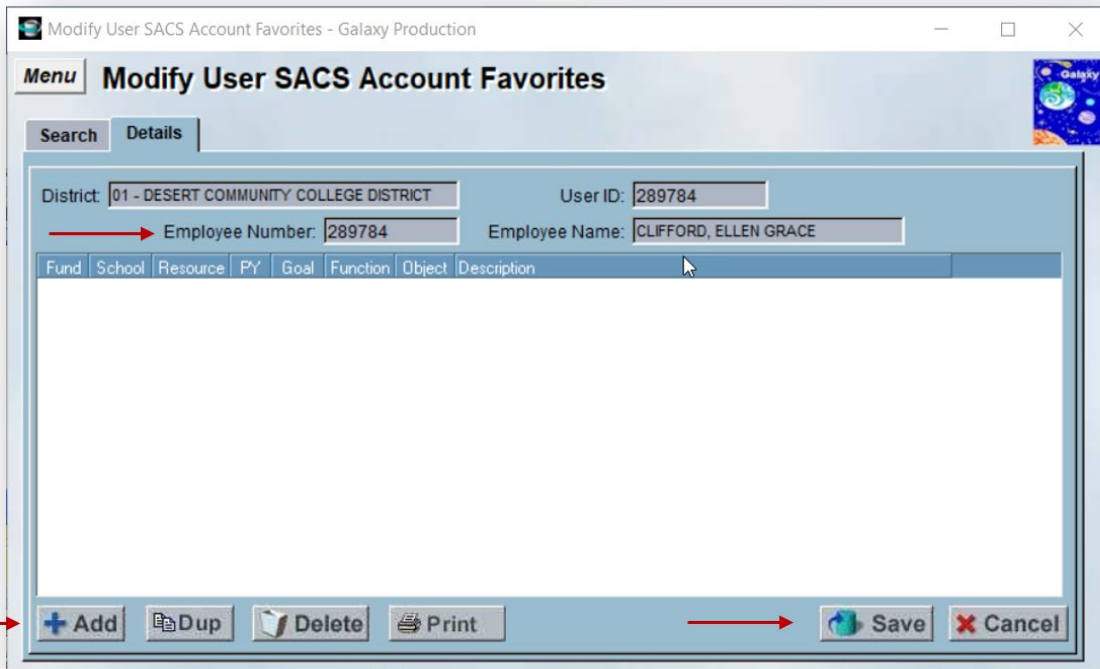
First Name:

Middle Name:

Find

Step 5

Select +Add to set up SACS Account. Check your budget to verify that the entire account string is valid before adding it as a favorite. Enter the Account String and description. Description is limited to 50 characters including spaces.



Step 6

Select Save when done entering Account Strings. This button is located on the bottom of the Modify Purchase Requisition or Modify Open Purchase Requisition Screen.

Modify Purchase Requisition - Galaxy Production

Menu **Modify Purchase Requisition**

Search Details **Items** Notes Approvals Cost Distribution

Vendor: _____ Fiscal Year: 2020 P.R. Number: R0000NEW Acct. Dist. _____

Show Description Edit Desc. Discount Amt: 0.00 Pct: 0.000000 Freight Amt: 0.00 View Expand Close

Line Nbr.	P.R. Line	Item Name	Description	Quantity	Unit Price	U/M	Amount	Discount	Discount Amount	Freight	Freight Amount	Tax
0001	2020	TEST		0.00	0.00		0.00	N	0.00	Y	0.00	Y
	Fund	School	Resource	PY	Goal	Function	Object	Amount	Percent	Acct. Amount		
	11	A50	0000	0	0000	0000	4500	0.00	1.000000			

Select an Account

Fund	School	Resource	PY	Goal	Function	Object	Description
11	A50	0000	0	0000	0000	4500	NON INSTRUCTIONAL SI

0.00 0.00 0.00

Appendix A: Budget Check

Always review your Budget prior to submitting a Purchase Requisition or Open Purchase Requisition. Expenses made before prior entry of expenses in Galaxy are not approved Purchases and should not be made without a Purchase Order or Blanket Purchase Order number.

Budget Check

Step 1

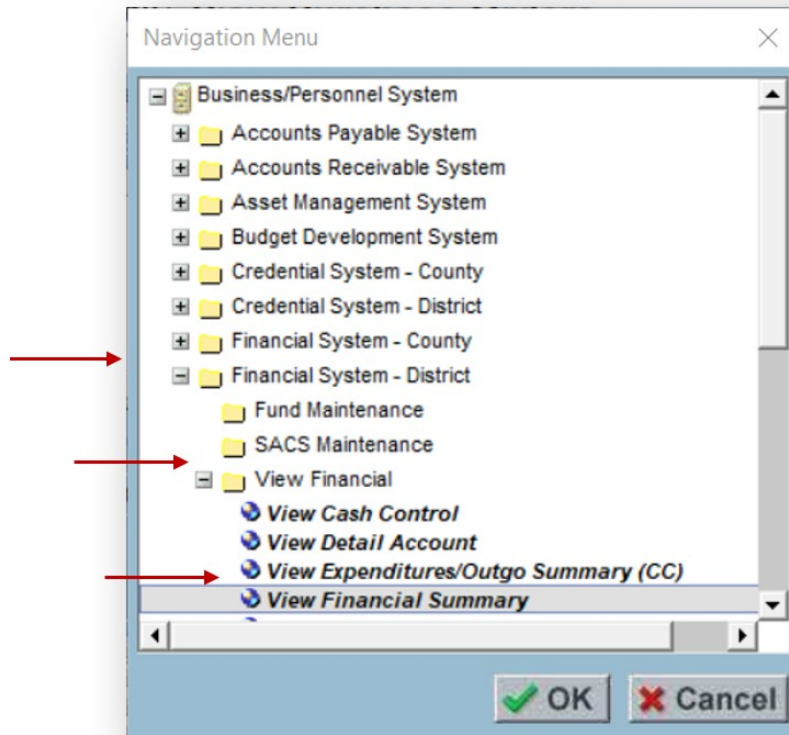
Double-click to expand the "Business/Personnel System" in the Navigation Menu.

Step 2

Double-click to expand the "Financial System-District" folder.

Step 3

Double-click to expand the "View Financial" folder then select the "View Financial Summary" screen. Select Ok.



Step 4

A web-based version of GALAXY WEB screen will open up in your internet browser.

View Financial Summary Example

GALAXY WEB
BUSINESS INFORMATION SYSTEM

Galaxy Production
Build Date: 2019-06-03 16:00
server-four-production
User: 243510

View screens in Payroll module have been enabled in Gala...

View Financial Summary

Search Details

County: 33 - RIVERSIDE COUNTY

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Begin Date: 07/01/2019

End Date: 10/08/2019

Fiscal Year To Date

Do Not Show 9XXX Object Codes

From Fund: [] ... To Fund: [] ...

From School: [] ... To School: [] ...

From Resource: [] ... To Resource: [] ...

From Project Year: [] ... To Project Year: [] ...

From Goal: [] ... To Goal: [] ...

From Function: [] ... To Function: [] ...

From Object: [] ... To Object: [] ...

Clear Criteria Find

Generate Budget Report of Department Example: School of Social Arts Science and Arts General Fund Operational Budget.

Step 5

- **Fiscal Year:** Enter the current fiscal year you are working in. The current year is the default.
- **Begin Date:** The begin date you are running the report for.
- **End Date:** The end date you are running the report for.
- For this example, if you run a report for the 1st Quarter the dates will be 7/1/2019 to 9/30/2019.
- **From Fund Section:** A two-digit number on both the left and right side.

- **From School:** A two-digit number and one letter on both the left and right side.
- **From Resource:** A four-digit number on both the left and right side.
- **From Project Year:** A one-digit number on both the left and right side.
- **From Goal:** A four-digit number on both the left and right side.
- **From Function:** A four-digit number on both the left and right side.
- **From Object:** A four-digit number on both the left and right side.

Step 6

Select find.

Example

In the diagram below, in the From School section, 50A has been entered on the left side and 50Z on the right side. The Resource, Project Year and Goal-Function has been left blank. In the From Object Code section, 4000 has been entered on the left side and 6400 has been entered on the right side. Select on Enter.

View Financial Summary

Search Details

County: 33 - RIVERSIDE COUNTY

District: 01 - DESERT COMMUNITY COLLEGE DISTRICT

Fiscal Year: 2020

Begin Date: 07/01/2019

End Date: 09/30/2019

Fiscal Year To Date

Do Not Show 9XXX Object Codes

From Fund: 11 ... To Fund: 11 ...

From School: 50A ... To School: 50Z ...

From Resource: ... To Resource: ...

From Project Year: ... To Project Year: ...

From Goal: ... To Goal: ...

From Function: ... To Function: ...

From Object: 4000 ... To Object: 6999 ...

Clear Criteria Find

View Financial Summary

Search		Details									
County: 33 - RIVERSIDE COUNTY		District: 01 - DESERT COMMUNITY COLLEGE DISTRICT									
Show											
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Total Rows: 46											
Fund	School	Resource	Project Year	Goal	Function	Object	Adopted Budget	Revised Budget	Rev/ Exp Net of Abatements	Encumbrances	Uncommitted/ Unrealized
11	50P	0000	0	0604	1000	4500	3,300.00	3,300.00	0.00	574.38	2,725.62
11	50P	0000	0	0604	1000	5100	4,700.00	4,700.00	0.00	0.00	4,700.00
11	50P	0000	0	0604	1000	5300	7,000.00	7,000.00	0.00	0.00	7,000.00
11	50P	0000	0	0604	1000	5520	3,700.00	3,700.00	0.00	0.00	3,700.00
11	50P	0000	0	0604	1000	5545	5,800.00	5,800.00	1,050.00	3,595.50	1,154.50
11	50P	0000	0	0604	1000	5630	5,000.00	5,000.00	975.00	0.00	4,025.00
11	50P	0000	0	0604	1000	6400	4,500.00	4,500.00	0.00	0.00	4,500.00
11	50P	0000	0	1002	0000	4500	300.00	300.00	0.00	0.00	300.00
11	50P	0000	0	1002	0000	4555	3,900.00	3,900.00	899.78	0.00	3,000.22
11	50P	0000	0	1002	0000	5100	5,000.00	5,000.00	210.00	0.00	4,790.00
11	50P	0000	0	1002	0000	5640	200.00	200.00	0.00	0.00	200.00
11	50P	0000	0	1002	0000	5890	500.00	500.00	0.00	0.00	500.00
11	50P	0000	0	1004	0000	5640	8,800.00	8,800.00	2,030.00	0.00	6,770.00
11	50P	0000	0	1004	0000	5800	3,000.00	3,000.00	585.15	0.00	2,414.85
11	50P	0000	0	1007	0000	5300	100.00	100.00	0.00	0.00	100.00
11	50P	0000	0	4930	1200	4500	4,975.00	4,975.00	-513.80	0.00	5,488.80
Totals							138,830.00	138,830.00	12,904.01	12,535.02	113,390.97

Step 7

A list of the account strings including the Fund, School, Resource, Project Year, Goal, Function, and Object will generate. Other information included on this report will be the numbers from the Adopted Budget, Revised Budget, Revenue/ Expenditures Net of Abatements, Encumbrances, and Uncommitted/Unrealized. Analyze as needed.

View Financial Summary

Search		Details											
County: 33 - RIVERSIDE COUNTY		District: 01 - DESERT COMMUNITY COLLEGE DISTRICT											
Show													
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Total Rows: 46													
Fund	School	Resource	Project Year	Goal	Function	Object	Object Code Description	Adopted Budget	Revised Budget	Rev/ Exp Net of Abatements	YTD Rev/ Exp/ Enc %	Encumbrances	Uncommitted/ Unrealized
11	50P	0000	0	0604	1000	4500	NON INSTRUCTIONAL SUPPLIES	3,300.00	3,300.00	0.00	17.4055%	574.38	2,725.62
11	50P	0000	0	1002	0000	4500	NON INSTRUCTIONAL SUPPLIES	300.00	300.00	0.00	0.0000%	0.00	300.00
11	50P	0000	0	4930	1200	4500	NON INSTRUCTIONAL SUPPLIES	4,975.00	4,975.00	-513.80	-10.3276%	0.00	5,488.80
11	50P	0000	0	6010	0000	4500	NON INSTRUCTIONAL SUPPLIES	17,000.00	17,000.00	2,185.44	46.3401%	5,692.37	9,122.19
11	50P	0000	0	6960	0000	4500	NON INSTRUCTIONAL SUPPLIES	2,000.00	2,000.00	0.00	0.0000%	0.00	2,000.00
11	50P	0000	0	6960	0010	4500	NON INSTRUCTIONAL SUPPLIES	500.00	500.00	0.00	0.0000%	0.00	500.00
11	50P	0000	0	1002	0000	4555	COPYING & PRINTING	3,900.00	3,900.00	899.78	23.0713%	0.00	3,000.22
11	50P	0000	0	4930	1200	4555	COPYING & PRINTING	3,000.00	3,000.00	705.00	23.5000%	0.00	2,295.00
11	50P	0000	0	6010	0000	4555	COPYING & PRINTING	5,055.00	5,055.00	1,899.42	37.5751%	0.00	3,155.58
11	50P	0000	0	6200	0000	4555	COPYING & PRINTING	500.00	500.00	0.00	0.0000%	0.00	500.00
11	50P	0000	0	6460	0000	4555	COPYING & PRINTING	500.00	500.00	0.00	0.0000%	0.00	500.00
11	50P	0000	0	4930	1200	4700	FOOD SERVICES	3,000.00	3,000.00	0.00	0.0000%	0.00	3,000.00
11	50P	0000	0	6010	0000	4700	FOOD SERVICES	5,000.00	5,000.00	664.03	39.4650%	1,309.22	3,026.75
11	50P	0000	0	6010	0000	5045	POSTAGE	100.00	100.00	36.65	36.6500%	0.00	63.35
11	50P	0000	0	0604	1000	5100	CONTRACTS AND PERSONAL SERVIC	4,700.00	4,700.00	0.00	0.0000%	0.00	4,700.00
11	50P	0000	0	1002	0000	5100	CONTRACTS AND PERSONAL SERVIC	5,000.00	5,000.00	210.00	4.2000%	0.00	4,790.00
Totals								138,830.00	138,830.00	12,904.01	18.3239	12,535.02	113,390.97
SACS Description		Excel	Print										

Department Budgets Five Categories of Expenditures:

- **Academic Salaries** - Object code series 1000-1999.
- **Classified** - Object Code series 2000-2999.
- **Benefits** - Object Code series 3000-3999.
- **Supplies and Materials** - Object Code series 4000-4999.
- **Operating Services and Expenses** - Object Code series 5000-5999.
- **Capital Outlay** - Object Code 6400 (Any purchase over \$500.00).

Refer to [Object Code](#) for more information.

Understanding View Financial Summary Terms

- **Fund**- Restricted or Unrestricted (General fund 11).
- **School** - department and location (Cost Center).
- **Resource** - Assigned to specific Restricted/Grant program.
- **Project Year** - Fiscal Year.
- **Goal-Function** - Eight-digit numeric code assigned to discipline.
- **Object code** - the category of an expenditure.
- **Object code description** - description of expenditure Object code.
- **Rev / Exp Net of Abatements** - expenditures or Revenues less abatements.
- **Abatement** - A reduction to an expenditure that already been made.
- **Encumbrances** - The commitment of all or part of an appropriation.
- **Uncommitted** - The balance of an appropriation not yet committed for specific purposes.

How to Read the View Financial Summary

- **Revised budget** – Total current entire amount in the specific budget.
- **Rev/Expenses Net of Abatements** – Actual Expenses that have been accounted for on the ledger to date.
- **Ytd rev/expenses enc%** - percentage of total budget expenditures including Encumbrances expensed to date.

- **Encumbrances** - the commitment of all or part of an apportionment (contracts for 1 year).
- **Uncommitted/unrealized** – available balance in the budget for expenditures.

Formula for the Entire Budget:

- *Revised Budget: Less: (Expenditures + Encumbrances) = Equals: Available Balance.*

How to read the View Financial Summary Account Budget String

The view Financial summary has a breakdown of individual budgets within the entire budget. These are called budget account strings. Assigned to Expenditure object codes such as food, instructional supplies, contracts, etc. Each individual account budget string is used to budget for each category.

Budget or Expense Transfers

Budget or Expense Transfers are Funds being transferred from one account to the next. They are not actual expenditures. Budget Transfers are always whole dollar amounts. Budget Transfers allow to Increase or Decrease Object Spending amounts. Budget Transfers must Balance to Zero. Budget Transfers can only be between Expenditures or Revenue Object Codes. Budget Transfers can only be transferred within assigned Budget and Project Year. [Budget and Transfer Request Forms](#).