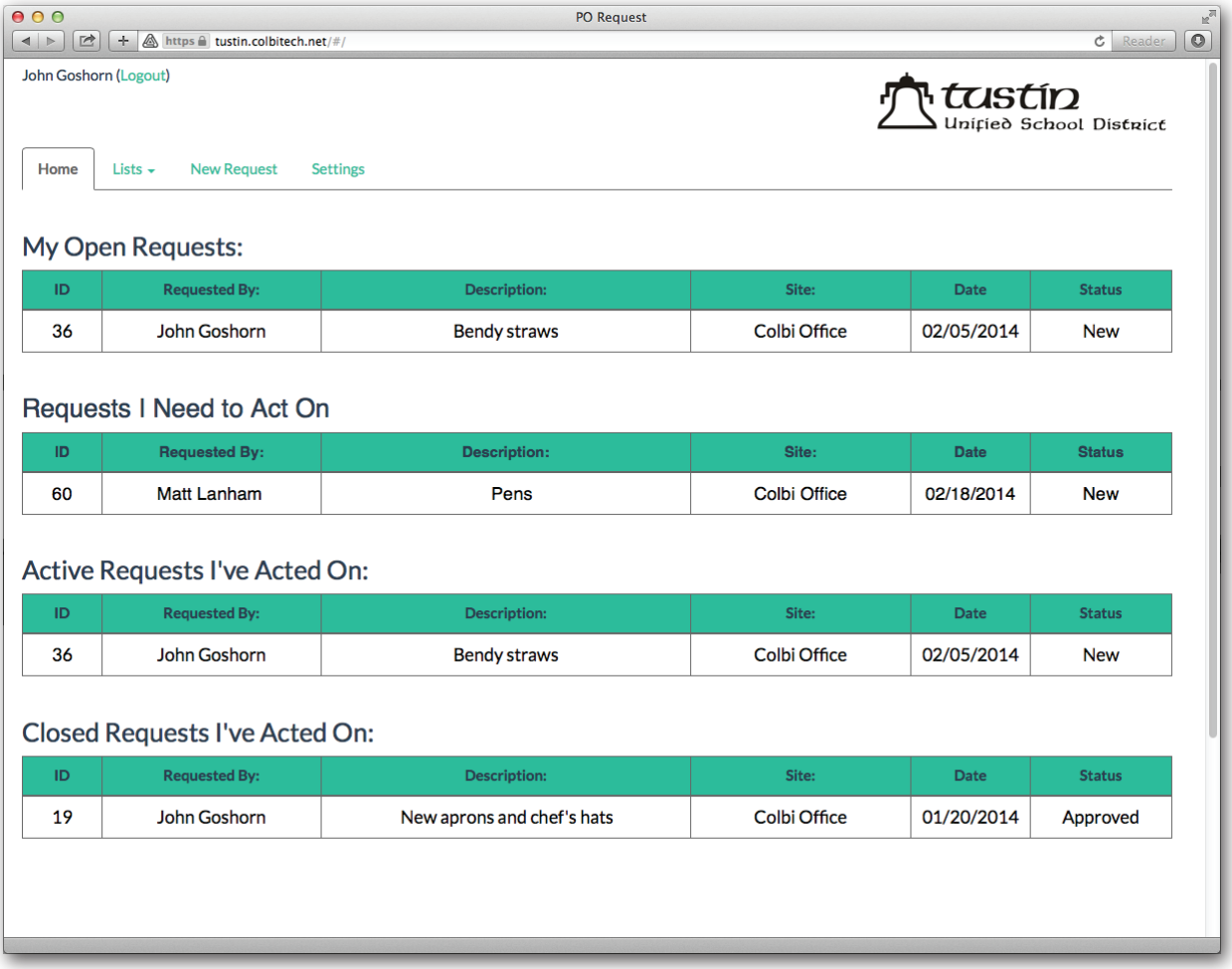
Colbi Technologies

User Name:
Password:

Welcome to the Tustin Unified School District Purchase Request System.

It's designed with simplicity in mind. Start here: **https://tustin.colbitech.net**

Login with your supplied **Login** name and **Password** to access the system. The first screen is a Home screen, shown below.



On the home screen, you can create **New Requests**, adjust your **Settings**, or review open and closed requests.

My Open Requests: Shows your requests that are still in process.

Request I Need to Act On: Shows the requests that require your review.

Active Requests I've Acted On: Shows the ten most recent requests you have created, approved, or sent back.

Closed Requests I've Acted On: Shows the ten most recent requests you have acted on that have been closed: either approved or denied.

New Requests

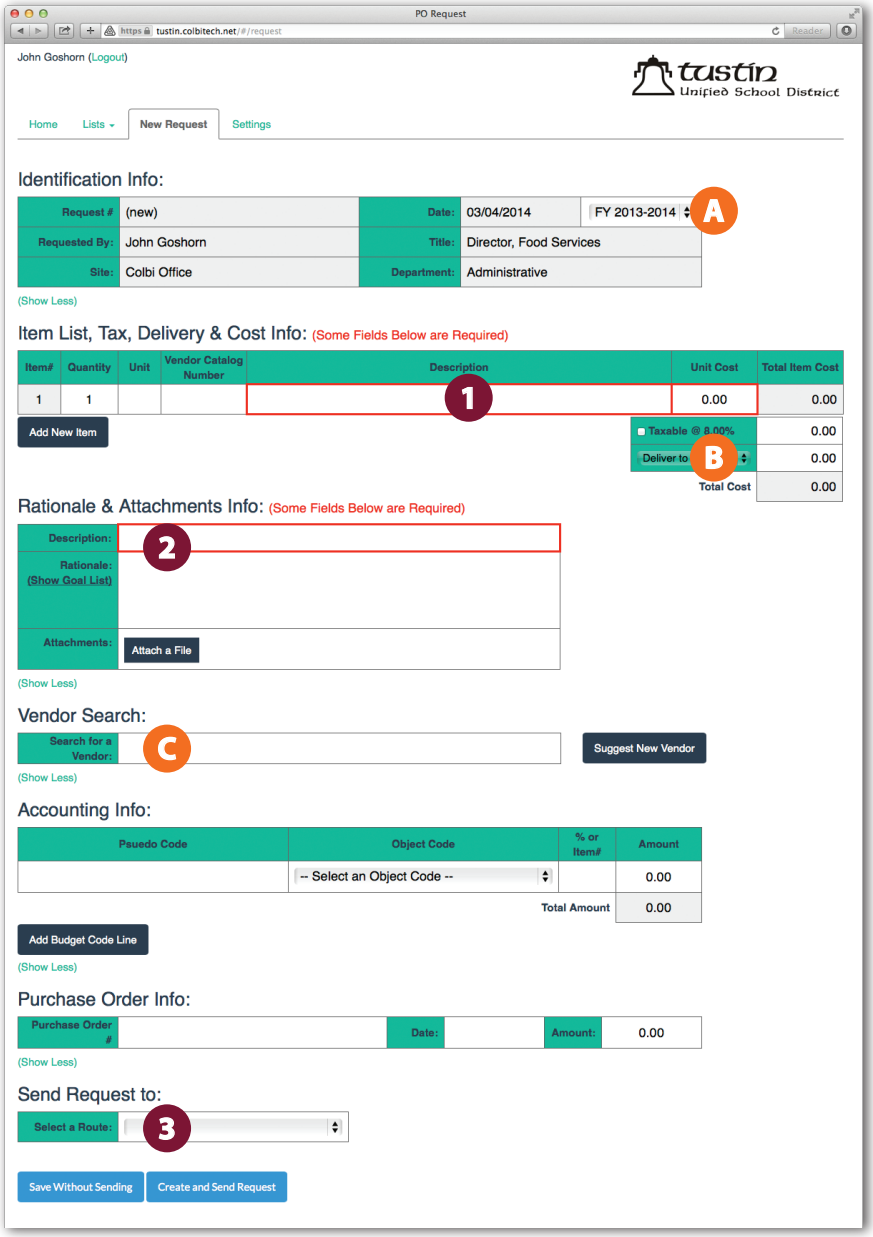
Click on the **New Request** tab to request a purchase requisition. Click anywhere on the item line to open an existing request.

Creating a New Request

Creating a new request is rather straight forward. When you click the **New Request** tab, a request form appears.

The form appears in its entirety, but you don't have to fill the whole thing out. You won't be expected to enter accounting or purchase order information. **Just fill out the required items outlined in red.**

If you'd like to add anything else (like an **Attachment** to show a picture of the item), you can. It's not required.



1. **What do you need?** Enter a **Description** and a best guess at the **Unit Cost**. Press the **Add New Item** button to add more items.
2. **Why do you need it?** The **Description** will copy from the first item above You can also enter a **Rationale** and **Attach** files here.
3. **Who needs to approve this?** If this option appears, it is because you can send requests to different people along different approval chains. Select an Approval Route.

That's all that's required. There's three other fields you should be aware of.

- **A** If you need to request something for the next fiscal year, select that here.
- **B** The **default delivery** method is to **Deliver to Site**. If you need this changed, change it here.
- **C** Request a certain vendor, search for preferred vendor, type here. If your vendor is not found, press the **Suggest New Vendor** button to suggest a new one.

Click the **Create New Request** button at the bottom of the screen to create the request.

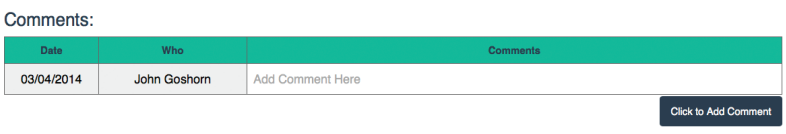
Save Without Sending will save the request for future editing.

That's it. Your request has been forwarded for processing.

Editing Your Request

Once your request is created, you may edit it until it has been Approved or Denied by the next person in the Approvals process. You can even **Delete Request** if you like.

After your request has been approved by someone in the Approvals process, you can still add **Comments**. Comments are logged by user and date. Press the **Click to Add Comment** button to save the comment. Comments will stay with the document and be viewable by all.



The Details

Every member of the Approvals process sees the entire form, though some portions are only meant for purchasing and reviewers. Required fields are marked in red at each step.

Identification Info:

Request #	(new)	Date:	03/04/2014	FY 2013-2014
Requested By:	John Goshorn	Title:	Director, Food Services	
Site:	Colbi Office	Department:	Administrative	

This shows basic information about the **Request**, including the **Number**, **Date**, **Originator**, Originator's **Title**, **Department**, and **Site**.

Item List, Tax, Delivery & Cost Info: (Some Fields Below are Required)

Item#	Quantity	Unit	Vendor Catalog Number	Description	Unit Cost	Total Item Cost
1	1				0.00	0.00

Add New Item

Taxable @ 8.00%	0.00
Deliver to Site	0.00
Total Cost	0.00

Space for **Quantity**, **Units**, **Vendor Catalog Number**, **Description***, **Unit Cost***, **Sales Tax**, and **Delivery Charges**. Enter the information to the best of your ability: a catalog number is not required. For Unit Cost, put in your best guess.

Rationale & Attachments Info: (Some Fields Below are Required)

Description:	
Rationale: (Show Goal List)	
Attachments:	Attach a File

Enter a **Description*** (this will be the name of the Request) and a **Rationale** for requesting the item(s). If there are pertinent **Attachments**, you can **Attach a File** here (such as a picture of the item). Click **(Show Goal List)** for a list of commonly used Rationales.

Vendor Search:

Search for a Vendor:		Suggest New Vendor

You can search through the district's list of preferred vendors. Or click the **Suggest New Vendor** to suggest a different vendor.

Accounting Info:

Pseudo Code	Object Code	% or Item#	Amount
	-- Select an Object Code --		0.00
		Total Amount	0.00

Add Budget Code Line

If you work with account codes, start typing the **Pseudo Code**. **Select an Object Code** from the list and allocate money to cover the purchase. To add more budget lines, click **Add Budget Code Line**.

Purchase Order Info:

Purchase Order #		Date:		Amount:	0.00

When a **Purchase Order Number** is assigned, this means the requested item(s) will be purchased.

Comments:

Date	Who	Comments
03/04/2014	John Goshorn	Add Comment Here

Click to Add Comment

Use **Comments** to add any information you think is pertinent. When the Request goes through the approvals process, you won't be able to edit the above information, but you can add new comments.

Approvals:

Date	Who
02/18/2014	John Goshorn
(Pending)	Matt Lanham

This section shows the status of the request, where it is now, and who has approved it.

Send Request to:

Select a Route:	

Some users will be required to select an approvals route. This will appear in a drop-down menu.

At the bottom of the Request are the Action buttons:

Update Request — **Update Request** lets you save changes without moving the request forward.

Delete Request — **Delete Request** allows the originator to delete the request.

Approve and Send Request — **Approve and Send** moves a request forward.

Send Back Request — **Send Back** sends the request backward for modification.

Deny Request — **Deny Request** denies the request.

Approve and Complete Request — **Approve and Complete** is for the final approval.

Frequently Asked Questions

[We're still assembling our Frequently Asked Questions. Please bear with us.]

What sort of internet browser will this work on?

The Purchase Request System will work on any modern internet browser — including mobile versions — which includes the newest version of Chrome, Firefox, Safari, and Internet Explorer 8 or above. If you use Internet Explorer 7 or below, you may encounter difficulties.

How can I tell if my request has been approved?

You can open any request you have created from the **Home Page**. Approved or Denied requests will display a note at the top of the **Request Page.** Open requests have a summary of approvals at the bottom of the page, including who currently has the request for review.

Can I be emailed when my request is approved?

You can set your email preferences in the **Settings** tab. You can set it to email you when requests are approved or denied, any time a comment is posted, or even when your requests advance to another reviewer.

What if I forget my login or password?

Click either of the **(Forgot?)** links in the **Login** screen. Your **Login** or **Password** will be emailed to you.