

Trinity Valley Community College
Business Office

Request for Purchase-
Adobe Acrobat 5.0
Procedure Manual

October 2001

Step 1:

Retrieve the Electronic Request for Purchase by going to the Business Office website.

<http://www.tvcc.cc.tx.us/busoffice/>

Click on 'Employee Forms' then click on 'Request for PO.'

Step 2:

The Request for Purchase form will appear in the window as shown to the right.

Move the mouse pointer to the Date field. Notice that the hand pointer turns to an I-Beam cursor whenever it crosses a field that can be filled in. Click in the Date field with the left mouse button. The cursor changes to a blinking cursor. You are now ready to begin filling in the fields just as you would the paper form. You must enter the date in the style indicated on the form. It is important to enter the 4 digit year.

REQUEST FOR PURCHASE
TRINITY VALLEY COMMUNITY COLLEGE

Business Office
ck # _____
Amt. \$ _____
Date _____

P.O.# _____ Date: _____
mm/dd/yyyy

Requester/Dept.: _____ Campus: Athens Palestine
 Kaufman Terrell

Suggested Supplier: _____
Address 1 _____
Address 2 _____
City State ZIP _____
Phone #: () _____

Check box to have P.O. mated
Check box for verbal P.O. (This is for phone orders. No hard copy of P.O. will be generated.)
Check box for P.O. to be returned to requester

Account No.	Quantity	Complete description, including brands, stock numbers, etc.	Unit Cost	Extended Cost
			TOTAL	\$0.00

Vice President _____ Purchasing Department _____ Business Office _____
Dean _____ Division Chair / Director _____ Requester _____
E-MAIL SAVE

To move from one field to the next simply press the TAB key on the keyboard. If for some reason you need to return to a previous field, simply press Shift + TAB on the keyboard. You may also move the mouse pointer to any field you need to and click with the left mouse button.

After entering the Date, TAB to the Requester / Dept field and fill it in. After filling in the Requester/ Dept field, TAB over to the next area which is the Campus selection.

Now to select your campus simply TAB until your campus is highlighted with a box and then press the space bar on the keyboard.

Date: _____
mm/dd/yyyy

Campus: Athens Palestine
 Kaufman Terrell

Continue to TAB through the remaining Campus selections until you reach the Suggested Supplier field.

Check box to have P.O. mailed

Check box for verbal P.O. (This is for phone orderssm) No hard copy of P.O. will be generated.)

Check box for P.O. to be returned to requester

Notice the Suggested Supplier area now has an additional address line as compared to the previous paper form. If the additional line is not needed only use the Address 1 line and TAB passed Address 2 to City, State, Zip.

These fields are divided. Simply type the “city”, TAB, “state”, TAB, and “zip code.”

P.O.# _____ Date: _____
mm/dd/yyyy

Requester/Dept.: _____
 Suggested Supplier: _____
 Address 1 _____
 Address 2 _____
 Phone #: () _____

Campus: Athens Palestine
 Kaufman Terrell

Check box to have P.O. mailed

Check box for verbal P.O. (This is for phone orders. No hard copy of P.O. will be generated.)

Check box for P.O. to be returned to requester

TAB to the Phone # field and fill in the Area code then TAB and fill in the rest of the number including the Extension if required.

TAB to the next area which is where you request the desired method by which the PO is handled. Notice the dashed box around the current selection. Simply TAB until the desired option is reached and then press the Space bar on the keyboard. There will be an X placed in the box.

TAB to the next area. The field you come to is the Account number field. Simply type in the required account

Account No.	Quantity	Complete description, including brands, stock numbers, etc.	Unit Cost	Extended Cost
1234-56	1	500 Horsepower rocket powered pair of roller skates with titanium roller bearings. Blast shield attached to protect back of legs.	\$3,298.95	\$3,298.95
1234-56	1	Parachute for safety purposes.	\$1,599.95	\$1,599.95
1234-56	10	24 roll box of bandages	\$12.95	\$129.50

number and press the TAB key. Next is the Quantity field. Type the desired quantity. Next is the Description field. This field is somewhat unique in that it will automatically adjust the font size to accommodate long descriptions. Fill it in and p r e s s t h e T A B k e y .

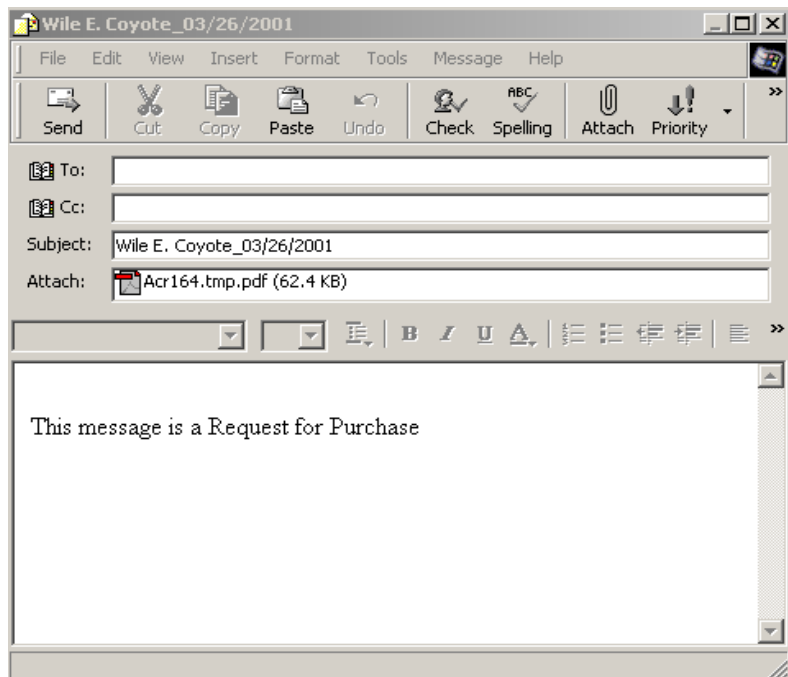
The next field is the Unit Cost. This is the cost per single unit. Type in the cost for

a single unit and press the TAB key. The form automatically does the multiplication for you and enters that value in the Extended Cost field. The cursor will drop to the next line and begin again at the Account number field. There is room for Ten (10) items on this form and at the bottom of the Extended Cost column is the Total for this form.

TAB through until you reach the Requester signature line. You may also click in the Requester signature line with the mouse. This is simply a text field. Type your name in the Requester field. Double check the form to make sure that all the information provided is correct.

Purchasing Department	Business Office
Division Chair / Director	Requester
E-MAIL	SAVE

To send this Request for Purchase on for the next required signature, press the “E-MAIL” button. The file is set as an attachment to an e-mail message. Your e-mail client’s New Message box will appear. In the example, Outlook Express is shown. Simply enter the e-mail address of the next person you need a signature from in the “To:” field.

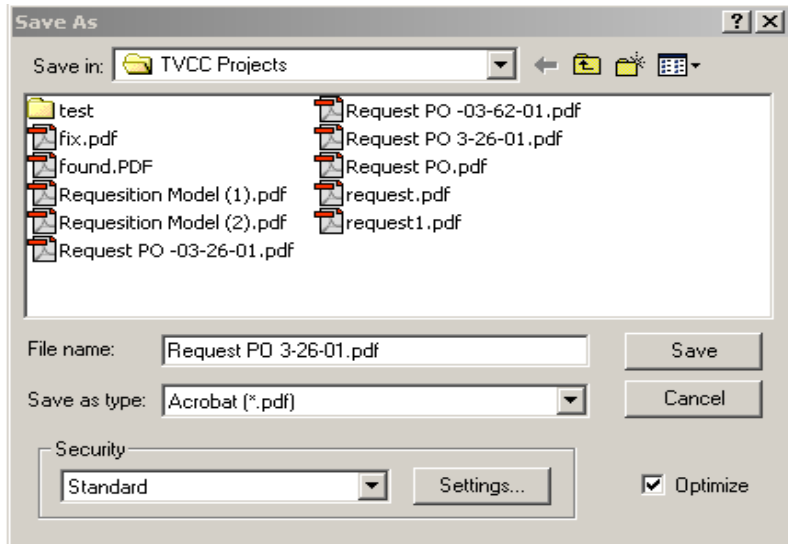


Notice the Requester / Department information, as well as the date on the request form, appears in the “Subject:” field. If you think you need to change it you can. In most cases this will work fine.

Note: Make sure that your **Name**, **Department**, and **Date** appear in the subject

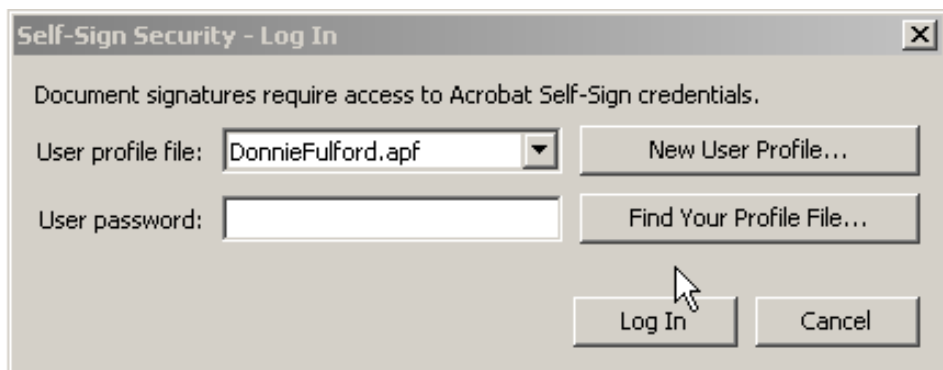
box. Failure to do so may delay processing of your request.

After the e-mail message is sent, you will want to save this file. Press the “SAVE” button. You are now prompted to save the file. A suggestion would be to make a directory to store your Requisitions and name them something descriptive or by date as shown in the example. After naming the file click Save.



STEP 3: (This step pertains to all Division Chairs / Directors and higher)

Notice the signature mouse pointer located in the Division Chair field. This is how the Request for Purchase gets digitally signed in order to be tracked and verified.



When you click your appropriate field to sign the document, the dialog box to the right appears if this is the first document you’ve signed since opening this session of Acrobat 5.0. In this box you will see your Signature Profile listed. If not click on ‘Find Your Profile File’ and look for your profile. Your profile will be generated by the Business Office and installed on your machine along with Adobe Acrobat 5.0.

Simply enter your password in the User password box and click OK.

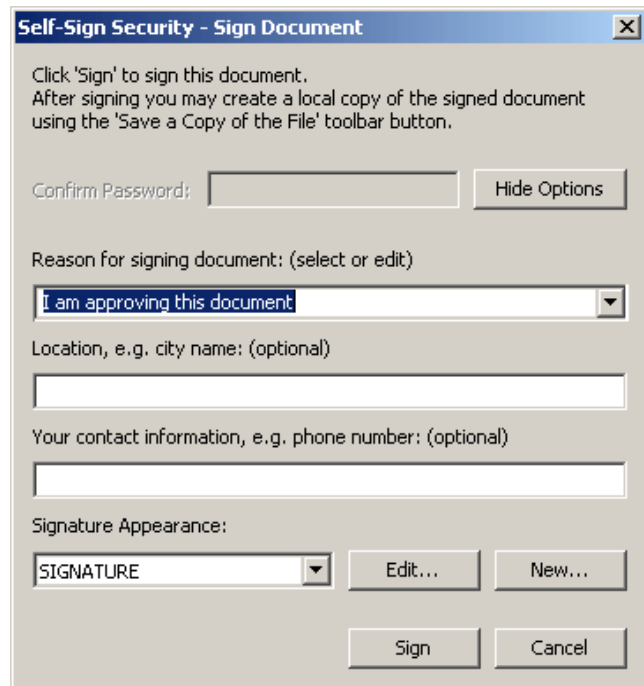
If this is any subsequent form while in this session of Acrobat 5.0 the dialog box to the right will appear. If the dialog box does not look exactly like the example press the ‘Show Options’ button.

This next dialog box is the Sign Document box. Click the down arrow to the right of the “Reason for signing document:” window.

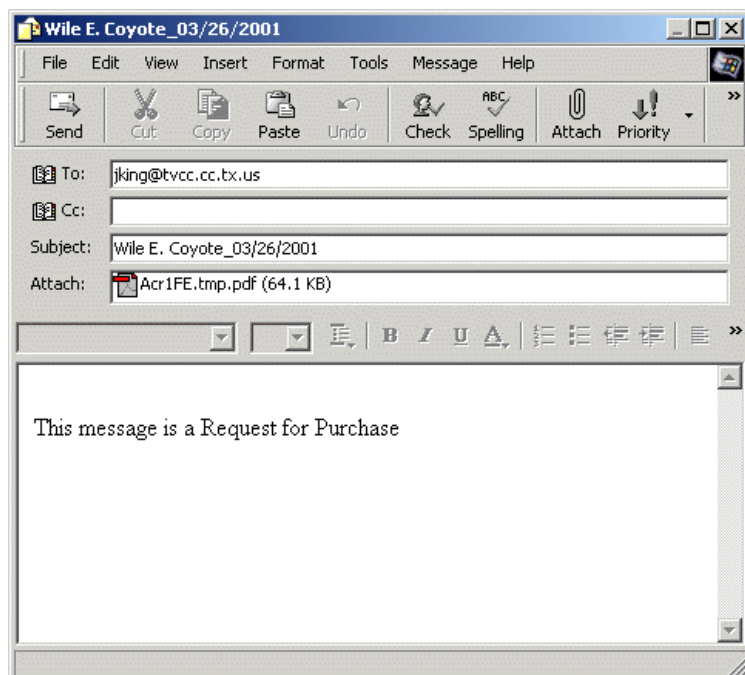
A list of choices is presented. Click on the appropriate response. In most cases “I am approving this document” is appropriate.

Make sure that the Signature appearance window indicates “SIGNATURE.” If it does not, use the down arrow to the right of that window and select “SIGNATURE” from the list.

Now enter your password in the Confirm user password box and click Save Document. This is important in order to insure the document and signature are valid. If the confirm password box is grayed out there is no need to enter a password. Click on the Sign button.



Now this document needs to be sent to the next person for approval. Click on the “E-MAIL” button. A new message box will appear for you to send it to the next appropriate person. Put the address in the “To:” field. Who originated the requisition and the date will appear in the “Subject:” field. You might also include a message in the message window as an option. Once everything is filled out, click Send and the document is on its way.



Now that the Request for Purchase has been sent, you may want to save it for your records. Press the Save button at the bottom of the Request for Purchase form. Locate where you would like to store this file for your records. Give this file a unique file name and press Save. (Ex. request_032601)