Margaretta Local School District - Purchasing Process

Friday, August 22, 2025 8:24 AM

Submitting Purchase Requisitions Through SCView

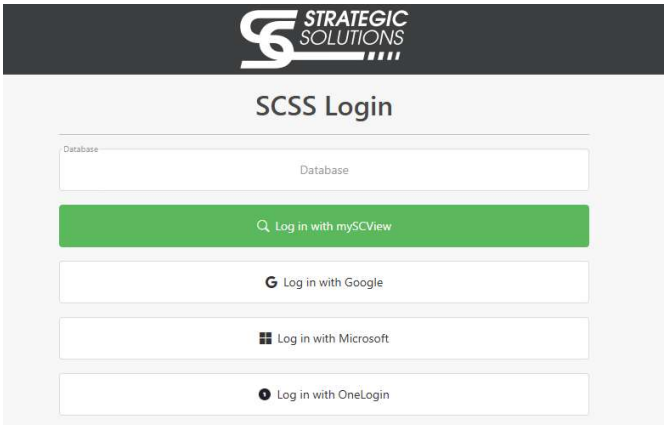
IMPORTANT NOTE: Purchase requisitions must be submitted ***AND*** approved prior to completing the purchase. If purchases are made prior to purchase requisition approval, you risk being denied and having to cover the costs of the purchase out of your own pocket. Please allow ample time for purchase requests to be submitted and move through the approval process. If items need to be ordered quickly, please submit your purchase requisition in SCView and reach out to the appropriate parties (your direct supervisor and Accounts Payable) to try to move the approval process along more quickly, if possible.

Only users who are approved to order their own items will be provided with a username/password to submit requisitions in SCView. If you are unsure whether you should make your own purchases, or if someone else submits requisitions on your behalf, please reach out to your Administrator for further guidance.

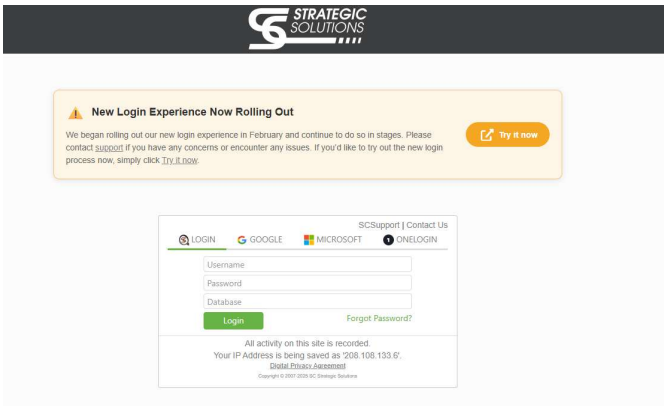
The *typical* approval process in SCView looks similar to this:

The steps to submitting a purchase requisition in SCView are as follows:

Go to SCView in your Browser: https://auth.myscview.com/Identity/Account/Login



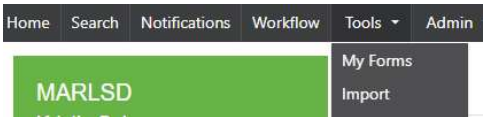
At the Login Screen (you may see this updated version, or the "Classic Version", which looks like this:

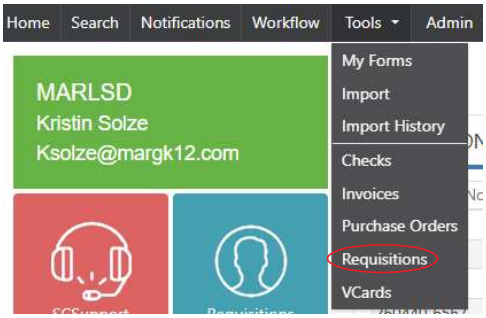


In both instances, the "Database" is MARLSD.

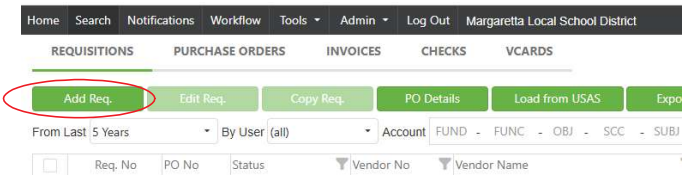
If you are unsure of, or don't have, your username and/or password, please reach out to accountspayablemarg@margarettaschooldistrict.com. If you've forgotten your password, Accounts Payable can set you up with a temporary password which will prompt you to change it once you've logged back in.

The first page that appears upon login in user-specific, but to submit a purchase requisition, you will want to click the "Tools" dropdown at the top towards the middle, and choose "Requisitions" (if you don't see Requisitions as an option, please reach out to Accounts Payable as you may not have access to submit requisitions by default):

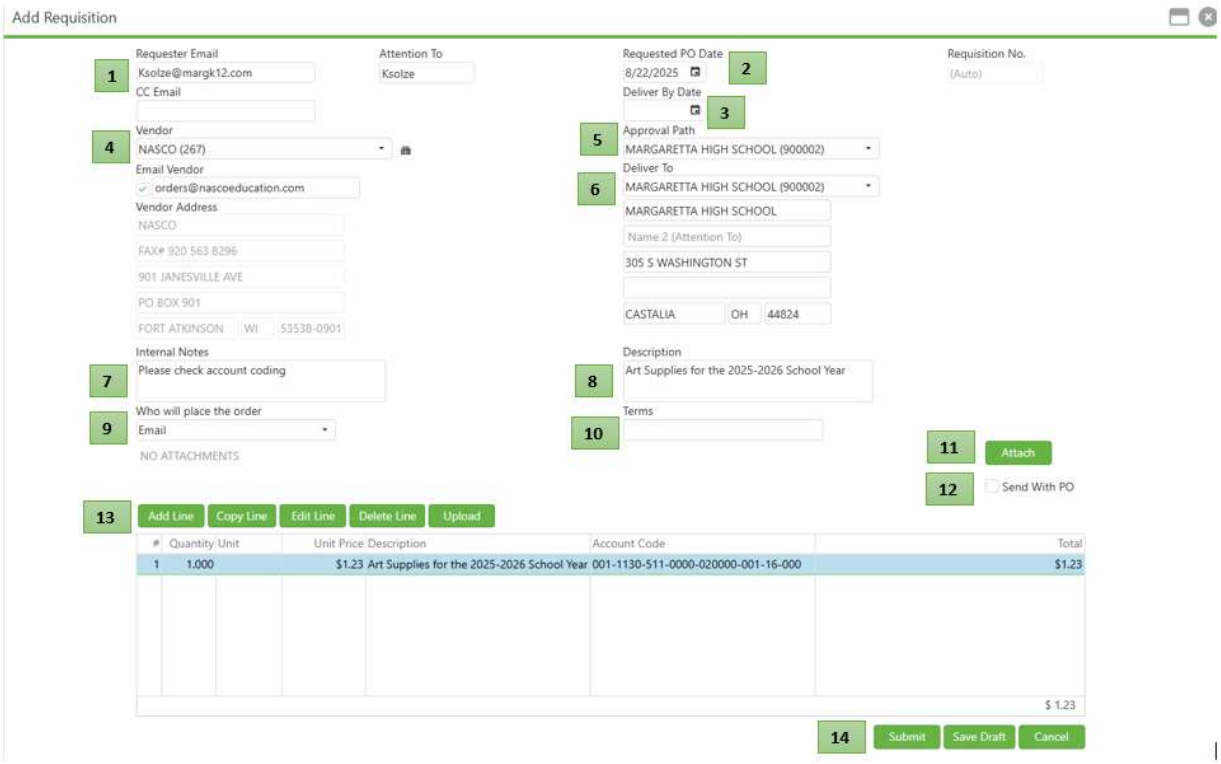




Once on the "Requisitions" screen, click the "Add Req." button towards the top:



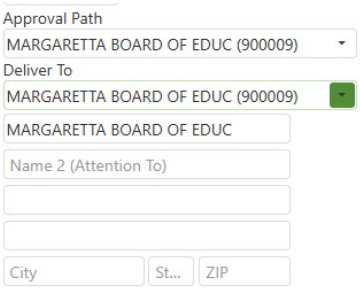
This will bring you to the screen on which you will create your purchase request. Please fill out as much information as you can provide about the request. A sample is done below. Please note the information for each field:

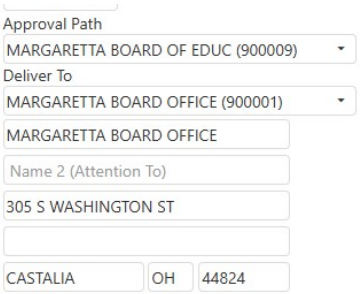


1. **Requester Email**: In this field, you will enter **your** email school email address (if someone else in the District should be made aware of the request, or if you are making the request on behalf of someone else, enter your email address in the "requester" email, but enter theirs in the "CC Email" field.
2. **Requested PO Date**: This field will default to today's date. You do not need to change this EXCEPT at the end of a fiscal year. If you are submitting a requisition at the end of a school year in May for the following school year, you will change this date to 7/1 by either choosing 7/1 as your date, or there will be a check box you can click that says "Next Fiscal Year".
3. **Deliver By Date:** This field is not required; However, if you need an item ordered by a specific date, this is where you could request that (the Treasurer's office will do their best to accommodate this request, but depending on the timeline, it is not always feasible).
4. **Vendor:** You can find a vendor either by starting to type the vendor name in the box, at which point a list of vendors should begin to populate, or you can click the binoculars next to the vendor dropdown, and search for a vendor that way. If you cannot find the vendor you are looking for, or believe we do not currently use the vendor, please reach out to Accounts Payable for further instructions, or follow the instructions for a "New Vendor Request" which are available separately from this procedure.
    - Depending on how the vendor is set up in the system, an email address may auto-populate in the "Email Vendor" box below the vendor box. It is important to note: if this box is checked when the purchase order is approved, the purchase order and any attachments will email automatically to that email address. ***If you do not want your purchase order emailing directly to the vendor***, uncheck this box.
5. **Approval Path:** This is the approval path your requisition will go through. For example, in the screenshot above, I've chosen the "Margaretta High School" approval path, which will send the requisition to the High School building principal, then the Superintendent, then the Treasurer, then Accounts Payable. This should always go to your direct Admin Supervisor's approval path.
6. **Deliver To**: This section *can* be different from the "Approval Path" section, but does not have to be. All items should be delivered

to the Board Office address (305 S Washington St., Castalia, OH 44824). In MOST cases, your items should never be delivered directly to your building. In the screenshot, you will notice "Name 2 (Attention To)" is an available fillable field. It is helpful to put your name in this field so the Board Office and/or office staff at your building knows to whom the products belong without having to open the boxes to search for a PO number, but this is not required.

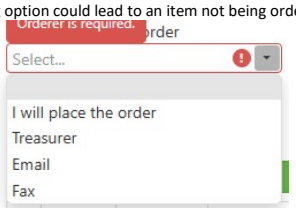
An example of when the "Approval Path" and "Deliver To" sections could be different is below:





In the example above, The Approval Path is going to 900009, which sends my requisition directly to the Treasurer for approval, but the "Deliver To" section for that approval path doesn't have an address listed, so I have to change the "Deliver To" path to the 900001 vendor so the Board Office address populates for delivery.

7. **Internal Notes**: These are any notes you want to add about your requisition that you want to further explain to the approvers. This does not get added to the actual PO. The most common note is "Please check account coding". This informs the approvers that you have chosen a budget account from which to charge your purchases against, but if you are unsure that you've chosen the correct account, this gives you the option to ask the approvers to double-check. This field is not required.
8. **Description**: This is a description of what you are purchasing. This field is important because it allows the back office to easily identify purchases for reporting purposes. This field and the field in the account coding section can be the same. In the example above, something simple like "Art Supplies" will suffice.
9. **Who will place the order:** This field is especially important, as it tells the Treasurer's Office who should be placing this order. A detailed explanation of each option is below. Please be conscientious about which option you choose here, as choosing the wrong option could lead to an item not being ordered in a timely fashion.



- **"I will place the order"**
  - If you choose this option, you are saying you (the person submitting the requisition) will be placing the order yourself once the purchase order is approved. You do not need the Treasurer's Office to do anything else with the ordering once the purchase order is approved.
    - Note: If you are using Amazon Marketplace feature in SCView, choose this option as your "Orderer" option. Amazon Marketplace orders automatically place once the purchase order is approved, so the Treasurer's office doesn't have to take any additional steps outside of approving the purchase order to place that particular purchase.
- **"Treasurer"**
  - Choose this option ONLY if you have not taken any steps to place this purchase yourself. Do not choose this option if you have used the Amazon Marketplace feature in SCView, or if the purchase order is emailing directly to the vendor (as explained previously). By choosing this option, you are telling the Treasurer's Office "I need you to place this order for me".
- **"Email"**
  - Choose this option if you (the person submitting the requisition) are emailing your order separately to a contact you have at the vendor you've chosen, or if the "email vendor" option is selected from Step 4 where an email address is directly tied to the vendor record in the system. If you choose this option, you are telling the Treasurer's office they do not need to take any additional steps to place this order once the Purchase Order is approved.
- **"Fax"**
  - Choose this option if you (the person submitting the requisition) are faxing your order separately to the vendor yourself. If you choose this option, you are telling the Treasurer's office they do not need to take any additional steps to place this order once the Purchase Order is approved.

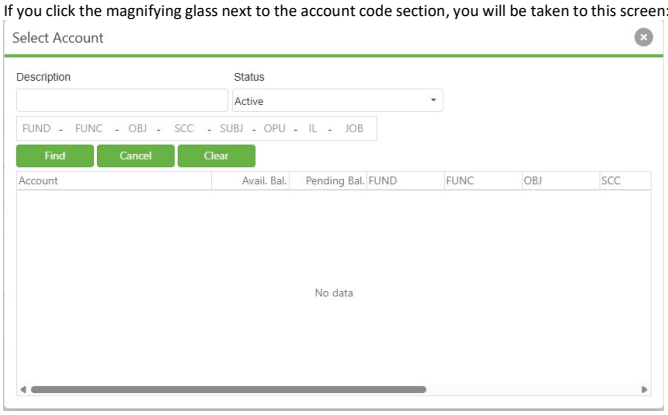
10. **Terms**: This field is not required and is rarely used
11. **Attach**: Here you can add any attachments you want to the purchase requisition. Some commonly added attachments are:
    a. Quotes related to product purchase
    b. W-9 forms (for setting up a new vendor we don't currently have in our system)
    c. Emails further explaining the purchases
    d. Screenshots of carts made online for accurate product ordering if the Treasurer's office is ordering your items for you and/or if the purchase order is directly emailing to the vendor upon approval.
    e. In the instance where something was purchased prior to purchase order submission, an invoice that needs to be paid

or receipts for the purchase (keep in mind, your purchase can be denied in this instance because PO's should be approved PRIOR to purchasing and not after the fact).

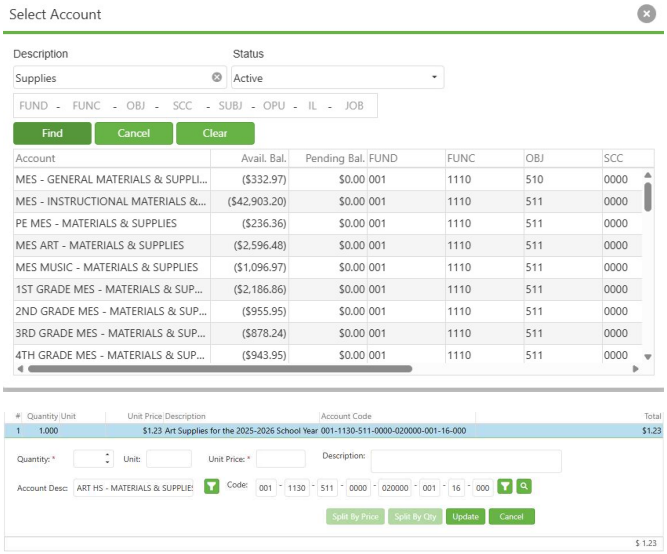
i. **Note:** invoice and receipt attachments can be missed if attached directly to the PO, especially during heavy volume purchasing times. It is helpful to email invoices and/or receipts that need to be paid directly to accountspayablemarg@margarettaschooldistrict.com versus adding them to the purchase request.

12. **Send With PO**: Check mark this box if you need the attachments to send with the PO. If there are not attachments, this box should not be checked.
13. **Add Line, Copy Line, Edit Line, Delete Line, Upload**: This section is where you will add the dollar amounts, quantities, descriptions, and account codings for your order. Items should be listed as separate line items -- specifically in the case where your purchase order is being directly to the vendor, or the Treasurer's office is placing your order for you. This is basically a "shopping list" of your order. Each item should have a quantity, a unit price, a description, and an account code.
    a. If you are unsure of an account code, once you click "Add Line" your screen should look similar to this:

If you click the magnifying glass next to the account code section, you will be taken to this screen:



If you start typing in a description of what you might be looking for (the most commonly used ones are "Supplies" accounts and "Building Fund" accounts), you can start to type a description and then click "Find". This will find all the accounts available that include that word. For example, if I type "Supplies" and then click "Find", it will list all the available budget accounts that include the word "Supplies" in the bottom section. From there, you would just double click the account you need, which will then take you back to your requisition screen.



Once back at the requisition screen, you would just need to complete the Quantity, Unit Price, and Description sections. Then click "Update" which confirms that line item is complete.
You will complete this step for each item included in your order.
NOTE: If you are ordering *physical* goods where "Free Shipping" is not specifically listed, add a line item with an estimated amount for Shipping and Handling.

14. **Submit, Save Draft, or Cancel:** Once you have added all your items to your requisition, and all the other required fields are filled out, you can click "Submit". If you need to finish your requisition at a later date, you can choose "Save Draft" and come back to it later. If you no longer need the requisition prior to submitting, you can just click "Cancel". Once you "Submit" your requisition, this will start the requisition approval process listed at the beginning of this procedure. This does NOT mean your purchase order is approved and ready to go. You will receive a separate email from SCView once your purchase order is approved which will provide you with your purchase order number. At that point, you can complete your purchase, or the Treasurer's office will order your items.

Additional Notes:

- If you are purchasing items yourself and requesting reimbursement, the "Vendor" will be your name. If you do not have a vendor record set up, please reach out to Accounts Payable. ALL reimbursements made to employees are directly deposited into the same bank account you provided to Payroll. If this information changes, please update both Payroll AND Accounts Payable with the new banking information. Expense reimbursements are NOT tied to your payroll, and will not

necessarily pay out at the same time as a payroll is deposited.

- If you purchase an item on your own and tax or tip were charged, you will ***not*** be reimbursed for the amounts of the taxes or tips.
- If you do not know the exact amount of your purchase, you can provide an estimated amount to complete to purchase requisition (aim high). Only the actual amount you spend will be charged against your budget.

If at any point you have questions regarding SCView or the purchasing process, please reach out to Accounts Payable at accountspayablemarg@margarettaschooldistrict.com or (419) 684-5322.