



Weston Public Schools
Purchase Order Approval

Finance and Operations Office
 89 Wellesley Street
 Weston, MA 02493

Procedure:	Request to Purchase	Revised Date:	May, 2012
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Policy: WPS procures only those items and services that are required to perform the WPS mission.

The purpose of the Requisition Approval procedure is to provide instructions how requisitions are approved in Munis.

Completed By:	Individuals with access to the Munis Financial system	Reviewed By:	Assistant Superintendent for Finance and Operations
Approved By:	Assistant Superintendent for Finance and Operations	Entered By:	Individuals with access to the Munis Financial system
Form Title:	Munis Requisition Entry	Estimated Time Frame:	1 working day

Process for Completion:

Weston Public Schools utilizes a Purchase Order system to order goods and services for use within the district. The process begins with the entry of a Requisition. The process to approve a Requisition is as follows:

The approval process of Requisitions is:

1. Once entered and reviewed for errors, the individual “releases” the requisition to the Assistant Superintendent for Finance and Operations. Although Principals are not part of the electronic approval process, it is expected that individuals seek approval by the Principal in advance.
2. The Assistant Superintendent for Finance and Operations reviews by:
 - a. Financials
 - C. Purchasing
 - B. Purchase Order Processing
 - B. Requisition Approvals
 - Using the update button, each requisition is reviewed for accuracy of entry, procurement issues, appropriate account designation, etc.

Rejected requisitions and returned to the enterer with a note detailing the corrections needed. If the corrections are significant, the note will ask the enterer to contact the Assistant Superintendent for Finance and Operations by phone.

If approved, the process continues:

- C. Requisition Conversion
 - Choose “find” to pull up the requisitions ready for processing. Batch using today’s date, select and enter “A” for approve. Process.
- F. Purchase Order Entry
 - Release batch, output/post batch, save file rather than printing, choose “yes” to post providing no errors exist.
- H. Print Purchase Orders
 - Choose Export PO(s), define using the following parameters: print, include PO numbers 120000 to 129999 (FY’12), Fiscal Year 2012 and choose OK. Select. This should provide you with a number in the “records selected” field. File, output: choose the printer named: fm PO (TF02) and OK.

3. The purchase orders are printed to Case House 3rd floor. The Head Bookkeeper is responsible for faxing orders to the vendors, providing file copies to the Bookkeeper and distributing other copies to the schools/departments.

For additional information, please contact:

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Weston School Committee Policy:	Purchasing and Contract Authority, DJ/DJE		