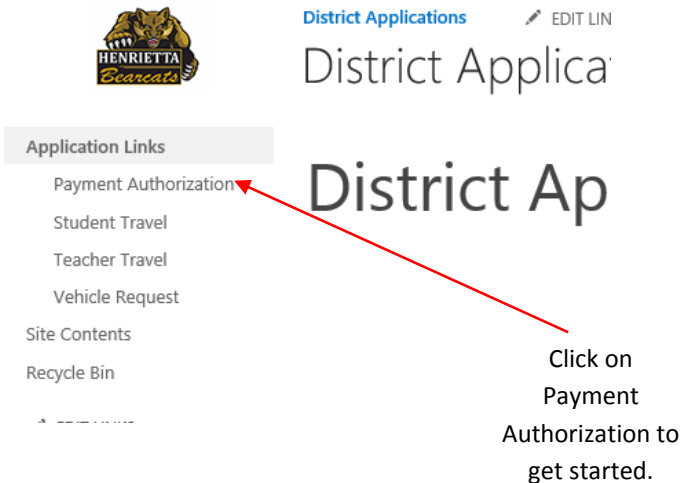


# PURCHASE AUTHORIZATION PROCESS

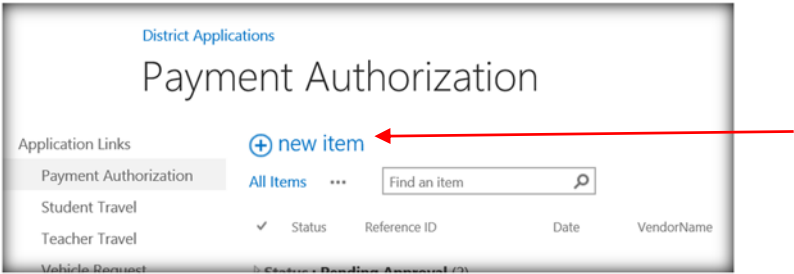
## TO CREATE A PA

To create a PA you will be going to the district Sharepoint site. You can either click on this link - [HISD SHAREPOINT](#) or you can visit the Technology section of the school website. From the Technology page look towards the left for the Employee Links page. Click on that link and you will be taken to an Office 365 login screen. You will have to login to your Office 365 account to gain access to the site (username – [5letterlogin@henrietta-isd.net](mailto:5letterlogin@henrietta-isd.net) password – normal computer login password). These links will only work when you are on a computer at school, they WILL NOT work from outside the school buildings.



## TO GET STARTED

To get started on a PA click on the + sign by the words “new item” in the upper left hand corner.



Then you will see the new PA form.

## FILL IN THE REQUIRED INFORMATION.

All of the fields marked with an \* are required fields. The form will not submit without information being added to these fields.

The screenshot shows a web form titled "Payment Authorization". It contains several input fields and sections:

- PA No**: A text input field.
- Date**: A date picker showing "7/21/2014".
- Requestor**: A text input field with a user selection icon and a red asterisk.
- Vendor**: A dropdown menu with a red asterisk.
- Vendor ID**: A dropdown menu with a red asterisk.
- Vendor Information**: A section with three empty text input fields.
- Attachments**: A button labeled "Click here to attach a file".
- Notes**: A large text area for entering notes.
- Account**: A dropdown menu with a red asterisk.
- Description**: A text input field with a red asterisk.
- Invoice No**: A text input field with a red asterisk.
- Invoice Date**: A date picker.
- Invoice Amt**: A text input field with a red asterisk.
- Total**: A text input field showing "\$0.00".

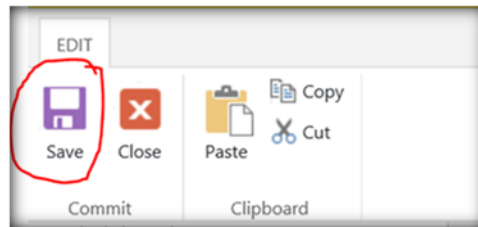
When you enter your vendor, unlike the old system, you can start typing in your vendor name and it will bring your vendor up. You will not have to scroll through the whole list to enter your vendor as in the past. **If your vendor is not on the list...type in "Blanks" to search. That will leave the vendor area blank if it is selected as the vendor. You can add your vendor information onto the printed form.**

## ADDING THE ACCOUNT CODES

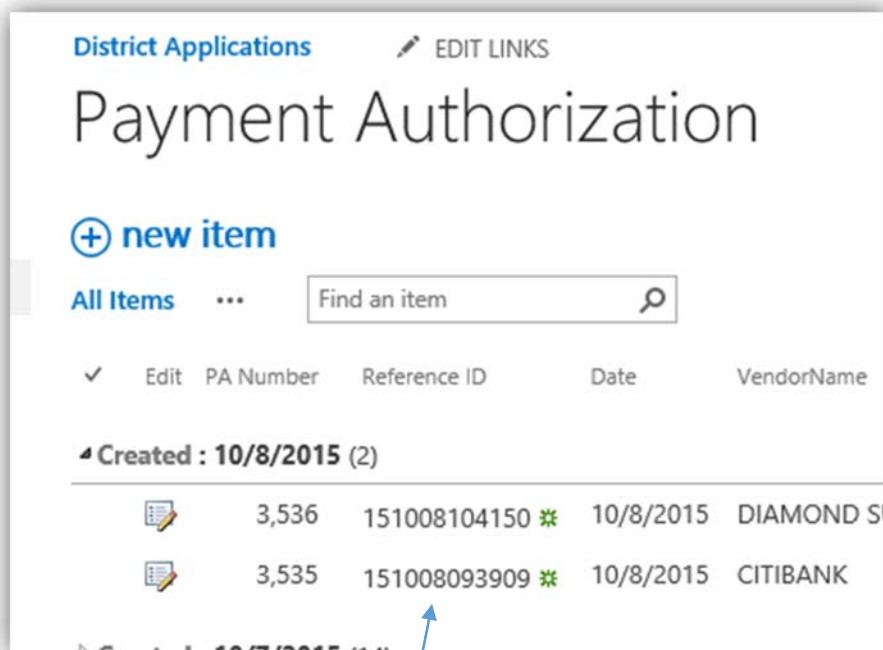
This close-up view of the form highlights the "Account" field. A red arrow points to a small downward-pointing arrow icon at the end of the text input field, indicating that it is a dropdown menu. The "Description" field also has a red asterisk, and the "Invoice Amt" field has a red asterisk. The "Total" field shows "\$0.00".

Notice the arrow at the end of the account field. If you click on that arrow it will bring up a list of active account codes as well as a short description of the account. Select your account code from the list. Enter your item description and invoice information and amount. The form will add another line each time that the account code is selected for the previous line. It will total up the amount of the purchase for you.

# THE PA IS NOT CREATED UNTIL YOU HAVE CLICKED ON THE SAVE BUTTON.

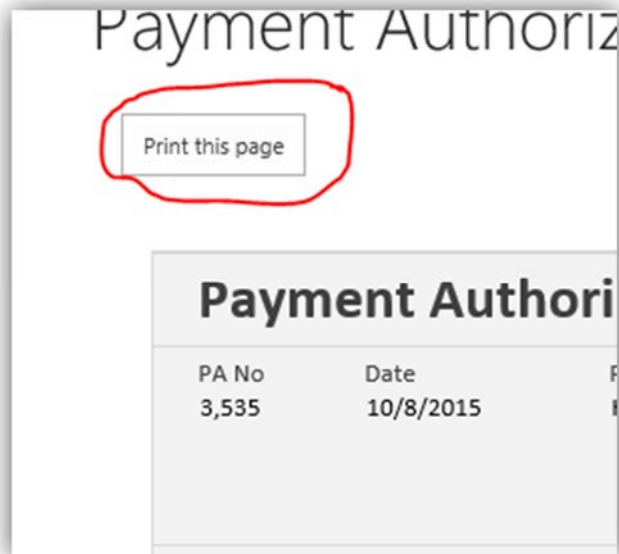


After saving the PA you will notice that you have a completed PA on your PA screen. You will also see any other PAs created that day in the list. Just disregard the ones not created by you. You are not responsible for these in any way.



To print the PA for approval, click on the PA number to reopen the PA.

You will see an active print button in the upper left quadrant of the page. Click on the button to print your PA.



Once your PA is printed, attach any receipts/invoices you have for the purchase to the PA. Turn it in to your approver for proper signatures and submission.