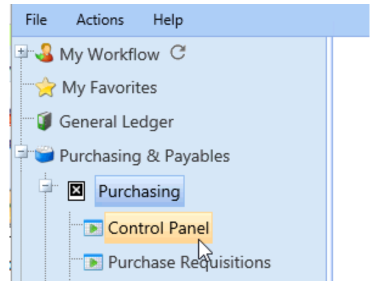
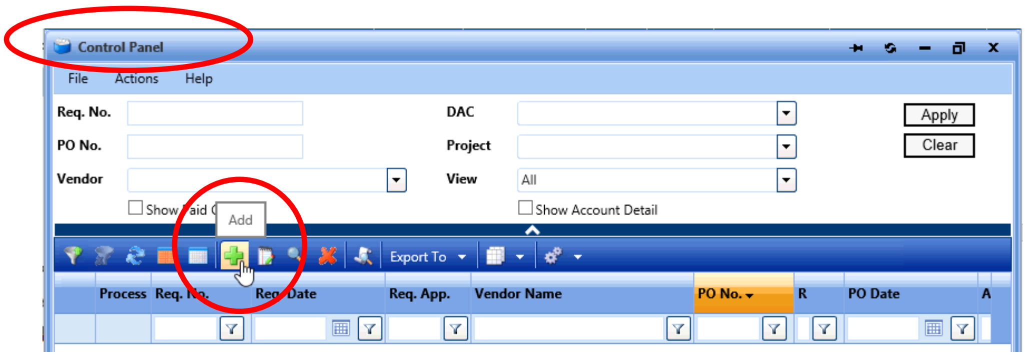
Requisition & Purchase Order How To

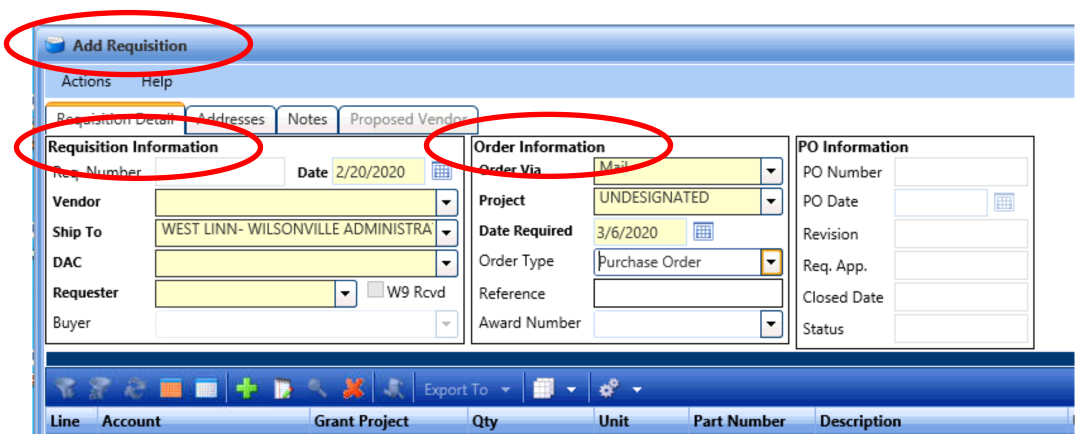
1. iVisions Workflow > Purchasing and Payables > Purchasing > Control Panel



2. In the Control Panel, click on green **<u>Add</u>** button: 

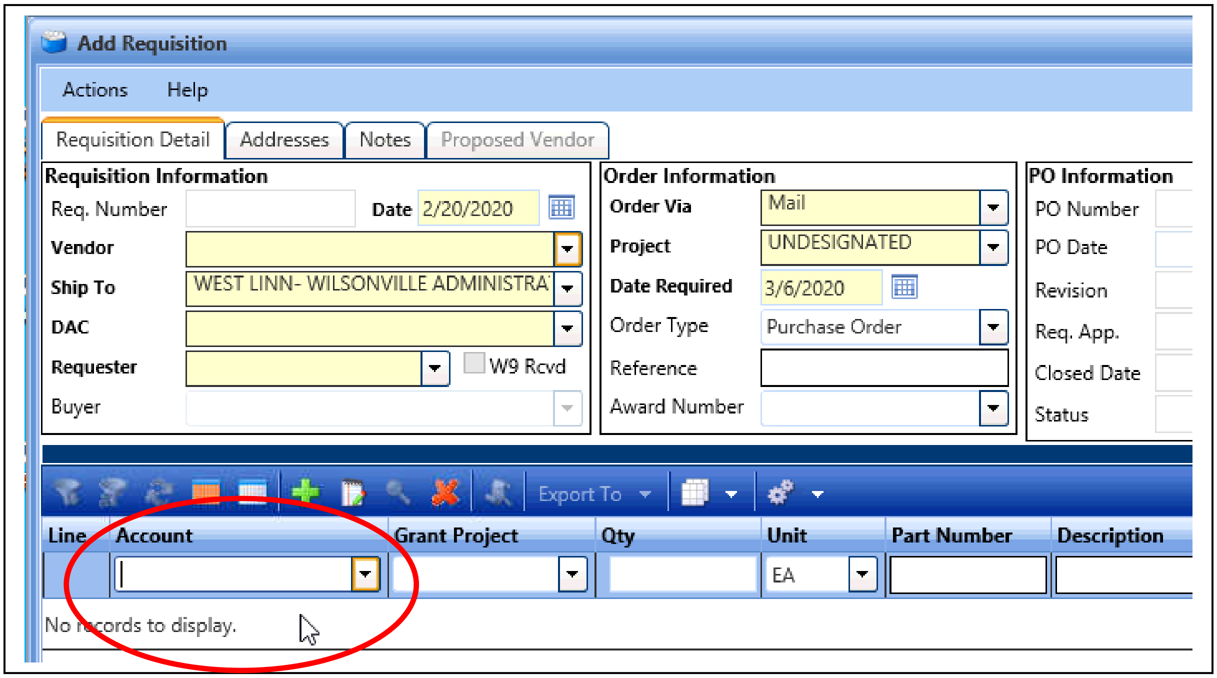


3. Fill in the <u>Requisition Information</u> and <u>Order Information</u>:

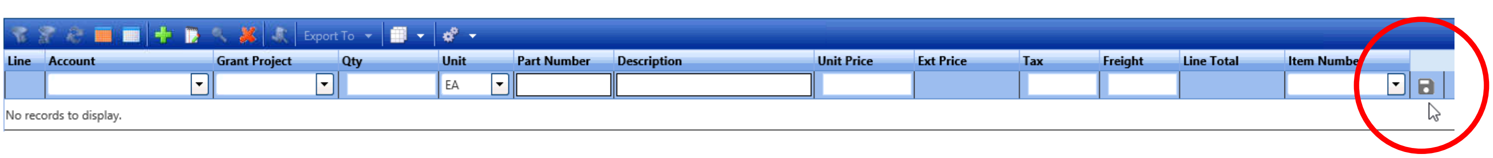


   a. Select a <u>Vendor</u> (if you do not find a vendor, see Request New Vendor How To)
   b. Your DAC will be pre-filled.
   c. Enter a <u>Requester</u> : use the name of the person who was approved to place the order
   d. Date Requested can be left as is (<u>EXCEPTION</u>: if you are entering requisitions in June for the following fiscal year, you MUST enter JULY 1as the Date Requested).
   e. Order Type:
      i. Leave as <u>Purchase Order</u> unless the following apply:
      ii. The following requisitions must be set to **BLANKET**:
         1. Office Depot (only one Detail Line allowed; one PO per account code)
         2. Amazon Capital Services (only one Detail Line allowed; one PO per acct)
         3. Anything you will use continuously throughout the year.
   f. Reference: Leave it blank or enter any meaningful info you like. (example: Quote #)

4. Once you have entered the above information, place your cursor in the Account field:



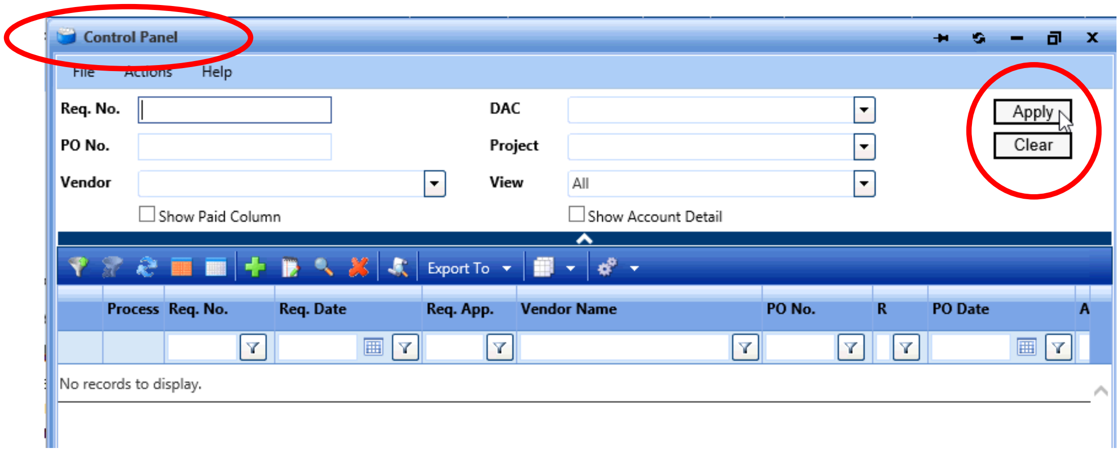
a. Account – you can use the drop-down or just start typing. (Note: the drop-down will populate a limited number of acct codes. If you do not see your code, just type it in.)
b. Qty: be accurate. Don't just enter, "1" and put the total when you are actually ordering 5 of something. This helps with auditing and budgeting.
c. Unit: be accurate. Don't just use the default of, "EA".
d. Part Number: this is optional – some vendors like to see it on the PO.
e. **Description**: be accurate and concise. For example:
    i. Books for Library = Library books
    ii. flowers for Sick Staff Member = sympathy flowers
    iii. laminating material for laminating machine = laminating supplies
    iv. Pencil boxes for students and screen cleaner kits for monitors = Pencil boxes, monitor cleaner
    v. Pentel erasers and small white erase boards for the new 2nd grade cohort = G2 erasers, whiteboards
f. Unit Price: this ties to Qty. Unit Price x Qty (+shipping) = PO Total.
g. Freight: here is where you can enter a shipping cost
    i. You can put the whole shipping cost for all items on just the first line.
    ii. You can estimate shipping to an amount over what it will actually be.
    iii. If you under-estimate, that is ok (Invoices can be paid for up to 25% over what the PO says.)
h. Now **SAVE YOUR WORK** – click the save button all the way to the right.



5. Now your line has popped down below (where it previously said, "No records to display.")
   a. You can still edit the line by double-clicking on it, or
   b. You can place the cursor into the Account field and start working on another line item.

6. Once you have entered all of the line items:
   a. Check the box, "Submit for Approval"
   b. Click OK

7. You can check on the status of your requisition by clicking Apply in the Control Panel.



8. In the Grid, you can:
   a. View who the Next Approver is (to see where a req is in the workflow).
   b. PO No. – if there is no number, then it has not been turned into a PO yet.
   c. Sort by any of the column headings to quickly find vendors, amounts, etc.
   d. Drag and drop to put the columns into a different order.
   e. Print POs by selecting a PO (1 click) > Actions > Print PO