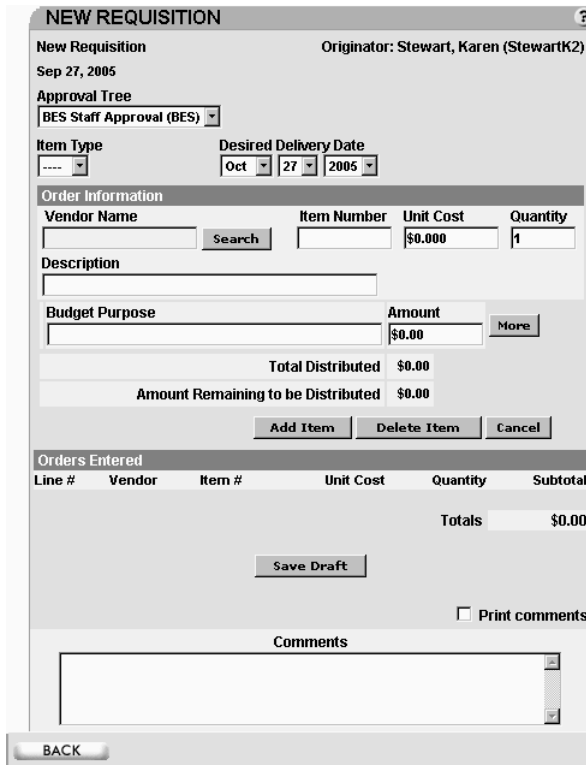


Creating eRequisitions

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **Create a purchase requisition**. This window opens.



4. Use the pull-down menus to select an approval tree and desired delivery date.
5. Press **Search** to enter a vendor name. This window opens.



- Type a few letters from the vendor's name, then click the **Search** button to see a list of vendors whose names resemble what you typed. Press the **Select** button for the vendor you want to add to the eReq. You're returned to the New Requisition window.
- Or click the Browse tab to see the whole list of vendors. Click the first letter of the vendor's name to see that portion of the list. Press the **Select** button for the vendor you want to add to the eReq. You're returned to the New Requisition window.

Remember: First click the Search button in the new requisition window to select a vendor. Do *not* type a vendor name first.

6. Tab through the fields entering the item number, unit cost, quantity and description.
7. Enter the **budget purpose** if you want. **Note:** The budget purpose may be a description or an account number.

8. Click the **More** button, if you have more than one budget purpose to enter for the item. The Order Information area expands.

- Change the amount for the first budget purpose.
- Enter additional budget purposes and amounts. Note: Totals at the bottom of the list alert you to the total amount distributed and remaining to be distributed.
- Click the **Hide** button to roll up the window.

9. Press **Add Item** when you have finished entering information.
10. Repeat step 6 through step 9 until you have finished adding items to this requisition.

NEW REQUISITION

New Requisition Originator: Stewart, Karen (StewartK2)
 Sep 27, 2005

Approval Tree
 BES Staff (BES) - Any (BES)

Item Type Desired Delivery Date
 Any Oct 27 2005

Order Information

Vendor Name	Item Number	Unit Cost	Quantity
MacMillan Moore Publi: Search		\$0.00	1

Description

Budget Purpose Amount
 \$0.00 More

Total Distributed \$0.00
 Amount Remaining to be Distributed \$0.00

Add Item Delete Item Cancel

Orders Entered


Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
1	MacMillan Moore Publis...	MM345	\$1.35	20	\$27.00
	Little House on the Prairie classroom books				\$27.00
2	MacMillan Moore Publis...	MM9987	\$25.95	10	\$259.50
	US Atlas library reference classroom books				\$25.95 \$233.55
Totals					\$286.50


Submit Requisition Save Draft

Print comments

Comments

BACK

Note: You may *change* an item by pressing the  beside the item. When you press the icon the information for that item is displayed in the Order Information section. Make the needed changes, and press Update Item.

To *delete* an item, press the  beside the item, and press Delete Item.

11. (Optional) Enter comments in the Comments box.
 - You may use the comments box to designate this eReq for the *next fiscal year*. See “Future fiscal year” on page 4-9 in the eRequisitions User’s Guide.
 - Check the **Print Comments** box if you want the comments to be printed on the eReq. **Note:** The comments are to be entered for the benefit of the originators, approvers and procurement clerk. They will *not* be printed on the PO.

Note: If you want to complete the requisition later, press Save Draft.

12. When you’ve completed entering the requisition, press **Submit Requisition**. You’ll see a message like this one.

CONFIRMATION

Requisition #278 Originator: Stewart, Karen (StewartK2)
 Sep 27, 2005

Requisition Submitted on Sep 27, 2005

Thank You, Karen












Done

BACK

13. Press **Done**. You’re returned to the Procurement menu.



Checking the status of an eRequisition

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **View status of my purchase requisitions**. This window opens.

MY REQUISITION STATUS ?				
Req #	Approver	Approval Tree	Status	Total
 144	Haaack, Roger (HaaackR1)	District Office	Pending	\$170.00
 152	DRAFT	District Office	RETURNED	\$350.00
 156	Procurement Clerk	District Office	Approved	\$5.00
 157	Haaack, Roger (HaaackR1)	District Office	Rejected	\$25.00
 163	Haaack, Roger (HaaackR1)	District Office	Rejected	\$537.67
 164	Haaack, Roger (HaaackR1)	District Office	Pending	\$203.97
 165	DRAFT	District Office	RETURNED	\$100.00
 166	Haaack, Roger (HaaackR1)	District Office	Pending	\$10.00
 167	Procurement Clerk	District Office	Pending	\$25.00
 168	Farris, Randy (FarrisR)	Budget - Curriculum	Pending	\$1,021.76
 169	DRAFT	District Office	DRAFT	\$200.00

BACK

There are several ways you can review the eReqs.

- Click the  to view the eReq detail. This option allows you to see comments that have been added or edits that have been made during the approval process.
- Click the  beside draft eReqs to edit, delete or complete them.
 - To edit the draft, see "Editing the eReq" on page 4-7 in the [eRequisitions User's Guide](#),
 - To delete the draft eReq, click **Delete Draft**.
 - To complete the eReq, click **Submit Requisition**.
- Click the *approver's name* to send him an eNote.
- Click the *approval tree* to view the entire approval route and eReq status at each point.