



**Activity:**                    **Requisition Entry (Requisition to Vendor)**  
**Departmental Functions > Requisition Entry**

**Generate a requisition to vendor**

1. Navigate to **Requisition Entry**  
**Departmental Functions > Requisition Entry**
2. Select the Vendor requisition form
  - a. Click **Switch Form**
  - b. Select **A – VENDOR**
  - c. Click **OK**
3. Click **Add**
4. Input department and commodity details in the **Main** section
  - a. **Dept/Loc** and **Fiscal Year** will default in
  - b. Tab to **General Commodity** and input (or use the ellipsis to select) the general commodity that best represents the item(s) to be purchased
  - c. Tab to the **Receive by** field
    - i. Select **Quantity** or **Amount** (most requisitions will be received by **Quantity** – only select **Amount** if the requisition is a blanket)
    - d. Click on **General Notes** to add notes for the Purchasing department – notes are *not* visible to the vendor
5. Tab to **Vendor** to input vendor and remit information
  - a. Input the vendor number if it is known
  - b. Click on the ellipsis if the vendor number is unknown
    - i. Input search criteria in the **Vendor Name** field to narrow down the search results (e.g. input 'Allen' to help locate 'Allen Sports Center')
    - ii. Click **Accept**
    - iii. Select the vendor from the list and click **Accept** – if there are multiple addresses, select the line that contains the correct address
  - c. Tab to **PO mailing** and the default delivery method and selected remit address will populate in
  - d. Click on **Vendor/Sourcing Notes** to add notes that will be *visible to vendor on the final Purchase Order*
    - i. Click **Import** to select pre-generated notes, such as district closures or contract information
      1. Select a note from the list and click **Accept** to add it to the requisition
      2. Click **Add** to generate another note, or **Return** to the requisition
    - ii. To add a custom note, type in the provided field
      1. Click **Print On PO** (in the ribbon) to ensure that the note is attached to the vendor PO – this will mark a checkbox that indicates the note will be printed on the PO
      2. Click **Accept** to finalize the note
      3. Click **Add** to generate another note, or **Return** to return to the requisition
6. Tab to **Shipping and Billing** to change or add shipping and contact details
  - a. Input the cost center number the item(s) will be delivered to in the **Ship to** field
    - i. Input the email contact information of the individual ordering the goods in the **Email** field
    - ii. Input the individual who will be responsible for receiving the goods in the **Reference** field
7. Tab to the **Terms** section to input discount and freight percentages that will be applied *to the entire requisition*
  - a. The **Freight %** field applies the freight percentage to the entire requisition
    - i. To apply freight to individual items, add the freight on that item's line detail
    - ii. To apply a flat rate freight, generate a separate line item for freight
  - b. The **Discount %** field applies the discount percentage to the entire requisition – if there is not a single discount percentage for the entire order, apply discount on that item's line detail
8. Tab to the **Type** field and select **B – BLANKET** *only* if it is a blanket requisition – otherwise, use the default of **N – Normal**
9. Click **Accept** – the system will proceed directly to the first line of the requisition's line detail



Bid and vendor information can be located on the Purchasing website. (<http://www.pasco.k12.fl.us/purchasing/>)

### Input line detail

1. Input the quantity ordered in the **Quantity** field (leave this at **1.00** for a blanket order)
2. Tab to description and input a *meaningful* description for the item
  - a. Input the page number of the current year board-approved catalog, if applicable
  - b. Input a *precise* description of the item, including color, type, item number, etc.
  - c. Input quote information if there is a quote for the item
3. Tab to **Unit Price** and input the per-item cost *before discount percent or freight*
  - a. Input the total amount for the line in this field for a blanket requisition
  - b. If the item has a discount amount (rather than percentage) use the discounted price (e.g. an item that is sold to the district for \$5.00 instead of \$10.00 would have a **Unit Price** of \$5.00)
4. Tab to **Freight** and input freight if there is a flat freight cost associated with this line (e.g. a piece of furniture that adds \$50.00 to shipping)
5. Tab to **Discount** and input the discount percentage if there is a percentage discount applied to this item (e.g. the school district receives a 15% discount on all items of the type ordered) – if the vendor applies the same discount to all items purchased, the **Discount %** field on the header screen will be used instead
6. Tab through the **Vendor** field to ensure that the vendor information populates – if updating a duplicated requisition, this field may need to be manually changed to match the vendor information on the main screen
7. Skip the **Vendor item no.** field – this field is to be left blank
8. Tab to the **Account** field and input (or use the ellipsis to select) the account that will be used for this line
9. Tab to the **Amount** field
  - a. Do not change this field if the entire line will be funded from the listed account
  - b. Change the field to represent the amount of funding that will come from the listed account if the line will be split-coded
    - i. Tab once to begin the next account line and repeat steps **9a** and **9b** until all lines have been coded
10. Click **Accept**
11. Click **Add** and repeat steps **1** through **8** to add additional lines (or use the **Duplicate** function to generate and edit lines for similar items)
12. Click **Return**



Duplicating a requisition will only copy the line detail if the budget is available with the original account. If over budget the line detail will not duplicate. When duplicating a requisition, check each line to ensure that the **Vendor** field matches the vendor information on the main screen.



The system will not allow orders over budget. Use **Account Inquiry** and **Year-to-Date Budget Reports** to ensure adequate funding is available, and process any necessary budget amendments to move funds into the correct segments.



When ordering items that will be received by someone other than the requestor, the individual to receive the items is not automatically notified that an order has been placed for the cost center. When the requisition is converted to a purchase order, contact the individual responsible for receiving the items as well as the bookkeeper of the school or department, and provide the purchase order number so that appropriate receiving processes can be completed.

### Release a requisition for approval

1. Add all necessary supporting documentation using the **Attach** function – this is *mandatory*
  - a. Select the **Requisition Attachment** document mapping
  - b. Click **View Documents**
  - c. Attach all supporting documentation, then click **Close Viewer** once finished
2. Ensure that the requisition is in status **4 – Allocated**
3. Click **Release** while on the header screen
4. The requisition changes to status **6 – Released** and moves into workflow



Requisitions can *only* be updated while in status **2 – Created** or **4 – Allocated**

### Update or change a requisition

1. Navigate to **Requisition Entry**
2. Click **Search** and input search criteria (such as location and requisition number) to narrow down search results
3. Select the requisition to be updated
4. For vendor, shipping and general PO updates
  - a. Click **Update** while on the main requisition screen
  - b. Make necessary changes
  - c. Click **Accept** – the message ‘Record(s) update’ appears at the bottom of the screen
5. To update detail Line items, click **Line Items**
  - a. Use the arrows at the bottom of the screen to locate the line to be updated (if applicable)
  - b. With the line to be updated visible, click **Update**
    - i. Input or select the **Effective Date of Changes** – the current date is the default
    - ii. Input the reason for the change in **Journal Description**
    - iii. Click **Accept**
  - c. Make changes to **Quantity, Unit price, Description, or Account** as needed
    - i. Any change to **Quantity, Unit Price, Freight, or Discount** that alter the **TOTAL** must be reconciled in the account coding so that the **TOTAL** and **Amounts** across all lines match
    - ii. Any change to **Amounts** in the account lines must be reconciled with appropriate changes to **Quantity, Unit Price, Freight, or Discount** so that the **Amount** sum matches the **TOTAL**
    - iii. Click **Accept** once changes are complete
    - iv. System displays ‘Records Updated’ at the bottom of the screen
  - d. Click **Return** to return to the requisition header screen

### Reactivate a rejected requisition

1. Navigate to **Requisition Entry**
2. Click **Search** and input search criteria (such as location and requisition number, as well as inputting a 1 for **Status**) to narrow down search results
3. Click **Activate** to return the requisition to status **4 – Allocated** and can be updated and released as normal

### Check approval status and rejection notes

1. Navigate to **Requisition Entry**
2. Click **Search** and input search criteria (such as location and requisition number) to narrow down search results
3. Click **Approvers** (which is located at the bottom of the screen) – note that a requisition that is in status **2 – Created** and **4 – Allocated** will not permit access to the **Approvers** screen
  - a. The **Approvers’ comments** field at the top of the display lists any comments made by an approver – all rejections require a comment, while approval comments are optional
  - b. The **Steps** field displays the current approval level and can be expanding by clicking the arrow icons to view the approval rule (such as ‘any approver from this group’) and expanded further to view the individuals in an approval step



To check on a requisition’s workflow status, click on **Approvers**. This will show a list of all approvers in workflow, including the current level. This is particularly useful if a requisition is rejected, as it will show who rejected the requisition as well as rejection reason.