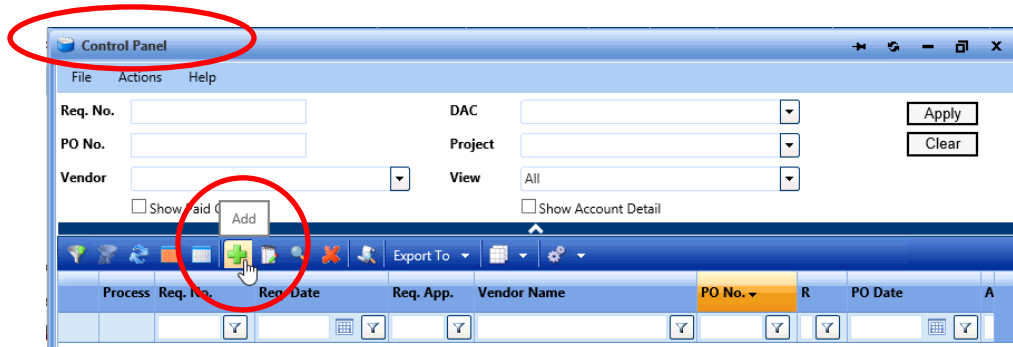


Requisition & Purchase Order How To

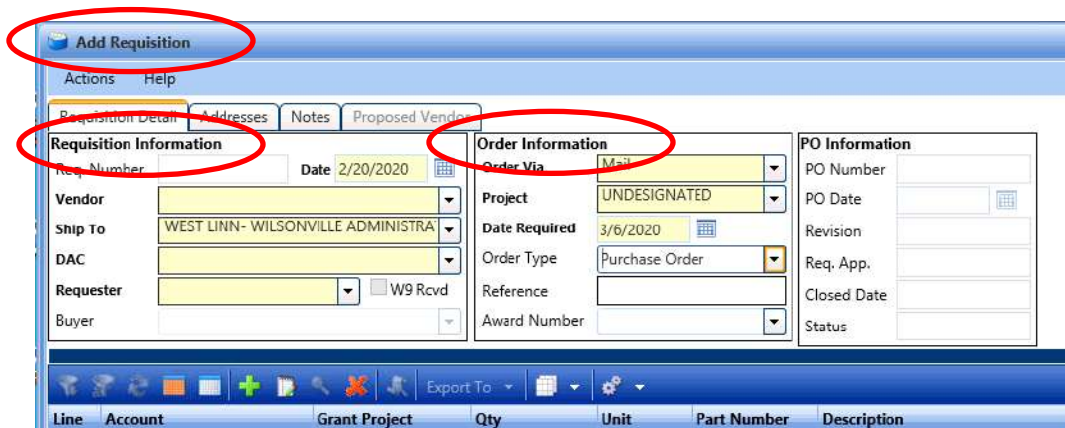
1. iVisions Workflow > Purchasing and Payables > Purchasing > Control Panel



2. In the Control Panel, click on green **Add** button:



3. Fill in the Requisition Information and Order Information:



- a. Select a **Vendor** (if you do not find a vendor, see Request New Vendor How To)
- b. Your DAC will be pre-filled.
- c. Enter a **Requester** : use the name of the person who was approved to place the order
- d. Date Requested can be left as is (EXCEPTION: if you are entering requisitions in June for the following fiscal year, you **MUST** enter JULY 1 as the Date Requested).
- e. Order Type:
 - i. Leave as Purchase Order 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 #)

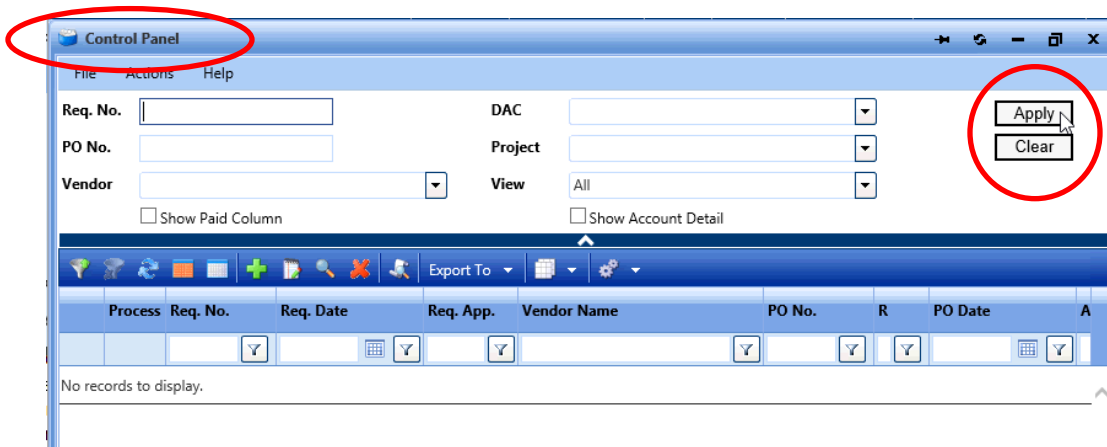
4. Once you have entered the above information, place your cursor in the **Account** field:

The screenshot shows the 'Add Requisition' window with several tabs: 'Requisition Detail', 'Addresses', 'Notes', and 'Proposed Vendor'. The 'Requisition Information' section includes fields for 'Req. Number', 'Date' (2/20/2020), 'Vendor', 'Ship To' (WEST LINN- WILSONVILLE ADMINISTRA), 'DAC', 'Requester', and 'Buyer'. The 'Order Information' section includes 'Order Via' (Mail), 'Project' (UNDESIGNATED), 'Date Required' (3/6/2020), 'Order Type' (Purchase Order), 'Reference', and 'Award Number'. The 'PO Information' section includes 'PO Number', 'PO Date', 'Revision', 'Req. App.', 'Closed Date', and 'Status'. Below these sections is a table with columns: 'Line', 'Account', 'Grant Project', 'Qty', 'Unit', 'Part Number', and 'Description'. The 'Account' field in the first row of the table is circled in red. Below the table, it says 'No records to display.'

- 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.)
- 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.
- Unit**: be accurate. Don't just use the default of, "EA".
- Part Number**: this is optional – some vendors like to see it on the PO.
- Description**: be accurate and concise. For example:
 - Books for Library = Library books
 - flowers for Sick Staff Member = sympathy flowers
 - laminating material for laminating machine = laminating supplies
 - Pencil boxes for students and screen cleaner kits for monitors = Pencil boxes, monitor cleaner
 - Pentel erasers and small white erase boards for the new 2nd grade cohort = G2 erasers, whiteboards
- Unit Price**: this ties to Qty. Unit Price x Qty (+shipping) = PO Total.
- Freight**: here is where you can enter a shipping cost
 - You can put the whole shipping cost for all items on just the first line.
 - You can estimate shipping to an amount over what it will actually be.
 - If you under-estimate, that is ok (Invoices can be paid for up to 25% over what the PO says.)
- Now **SAVE YOUR WORK** – click the save button all the way to the right.

The screenshot shows the bottom part of the 'Add Requisition' form, specifically the table with columns: 'Line', 'Account', 'Grant Project', 'Qty', 'Unit', 'Part Number', 'Description', 'Unit Price', 'Ext Price', 'Tax', 'Freight', 'Line Total', and 'Item Number'. The 'Save' button is circled in red. Below the table, it says 'No records to display.'

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

