Using Infinite Visions Online Requisition Program
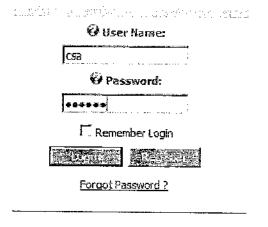
Logging In:

☐ Go to web page   https://visions.nwtoolbox.org/parkrose

☐ Click on Login

> Search
>
> Register Login

☐ Enter your user name and password

> 🌐 User Name:
>
> csa
>
> 🌐 Password:
>
> ••••••
>
> ☐ Remember Login
>
> [Login] [Cancel]
>
> Forgot Password ?

☐ On the menu bar click on My Workflow

> Home   Human Resources   My Workflow
>
> Tuesday, July 03, 2007

☐ Make sure the correct Connection Group Name is selected and click on OK.

User Information

User ID:	cball

Connection Group

Name:	Dennis
Fiscal Year:	2009
Description:	Dennis Wheeler

OK

Overview:

My Workflow: This will show you any items that need your approval. If you have items to approve the My Workflow will be bold, as will whatever type of item is needing your attention (i.e.Purchase Requisitions).

General Ledger: *You will be able to access your budget information through here. Transaction Inquiry | Account Detail will show you a budget summary for each account you have access to. You may also look up a certain account or a group of accounts this way. * Under Reports | General Ledger Report Writer you can run summary report of each of your account codes.

Purchasing and Payables: This is where you will be doing all purchasing and purchasing lookup. You will spend the majority of your time in this menu item.

Entering a New Requisition:

☐ Go to Purchasing and Payables | Purchasing | Control Panel

☐ Click on green plus sign on the upper left-hand side of the grid:

Export To ▾

☐ Enter Purchase Order information
  ➤ **Note:**
    ➤ All Red Arrows are Required
    ➤ If a Requestor is not in the list you can type in the name and you will be prompted to add it to the list
    ➤ PO Notes Print on the PO
    ➤ Internal Notes are for approvers and Purchasing to view only

Group: School FY: 2011 DAC: Capital City Elementary School

Close

Req. Number:

Req. Date: 2/6/2011

Vendor: (Enter text to select a vendor)

DAC: Capital City Elementary School

Ship To: Capital City ISD Main Warehouse

Requisition:

PO Notes:

Buyer:

☐ Split Funded

Order Via: Mail

Project: None

Date Required: 3/6/2011

Order Type: Purchase Order

Reference:

Award #:

Internal Notes:

Has Documents: No

☐ Detail can now be added in the following ways, which will be discussed in the following three sections:
  ➢ Using "Add Detail" at the bottom of the screen
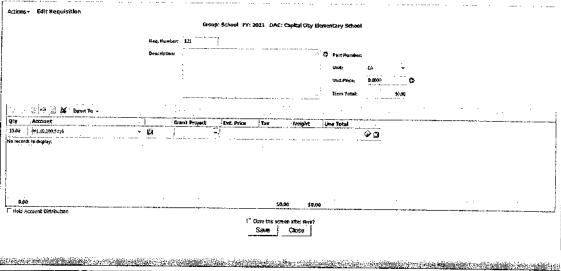 ➢ Using a Quick Requisition
  ➢ Importing from Excel

Adding a Detail Line:

☐ To add a detail line you will click on the green plus sign on the upper left-hand side of the grid:

Export To ▾

Req. No.   Req. Date   Re~

☐ Enter the following information in the Edit Requisition Detail screen:
  ➢ Description
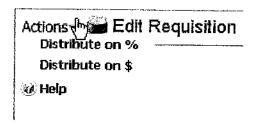 ➢ Part Number (not required)
  ➢ Unit (not required)
  ➢ Unit price

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Actions▾ Edit Requisition

Group: School FY: 2011 DAC: Capital City Elementary School

Req. Number: 121

Description:

Part Number:
Unit: EA
Unit Price: 0.000
Item Total: $0.00

Export To ▾

Qty	Account		Grant Project	Ext. Price	Tax	Freight	Line Total	
15.00	041.40.100.5410							

No records to display.

0.00 $0.00 $0.00

☐ Hold Account Distribution

☐ Close this screen after Save?

Save | Close

☐ Once the detail information is added you need to add the funding lines
  ➢ Enter quantity for this funding line
  ➢ Enter the funding code
  ➢ If you are split funding you have several options:
    • Enter the first code as seen above and then click on the green plus sign in the upper left-hand side of the grid:

    • Go to Actions | Distribute on % or Distribute on $

Actions▾ Edit Requisition
  Distribute on %
  Distribute on $
  🕮 Help

  ➢ Once the detail line is complete click on Save.

☐ Finish adding all detail lines.

☐ When you are finished, click Save.

4

Qty	Account	Ext. Price	Tax	Freight	Line Total		
25.00	110.10.100.5410	$875.00	$0.00	$0.00	$875.00	✎	✕
30.00	110.10.300.5410	$1,050.00	$0.00	$0.00	$1,050.00	✎	✕
55.00		$1,925.00	$0.00	$0.00	$1,925.00		

Add Funding Line

[Save] [Close]

☐ You will be taken back to the main requisition screen.

☐ Review the information on the screen to ensure it is correct. Make necessary changes if it is not.

☐ If finished and ready to submit for approval click the "submit for Approval" box at the bottom of screen then "save."
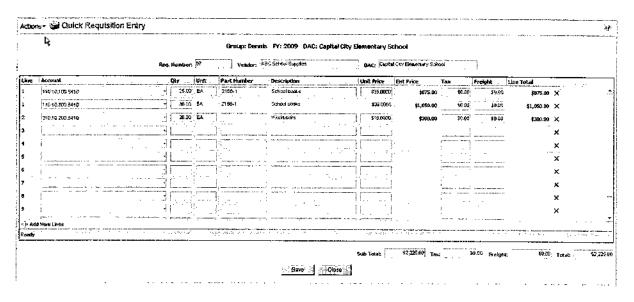

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□ When you are finished, click Save at the top of the screen. If this is your last one to enter you can click "Close this screen after save?" before hitting Save. If you have more to enter you can click Save and then click New to initiate a new Requisition.

Adding Detail using Quick Requisition:

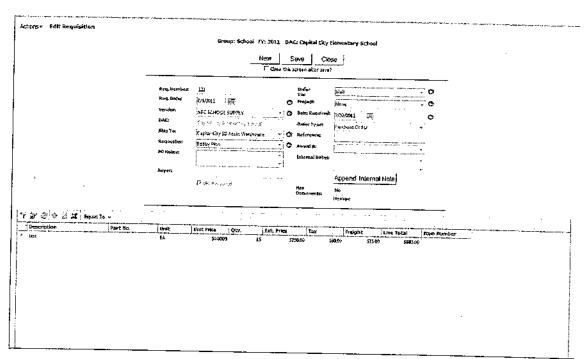□ After adding the Vendor information go to Actions (▼) | Quick Requisition.

□ Enter the detail description on this screen. You may tab through to each cell to expedite the process.

□ Once all detail is entered click on Save at the bottom of the screen.

□ Notes:
  ➢ There are ten lines on the screen. To add more lines click "Add More Lines" at the bottom of the screen.
  ➢ The Actions (▼) menu contains several helpful features:
    • Split Fund-Highlight the line you wish to split and go to Actions | Split Fund. You will then have two lines with the same row number. Enter the appropriate amount for each line.

- Copy Line-Highlight the line you wish to copy. Go to Actions | Copy Line. You will now have two lines with the same information. They will have different row numbers.
- Recalculate Tax & Freight-You will not use.
- Distribute Tax and Freight-Allows you to enter a freight amount which will be distributed proportionately across the funding lines. Go to Actions | Distribute Tax & Freight. Check Box Freight and enter the Freight amount. Click Ok.
- Import from Excel-See next section for instructions.
- Export to Excel-Allows you to begin entering the detail information and then export it to excel to save it and reimport later.
- Vendor Web Site-If a vendors website is stored in their Vendor information you can get to their site from here.

☐ You will be taken back to the main requisition screen.

☐ Review the information on the screen to ensure it is correct. Make necessary changes if it is not.
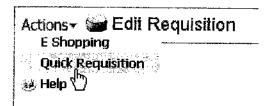

☐ When you are finished, click Save at the top of the screen. If this is your last one to enter you can click "Close this screen after save?" before hitting Save. If you have more to enter you can click Save and then click New to initiate a new Requisition.

Importing a Requisition From Excel:

☐ After adding the Vendor information go to Actions (▼) | Quick Requisition.

Actions▼ 🖼 Edit Requisition
    E Shopping
    Quick Requisition
    📖 Help 👆

☐ The Excel sheet must be in the following format:

- o Column A: Line Number
- o Column B: Description
- o Column C: Part Number (not required)
- o Column D: Unit (ea, per, etc)
- o Column E: Quantity
- o Column F: Unit Price
- o Column G: Tax (enter $0 if there's no tax)
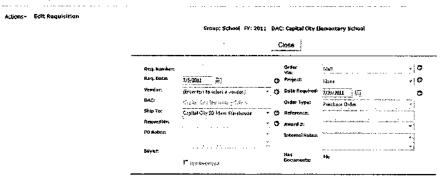- o Column H: Freight (enter $0 if there's no freight)
- o Column I: Account
- o Column J: Warehouse – leave blank but header must be included
- o Column K: Grant - leave blank but header must be included

    ➤ All columns must be filled in with the exception of Part Number. If you have no freight or tax, enter $0.
    ➤ The worksheet must be named Sheet1.
    ➤ If an item is split funded enter the same Line Number multiple times. In the example below, the School Books are split between two lines. So both lines that contain School books have a line number 1.
    ➤

	A	B	C	D	E	F	G	H	I
1									
2	LineNo	Description	PartNumber	Unit	Qty	UnitPrice	Tax	Freight	Account
3	1	School books	2156-1	EA	25	35	70	87.5	110.10.200.5410
4	1	School books	2156-1	EA	30	35	84	105	210.10.200.5410
5	2	Workbooks		EA	20	15	24	30	210.10.200.5410
6									
7									

☐ Go to Actions (▼) | Import from Excel

☐ Click on browse and find the excel sheet containing the detail to be imported. Click on Open.

Import from Excel ✕

Upload detail from Excel file.

C:\Documents and Settings\kimy.CSA-INC\Desktop\This i [Browse]

[OK] [Cancel]

☐ Click on Ok to import the file.

☐ The information will populate the screen. Make any necessary changes before clicking Save at the bottom of the screen.

☐ You will be taken back to the main requisition screen.

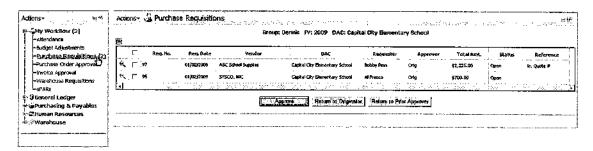☐ Review the information on the screen to ensure it is correct. Make necessary changes if it is not.

Group: School FY: 2011 DAC: Capital City Elementary School

Close

Req. Number:	Order Via:
Req. Date: 7/5/2011	Project: None
Vendor: [Enter text to select a vendor]	Date Required: 7/30/2011
DAC:	Order Type: Purchase Order
Ship To: Capital City SD Main Warehouse	Reference:
Requestor:	Award #:
PO Notes:	Internal Notes:
Buyer:	
☐ Pre-Approved	Has Documents: No

☐ When you are finished, click Save at the top of the screen. If this is your last one to enter you can click "Close this screen after save?" before hitting Save. If you have more to enter you can click Save and then click New to initiate a new Requisition.

Approving a Requisition:

☐ Go to My Workflow | Purchase Requisitions

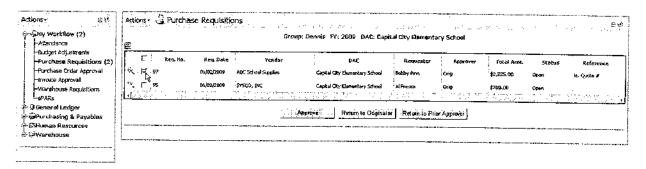| Actions▾		Actions▾ Purchase Requisitions							
My Workflow (2)		Group: Dennis FY: 2009 DAC: Capital City Elementary School							
─Attendance									
─Budget Adjustments		☐	Req. No.	Req. Date	Vendor	DAC	Requester	Approver	Total Amt.	Status	Reference
─Purchase Requisitions (2)		☐	97	01/02/2009	ABC School Supplies	Capital City Elementary School	Bobby Ann	Orig	$1,225.00	Open	Ic. Quote #
─Purchase Order Approval		☐	95	01/02/2009	SYSCO, INC	Capital City Elementary School	Al Fresco	Orig	$700.00	Open	
─Invoice Approval											
─Warehouse Requisitions											
─SPARE				Approve	Return to Originator	Return to Prior Approver					
⊞ General Ledger											
⊞ Purchasing & Payables											
⊞ Human Resources											
⊞ Warehouse											

☐ The top box is used to select all requisitions, or you can select each requisition individually.

☐ When you are ready you can select Approve. Each requisition that has a checkmark by it will be moved on to the next approver.

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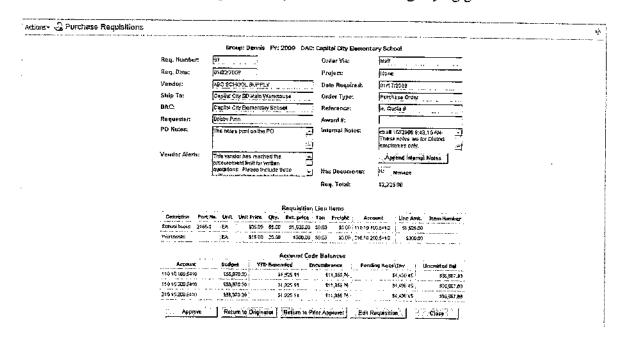# Approving Requisitions (Principals or other approvers):

☐ Go to My Workflow | Purchase Requisitions

☐ To view a Requisition click on the magnifying glass
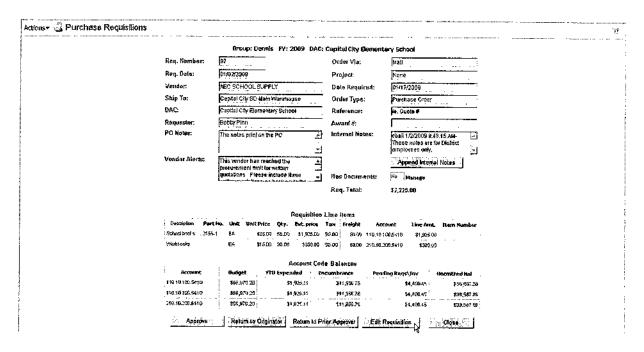

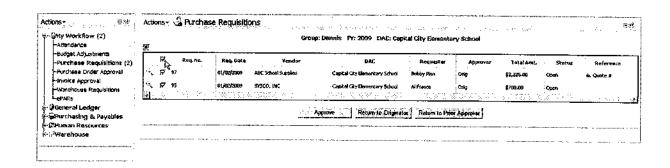☐ The following screen will open when you click on the magnifying glass

☐ If you need to send a requisition back, select "Append Internal Notes". You can then select "Return To Originator" or "Return to Prior Approver".

☐ You can also edit the requisition yourself by clicking on the Edit Requisition button at the bottom of the screen.

☐ From the main screen you can select all the requisitions by selecting the top box or you can select each requisition individually to send it on.

Editing a Requisition:

- ☐ Go to Purchasing and Payables | Purchasing | Control Panel

- ☐ You can enter filter criteria, such as vendor or requisition number to find the requisition. Select the Apply button.

- ☐ Highlight the requisition that needs to be edited and select the Edit button. You may also double click on the record.
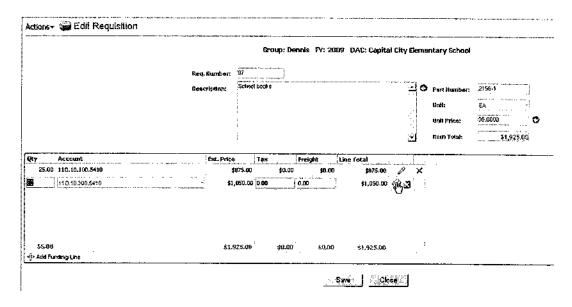

- ☐ If you need to edit the main information, make the appropriate changes and select Update Requisition.

Group: School FY: 2011 DAC: Capital City Elementary School

New | Save | Close

☐ Close this screen after save?

Req. Number:	131	Order Via:	Mail
Req. Date:	7-5/2011	Project:	None
Vendor:	ABC SCHOOL SUPPLY	Date Required:	7/29/2011
DAC:		Order Types:	Purchase Order
Ship To:	Capital City SO Main Warehouse	Reference:	
Requester:	Bobby Finn	Award #:	
PO Notes:		Internal Notes:	
Buyer:			

Append Internal Note

☑ My Requested

Has Documents: No   Manage

Export To ▾

Description	Part No.	Unit	Unit Price	Qty.	Ext. Price	Tax	Freight	Line Total	Item Number
test		EA	50.0000	15	$750.00	$80.00	$75.00	$905.00	

☐ If you need to edit a detail line double click on the detail line in the grid.

☐ You can also update an account code once you are in the detail line by selecting the pencil located on the left side of the screen or by double clicking.

☐ Once all changes are made, choose Save.

Group: Dennis FY: 2009 DAC: Capital City Elementary School

Req. Number:	97
Description:	School books

Part Number:	2156-1
Unit:	EA
Unit Price:	35.0000
Item Total:	$1,925.00

Qty	Account	Ext. Price	Tax	Freight	Line Total		
25.00	110.10.100.5410	$875.00	$0.00	$0.00	$875.00	✏	✗
	110.10.300.5410	$1,050.00	0.00	0.00	$1,050.00		
55.08		$1,925.00	$0.00	$0.00	$1,925.00		

⊕ Add Funding Line

Save | Close

☐ You will return to the main requisition screen. Select Save.

Group: School FY: 2011 DAC: Capital City Elementary School

New | Save | Close

☐ Close this screen after save?

☐ You now need to approve the requisition with the changes.

Deleting a Requisition:

☐ Go to Purchasing and Payable | Purchasing | Control Panel

☐ You can enter filter criteria, such as vendor or requisition number to find the requisition. Select the Apply button.

☐ Highlight the requisition and select the Delete button or use the Red X on the grid to remove the requisition.

Group: School   FY: 2011   DAC: Capital City Elementary School

□ The following message will appear asking for confirmation the requisition is to be deleted.

Windows Internet Explorer

Are you sure you wish to delete the selected item(s)?

OK   Cancel

□ The following message will appear at the top of the screen to confirm the record has been deleted.

1 record has been deleted.