



Parkrose

## 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:

CSU

Password:

.....

☐ Remember Login

Login Register

[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	Connection Group
User ID: cball	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:



- ☐ 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



Actions Edit Requisition

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

Close

Req. Number:		Order:	Order
Req. Date:	5/5/2011	Order:	Order
Vendor:	[Click here to select a vendor]	Project:	None
DAC:	Capital City Elementary School	Order Required:	5/5/2011
Ship To:	Capital City 20 Main Warehouse	Order Type:	Purchase Order
Requisition:		Approved:	
PO Number:		Internal Notes:	
Buyer:		Has Documents:	No

☐ With attached

- ☐ 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
Item	Part	Unit	Price	Quantity	Description	

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



Actions - Edit Requisition

Group: School FY: 2021 DAC: Capital City Elementary School

Req. Number: 121

Description:

Part Number:

Units: EA

Unit Price: 0.0000

Item Total: \$0.00

Export To

Qty	Account	Grant Project	Ext. Price	Tax	Freight	Line Total
15.00	911.001015216					

No records to display.

\$0.00 \$0.00 \$0.00

Hold Account Distribution

Done 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:

Export To

Req. No. Req. Date Req. By

- 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.

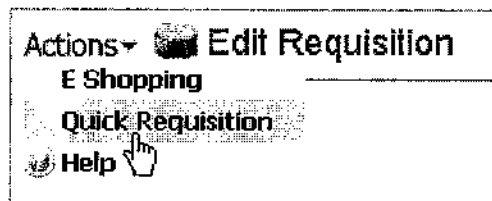




- ☐ When you are finished, click Save at the top of the screen. If this is your last one to enter you can click "Close this screen after save?" before hitting Save. If you have more to enter you can click Save and then click New to initiate a new Requisition.

## 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.

Actions ▼ Quick Requisition Entry

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

Req. Number: 27 Vendor: ABC School Supplies DAC: Capital City Elementary School

Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax	Freight	Line Total
1	5140 10 100 5410	25.00	EA	2156-1	Schoolbooks	\$35.0000	\$875.00	\$0.00	\$9.00	\$884.00 X
1	5140 10 100 5410	30.00	EA	2156-1	School books	\$35.0000	\$1,050.00	\$0.00	\$9.00	\$1,059.00 X
2	5140 10 200 5410	30.00	EA		Workbooks	\$10.0000	\$300.00	\$0.00	\$9.00	\$309.00 X
3										X
4										X
5										X
6										X
7										X
8										X
9										X

Ready

Sub Total: \$2,225.00 Tax: \$0.00 Freight: \$0.00 Total: \$2,225.00

Save Close

- ☐ 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.

Actions Edit Requisition

Group: School FY: 2011 DAC Capital City Elementary School

New Save Close

☐ Close this screen after save?

Req Number: 123  
 Req Date: 7/1/2011  
 Vendor: AEC SCHOOL SUPPLY  
 DAC: Capital City Elementary School  
 Ship To: Capital City 20 Main Warehouse  
 Requester: Emily Chen  
 PO Number: 123456789  
 Subject: 123456789

Order View: 2011  
 Project: 2011  
 Date Required: 7/20/2011  
 Order Type: Purchase Order  
 Reference: 123456789  
 Award #: 123456789  
 Internal Note: 123456789

Append Internal Note

Has Documents: No  
 Has Image: No

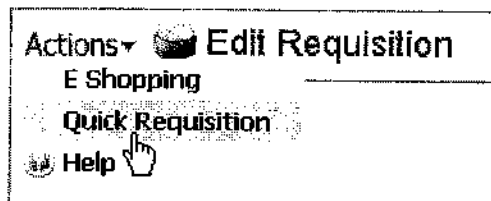
Description	Part No.	Unit	Unit Price	Qty.	Ext. Price	Tax	Freight	Line Total	Row Number
123456789		EA	\$0.0009	15	\$750.00	100.00	\$75.00	\$825.00	1

- ☐ 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.



- ☐ The Excel sheet must be in the following format:

- Column A: Line Number
  - Column B: Description
  - Column C: Part Number (not required)
  - Column D: Unit (ea, per, etc)
  - Column E: Quantity
  - Column F: Unit Price
  - Column G: Tax (enter \$0 if there's no tax)
  - Column H: Freight (enter \$0 if there's no freight)
  - Column I: Account
  - Column J: Warehouse – leave blank but header must be included
  - 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	<b>LineNo</b>	<b>Description</b>	<b>PartNumber</b>	<b>Unit</b>	<b>Qty</b>	<b>UnitPrice</b>	<b>Tax</b>	<b>Freight</b>	<b>Account</b>
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.



Actions Edit Requisition

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

Close

Req. Number:	Order	Order
Req. Date:	View	View
Vendor:	Project:	Project
DAC:	Date Required:	Date Required
Ship To:	Order Type:	Order Type
Requester:	Reference:	Reference
PO Number:	Award #:	Award #
Buyer:	Internal Notes:	Internal Notes
	Has Documents:	Has Documents

☐ Not Required

- 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 My Workflow (2)

Attendance

Budget Adjustments

Purchase Requisitions (2)

Purchase Order Approval

Invoice Approval

Warehouse Requisitions

SPARE

General Ledger

Purchasing & Payables

Human Resources

Warehouse

Actions Purchase Requisitions

Group Details FY: 2009 DAC: Capital City Elementary School

Req. No.	Req. Date	Vendor	DAC	Requester	Approver	Total Amt.	Status	Reference
97	01/02/2009	ABC School Supplies	Capital City Elementary School	Robby Penn	Orig	\$1,225.00	Open	In Queue #
98	01/02/2009	XYZCO, INC	Capital City Elementary School	Al Presco	Orig	\$700.00	Open	

Approve Return to Originator Return to Prior Approver

- 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.



## Approving Requisitions (Principals or other approvers):

☐ Go to My Workflow | Purchase Requisitions

Actions

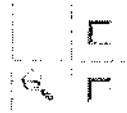
- My Workflow (2)
- Attendance
- Budget Adjustments
- Purchase Requisitions (2)
- Purchase Order Approval
- Invoice Approval
- Warehouse Requisitions
- PARs
- General Ledger
- Purchasing & Payables
- Human Resources
- Warehouse

Actions **Purchase Requisitions**

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

Req. No.	Req. Date	Vendor	DAC	Requestor	Approver	Total Amt.	Status	Reference
97	01/02/2009	ABC School Supplies	Capital City Elementary School	Bobby Pinn	Orig	\$2,225.00	Open	Is Quote #
98	01/02/2009	XYZCO, INC.	Capital City Elementary School	Al Fresco	Orig	\$700.00	Open	

☐ To view a Requisition click on the magnifying glass



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

Actions **Purchase Requisitions**

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

Req. Number:	97	Order Via:	Mail
Req. Date:	01/02/2009	Project:	None
Vendor:	ABC SCHOOL SUPPLY	Date Required:	01/17/2009
Ship To:	Capital City SD Main Warehouse	Order Type:	Purchase Order
DAC:	Capital City Elementary School	Reference:	Is Quote #
Requester:	Bobby Pinn	Award #:	
PO Notes:	The notes from the PO	Internal Notes:	01/02/2009 9:42:15 AM - These notes are for District employees only.
Vendor Alerts:	This vendor has reached the procurement limit for written quotations. Please include these	Has Documents:	None
		Req. Total:	\$2,225.00

Requisition Line Items										
Description	Part No.	Unit	Unit Price	Qty.	Ext. price	Tax	Freight	Account	Line Amt.	Item Number
Excess books	2166-1	EA	\$25.00	88.00	\$1,925.00	\$0.00	\$0.00	110 19 100 6410	\$1,925.00	
Workbooks		EA	\$15.00	20.00	\$300.00	\$0.00	\$0.00	210 19 200 6410	\$300.00	

Account Code Balances					
Account	Budget	YTD Expended	Encumbrance	Pending Receipts	Unencumbered Bal
110 19 100 6410	\$25,870.20	\$1,925.00	\$11,855.75	\$1,400.45	\$95,087.80
110 19 200 6410	\$38,870.20	\$1,225.00	\$11,855.75	\$1,400.45	\$95,087.80
210 19 200 6410	\$38,870.20	\$1,225.00	\$11,855.75	\$1,400.45	\$95,087.80

☐ 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.

Actions Purchase Requisitions

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

Req. Number:	97	Order Via:	Mail
Req. Date:	01/02/2009	Project:	None
Vendor:	ABC SCHOOL SUPPLY	Date Required:	01/17/2009
Ship To:	Capital City SO Main Warehouse	Order Type:	Purchase Order
DAC:	Capital City Elementary School	Reference:	No. Quote #
Requester:	Bobby Pinn	Award #:	
PO Notes:	The notes prior on the PO	Internal Notes:	Case 1/2/2009 8:43:15 AM These notes are for District employees only.
Vendor Alerts:	This vendor has reached the procurement limit for certain quotations. Please include these	Has Documents:	No Manage
		Req. Total:	\$2,225.00

Description	Part No.	Unit	Unit Price	Qty.	Ext. price	Tax	Freight	Account	Line Amt.	Item Number
Schoolbooks	3554-1	EA	\$55.00	55.00	\$1,925.00	\$0.00	\$0.00	110.10.100.5410	\$1,925.00	
Multi-copy	ES		\$15.00	20.00	\$300.00	\$0.00	\$0.00	240.10.200.5410	\$300.00	

Account	Budget	YTD expended	Encumbrance	Pending Reqs./Inv	Uncommitted Bal
110.10.100.5410	\$55,870.20	\$1,925.00	\$11,597.75	\$4,400.45	\$39,867.20
140.10.325.5410	\$55,870.20	\$4,925.00	\$11,597.75	\$4,400.45	\$39,587.25
240.10.200.5410	\$55,870.20	\$1,800.00	\$11,597.75	\$4,400.45	\$39,587.25

Approve Return to Originator Return to Prior Approval Edit Requisition Close

- ☐ 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.

Actions Purchase Requisitions

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

Req. No.	Req. Date	Vendor	DAC	Requester	Approver	Total Amt.	Status	Reference
97	01/02/2009	ABC School Supply	Capital City Elementary School	Bobby Pinn	Orig	\$2,225.00	Open	No. Quote #
95	01/02/2009	SYSCO, INC	Capital City Elementary School	N Fresno	Orig	\$700.00	Open	

Approve Return to Originator Return to Prior Approval

My Workflow (2)  
 Attendance  
 Budget Adjustments  
 Purchase Requisitions (2)  
 Purchase Order Approval  
 Invoice Approval  
 Warehouse Requisitions  
 Reports  
 General Ledger  
 Purchasing & Payables  
 Human Resources  
 Warehouse



## 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.

Actions- Control Panel

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

Apply Clear

Req. No:  DAC:

PO No:  Project:

Vendor: All View:

Add New Edit Delete Manage Documents

Req. No.	Req. Date	Req. App.	Vendor Name	PO No.	R	PO Date	Amount	Status
97	01/02/2009	No	ABC School Supplies	0	0		\$2,225.00	Open
96	01/02/2009	No	BEST OFFICE SUPPLY	0	0		\$220.00	Open
95	01/02/2009	No	SYSCO, INC	0	0		\$700.00	Open

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



Actions Edit Requisition

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

New Save Close

Close the screen after save?

Req. Number: 121

Req. Date: 7/29/2011

Vendor: ABC SCHOOL SUPPLY

DAC: Capital City SO Main Warehouse

Requestor: Robby Allen

PO Notes:

Buyer:

Order Vio:

Project:

Date Required: 8/29/2011

Order Type: Purchase Order

Reference:

Amend at:

Internal Notes:

Append Internal Note

Yes No

Documents: No Message

Description	Part No.	Unit	Unit Price	Qty	Ext. Price	Tax	Freight	Line Total	Item Number
test		EA	\$0.0000	15	\$0.00	\$0.00	\$0.00	\$0.00	

- ☐ 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.

Actions Edit Requisition

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

Req. Number: 87

Description: School books

Part Number: 2156-1

Unit: EA

Unit Price: \$5.0000

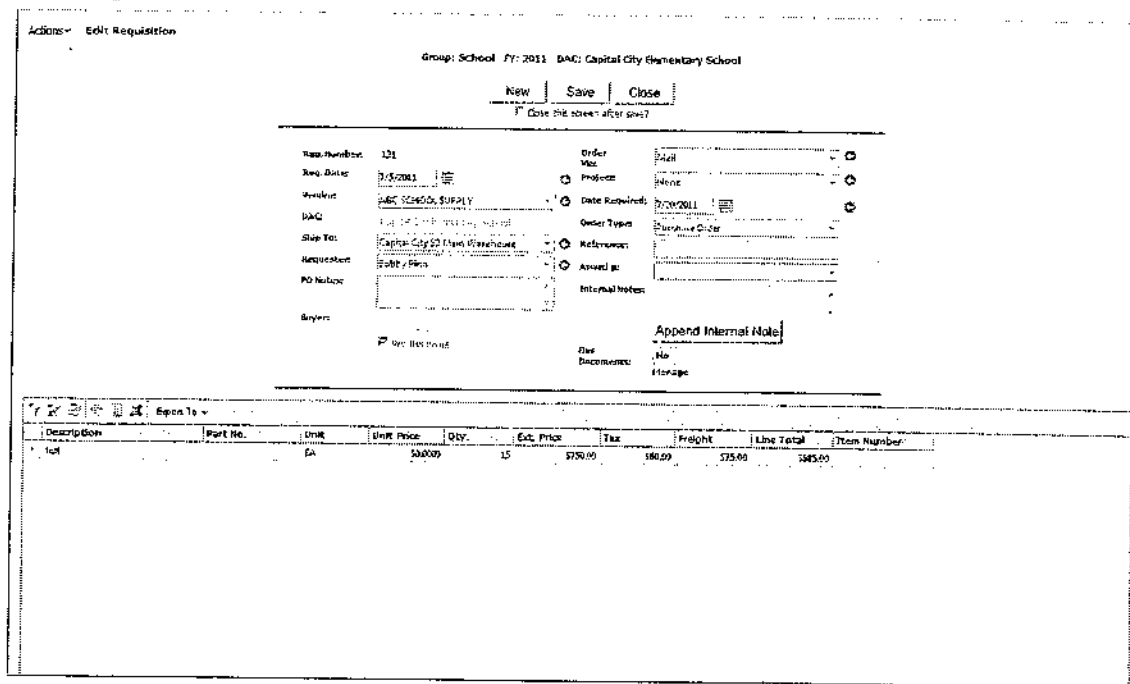
Item Total: \$1,925.00

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.



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

- ☐ 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.



Actions - Visions Enterprise Menu

- My Workflow (4)
  - Attendance (1)
  - Hours Entry Approval
  - Purchase Order Approval (1)
  - Purchase Requisitions (2)
- General Ledger
- Purchasing & Payables
  - Purchase
  - Control Panel
  - Requisitions

Actions - Visions Enterprise Display

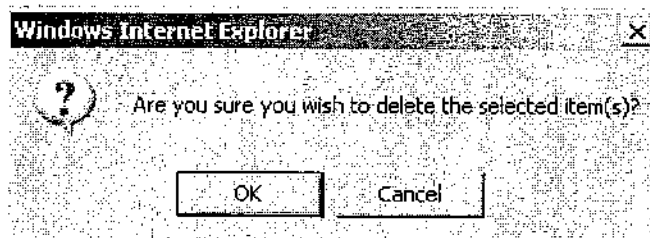
Group: School FY: 2011 DAC: Capital City Elementary School

Apply Clear

Req. No.: PO. No.: Vendor: DAC: Project: Fiscal Year:

Req. No.	Req. Date	Req. App.	Vendor Name	PO No.	PO Date	Amount	Status	Requisition Approver	DA
12125	06/17/2010	Yes	MACHILLAN MCDRAW HILL	10004	10/28/2010	\$1,000.00	Open	AP	
122	07/05/2011	No	ABC SCHOOL SUPPLY	0	0	\$0.00	Open	Orig	
123	07/05/2011	No	ABC SCHOOL SUPPLY	0	0	\$885.00	Open	Orig	
129	07/05/2011	No	ABC School Supply	0	0	\$0.00	Open	Orig	
129	07/05/2011	No	ABC SCHOOL SUPPLY	0	0	\$115.00	Open	Orig	
123	08/11/2010	No	SYSCO, INC	0	0	\$0.00	Open	Orig	
122	08/11/2010	Yes	ACME AUTOMOTIVE	0	0	\$0.00	Open	AP	
121	08/11/2010	No	ACME AUTOMOTIVE	0	0	\$0.00	Open	Orig	
129	08/11/2010	Yes	BEST BUY - STORE 125	10004	10/28/2010	\$2,750.00	Open	AP	
129	08/11/2010	No	SCHOOL SPECIALTY	0	0	\$100.00	Open	Orig	
129	08/11/2010	Yes	ABC SCHOOL SUPPLY	10004	10/28/2010	\$20.00	Open	AP	
129	07/12/2010	Yes	RELIANCE	10004	10/28/2010	\$24.00	Open	AP	
124	07/12/2010	Yes	ABC School Supply	10004	10/28/2010	\$20.00	Open	AP	

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



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

1 record has been deleted.

