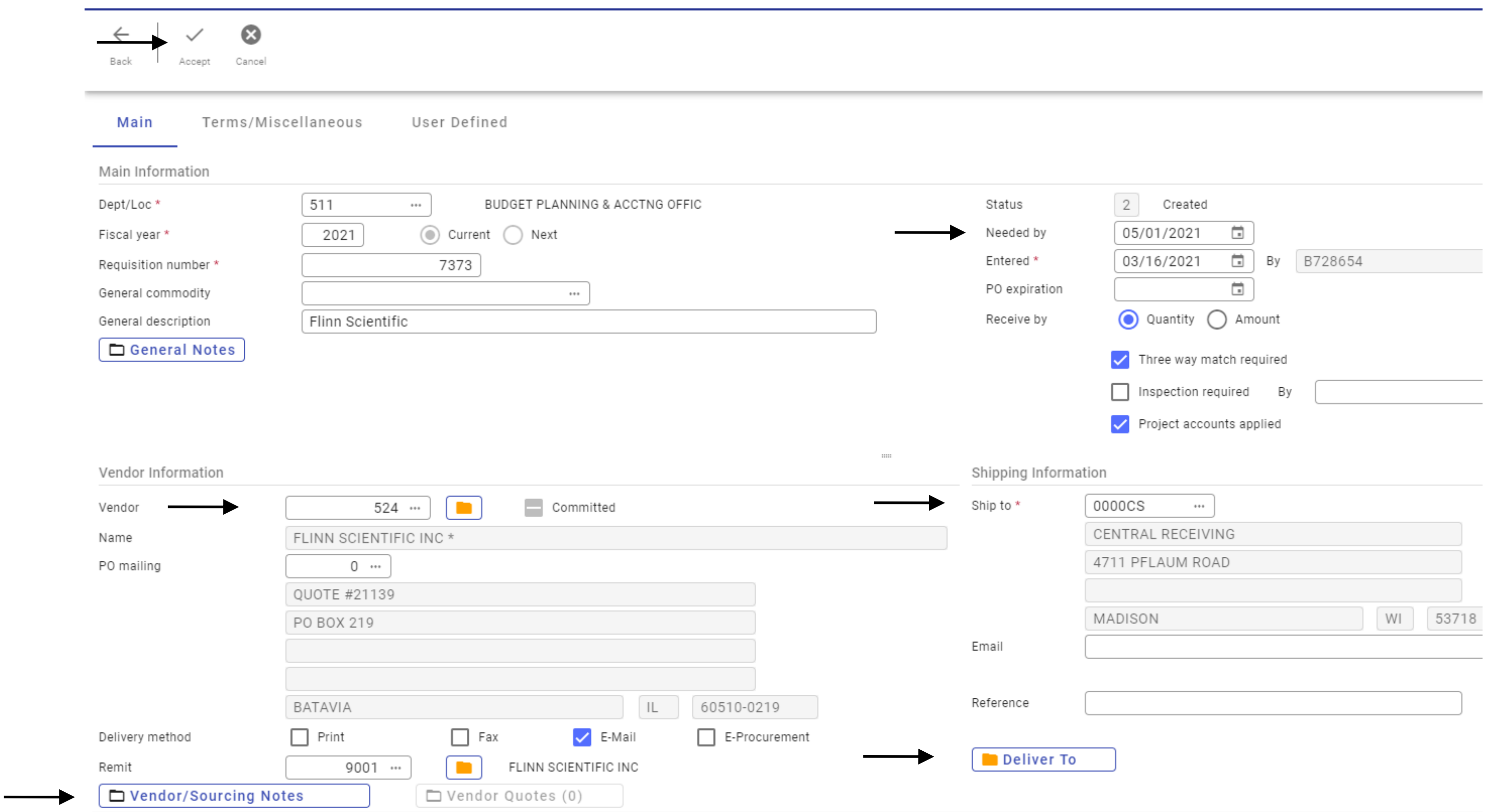
<u>Requisition Entry - Basic</u>

Staples, School Specialty, Nasco, Lakeshore Learning, School Health, WW Grainger, Really Good Stuff, Follett (Library orders only), Mackin and Central Stores ordering are different. Those instructions are in:
"Requisition Entry – Online Shopping"
or
"Requisition Entry – Central Stores Inventory"

1. From your DEPARTMENTAL FUNCTION folder open REQUISITION ENTRY:

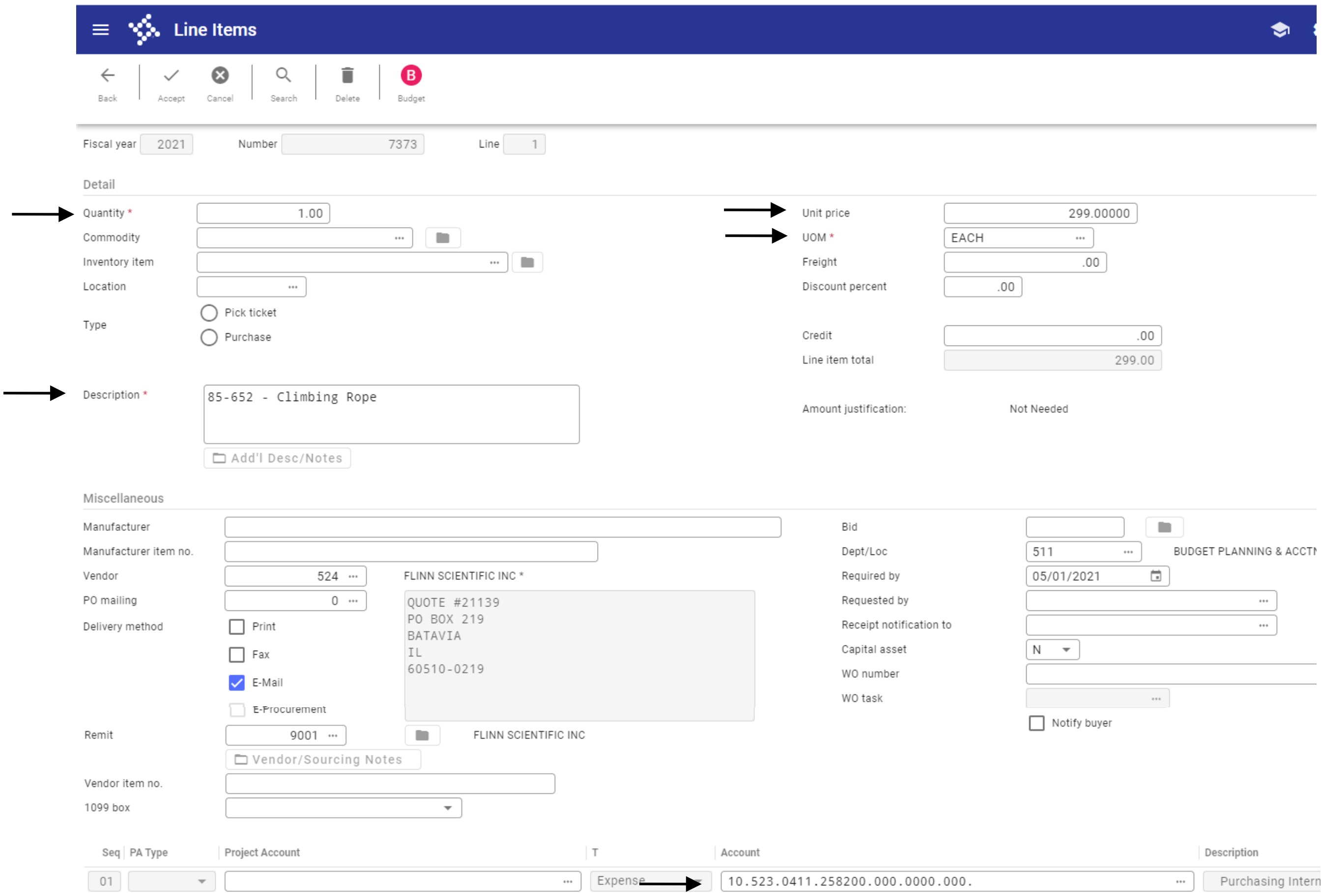


2. To start entering a req, click the **+** on the ribbon, which is ADD.

Field	Description/Data to enter
Dept/Loc	Will auto-fill based upon your user id
Req Number	Will auto-fill
General Description	Enter the vendor name
Needed by	Enter a date. A date must be entered or your order will not be processed.
Vendor	Type in number or Search.
Shipping Information	Default is to Pflaum. Change here only for direct vendor to location Shipping (i.e. live science materials, etc.)
Deliver To button	Default is to Pflaum. Change to your school's "D" location.

	In the “Reference” field enter the name of the staff member that is requesting this item.
Vendor/Sourcing Notes	Enter ALL notes in this field.

3. Click the Accept in the upper left. The line detail will open.



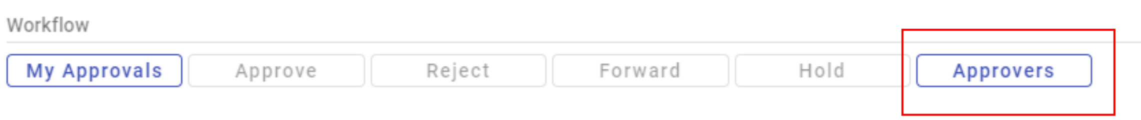
4. Click the **+** to add. The below fields are the only fields that need to be entered.
   <u>***Use the TAB key, not the mouse***</u>

Field	Description/Data to enter
Quantity	Number of items
Description	Enter in the part number and description in this field. Has 200 characters
Unit Price	Cost per unit or lump sum of blanket PO
UOM (unit of measure)	Defaults to each but you can enter another UOM if desired
Account Number	Enter the account number (if splitting account see directions titled “Requisition Entry Special Features”)

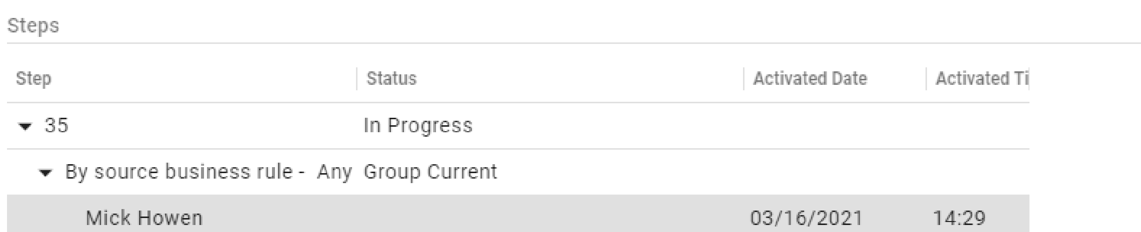
5. To finish this line record, click Accept

6. To add additional lines, click the **+** key. Repeat steps outlined in point 4 above. If all lines on the requisition are charged to the same account you can select the **COPY GL ACCT** function on the ribbon at the top of the page for each line following your first line. (You need to be in the **Seq** field for the lines to populate when you select this button.) After adding each line click the **Accept check mark**.
7. To finish adding lines, click the back arrow.
8. This brings you back to the requisition header screen. Click the **release** button on the ribbon at the top of the screen under menu.
9. Note the Status has changed to 6, Released.

Note: you can check the approval status by clicking on Approvers at the bottom of the screen.



This req is sitting with Mick. If there are more than one approver, you'll see all of them listed and you'll get the date/time each person approves.



<u>Attaching Documents to Requisition</u>

Step 1 Scan your documents into a scan folder

Step 2 Go to Req Entry

Step 3 Click: Search

Step 4 Enter your fiscal year and req#

Step 5 Click: Accept

Step 6 Click: Attach (paperclip in the upper corner of the taskbar)

Step 7 Double Click: Highlighted “Requisition Attachment”

Step 8 Click: New

Step 9 Click: Import

Step 10 Click: Choose File (go to your scan folder and select document) or click and drag the document to the import screen

Step 11 Click: Import (your document will appear)

Step 12 Click: Save

Step 13 Your Document is now attached – use this method for all documents, quotes, proposals, etc……. Please <u>DO NOT</u> use the tab in the middle of your screen called “**Vendor Quotes**” that is next to the Vendor/Sourcing Notes – We DO NOT use this area