



Requisition Entry - Basic

*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.

The screenshot shows the 'Line Items' application interface. At the top, there is a navigation bar with 'Line Items' and a user profile icon. Below the navigation bar are icons for Back, Accept, Cancel, Search, Delete, and Budget. The main content area is divided into sections: 'Detail' and 'Miscellaneous'. In the 'Detail' section, the 'Quantity' field is set to 1.00, 'Unit price' is 299.00000, 'UOM' is EACH, and 'Description' is 85-652 - Climbing Rope. In the 'Miscellaneous' section, the 'Manufacturer' is FLINN SCIENTIFIC INC, 'Vendor' is 524, and 'Account' is 10.523.0411.258200.000.0000.000. There are also fields for 'Bid', 'Dept/Loc', 'Required by', 'Requested by', 'Receipt notification to', 'Capital asset', 'WO number', and 'WO task'.

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

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.

Status 6 Released

Needed by 05/01/2021

Entered * 03/16/2021 By B728654

PO expiration

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

Workflow

My Approvals
Approve
Reject
Forward
Hold
Approvers

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.

Steps

Step	Status	Activated Date	Activated Time
▼ 35	In Progress		
▼ By source business rule - Any Group Current			
Mick Howen		03/16/2021	14:29

Attaching Documents to Requisition

- 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 DO NOT 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