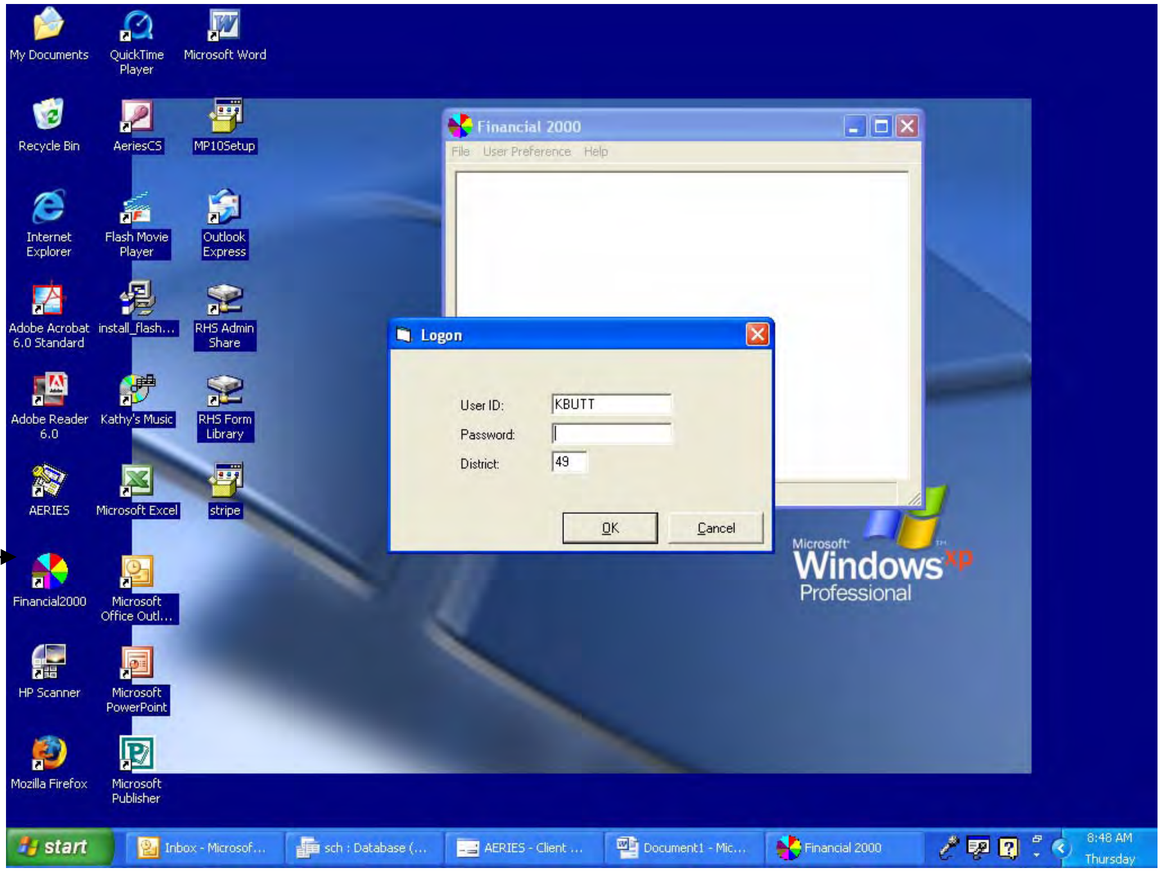


Welcome to Financial 2000

After clicking on the color wheel from your desktop you will enter your user ID and password.

Your user ID is the first letter of your first name and your last name (KBUTT) all in caps.
Your password (all lowercase letters) you will choose if not preset by purchasing.
Our district # is 49.
Click OK

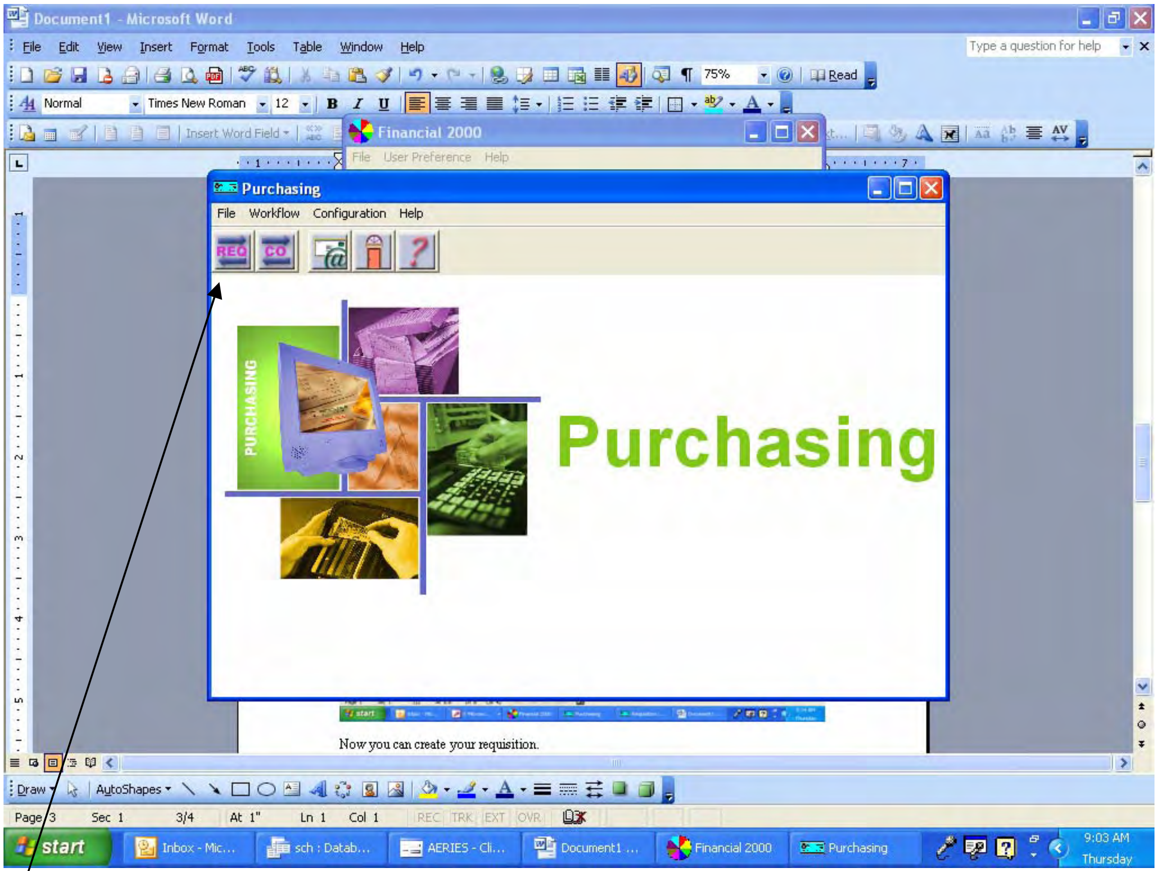
Set your keyboard on all CAPS FOR THE REMAINDER OF YOUR USE OF FIN 2000.

This is the screen you will see after you log in.

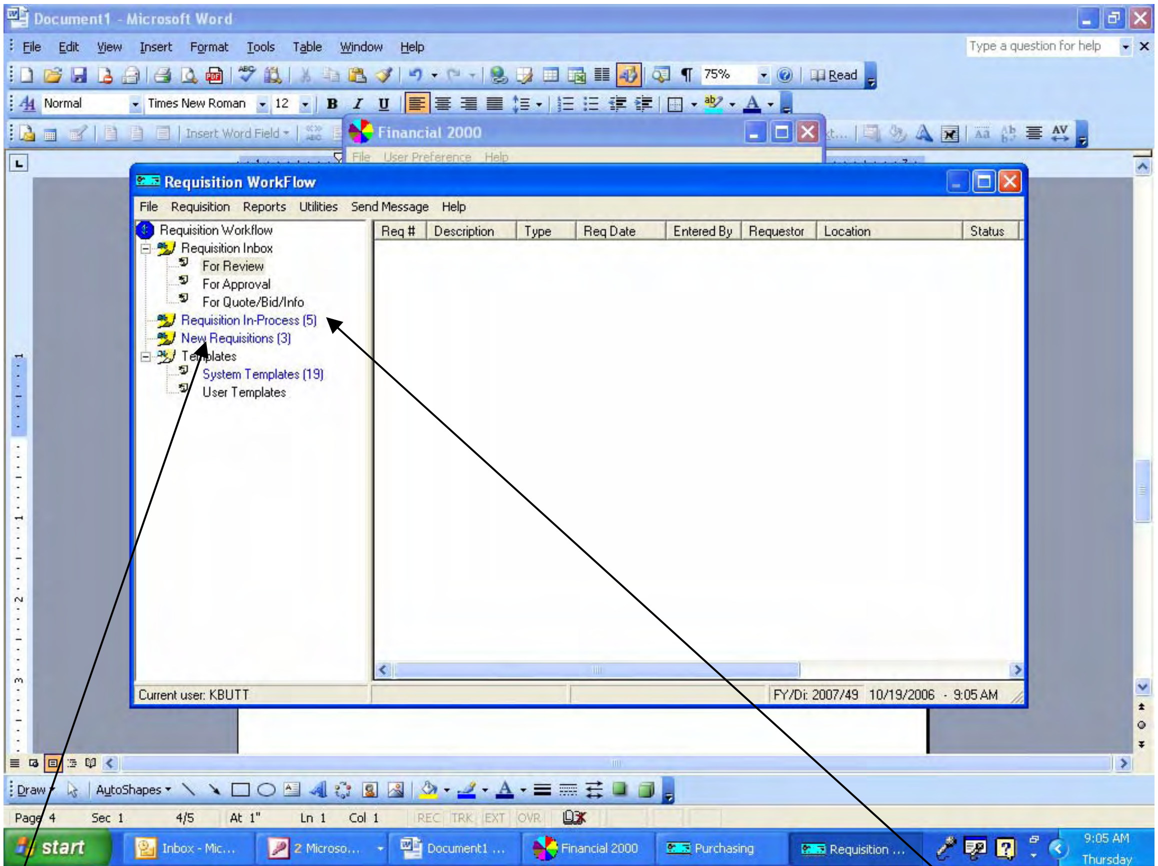
You will not have all these icons so don't be concerned.
You will always and only enter the purchasing icon.
Double click on the purchasing icon.

Notice in the lower right of the screen you see the FY 2007.
This shows you the current fiscal year. THIS WILL BE VERY IMPORTANT AT THE END OF THE FISCAL YEAR AND THE BEGINNING OF ANOTHER.
When we approach the end of the year and can no longer place orders due to closing out the books we will be able to about June 1 to access the next fiscal years budgets. To do this you will have to go to File (at the top left) and select "Set Fiscal Year". Here you can manually change the fiscal year to begin using the new year's budgets at the end of the current fiscal year.

NOTE: When a new fiscal year has begun you will want to make sure you are in the correct fiscal year before creating any requisitions. We have had people enter requisitions in the old fiscal year not realizing they are in the wrong year. They have to re-create the requisition in the current fiscal year for it to be processed. Requisitions cannot be pulled forward from one year to the next.

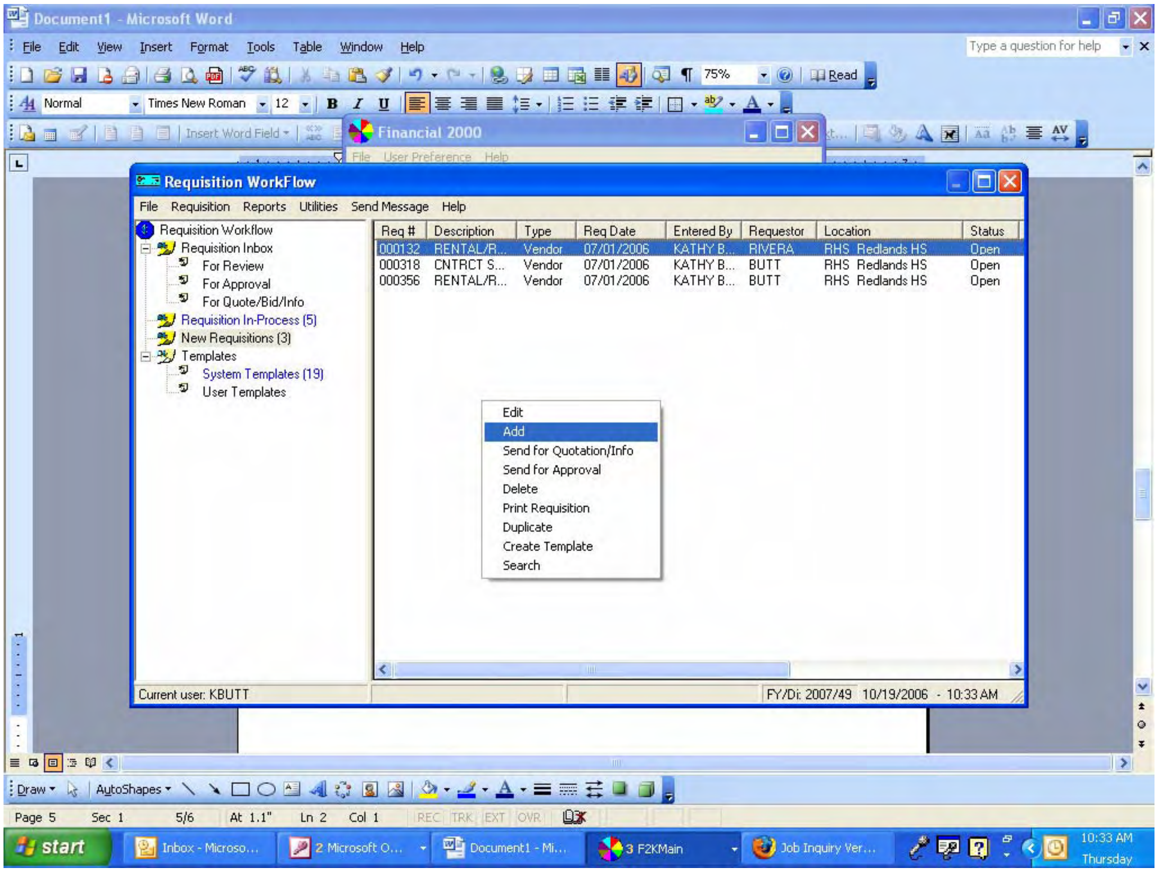


Click on the REQ button to enter the requisition workflow.

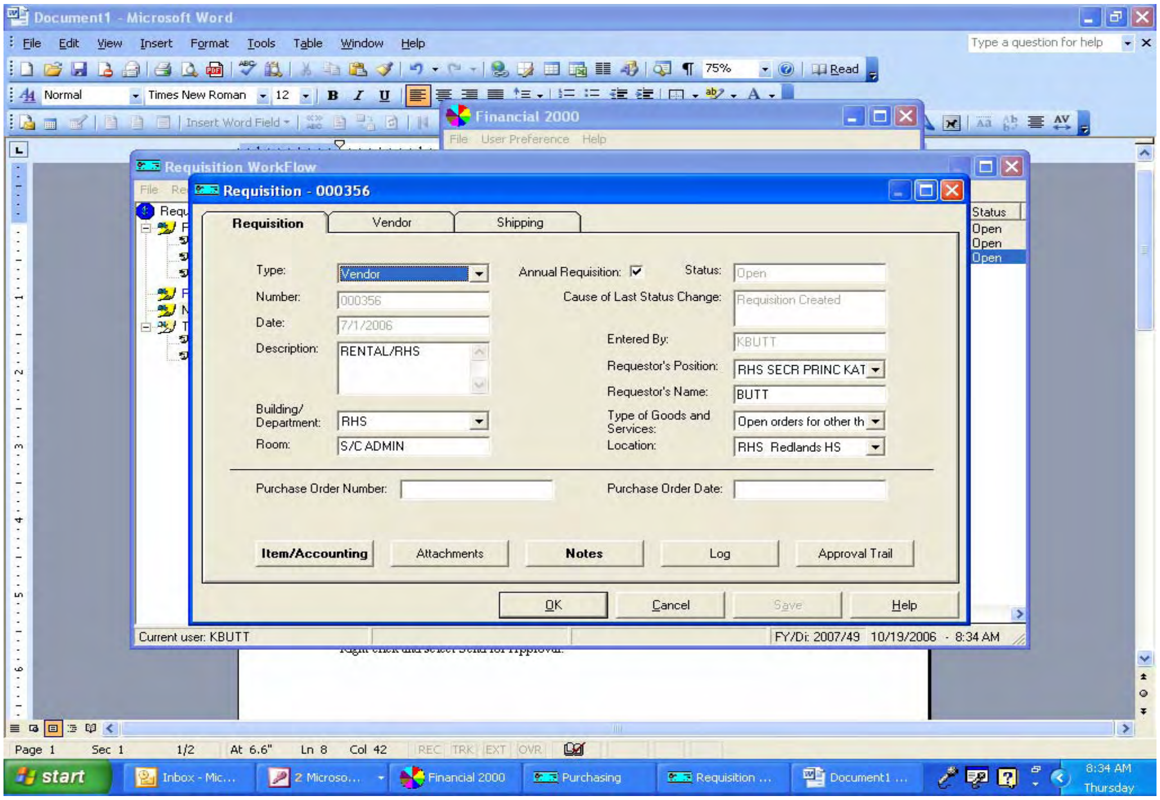


To create a new requisition click on New Requisitions.

To monitor a current requisition after sending for approval click on Requisition in Process. Here you can highlight the requisition you want to monitor, right click and click View Approval Path. You will see a list of positions and names. To the left you will see the word Yes. Wherever the Yes is on the approval path, this is whose workflow the requisition is in waiting for action to be taken.



To create a new requisition, right click in the large window and select Add.
The New Requisition Entry window will pop up.



Now you can create your requisition.
First you must determine whether you will use the Vendor or Stores Requisition mode.
Stores = Warehouse Vendor = All outside Vendors

Proceed by using the Tab to navigate through the fields.
Some fields are non-changeable. You will not have access to change certain information.

Tab to the Description field. Here you will enter information regarding the overall requisition.

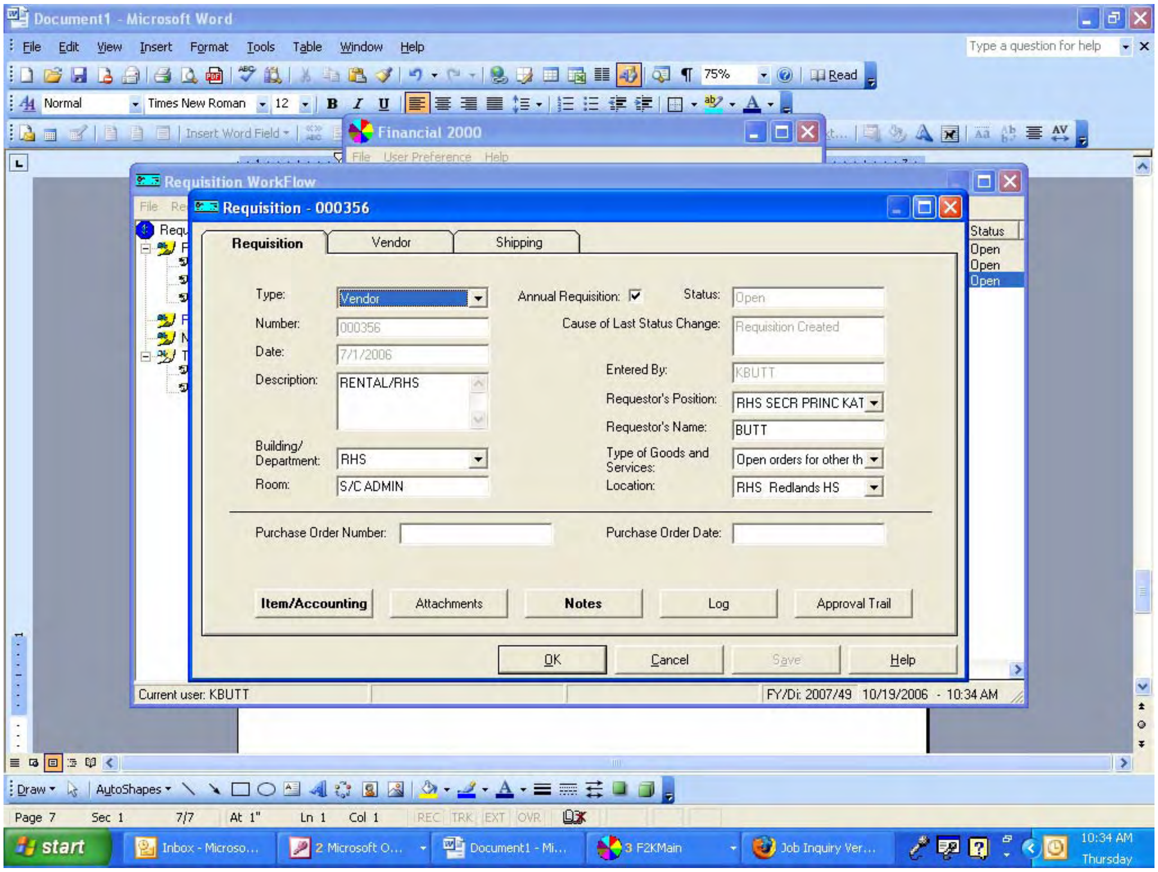
For example:

MISC. INST. SUPPLIES
OFFICE SUPPLIES
PLEASE RUSH NEED BY (PUT A SPECIFIC DATE YOU NEED YOUR ORDER BY) never just put PLEASE RUSH.
PLEASE BILL RHS ASB #_______

The next field is the building/dept. Select RHS by using the drag down arrow or simply begin typing RHS.

Room: Put your room number here

Tab over to Requestor's Name. Here you will type your last name (easy reference for search option).



Types of goods and services
Here is where it can get tricky.
You need to tell purchasing what type of good or service you are ordering in this field.

For example:

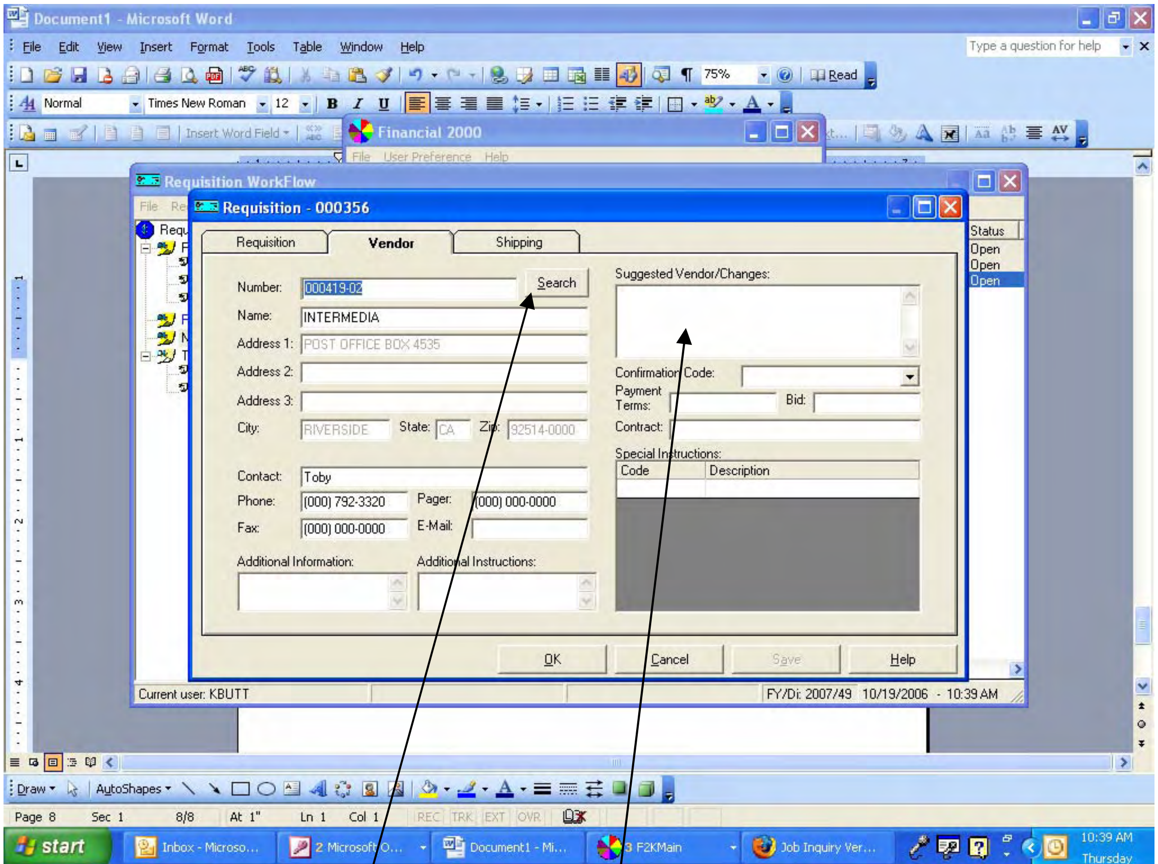
Stapler = office supplies

Test tube = instructional materials

IF YOU ARE ORDERING FROM OFFICE DEPOT, STAPLES, PIONEER STATIONEERS, OR ANY OTHER OFFICE SUPPLY STORE YOUR TYPES OF GOODS AND SERVICES WILL BE OFFICE SUPPLIES NO MATTER WHAT YOU ARE PURCHASING FROM THEM. This sends the requisition to the correct buyer in purchasing.

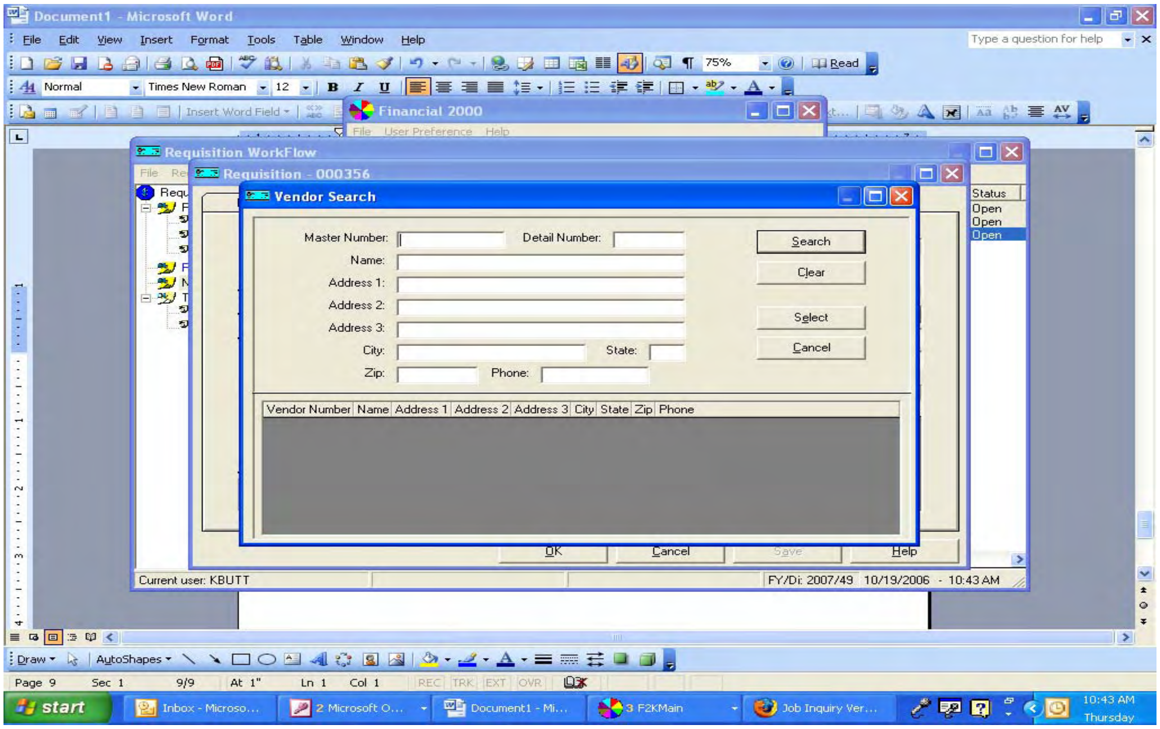
Any order placed on the Stores Requisition will use warehouse as the type of goods and services.

Now you are ready to proceed to the Vendor Tab.

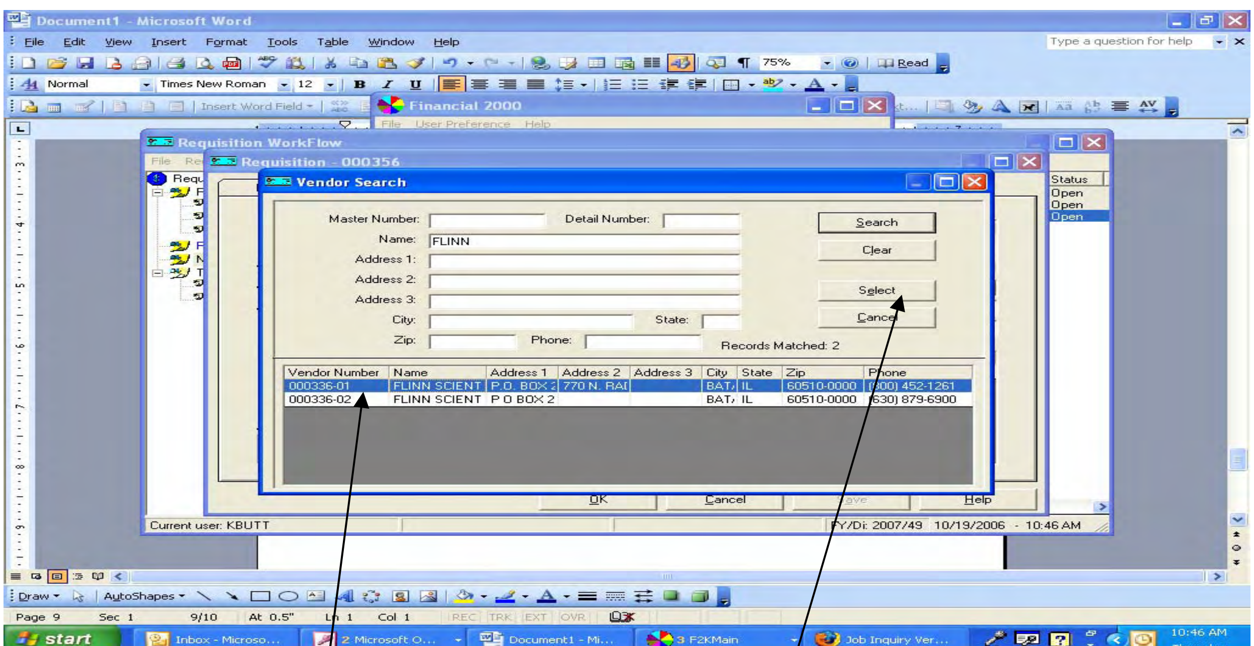


This is where you will enter the vendor information.
The quickest way to enter the vendor is to first do a search.
Click on the search button.

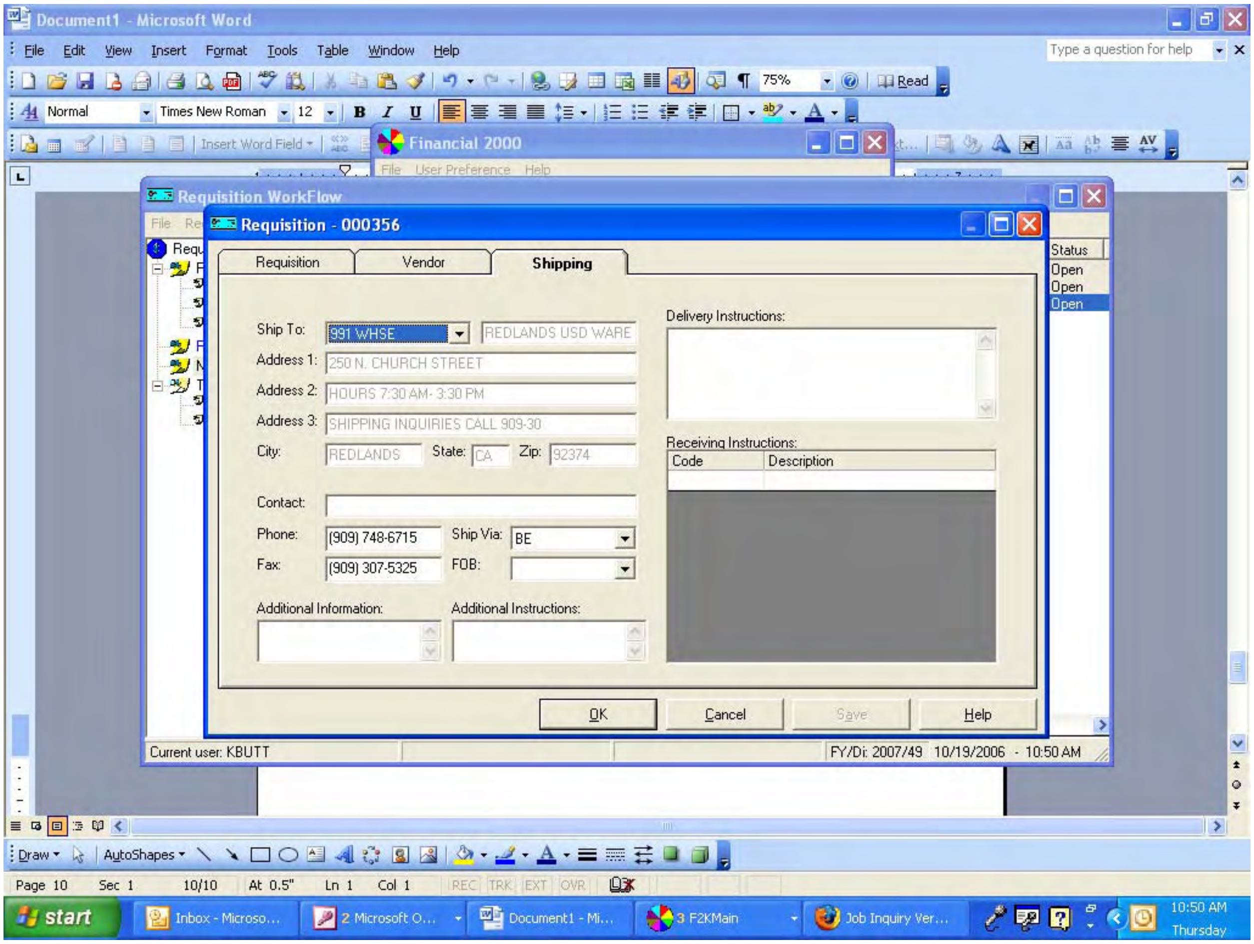
If you use a vendor who is not currently in our database you will have to enter the vendor information in the Suggested Vendor/Changes field. Make sure to put the name of the vendor, their address, city, state, and zip code. Also tab to the phone field and enter their phone number. Any additional information you have for the vendor is helpful to our purchasing department. If you have a name to contact enter the persons name in the contact field.



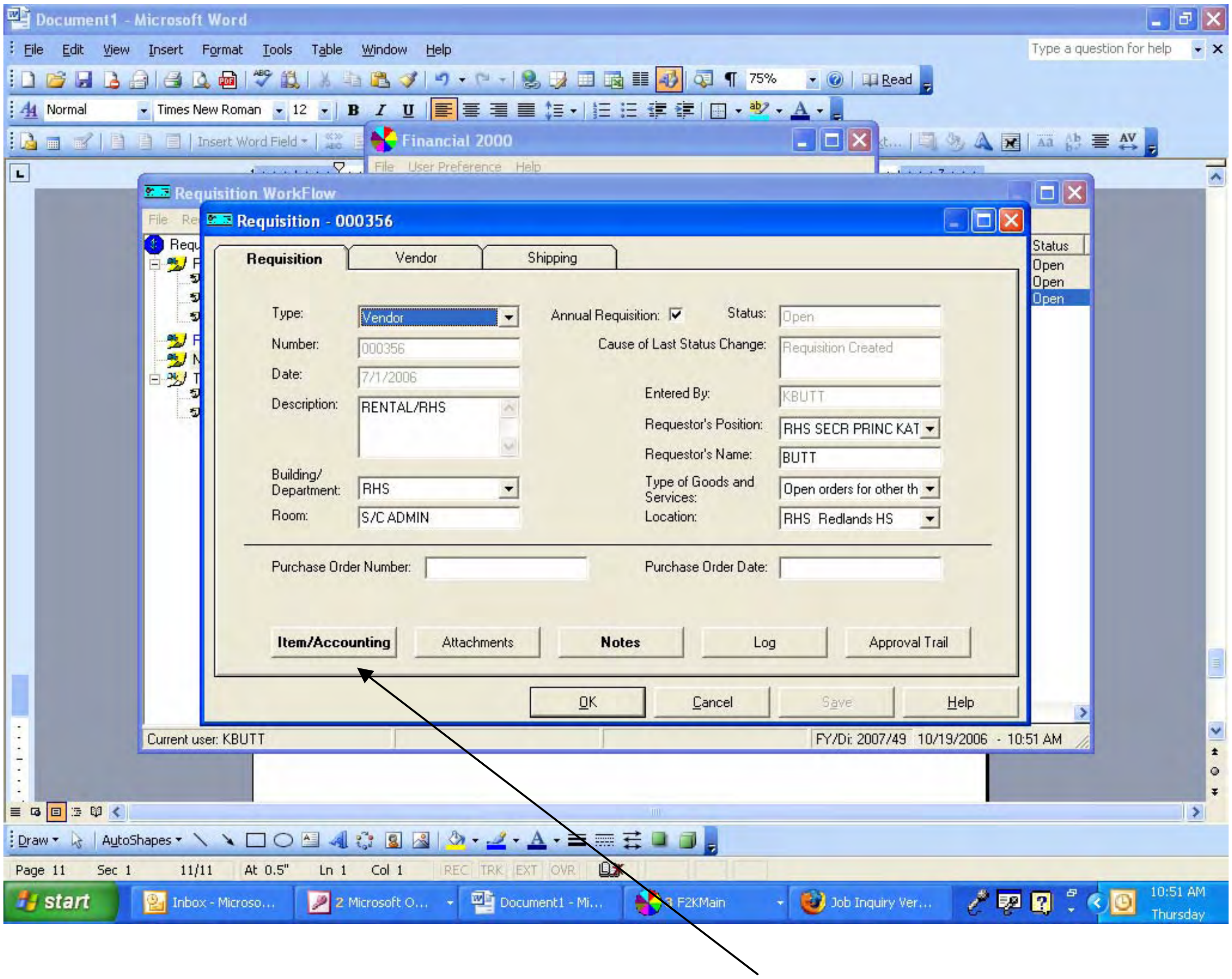
Begin typing your desired vendor in the Name field.
Click on Search.



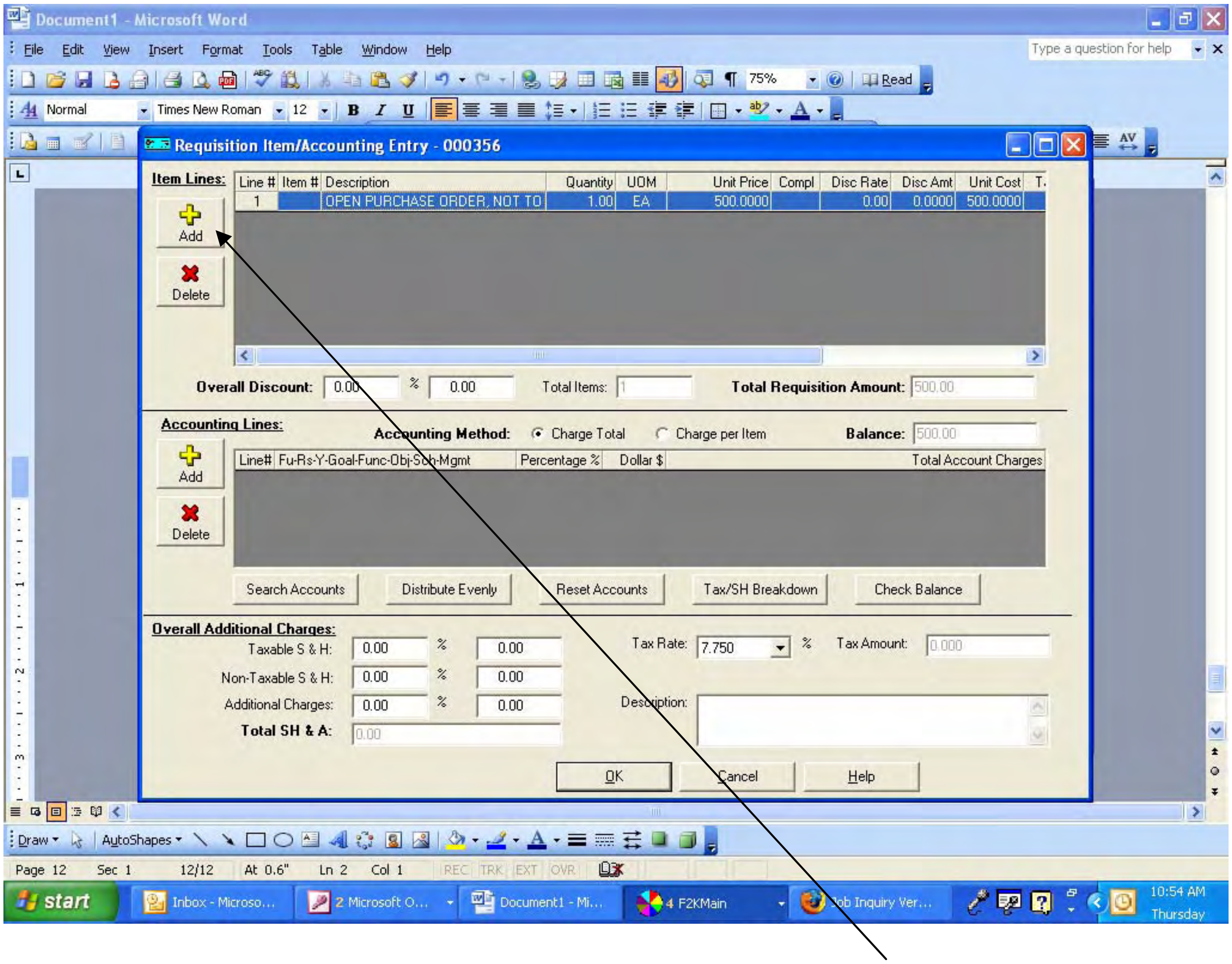
Choose the appropriate vendor from the list and click Select.
It is not necessary to type the entire name of the vendor in the search field. Most of the time a portion of the name is sufficient.
When you click select for your vendor, their information will default into the appropriate fields on the vendor tab.



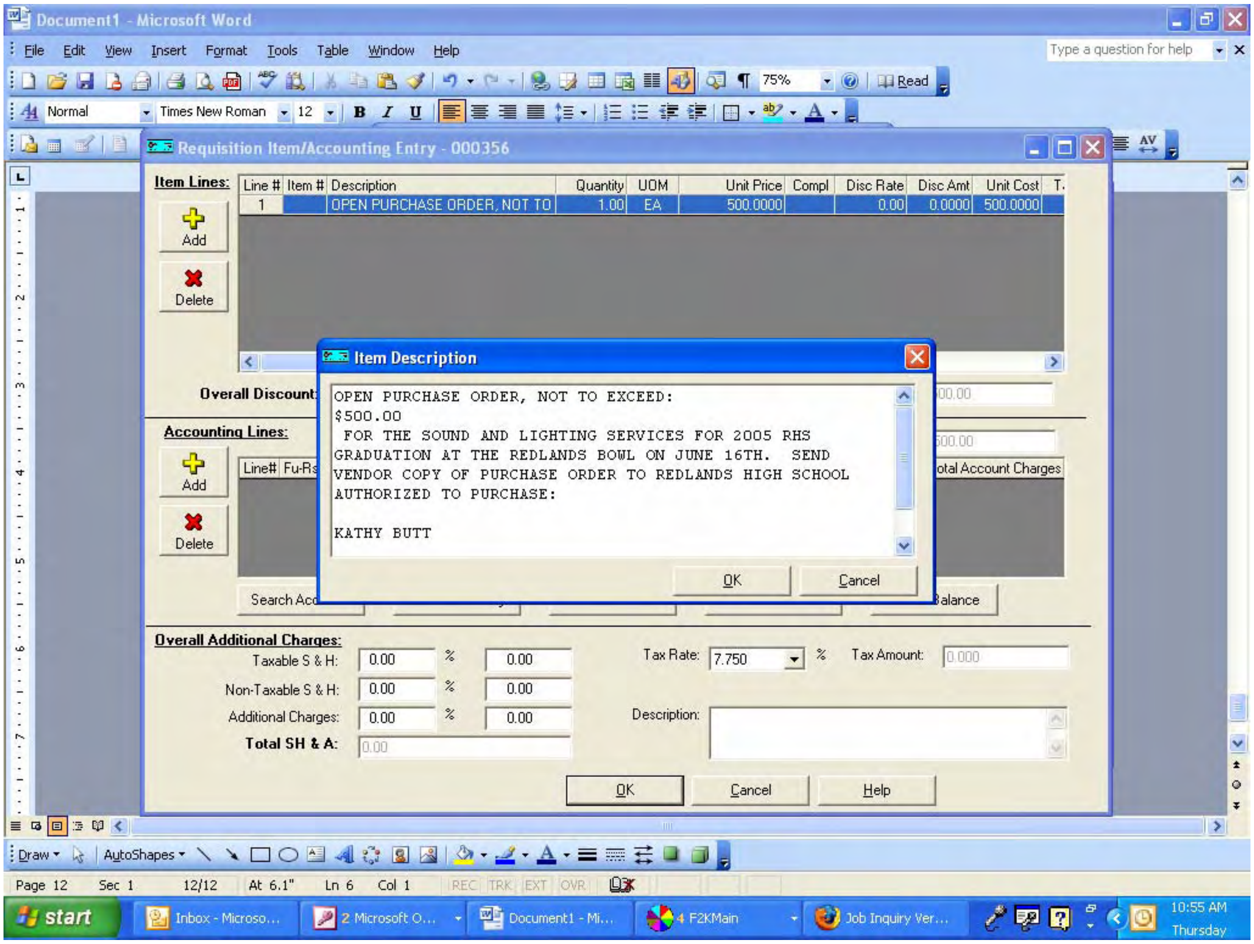
Now click on the Shipping Tab.
You don not need to do anything here.
I just thought you should see our warehouse information if defaulted for all deliveries.



Now go back to the main Requisition page and select Item/Accounting to begin placing your order.



To add a line item for ordering click on the Add button at the top left.



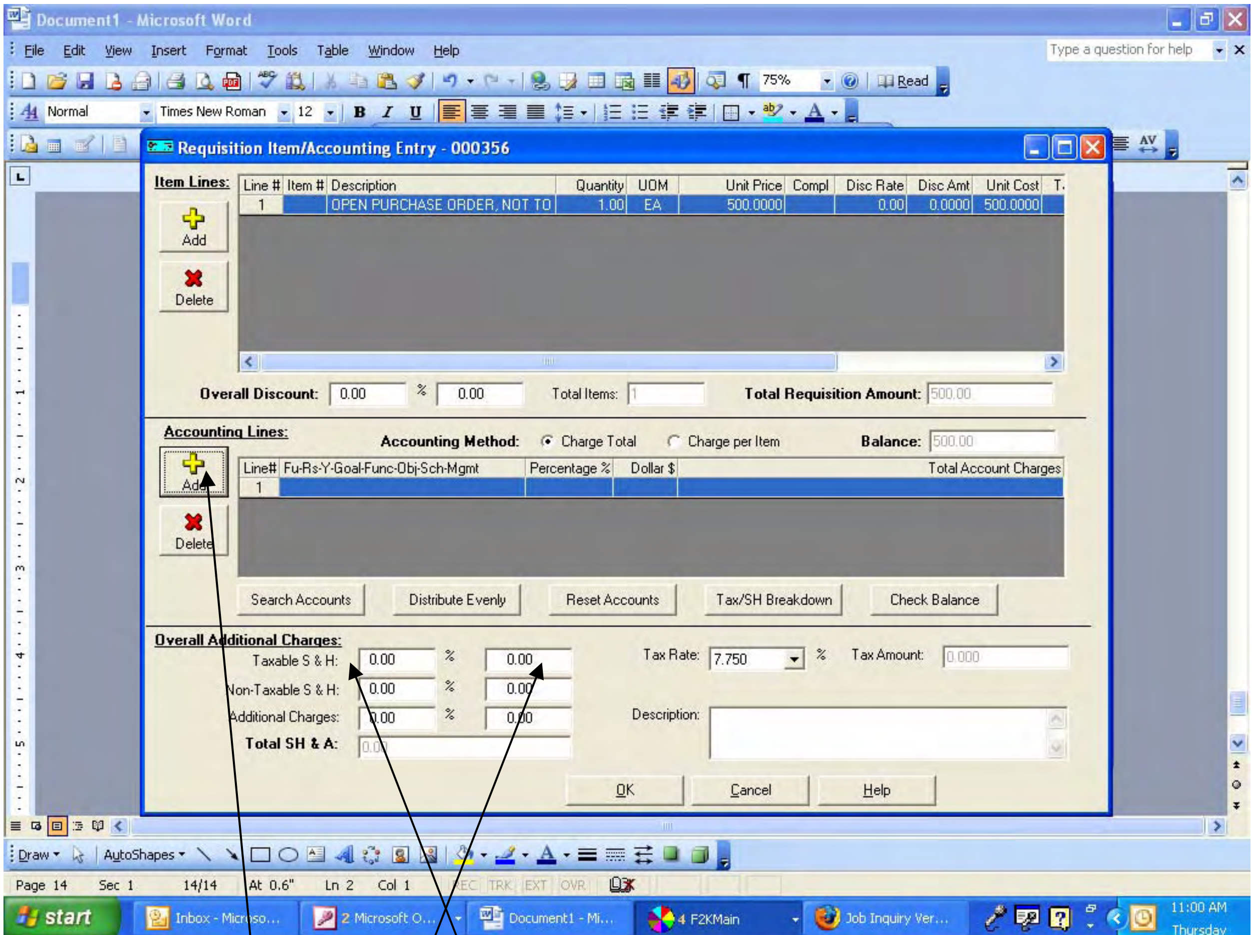
Click on the Description Field
In this box you will type the description of the item you are ordering.
For example:

CLAY ARTIC WHITE or

ITEM# 525-719 HP YELLOW INKJET CARTRIDGE

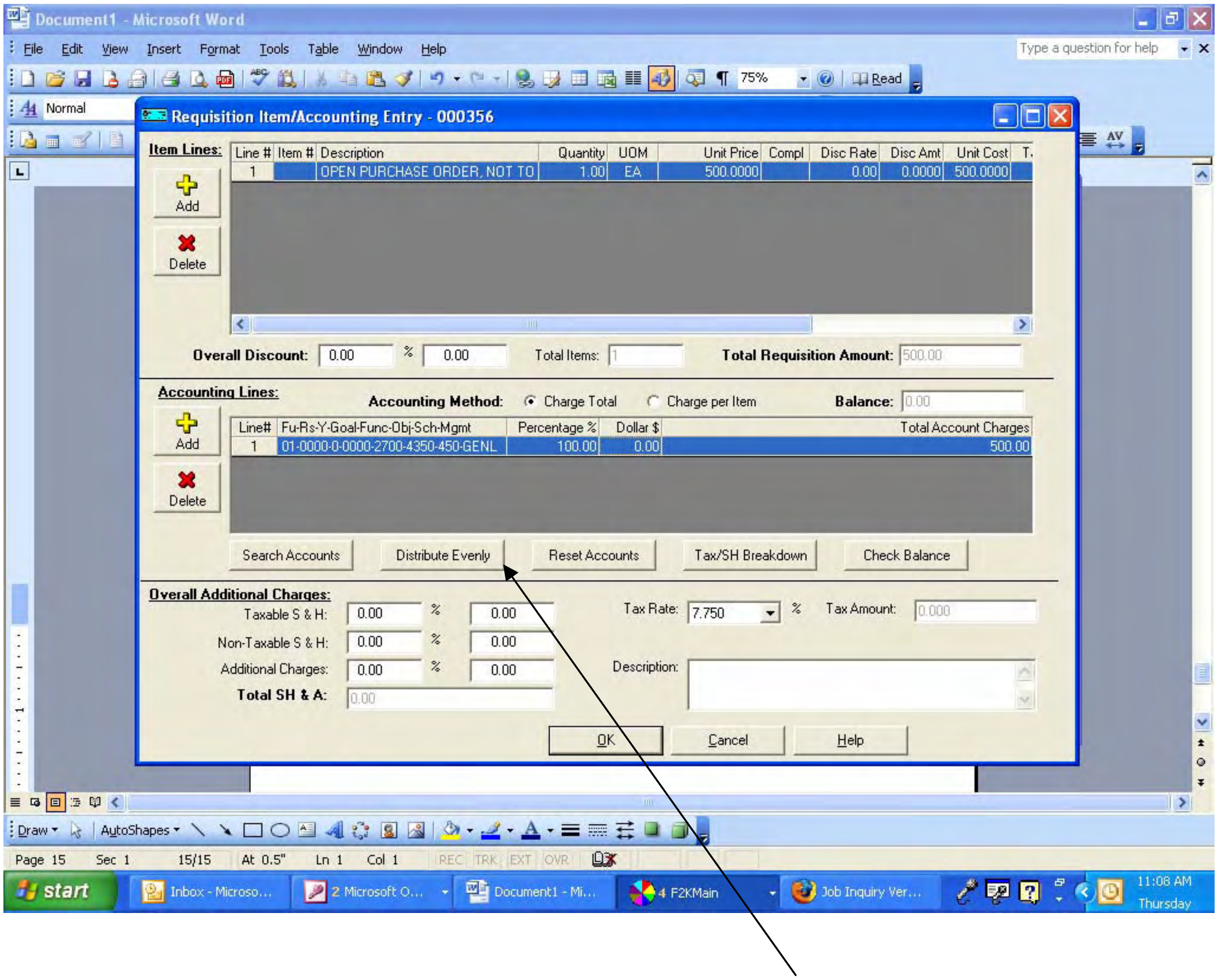
(Put as much information about the item and you can here.)
Click OK
Tab to the next field – Quantity. Enter the quantity of the item you are ordering.
Tab to the UOM (unit of measure) If you need to change this use the drag down arrow to locate the proper UOM for your order.
Tab to Unit Price. Enter the per item price here.
Tab to the tax field only if your item is free from tax. Here you may change to NTx by using the drag down arrow. If you are to pay tax you do not need to make any further changes on this line item.

If you have additional items to order just click the Add button for each line item.
When finished you are ready to enter the shipping and account number to be charged for your order.



Here is where you will enter your S&H charges. If you do not know the exact amount of shipping you will be charged then use the general rule of thumb of 10%. You can enter 10% in the left column. If you know the exact amount of your shipping you may enter the dollar amount in the right hand column.

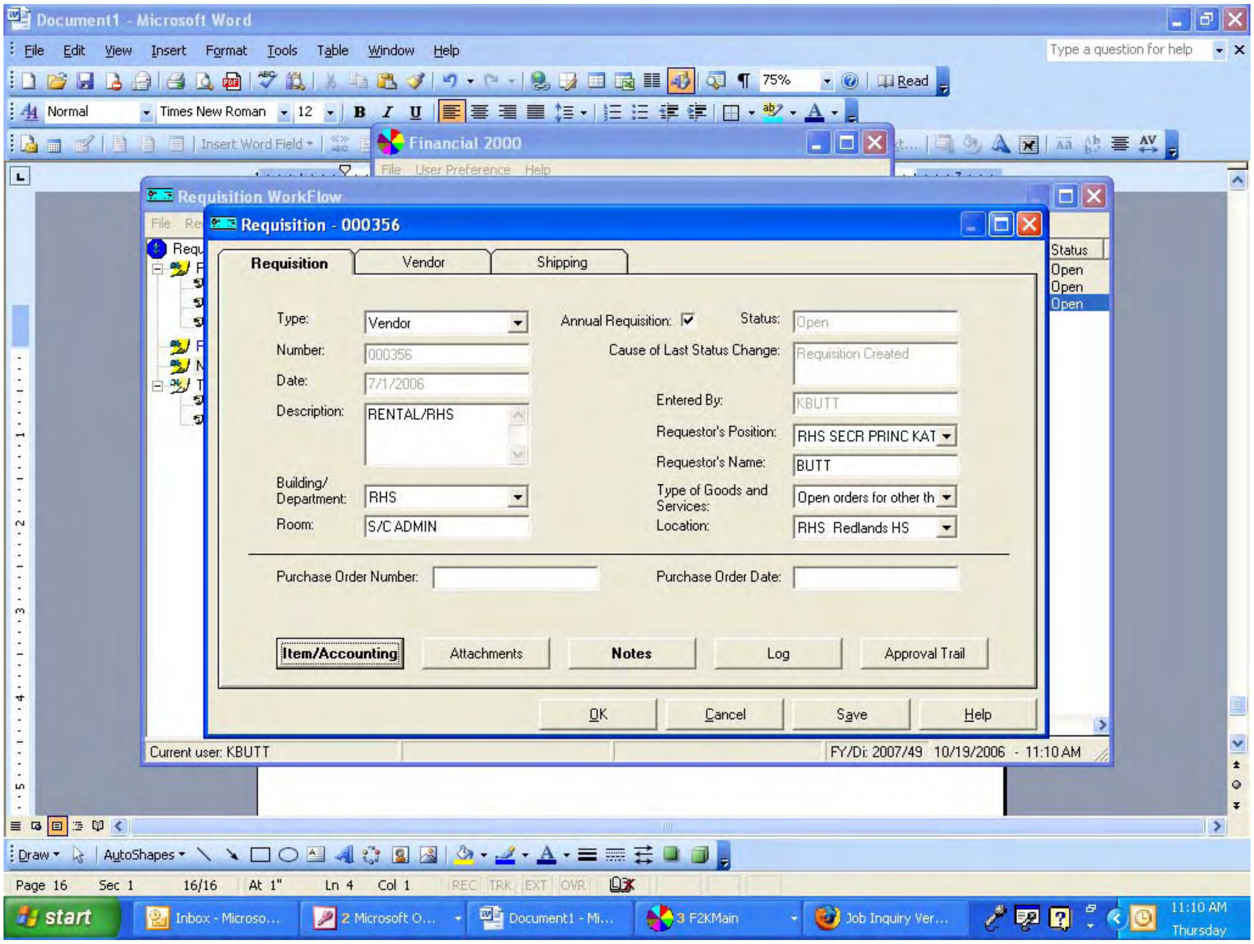
To add the account number you will use (your department budget number) click Add right under the Accounting Lines.
Place your cursor at the beginning of the line under the FU of the account number line.
Enter your 26 digit account number here. If you do not know your budget number, call me and I will give you the information for your department.
Tab to the percentage field. Enter 100% for the entire purchase to be paid from your account number.



After entering the account number you are ready to Distribute Evenly the balance due to the account number to be charged.

Click Distribute Evenly.

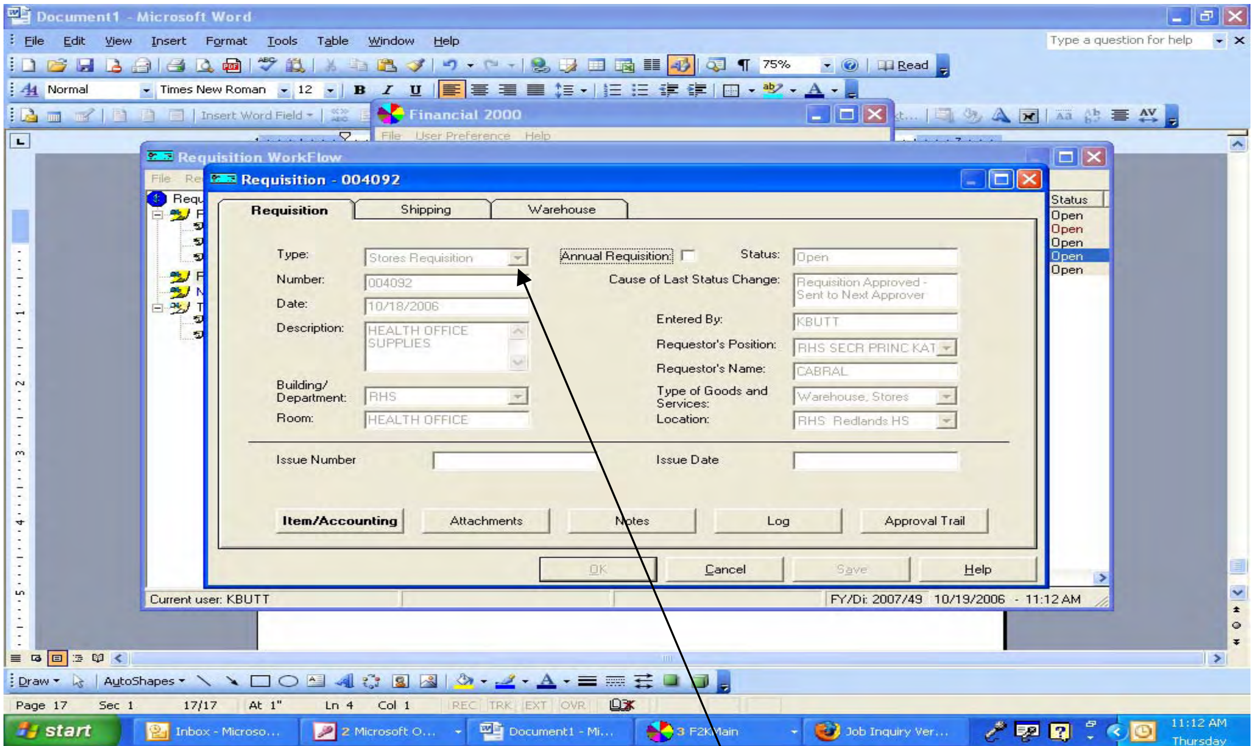
Click OK



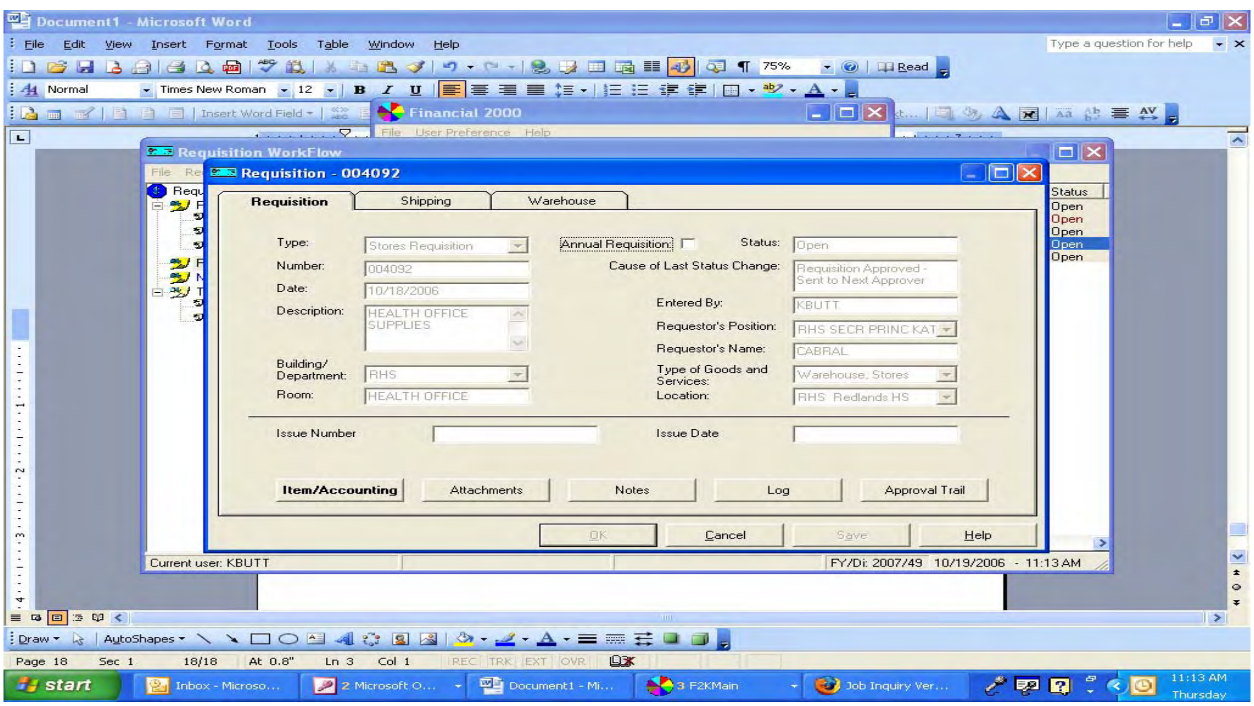
Now **<u>S A V E</u>** the requisition. If you do not save the req. you will be re-entering the information in the Item/Accounting window all over again.

You must always save the requisition after making any changes.

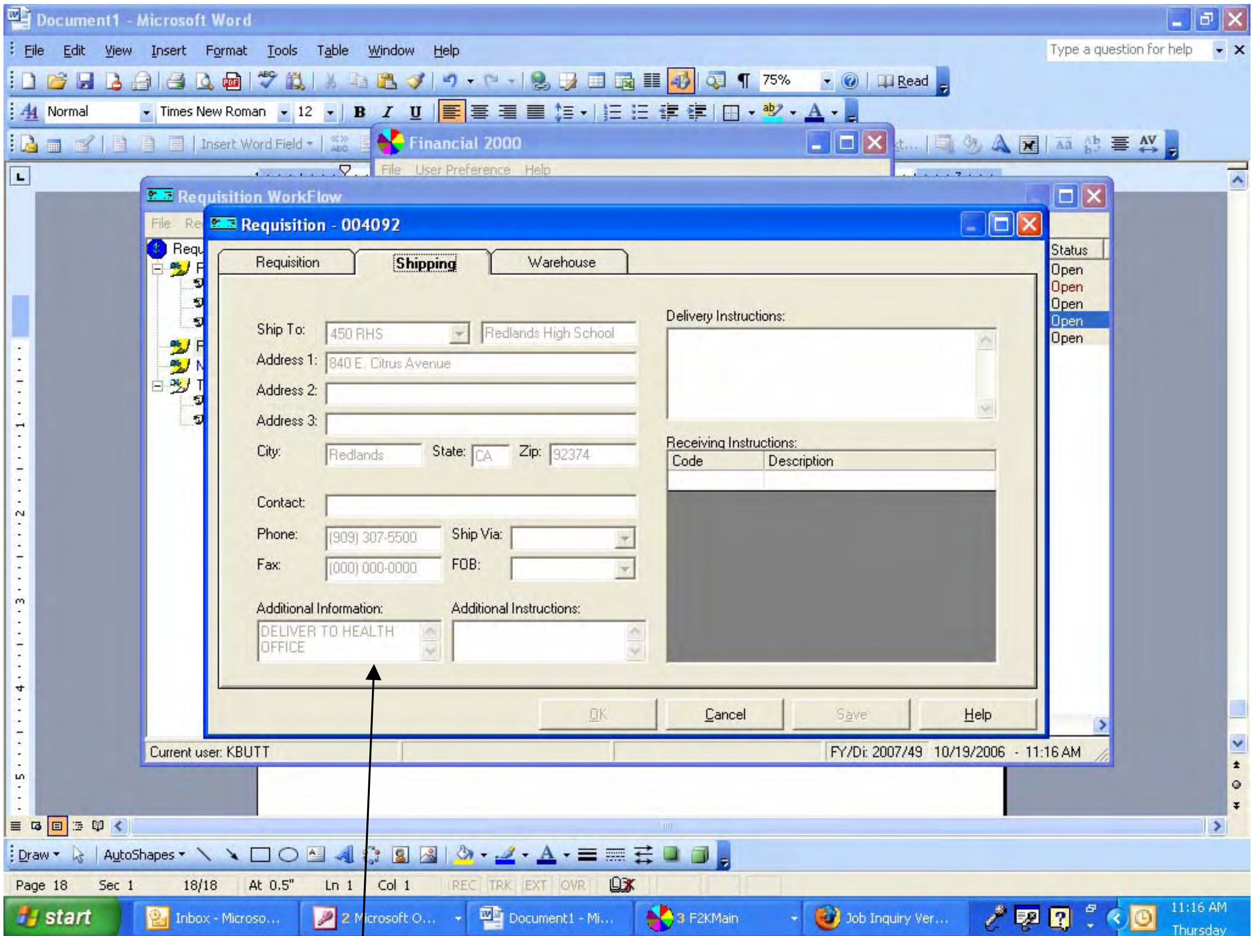
To create a Stores (warehouse) requisition, proceed to the next page for instruction.



To create a Stores Requisition you must change the Type of Requisition.
Click the drag down arrow to switch from Vendor to Stores.

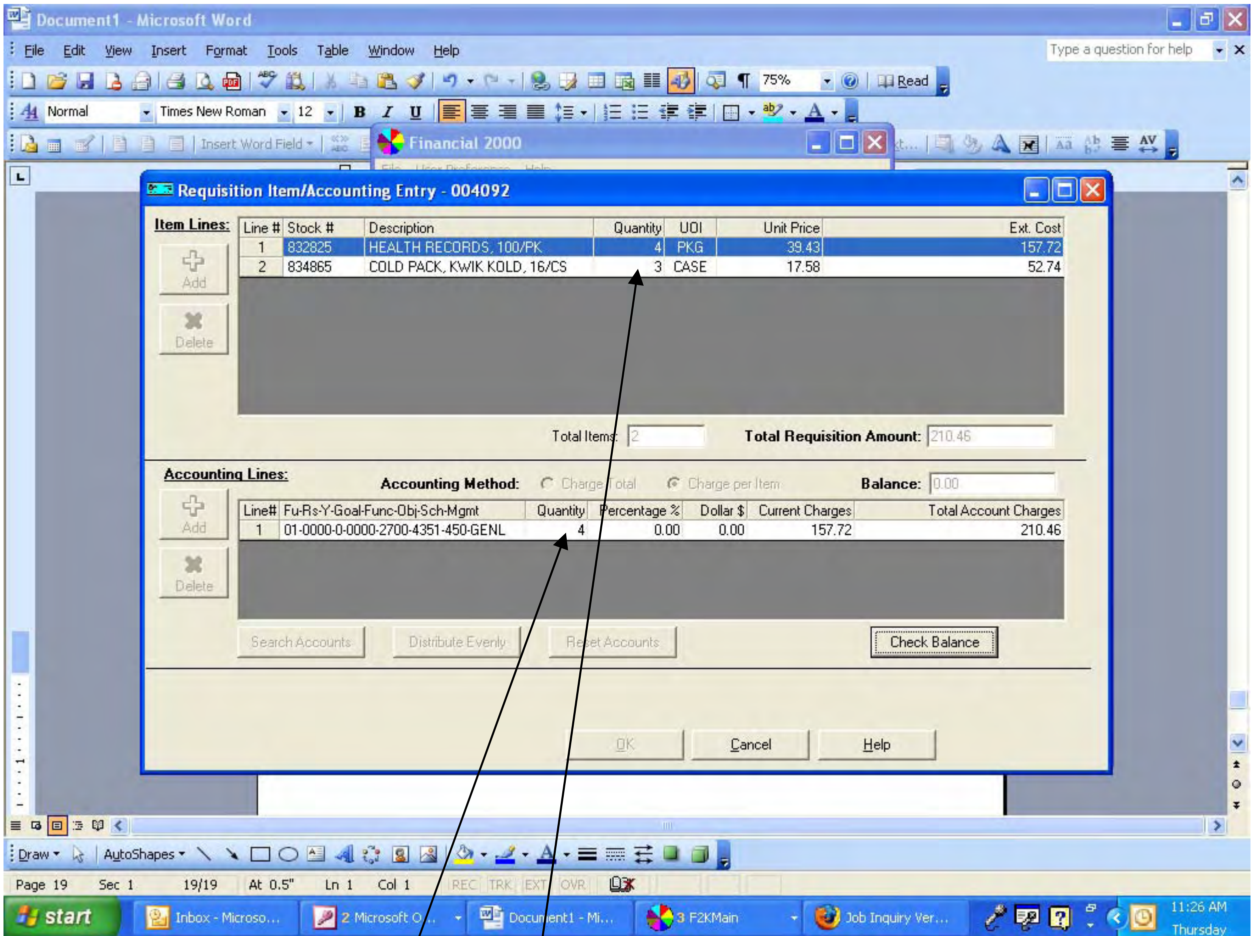


Follow the same instructions as the Vendor Req. to navigate through the fields here to complete this page for a Stores Requisition.



For a Stores Requisition the Shipping Tab tells our warehouse where to send your order. In the Ship To field you will enter **450** for our site (Redlands High School)
NOTE: If you enter the wrong site number your order will be shipped to the wrong place. It is very important that you double check to make sure you entered our site correctly.

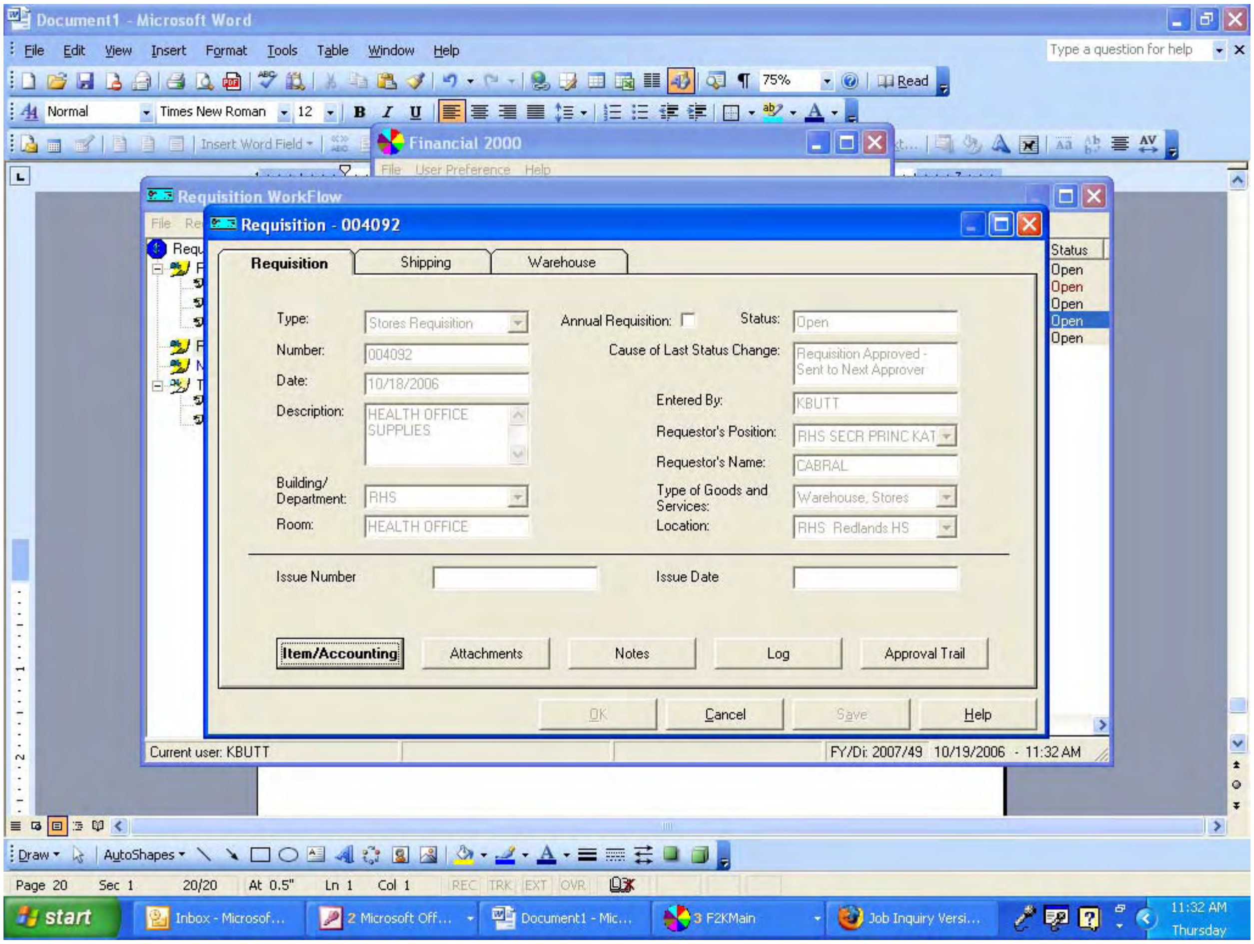
In the Additional Information field you **MUST** enter where you would like the warehouse to deliver your order. This is the only place on the requisition to enter the location and have it print on the warehouse packing slip. If you do not put your room number and south or north campus in this field you order will sit in the S/C administration workroom until you start looking for your order. If you do not put your room number here we do not know who placed the order.



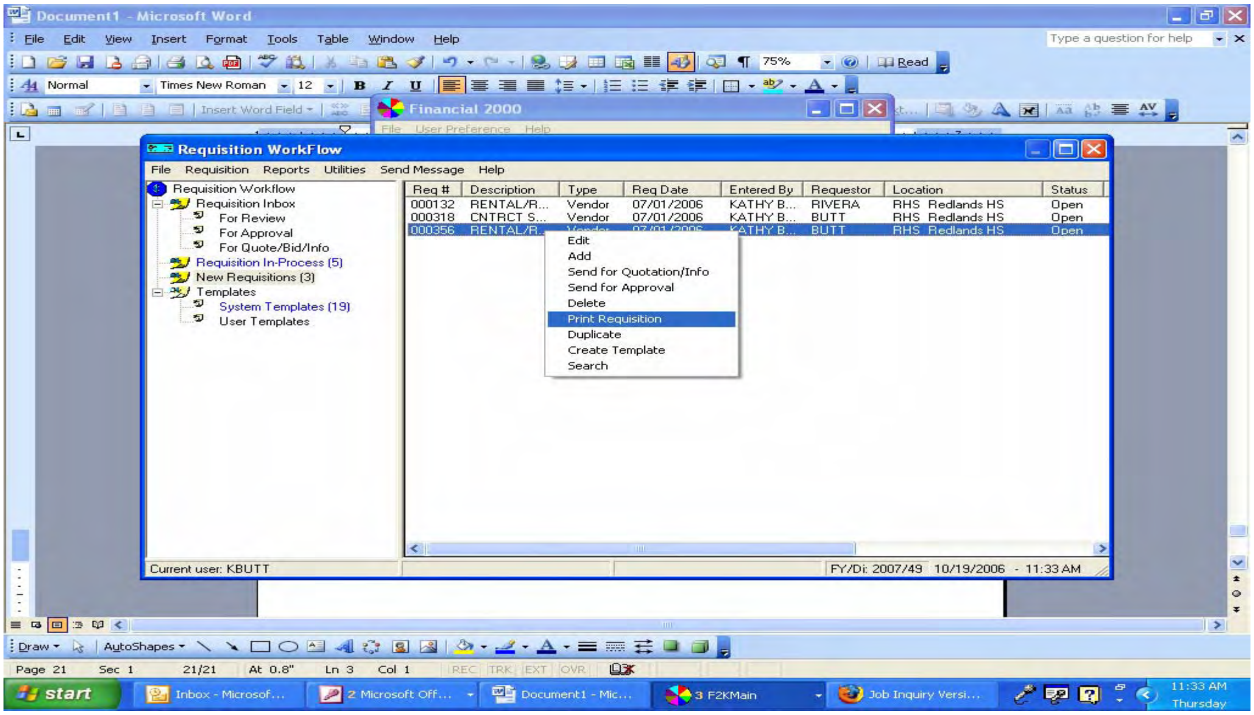
This is an example of a Stores order.
You will enter the stock number and tab to the additional fields.
Once you enter the quantity the system will default the current pricing.

ONE CATCH ON STORES ORDERS.
When entering your account number you MUST enter the quantity for each line item.
To do this you must click on the quantity field for each line item and enter the quantity in the account line quantity field. Once you have completed this you may click OK.

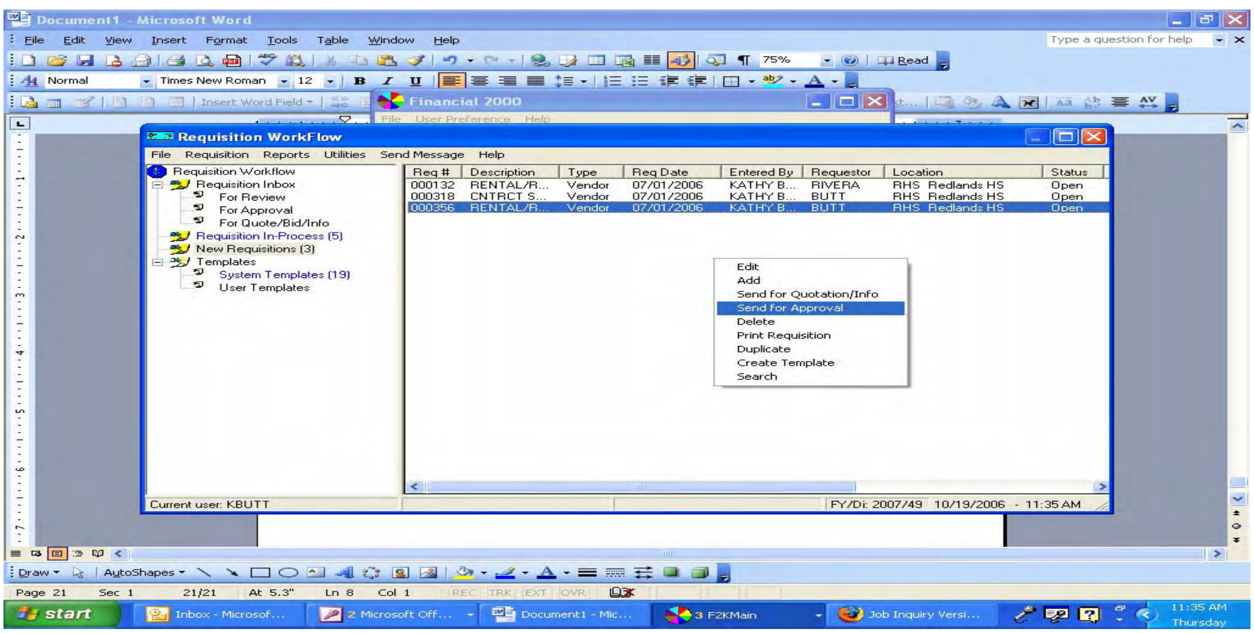
If you do not account for each line item, the system will tell you as you try to exit the screen.



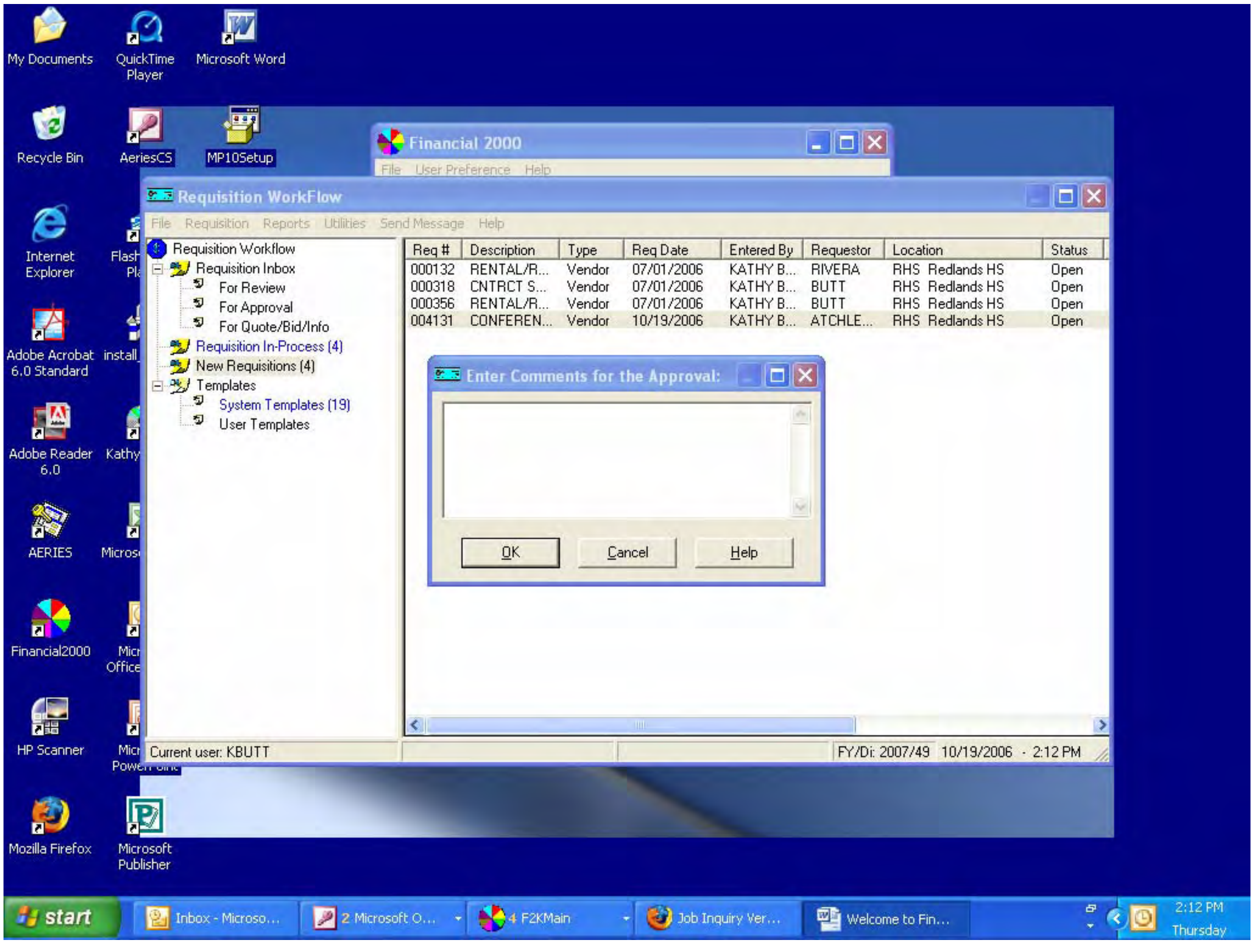
Again remember to **<u>S A V E</u>** your requisition before sending for approval.



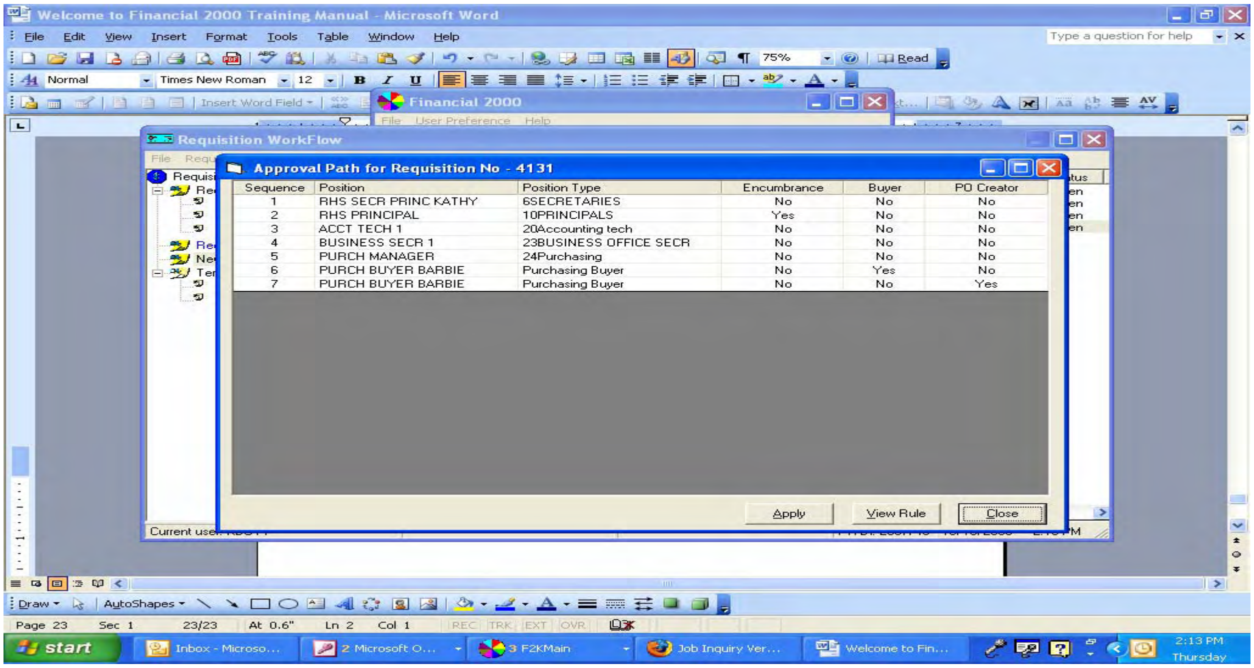
Before sending your requisition for approval you will want to print a copy for your records. To do this you will highlight the requisition in your New Requisition workflow. Right click and select Print Requisition.



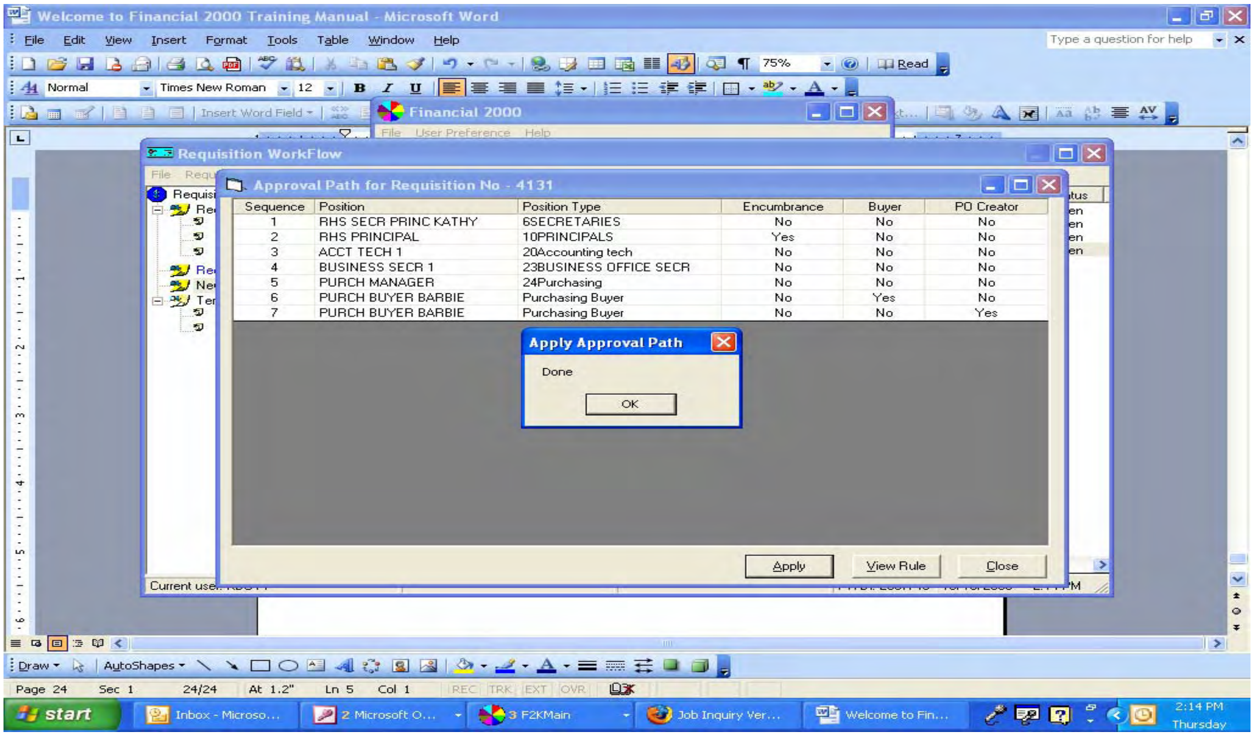
Now you are ready to send your req. for approval. Highlight the req. you wish to send for approval. Right click and select Send for Approval.



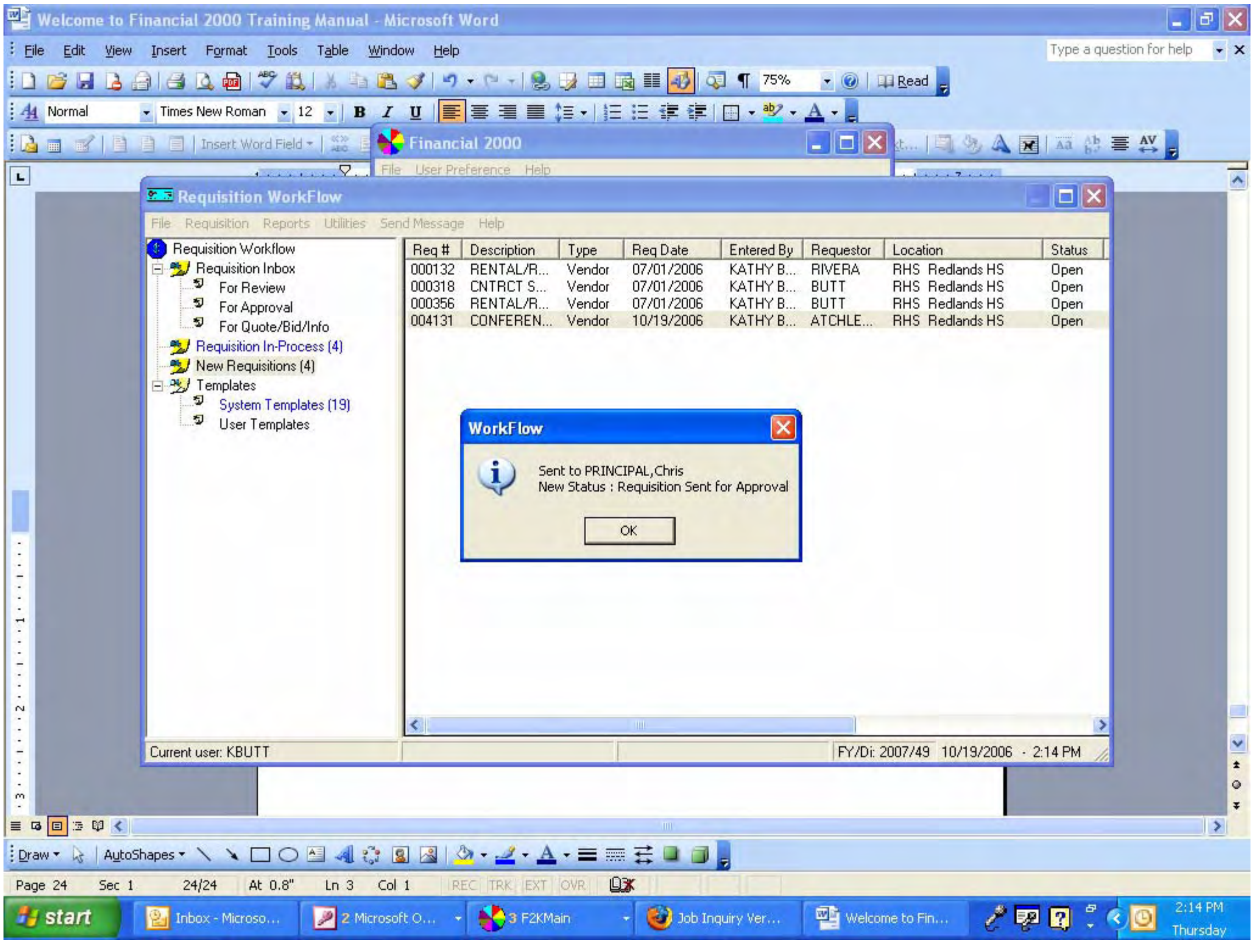
This box appears after you click send for approval.
Just click OK
You cannot enter any comments for the next approver because they do not see them so just leave this blank and click OK.



This window shows you the approval path the requisition will take.
Click Apply.
DO NOT ATTEMPT TO MAKE ANY CHANGES HERE.



Click OK



Click OK
Your requisition is now on its way to the principal's office.

Your new requisition will now move to your Requisition in Process workflow. You may view the approval path there.
If you highlight the requisition and right click then select View Approval Path you will see the word "yes". The requisition is in that person's approval workflow.

If you have a rush requisition, you may call each person on the approval path with the requisition number and request they approve and send the requisition forward.

ATTACHMENTS:
Any attachment you have regarding your order must be sent along the approval path to reach accounting and purchasing prior to your order being placed. Mark the attachment with your requisition number before sending.

KEEP COPIES FOR YOUR RECORDS.