v22.2 – 12/05/2022

Order Requisition Entry

The **Order Requisition Entry** webpage allows the user to create an electronic order request form for any active and viewable vendor in the district's customized list of SMART Finance vendors. Depending upon the user's security access, the SKU field, account code field and period field may not be visible. A requisition will be in not routed status until the creator routes it for processing. If these fields are NOT filled in, it will change to a routed status until an employee with a higher security access completes it. Once these fields are filled in the requisition will change to an open status. At an open status, the requisition can continue through the SMART eR approval process or be transferred to a purchase order depending on the district's setup.

Current Requisitions Tab

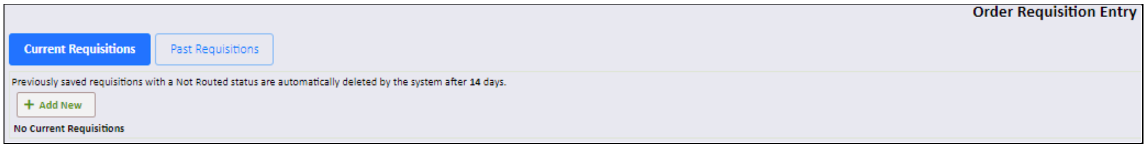
This tab will display active in process requisitions at a status of not routed, routed, validated/approved status. It will list requisitions in the requisition record number order and be filtered per your login User ID. If additional rights are permitted and the requisition approval process is not set, the page will automatically display requisitions built by this user and any user that needs finishing with data *(Status = Routed).* This tab will provide access to create a new requisition, edit an existing requisition or change the status on the requisition.

Definitions of requisition status

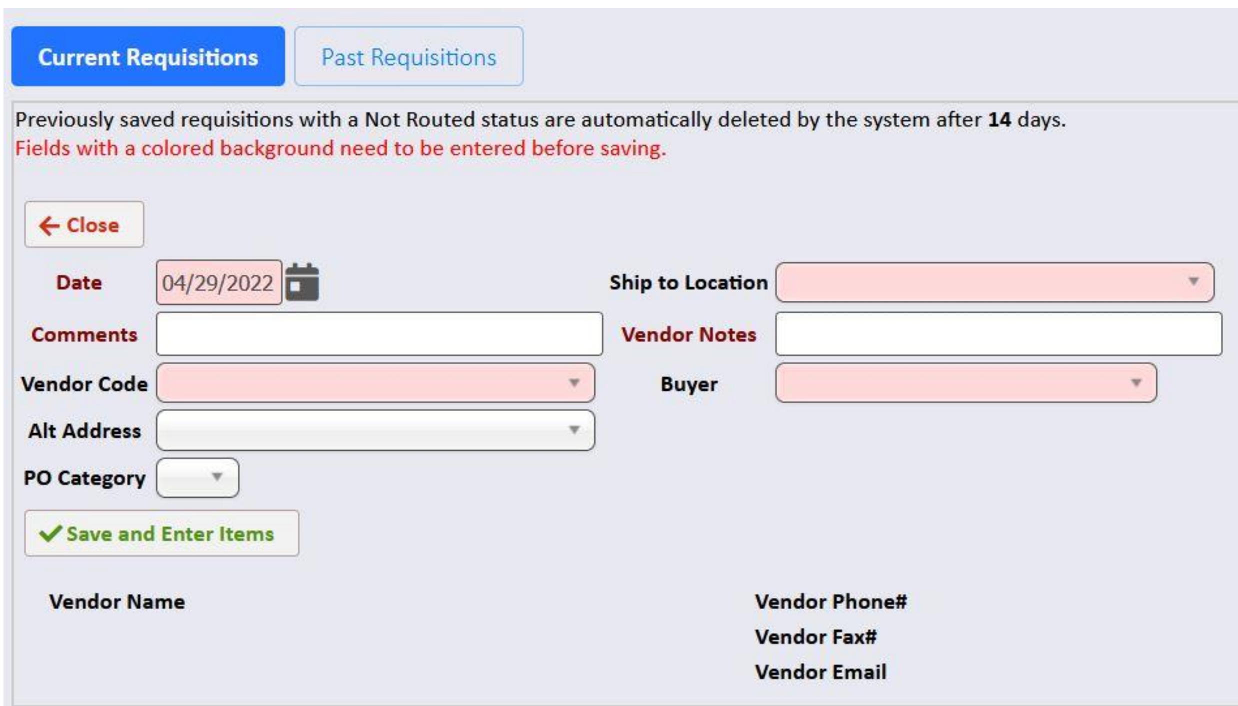
- **Not Routed** means the requisition has been entered by a user but it may not be finished for all required data.
- **Routed** means the requisition has been entered by a user and sent to an approver. The requisition is not finished for all required data.
- **Validated** means the requisition has been entered by a user and sent to an approver. The requisition has all the required data validated.
- **Approved** means the requisition has been entered by a user and finished the approval process. All the required data has been validated and the requisition can be transferred to a purchase order.
- **Completed** means the requisition has been entered by a user, finished the approval process and transferred to a purchase order record. In the approval process, it can also be a requisition that was denied. In the non-approval process, a requisition can be set to a completed status by a user with higher security rights.
- **Status changes in a non-approval setup:** Not Routed, Routed, Approved, Completed
- **Status changes in an approval setup:** Not Routed, Routed, Validated, Approved, Completed

Add a Requisition Row

1. If there are no requisitions to proof or user has not enter one, it will look like the following:

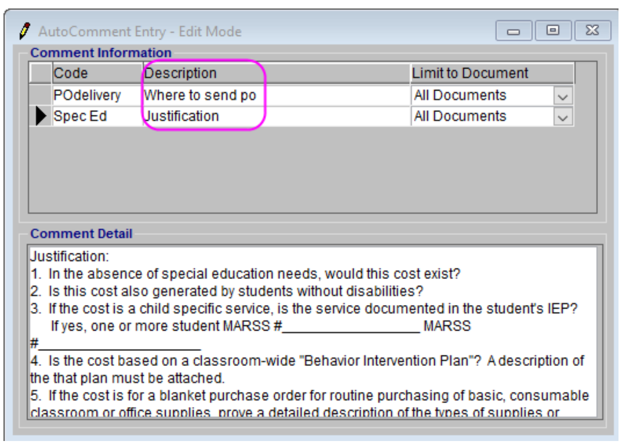


2. To add a requisition, click on the + Add New button.



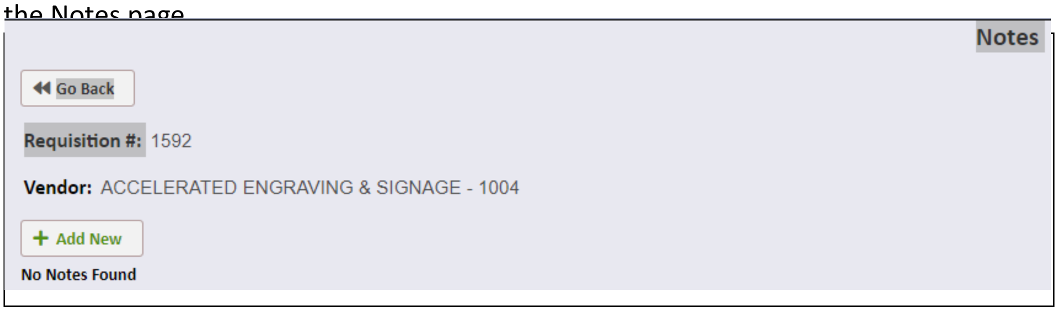
3. **Date.** Defaults to today's date. Another date can be keyed or selected from the drop-down calendar. Enter the date the item(s) is needed. *This is a required field.*
4. **Comments.** This is an optional field. Enter other pertinent information such as fax number, if incorrect or not listed with the Vendor information below, Grade/Subject, Requester will pick up or call order in. Could also be used as ATTN line or information for the Business Office. This line appears directly below the Ship-To Address information on the purchase order.
5. **Vendor Code.** This is a required field.

6. **Alt Address.** If there is an alternate vendor address, enter the Address Code or select from the list.
7. **PO Category.** Not required.
8. **Ship to Location.** It will automatically pre-populate with the user's assigned ship to location if it is setup in Permissions. Use the drop-down list box to select the **Ship to Location**. This is a required field.
9. **Vendor Notes.** This is an optional field. Enter any comments for the vendor that may be necessary. The Vendor Notes would be used for any information that the user would like printed on a Purchase Order in SMART Finance. Start typing a portion of an auto comment description for a short auto comment to appear, if known. This auto comment description will be used to obtain the auto comment detail to be placed on the purchase order comment tab when the purchase order is created.
   Example: *The auto comment description of 'Justification' would be entered/selected on the SMART eR Requisition Vendor Notes field. When the PO record is created, the PO comments tab would contain the auto comment detail that starts with the title of Justification and a numbered list.*

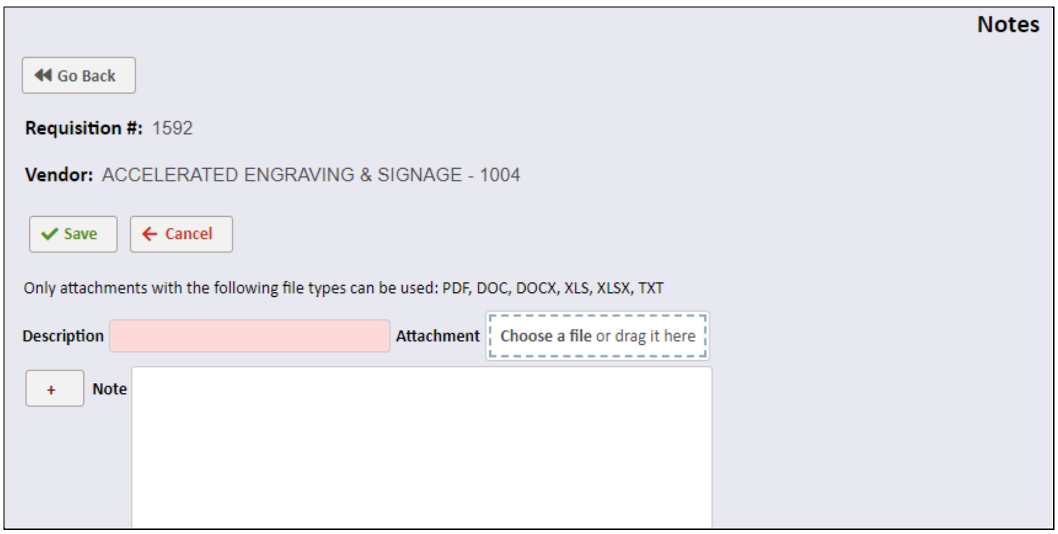


10. **Buyer.** This field will automatically pre-populate with the user's assigned buyer if it is setup in SMART HR or can be selected using the drop-down list box. This is a required field.
11. Click on the ✔ Save and Enter Items button to create the requisition entry.
12. This opens up the detail window for the requisition.

a. **Add/Maintain Notes.** This is optional. Click on the Add/Maintain Notes button the bring up the Notes page.



b. Click on the Add New button to add a note and/or a file attachment that may assist with processing the requisition.



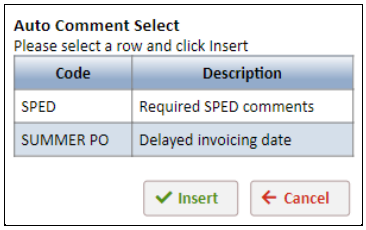
c. **Description.** Enter a description for this note. This is a required field.

d. **Attachment.** Click the Choose a file or drag it here button to browse for a file to attach or drag and drop the file on the Choose a file or drag it here button.

e. **Note.** The note area is for typing any other information that would help with processing this requisition.

f. Click the + sign to the left of the note area to view the Auto Comment Select box for summarized autocomments setup in SMART Finance (All documents, requisition and purchase order).

   i. Autocomments are displayed if they are setup.



1. Highlight a row and click on the Insert button to select the autocomment to populate the Note.
2. Click on Cancel to return to the Notes page.

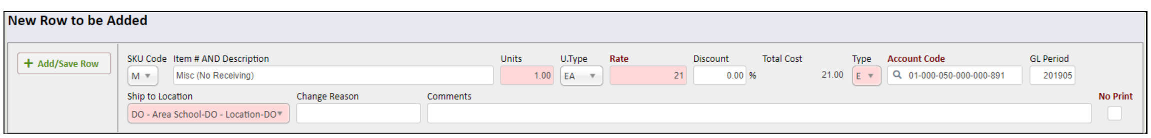
g. The **Note** area can be expanded for view by dragging the lower left corner area in some browsers.

h. Click on the Save button when finished making changes.

i. To add another note or attachment click on the Add New button.

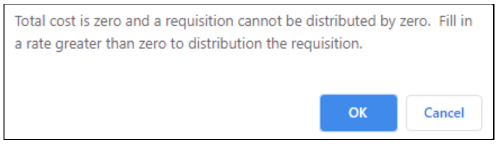
j. If Notes are complete, click on the Go Back button to exit the Notes page and return to the **Order Requisition Entry** page.

13. The Add/Maintain Notes button is now highlighted yellow to indicate to the user that notes have been entered.
14. Click on the Save button to save the vendor information.
15. Click on the Edit button to review or enter detail for the requisition.



Note: *The field description headings display in red. Hover with the cursor over the field description to view details of what should be entered into each field.*

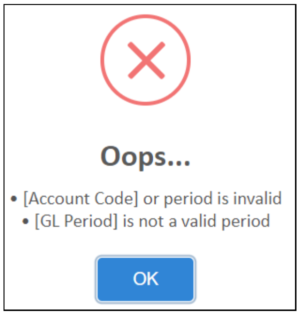
16. **SKU Code.** This is optional field. It is used for entry with a 'Not Routed' status requisition.
17. **Item# and Description**. Enter the catalog number and the item description.
18. **Units.** Enter the number of units. This is a required field.
19. **U. Type**: Unit Type will default to EA (each). Use the drop-down list box to change the selection if required.
20. **Rate**. Enter the rate per unit. Do not use commas in the entry. This is a required field.
21. **Discount.** This is not a required field. Enter the discount percentage if it applies. The field allows up to 7 digits such as 00.0000% or 000.000%.
22. **Total Cost.** The system will automatically calculate the **Total Cost** per row and the **Requisition Total**.



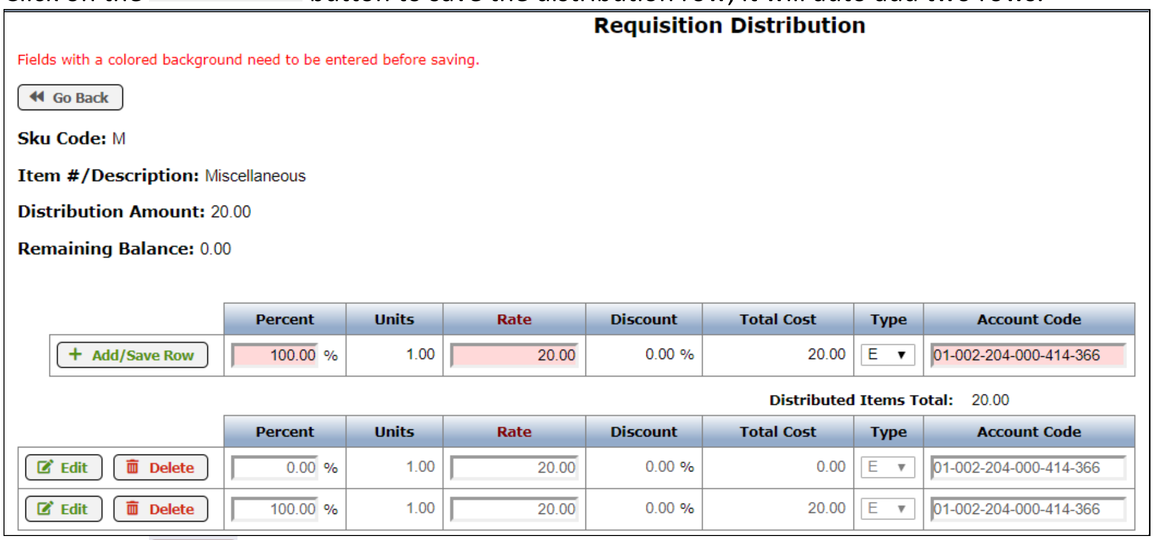
***Note**: If any of the detail rows are left as zero units, the detail row will not transfer to the purchase order.*

If the district needs to type a message to the vendor, enter in 1.00 unit at 0.00 rate to denote these for shipping or promotional items in the description field.

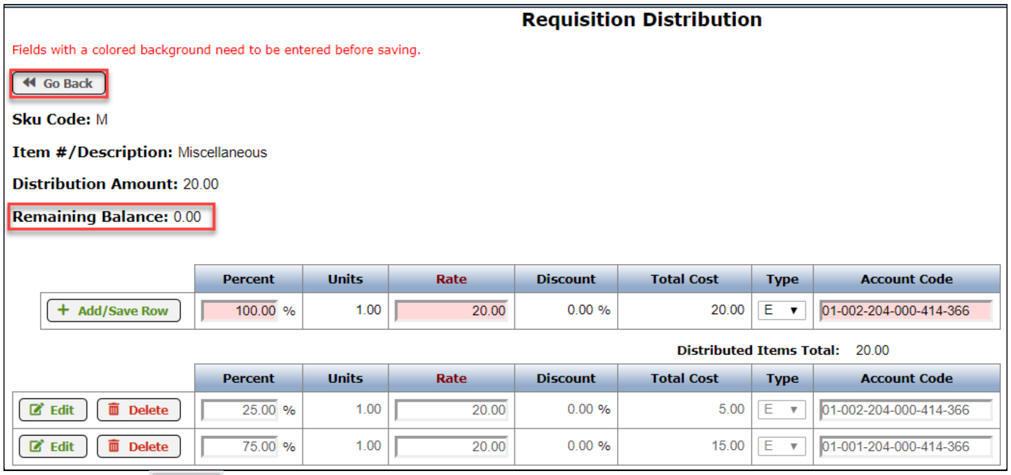
23. **Account Code.** Enter the 17-digit account code if known. This is an optional field.
    a. Enter 17-digits; do not enter any dashes or user will be prompted with an invalid format error. Otherwise, begin by keying in the fund.
    b. The first 5 relevant account codes in the user's permission range will be listed *(or less if they don't have access to 5 codes).* As you key more, the list will be refined.
    c. The account code description from the Finance Chart of Account record will display below the field. The description field can only hold so many characters so if this description is cut off, hover over the description to see the full account code description.
24. **Period.** If displayed, the period should default in based on the **Date Required** entered previously.
25. **Ship to Location.** Defaults to user's default if it is setup in SMART HR. User can select from the drop-down list box if required. This is a required field.
26. **Change reason.** This field is available to PO/POADMIN users to make a note on a detail line about why they a row has been changed so the original requester can see why or what happened.
27. **Comments.** This is an optional field. Enter any comments necessary for this row by clicking on the button to the right of the Add/Save Row button. These detailed comments will print on the **Purchase Order** form.
28. **Do Not Pay** is optional for selection. Check this box to have the detail row not transfer to the purchase order.
29. **No Print** is optional for selection. Check this box to have the detail line display on the purchase order but it will not be printed or emailed to the vendor.
30. **Dist button.** To distribute the amount to multiple account codes, click on the Dist button at the left side of the page. This will bring up the **Requisition Distribution** page.
    a. If user forgets to enter units, rate, account code or GL Period, the user is prompted with the 'Oops' message box.

b. 

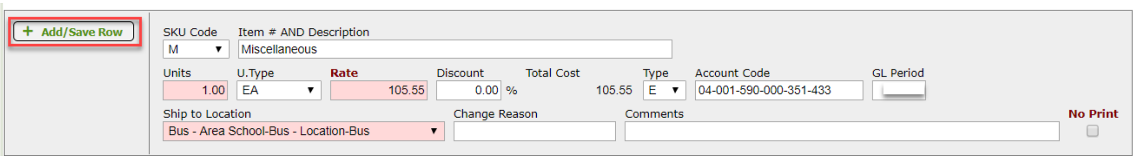
31. Click on the Add/Save Row button to save the distribution row, it will auto add two rows.



32. Click on the Edit button to modify the row that is at a total cost of 0.00.
33. Repeat the process by clicking on the Add/Save Row button to add and save any additional rows until the Remaining Balance is 0.00.
34. Click on the Go Back button at the top left to return to the **Requisition Entry** page. The Distributed rows will auto appear at the bottom half of the Requisition Entry page and the Dist button now will highlight in blue Dist to indicate there are distribution rows.

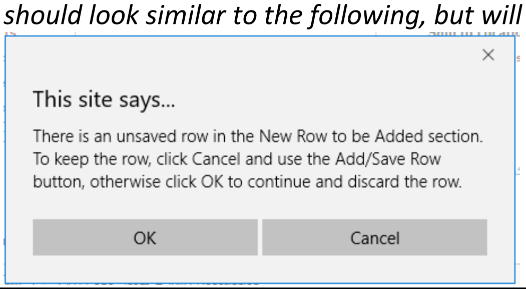


35. Click on the Save button to save the detail of the requisition. The saved row will move to the bottom portion of the webpage and highlight in yellow to indicate it is overbudget. If another row of detail is needed, enter the data on the Add/Save Row line. Continue to add rows as needed.

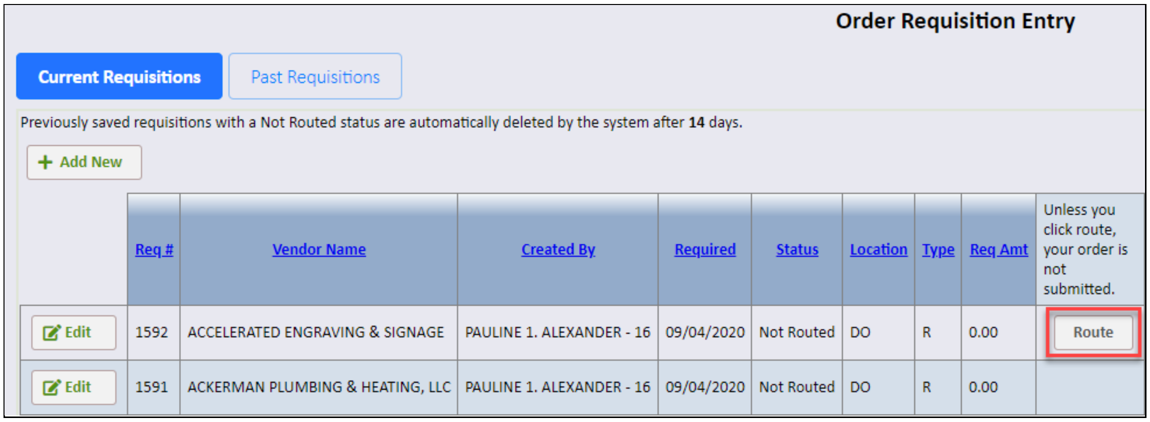


36. When finished adding detail rows, click the Save button at the top of the page to return back to the list of requisitions under the **Current Requisition** tab.

Note: *If the page finds a row that has been started, but not saved a warning will display (it should look similar to the following, but will depend on the browser being used. This is Edge.)*



37. The requisitions can be edited as many times as needed if they have not been routed. Click on the Route button if you are finished with the requisition to send it to be validated and processed.



Order Requisition Entry

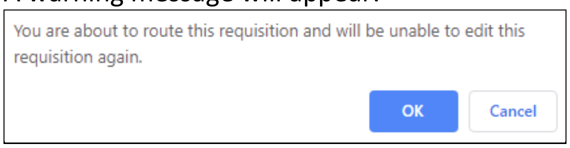
Current Requisitions | Past Requisitions

Previously saved requisitions with a Not Routed status are automatically deleted by the system after **14** days.

+ Add New

	Req #	Vendor Name	Created By	Required	Status	Location	Type	Req Amt	Unless you click route, your order is not submitted.
Edit	1592	ACCELERATED ENGRAVING & SIGNAGE	PAULINE 1. ALEXANDER - 16	09/04/2020	Not Routed	DO	R	0.00	Route
Edit	1591	ACKERMAN PLUMBING & HEATING, LLC	PAULINE 1. ALEXANDER - 16	09/04/2020	Not Routed	DO	R	0.00	

38. A warning message will appear:



39. Click **Ok** to continue or **Cancel** to go back to the list.

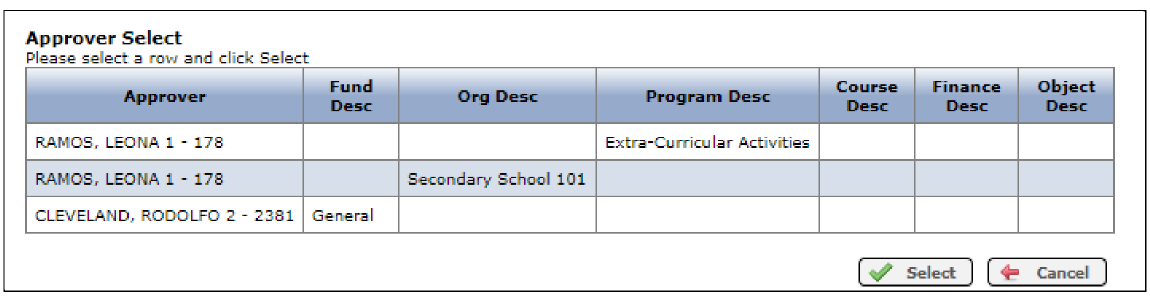
Note: *If a person has POADMIN role on a district not using routing/approvals, this person will be required to fill in the account code information prior to clicking the Route button.*

40. If the district is requiring account codes to be entered, this message may appear. The system will not allow the requisition to continue in the process until the account code(s) are entered on the requisition.

Please Correct the following errors or else this page will NOT save.

- Account code(s) are required on this requisition to proceed in the route process.

Note: *If a person has more than one supervisor OR if a supervisor is in charge of more than one building, a message will open asking the user to choose which one to route to:*



Approver Select

Please select a row and click Select

Approver	Fund Desc	Org Desc	Program Desc	Course Desc	Finance Desc	Object Desc
RAMOS, LEONA 1 - 178			Extra-Curricular Activities			
RAMOS, LEONA 1 - 178		Secondary School 101				
CLEVELAND, RODOLFO 2 - 2381	General					

Select | Cancel

41. The order will move to either a Routed or Validated Status for further processing and will only be viewable from that point forward *(unless you have additional credentials that allow for validating or approval and are not using routing and approvals).*

	Req #	Vendor Name	Created By	Required	Status	Location	Type	Req Amt	Unless you click route, your order is not submitted.
View	29603	QUILL CORPORATION	ADRIENNE 4. WEBSTER - 458	10/19/2019	Validated	300	R	34.00	
View	29602	TERI STATON	ADRIENNE 4. WEBSTER - 458	10/19/2019	Routed	100	R	823.00	
View	29599	A WISH COME TRUE	ADRIENNE 4. WEBSTER - 458	10/16/2019	Validated	100	R	65.22	

***Note:** For someone with additional credentials and NOT using approvals, the list will display your own requisitions as well as anything in a Routed status.*

Once they are in an Approved status, they will not show in the listing. If for some reason, they need to be accessed – click on the checkbox next to 'Include all Routed and Approved Reqs'. That will include them in the listing. They will not be in the list if they include some/all transferred requisition detail lines.

Current Requisitions | Past Requisitions

Previously saved requisitions with a Not Routed status are automatically deleted by the system after **14** days.

+ Add New ☑ Include Routed/Approved Reqs

	Req #	Vendor Name	Created By	Required	Status	Location	Type	Req Amt	Unless you click route, your order is not submitted.
Edit	1002	ABC SCHOOL SUPPLY INC	MATHEW 3. POWELL - 316	10/19/2019	Approved	Admin	R	65.00	
Edit	1001	A-Z RESTAURANT EQUIP CO	MATHEW 3. POWELL - 316	10/19/2019	Routed	Bus	R	213.55	

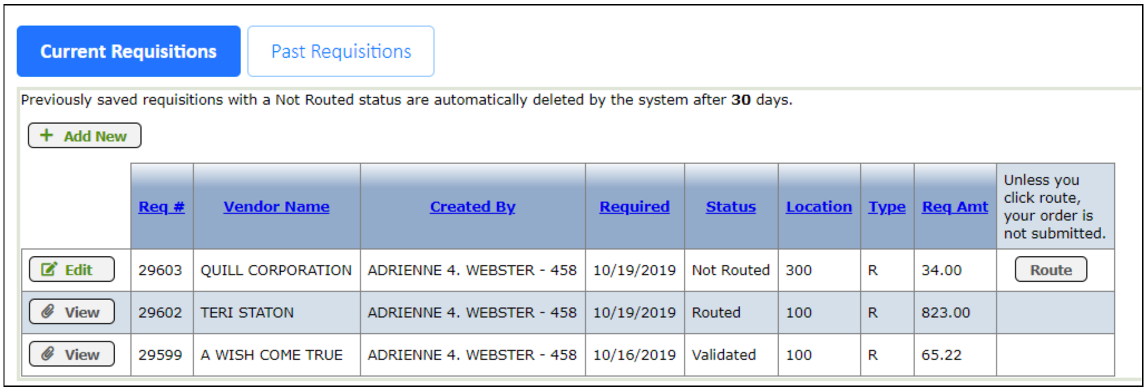
42. To place another order, repeat the above steps. Otherwise click the **Logout** link in the top right corner under your logged in name.
43. If using Approvals *(and if they have an email setup in SMART HR*), a notification will be sent overnight to tell them they have something to approve in case they didn't see it in SMART eR.

Requisitions are ready for approval.

Requisitions were entered and need to be approved. Please log into SMART eR to Responsibilities|Approvals to process them.

This is a non-monitored email account. Please do not reply to this account.

Edit a Requisition Row



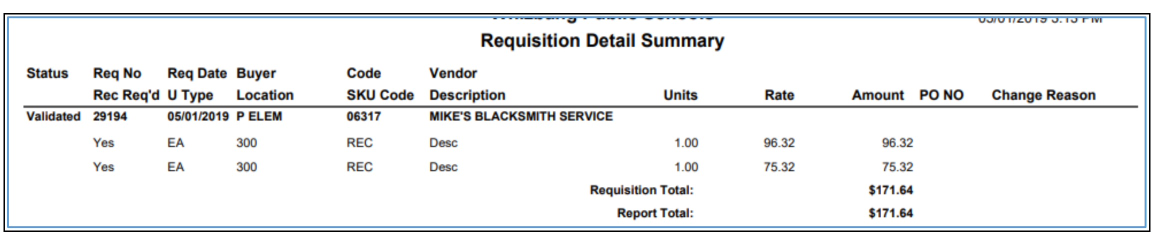
Current Requisitions | Past Requisitions

Previously saved requisitions with a Not Routed status are automatically deleted by the system after **30** days.

+ Add New

	Req #	Vendor Name	Created By	Required	Status	Location	Type	Req Amt	Unless you click route, your order is not submitted.
Edit	29603	QUILL CORPORATION	ADRIENNE 4. WEBSTER - 458	10/19/2019	Not Routed	300	R	34.00	Route
View	29602	TERI STATON	ADRIENNE 4. WEBSTER - 458	10/19/2019	Routed	100	R	823.00	
View	29599	A WISH COME TRUE	ADRIENNE 4. WEBSTER - 458	10/16/2019	Validated	100	R	65.22	

1. **Tab Sort**. By default, both tabs sort by Requisition Number. To change the sort temporarily, click on the blue underlined column heading. ***Example:*** *If you want to change the sort to Vendor Name, click on the column heading and column will sort alpha by Vendor Name.* Click back on the menu item **Requests| Order Requisition Entry** to reset the sort back to the orginal default sort.
2. **Edit an existing Requisition.** Click on the Edit button to edit an existing requisition row.
3. This will bring up the **Order Requisition Entry** page. If changes are needed at the top portion of the requisition such as date, vendor, comments, etc., then make and change and click the Save button near the Cancel button.
4. If further changes need to be made with the detail rows, click the Edit button to the right of the detail row. Click Save to save the changes.
5. If the detail row is no longer needed, click the Delete button to remove this detail row.
6. When finished with the changes, click the Save button at the top left of the requisition page to return to the requisition list on the **Current Requisitions** tab.
7. **View a processing Requisition.** Click on the View button to open up the Requisition Detail Summary. This report displays the detail for the requisition request after it has been routed for approval and processing. The view button is not available until after the requisition has been routed.

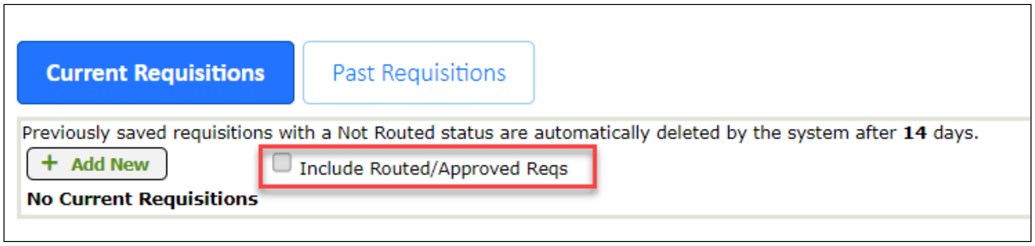


Requisition Detail Summary

Status	Req No / Rec Req'd	Req Date / U Type	Buyer / Location	Code / SKU Code	Vendor / Description	Units	Rate	Amount	PO NO	Change Reason
Validated	29194	05/01/2019	P ELEM	06317	MIKE'S BLACKSMITH SERVICE					
	Yes	EA	300	REC	Desc	1.00	96.32	96.32		
	Yes	EA	300	REC	Desc	1.00	75.32	75.32		
						Requisition Total:		$171.64		
						Report Total:		$171.64		

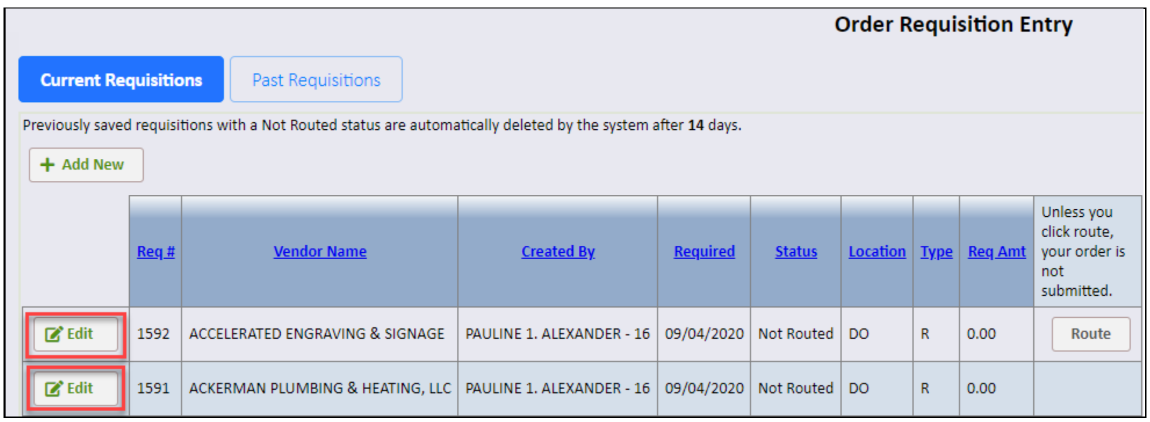
8. In the case where <u>**approval is not set,**</u> a user may notice the **'Include Routed/Approved Reqs'** option at the top of the list. If checked, this will display all Routed and Approved status

requisitions. Based on security rights, this will allow the user to edit them prior to transferring them to a purchase order record in SMART Finance.

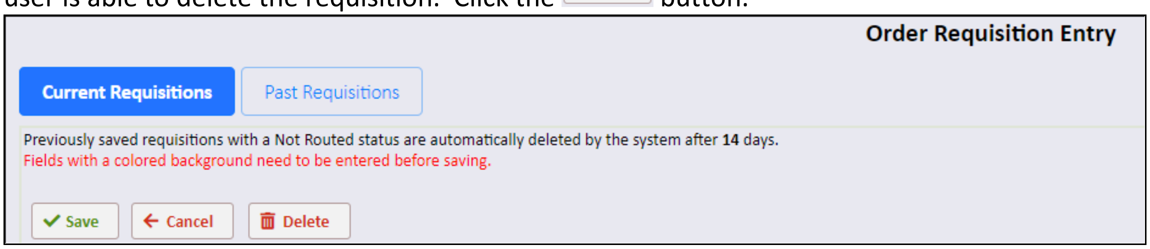


To Delete an Existing Requisition

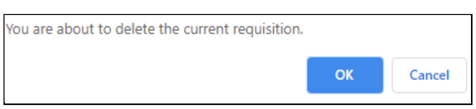
1. From the **Current Requisition** tab, click on the Edit button to bring up the Order Requisition Entry page to delete a requisition.



2. This will bring up the **Order Requisition Entry** page. If the requisition has not been routed, the user is able to delete the requisition. Click the Delete button.



3. The system will verify if the requisition should be deleted. Click OK to continue and delete the requisition. Click Cancel to go back to the Requisition Entry page and not delete the requisition.

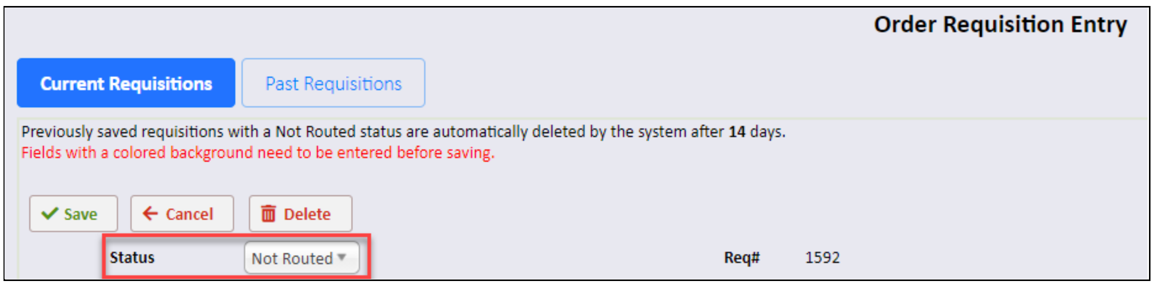


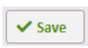
4. If OK was selected, the requisition is deleted and the user is brought back to the **Order Requisition Entry** page.

To Complete a Requisition

In the case where **approval is not used**, there is an option to set a requisition to a 'Completed' **Status**. This will set the status of the requisition to a Completed status and the requisition will not move further in the process.

1. **Status.** Use the drop-down list box to select Completed.



2. Click the  button to save this change.

3. To view this completed status requisition, continue on to the 'Past Requisition' section.

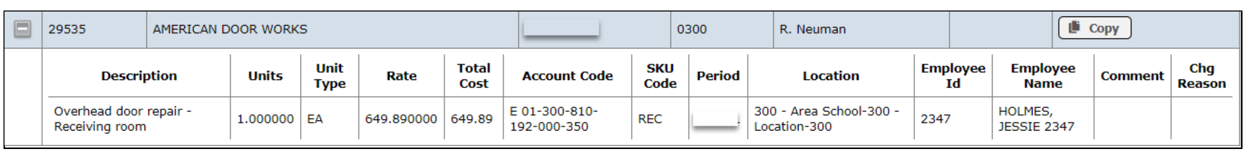
Past Requisitions Tab

If there are existing completed requisitions, they will be listed under the Past Requisitions tab. These are filtered per your login user ID. This screen is used for reference and to copy a completed status requisition.

***NOTE:** Online Orders through a webstore vendor will not be able to be copied due to changes on their sites and the way they are processed online.*

To View a Completed Status Requisition

Based on the filter options at the top of the screen, find the appropriate requisition(s). To the left of the requisition to be viewed, click on the button. This will expand the detail on the Requisition.

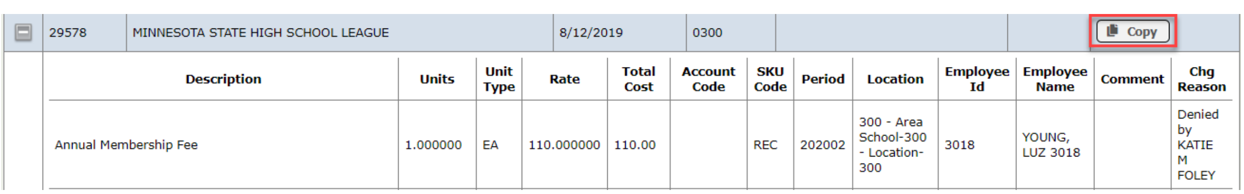


29535 | AMERICAN DOOR WORKS | 0300 | R. Neuman | Copy

Description	Units	Unit Type	Rate	Total Cost	Account Code	SKU Code	Period	Location	Employee Id	Employee Name	Comment	Chg Reason
Overhead door repair - Receiving room	1.000000	EA	649.890000	649.89	E 01-300-810-192-000-350	REC		300 - Area School-300 - Location-300	2347	HOLMES, JESSIE 2347		

To Copy a Completed Status Requisition

Based on the filter options at the top of the screen, find the appropriate requisition to copy. Click on the **Copy** button. The Copy button will **<u>not</u>** be available for Web or Web Express type orders.



29578 | MINNESOTA STATE HIGH SCHOOL LEAGUE | 8/12/2019 | 0300 | Copy

Description	Units	Unit Type	Rate	Total Cost	Account Code	SKU Code	Period	Location	Employee Id	Employee Name	Comment	Chg Reason
Annual Membership Fee	1.000000	EA	110.000000	110.00		REC	202002	300 - Area School-300 - Location-300	3018	YOUNG, LUZ 3018		Denied by KATIE M FOLEY

This will auto bring up the Order Requisition Entry window, prefilled with the copied data for the current date. The system will edit the data to verify it is still active for the period. Make changes as needed and save.