

Jefferson Parish Public School System`
IFAS End User Guide

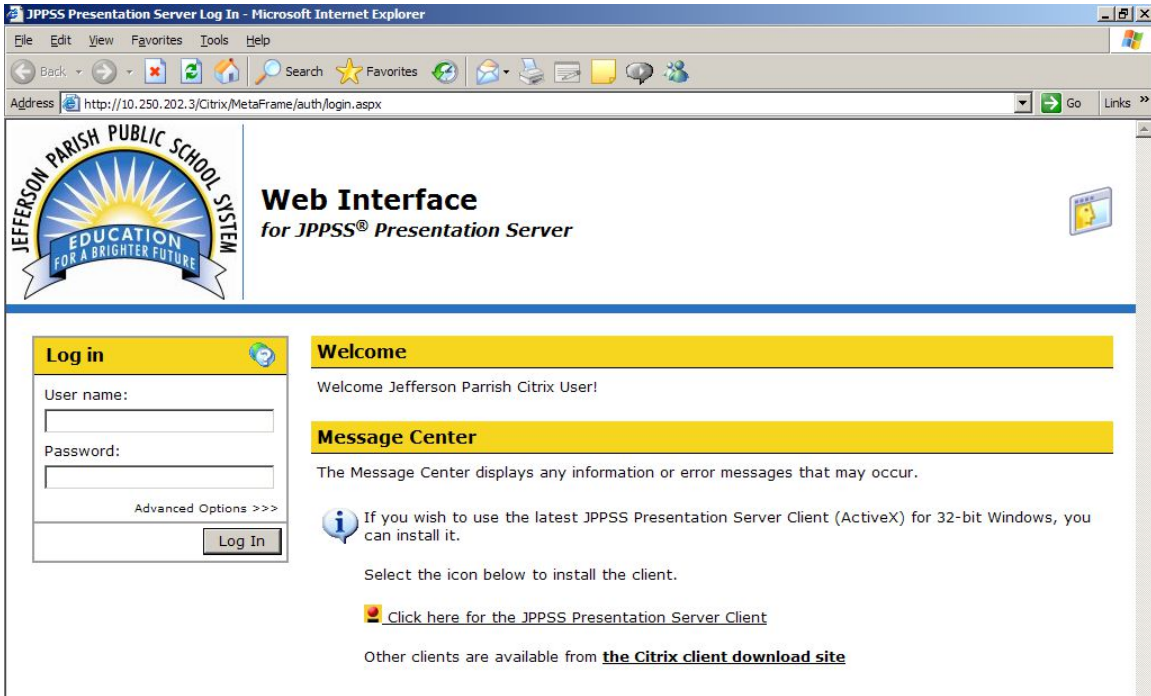
Purchase Requests

Logging into the Business Plus System

Double click on the IFAS Icon on your Desktop.



This will take you to the Citrix Login page. Enter your User name and Password to login. Your User name will be your first initial and your last name up to eight characters. Your password will be your first name followed by 012. Both must be in lower case.



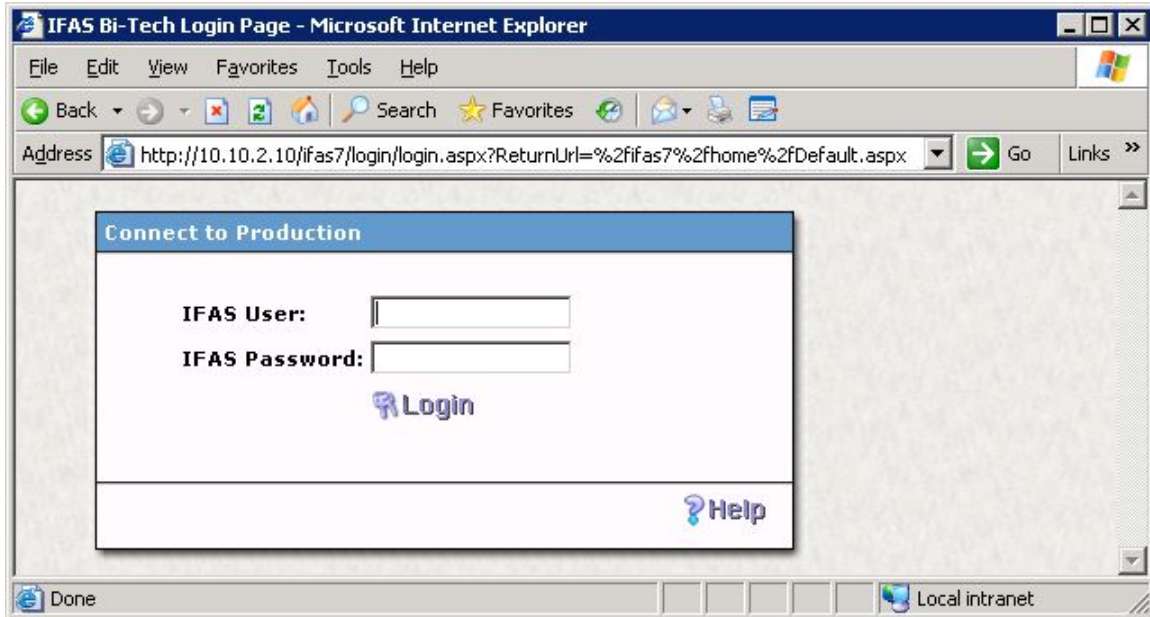
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After your first log in, click on the Dashboard icon to access the Dashboard Login.



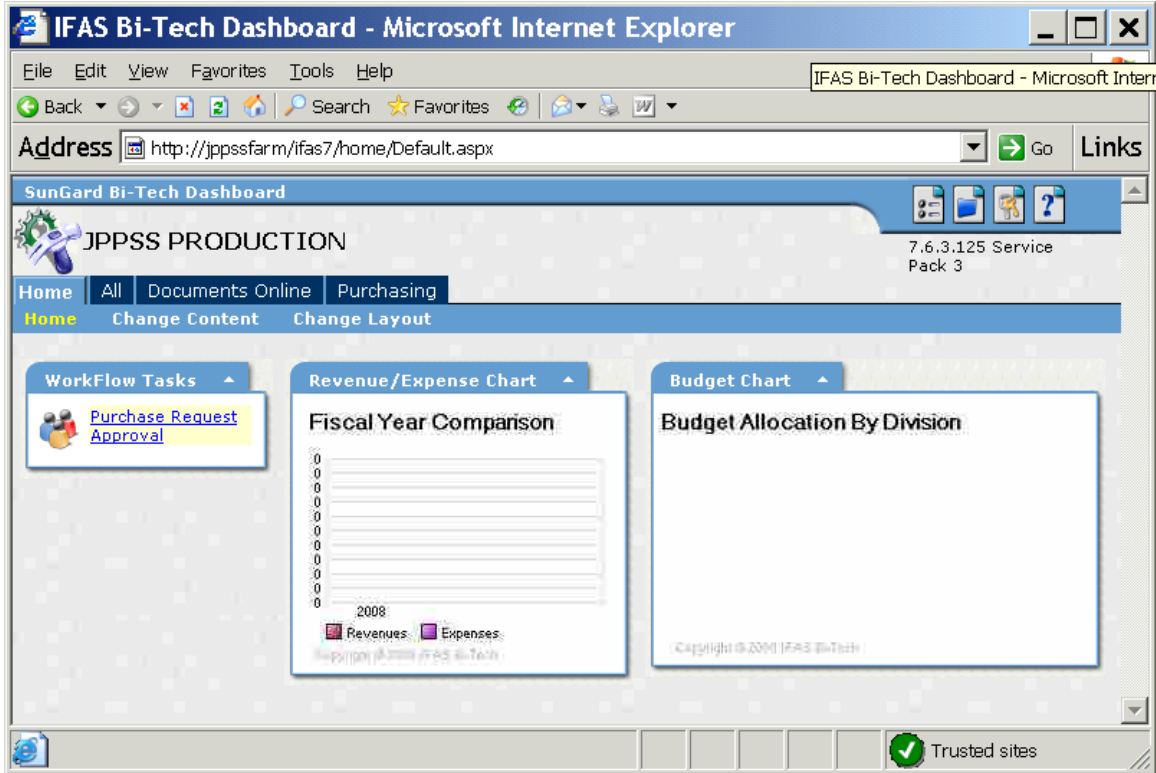
Enter your User ID and password to log in and click Login. Use the same IFAS User ID as was used to login to Citrix and your initial password is ifas. You will be prompted to change your password every 30 days.



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After logging in you will see the IFAS Dashboard.



Purchase Requests

Keyboard Commands

F1	Press F1 to display the help file associated with the screen you are viewing.
F5	Refreshes the screen. (If data is not saved before refreshing the screen, it will be lost.)
ESC	Cancel all changes to the record you are working on (since last "ENTER" or save).
TAB	Press the Tab key to move through the fields on a screen.
Shift + TAB	Holding the shift key when pressing Tab will move backwards through the fields on the screen.

Selection Criteria

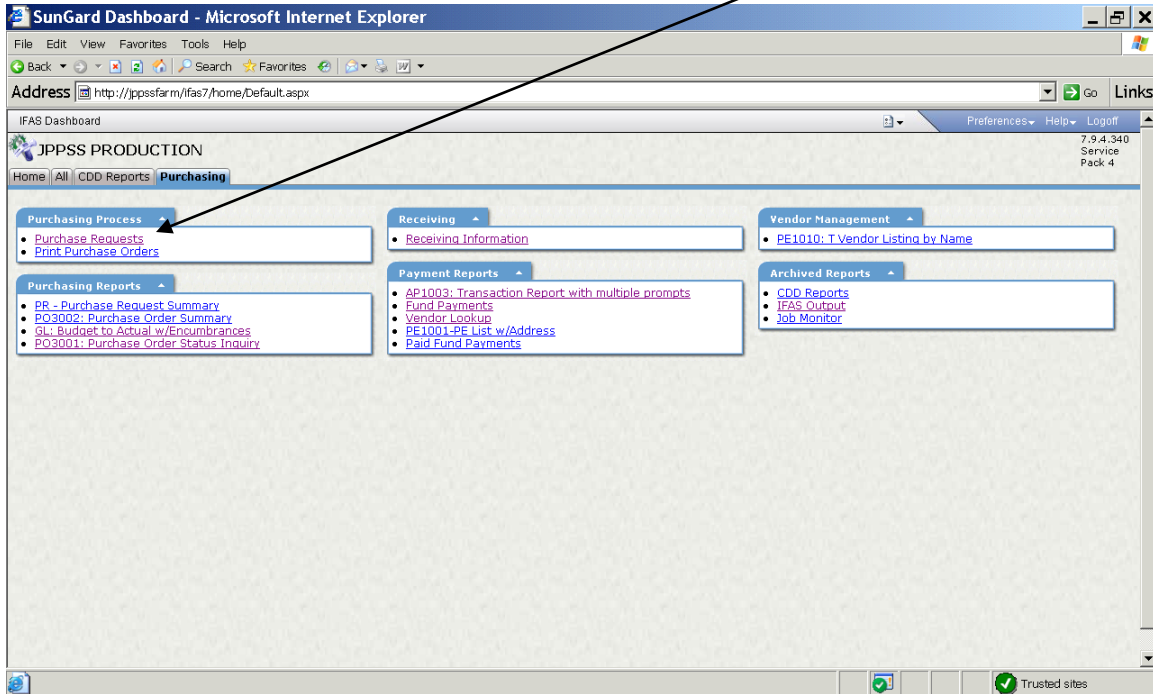
- Watch Case, some filters are case sensitive. It is recommended using all upper case when entering alphabetic information
- Use ':' to specify a range
- Both the '%' and the '*' can be used as wildcards
- Use '>' for greater than
- Use '<' for less than
- Use '>=' for greater than or equal to
- Use '<=' for less than or equal to
- Use '<>' for not equal to

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Creating a Purchase Request

Once logged into IFAS Dashboard click on the Purchasing tab, then on the Purchase Requests link to create a Purchase Requisition.



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You will see the POUPPR screen. Initially, the first record that you have security access to will come up on the screen. Notice that you are on Record 1 of XXXX.

The screenshot shows a web browser window with the URL <http://jppssfarm> and the page title "POUPPR - Purchase Requests - SunGard - jppssprod - Microsoft Internet Explorer". The browser address bar shows "Record 1 of 7422".

The main content area displays a purchase request form for PR: R009485. The form includes fields for Vendor (V00462), RemitTo, ShipTo, BillTo, Request'd, Appr'd, Printed, Details, Dates, Blanket, Req. Codes, Misc., Status (PR), Sec Cd (042), Aprv, Next, and PO Type (P). The vendor information is: V00462, GREAT SOURCE, 181 BALLARD VALE STREET, WILMINGTON, MA 01887. The request is by Gwen Kerneer, dated 09/14/2010. The PO Total is \$767.09. The end user is KAREN VANECDOM.

Below the form is a table with columns: Item Numbr, Quantity, Units, Description, Unit Price, and GL Account.

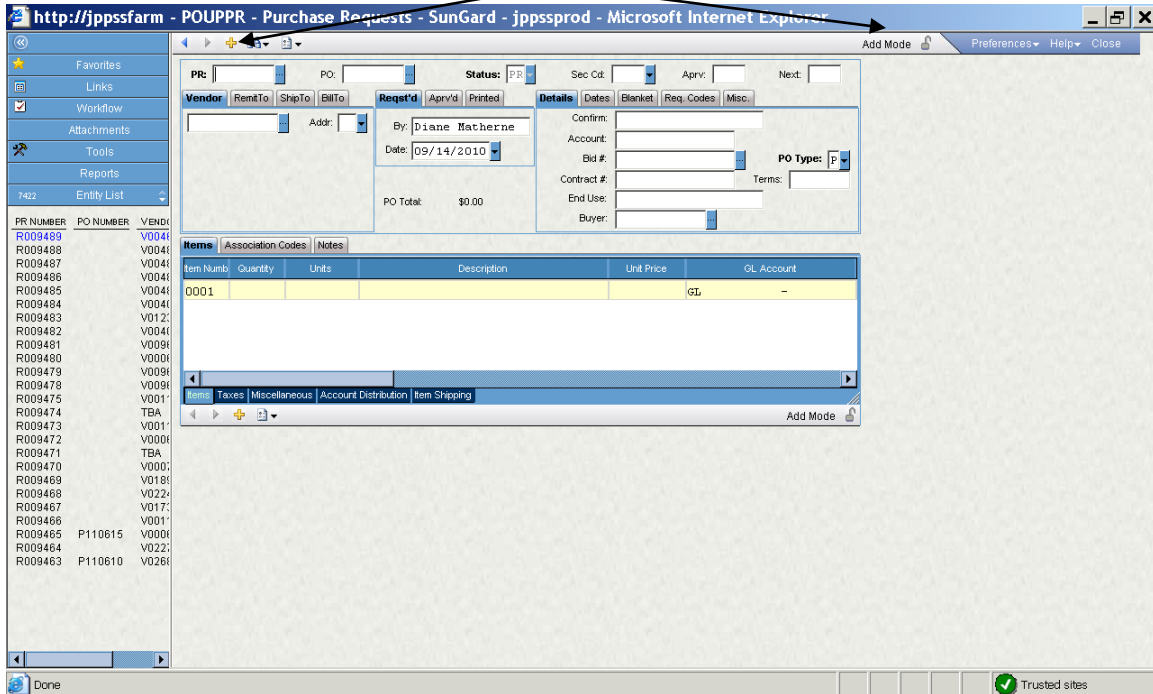
Item Numbr	Quantity	Units	Description	Unit Price	GL Account
0001	3	EA	EVERY DAY COUNTS KIT, GRADE 1,	232.45	GL 1152010042-51510610
0002	1	EA	SHIPPING FEE (10%)	69.74	GL 1152010042-51510610
0003					GL -

At the bottom of the form, there are tabs for Items, Taxes, Miscellaneous, Account Distribution, and Item Shipping. The status bar at the bottom of the browser shows "Record 1 of 2".

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You must be in Add mode to create a purchase requisition. Click the Add icon to go into Add Mode.



The following fields are required on the parent portion (top half) of the record:

1. PR
2. Vendor
3. Ship To
4. Sec Cd
5. End Use
6. Req Codes if Technology or special routing

The following fields are required on the child portion (bottom half) of the record:

1. Quantity
2. Units
3. Description
4. Amount
5. GL Account

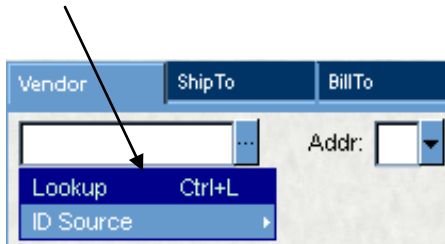
Purchase Requests

Data Entry – Header Information

1. PR Number – The system will assign the next available number. Click on the blue ellipse button to have a PR number assigned. Select PR.SEED and note the number assigned for future reference.

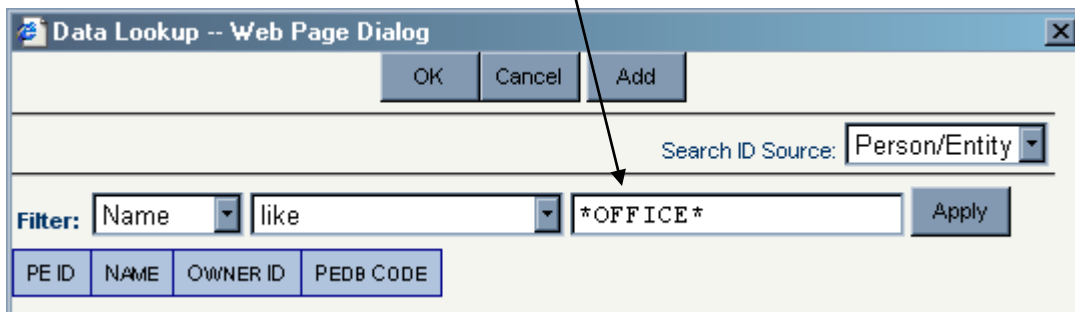


2. Vendor – To access the lookup feature, click on the ellipse button and select Lookup.



Enter a portion of the vendor's name (it is not necessary to enter the full name). Click Apply to display names matching the name entered.

Using wildcards () is recommended in the event the name is entered differently than what is in the system. Also remember that the search is Case Sensitive, so your search must be all in upper case.*



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Select the appropriate Vendor by highlighting it and clicking OK. Double clicking will also pull the ID back into the Vendor field.

Note that all addresses available for a vendor will be listed in the lower portion of this screen. The highlighted address is the one that will be brought into the record. Highlight the appropriate address if the default address is incorrect.

Data Lookup -- Web Page Dialog

OK Cancel Add

Search ID Source: Person/Entity

Filter: Name like *OFFICE* Apply

PE ID	NAME	OWNER ID	PEDB CODE
V006600	APG OFFICE FURNISHINGS		P
V009147	CAMERON TOWN OFFICE SUPPL		P
GOLF	HAMILTON COUNTY PARK DISTRICT GOLF OFFICE		P
V008032	HAMILTON OFFICE SYSTEMS		P
V010046	IKON OFFICE SOLUTIONS		P
V007871	KING'S OFFICE SUPPLY		P
V000624	MAILCO OFFICE PRODUCTS		P
V001681	MODERN OFFICE METHODS		P
V000731	OFFICE & INDUSTRIAL		P
V001383	OFFICE & INDUSTRIAL		P

Addresses:

CODE	ADDRESS LINE 1	ADDRESS LINE 2	ADDRESS LINE 3	ADDRESS LINE 4	CITY	ST./PRO
R1	4695-B INDUSTRY DR				FAIRFIELD	OH

Purchase Requests

If the vendor is not defined in the system and needs to be added for your order, enter TBA in the Vendor Field. It is necessary to enter the Vendor information on the PR Notes tab so the Purchasing department can create an ID for the Vendor.

****Be sure NOT to type your vendor name and address under the Print Before or Print After tabs.**

Items	Association Codes	Notes
Vendor Name		
Street Address		
City State Zip		
Phone Number		
Fax Number		

PR Notes | Print Before | Print After

3. Ship to – Click on the tab that says Ship To and enter your school/dept code preceded by an “S” or “D”. For example, Airline Park’s code is 001, so enter S001 for the Ship to location for Airline Park, or you can access the lookup feature.

Vendor	RemitTo	ShipTo	BillTo
S001			
Addr: P1			
AIRLINE PARK ELEMENTARY			
6201 CAMPHOR STREET			

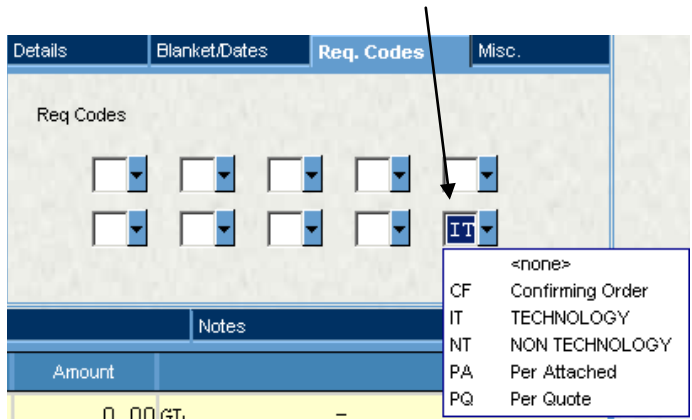
4. End Use – Enter the name of the person who will be receiving the items on the PR. This helps the Warehouse foreman determine who in your department or school should receive the items. This is a required field. You will receive an email from the system if this field is left blank.

Details	Blanket/Dates	Req. Codes	Misc.
Confirm:			
Account:			
Bid #:			
Contract #:			
End Use:	MARY SMITH		
Buyer:			
		PO Type:	P
		Terms:	

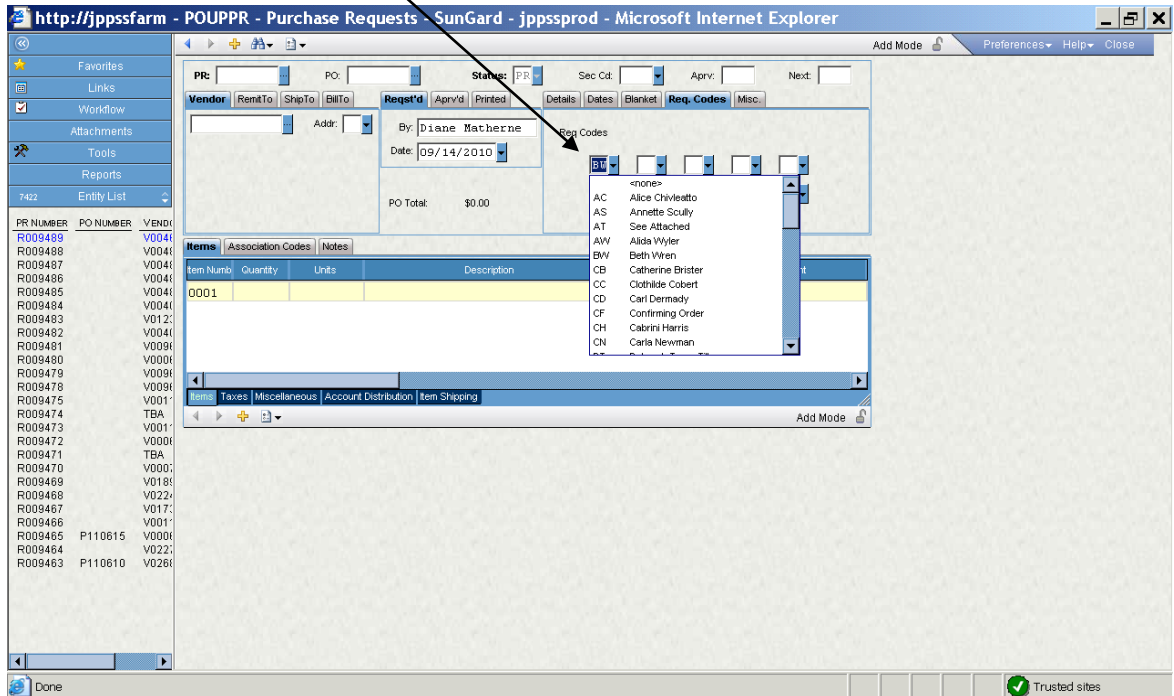
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8. Req Codes – If the item being purchased is being expensed to object codes 617, 730 or 731, it will be necessary to indicate if the item is TECHNOLOGY or NON TECHNOLOGY. Select the appropriate option and make sure to enter the code in the 10th/last box.



If your department has special approval routing needs, you can choose an approver in the first box as necessary.



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After completing the top half of the record, pressing Enter will save the header/top portion of the requisition, however no money has been encumbered until a quantity and unit cost is entered with the account to be encumbered.

Make sure that you see “Record Accepted” at the top of the screen. “Record Accepted” will appear with a green checkmark on the upper portion of the screen.

*****If you don't see “Record Accepted”, your requisition is not saved. *****

You may want to note the PR number in case you must leave the screen and have to locate the requisition at a later time.

Purchase Requests

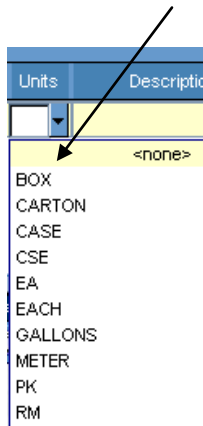
Data Entry – Item Information

1. Quantity – Enter the exact quantity for the item(s) being purchased.



A screenshot of a form field labeled "Quantity". The field is a text box with a blue header and contains the number "1".

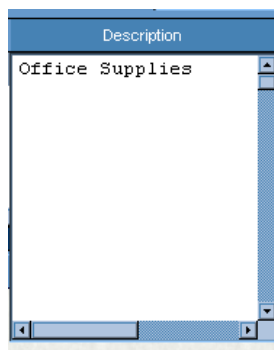
2. Unit – Select the appropriate Unit of Measure from the drop down list. Access the list by clicking on the down arrow.



A screenshot of a dropdown menu for the "Units" field. The menu is open, showing a list of units: <none>, BOX, CARTON, CASE, CSE, EA, EACH, GALLONS, METER, PK, and RM. An arrow points to the down arrow of the dropdown.

3. Description – Enter a short description** of the item being purchased. If you are attaching an itemized list, you may enter "See attached quote or list".

***Keep in mind that only the first 30 characters of the description entered will be available on reports.*



A screenshot of a text area labeled "Description". The text "Office Supplies" is entered in the field.

Quotations, specifications and other back up may be attached to the requisition if necessary.

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4. Amount – Enter the dollar amount for the item entered. This is the amount that will be encumbered. (If entering a number with no cents, it is not necessary to enter a decimal and zero cents.)

Amount
5000

5. Account – Enter the GL Account code and Object code to be used for the purchase. If the numbers are known, simply type them into the appropriate field. Security is set for your school or department only.

To see a list of available Keys, make sure your cursor is in the KEY field first, and then click on the ellipse icon to access the Lookup.

GL	GL Account	Percent D	Discount	Extend
▼	KEY	OBJ	0.00	

- Lookup ORG KEY Ctrl+L
- ✓ GL ORG KEY-OBJECT Ctrl+K
- GL Quick Ctrl+Q
- ✓ Show Ledger
- Show Work Order
- Show Account Splits Ctrl+S

A list will appear of account numbers for your department. Double-click on the appropriate code to have the system bring it onto the Purchase Request record.

Data Lookup -- Web Page Dialog

OK Cancel Add

Filter: COST CTR ▼ like ▼ 013

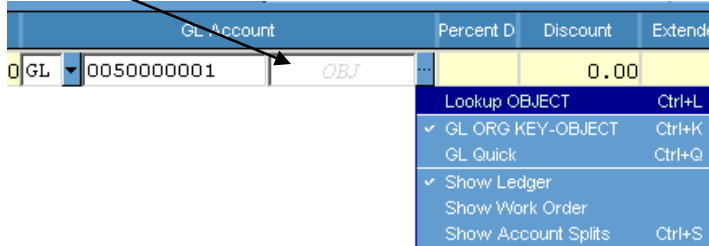
Apply

KEY	LONG DESCRIPTION	LEDGER/KEY	STATUS	FUND	YEAR	COST CT
0040000013	CHILD NUTR MARIE RIVIERE ELEM	GL	A	004	0000	013
0050000013	TEACHR SUPPLY MARIE RIVIERE EL	GL	A	005	0000	013
0400000013	CAPITAL IMPROV M RIVIERE ELEM	GL	A	040	0000	013
0420000013	1/2 S/T CONST 2002 M RIVIERE	GL	A	042	0000	013
0430000013	1/2 S/T SERIES 1995 M RIVIERE	GL	A	043	0000	013
1012005013	TITLE I MARIE RIVIERE ELEM	GL	A	101	2005	013
1012006013	TITLE I MARIE RIVIERE ELEM	GL	A	101	2006	013

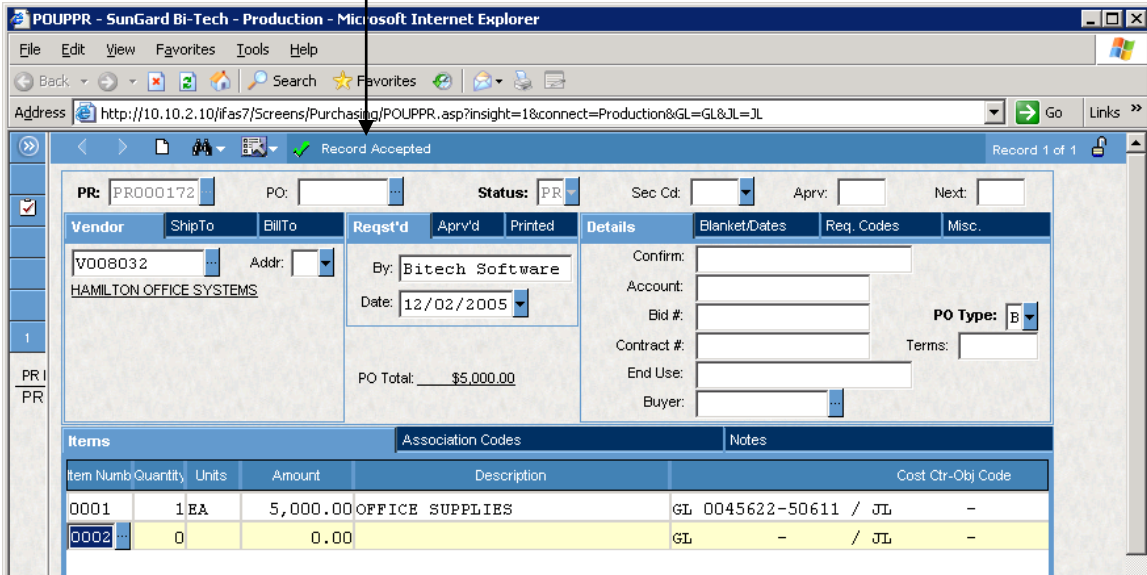
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Access the lookup for Object Codes by clicking on the ellipse when the cursor is in the Obj field. Select the appropriate Object Code by double clicking on it in the same fashion used to select the Key.



Press Enter to save the first line item on the Purchase Requisition. Again, make sure that you see "Record Accepted". Until the "Record Accepted" message is received the record is not saved in the database. If there is an error with your account code or there is not enough money in your budget, you will receive a message stating so.



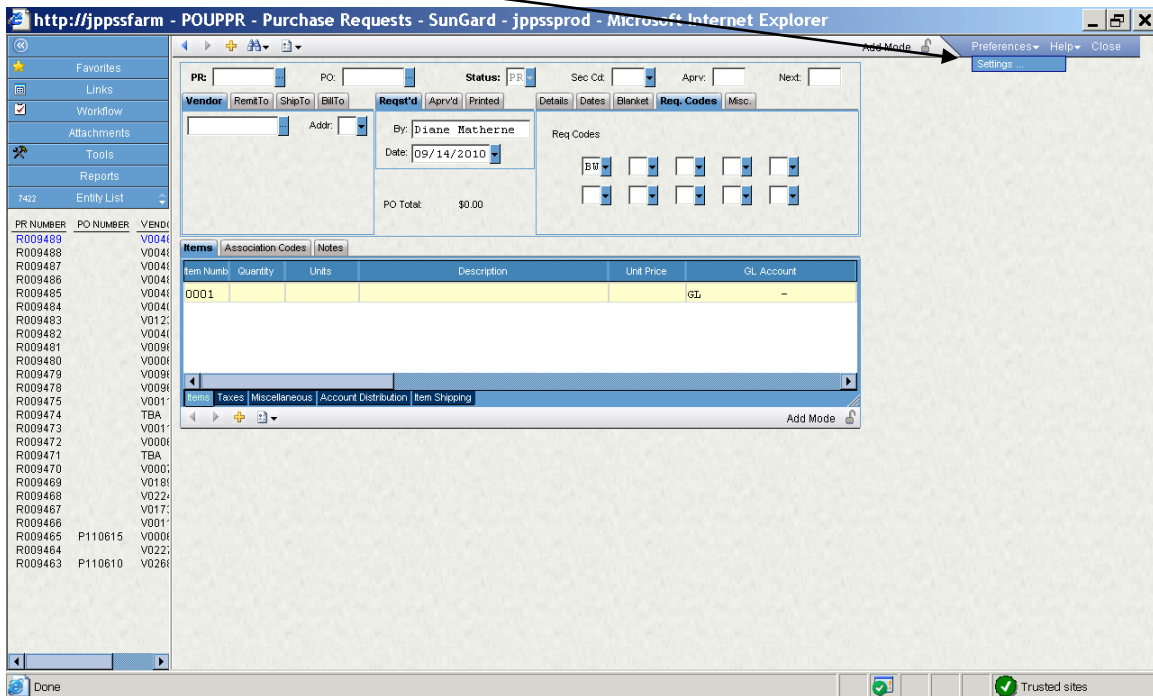
If additional line items are necessary, simply go to the next line and repeat the steps as done for Line 1. The system automatically numbers the next line item in anticipation of additional records.

Purchase Requests

Adding Attachments

It is possible to add attachments to requisitions. This is helpful if a vendor needs detailed specifications or a quote is required. Any electronic document can be attached to the requisition. Preferred formats are Word, Excel and Adobe.

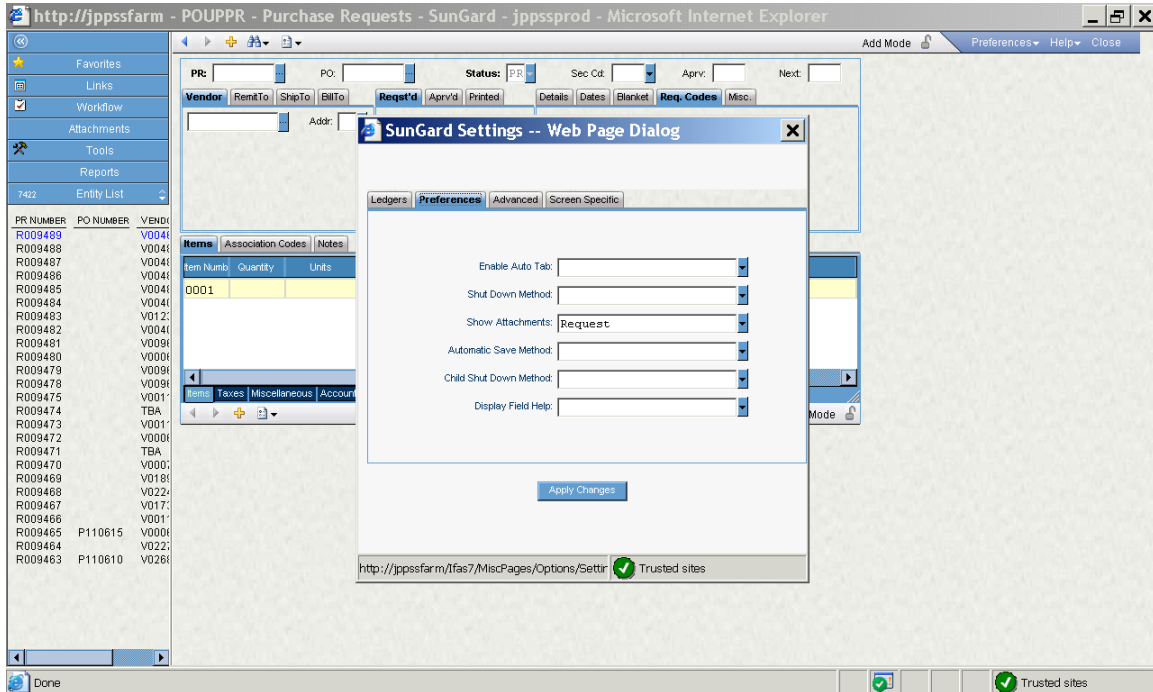
If you are attaching a document for the first time, you may have to do a one time set up for your log in. Click on Preferences at the top right of the screen, then click on Settings.



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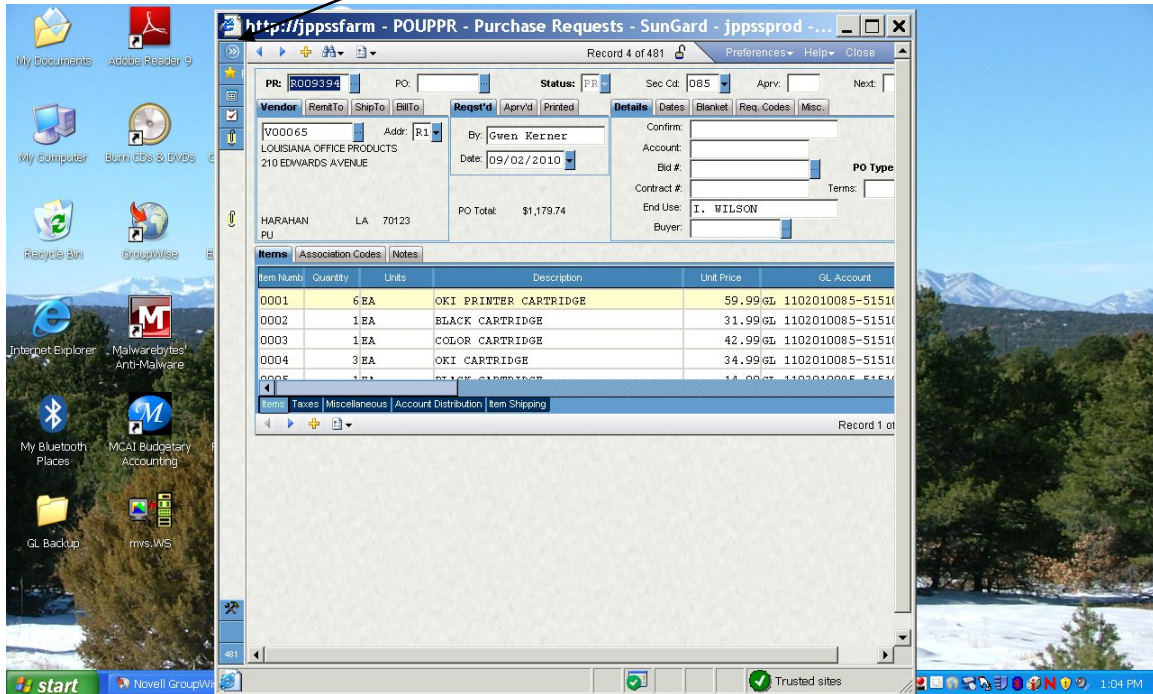
In the Settings box, click on the Preferences tab. In the Show Attachments field, click on the drop down arrow and choose "Upon Request". Click on Apply Changes. You will have to close the POUPPR screen and reopen it for the change to be effective.



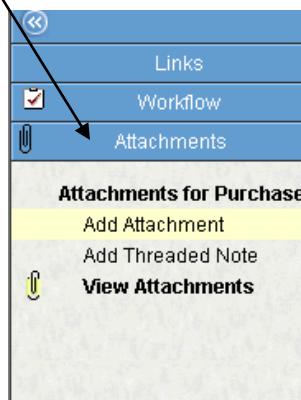
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To access the attachment option, open the option bar to the left of your screen by clicking on the double arrows.



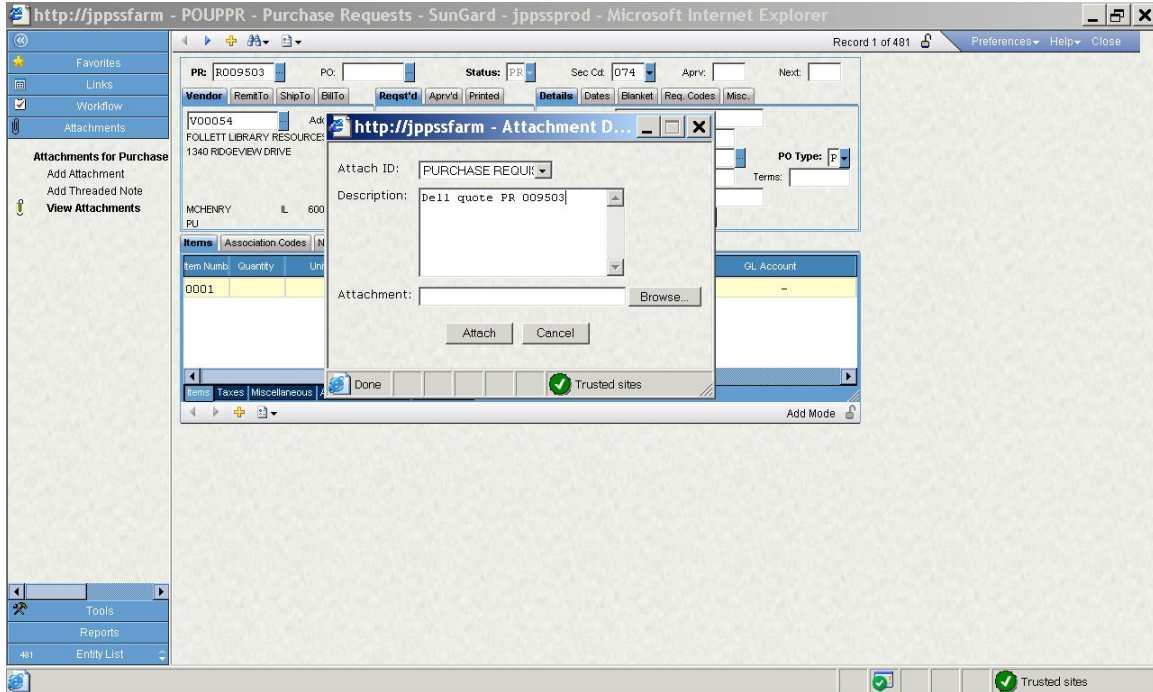
Click on Attachments. You will see a link to Add Attachments. Click on this and a window will appear that will allow you to browse your PC for the document. This process is very similar to adding an attachment to an email.



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You must have a Description in order for the system to accept the attachment. In the description, you may type a brief description of your attachment, such as Dell quote. It is also necessary to type your requisition number in the description box. Once you have entered the description, click on the Browse button.

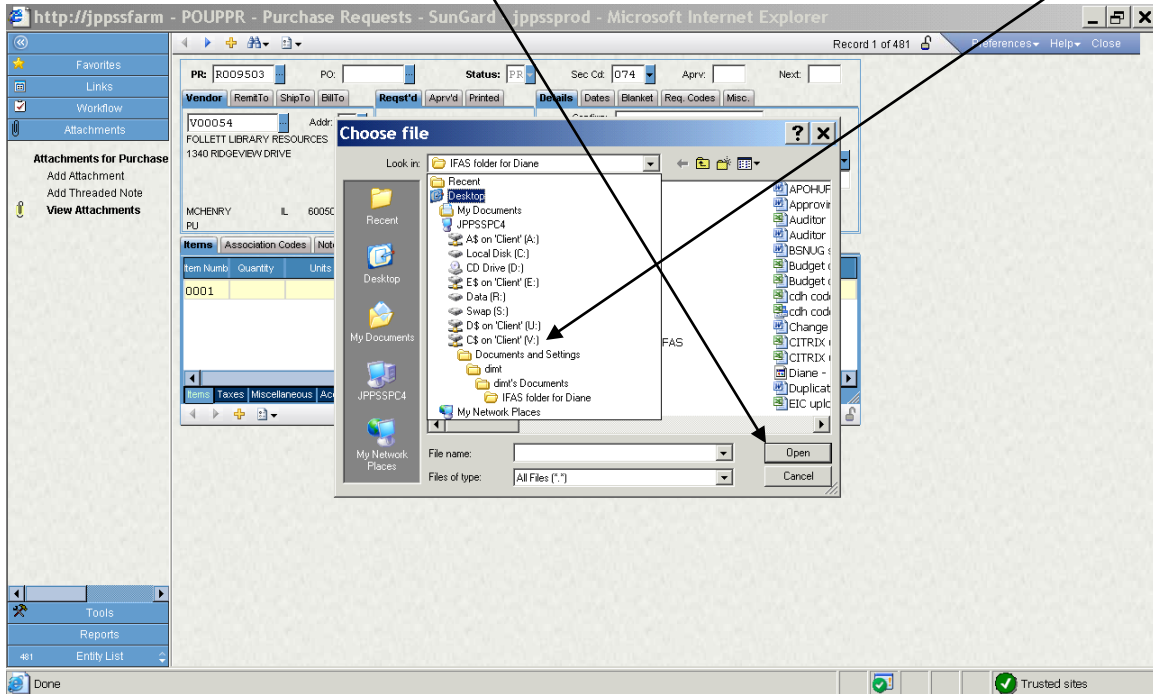


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When you click on the Browse button, look for your attachment file.

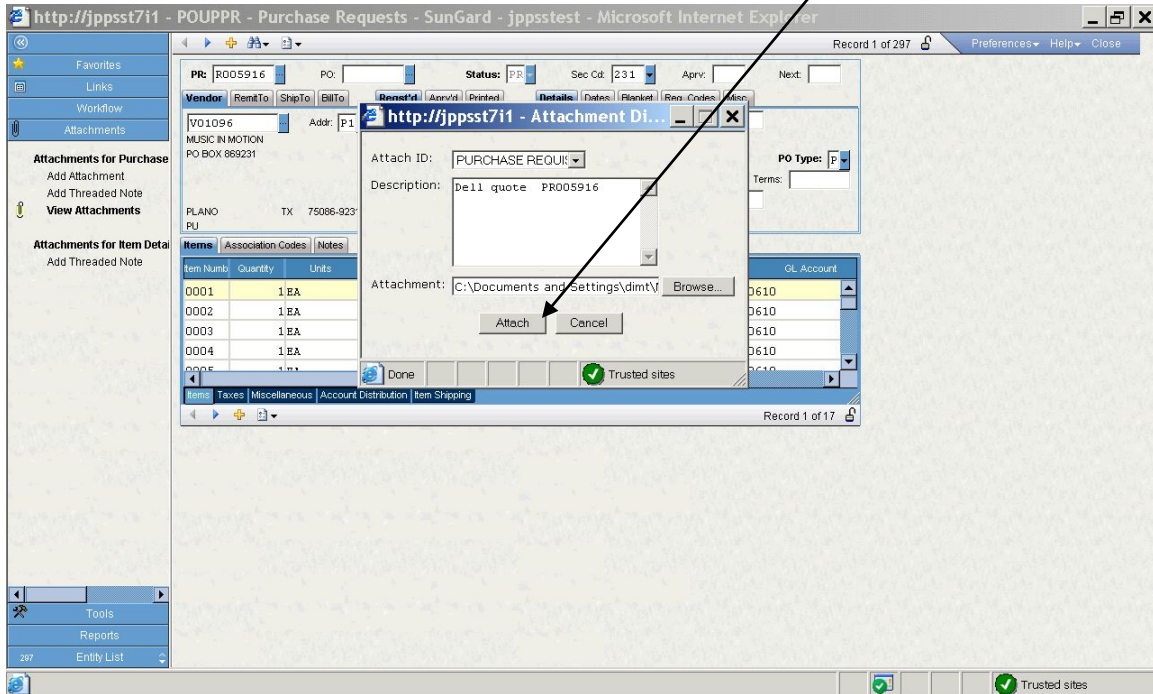
**When your attachment is initially saved on your computer, it must be saved to your C drive. When you search for your attachment, look for your file under C\$ on Client (*). IFAS converts your C drive files to the C\$ on Client (*) drive files. Once you have found your file, highlight it and click on the Open button.



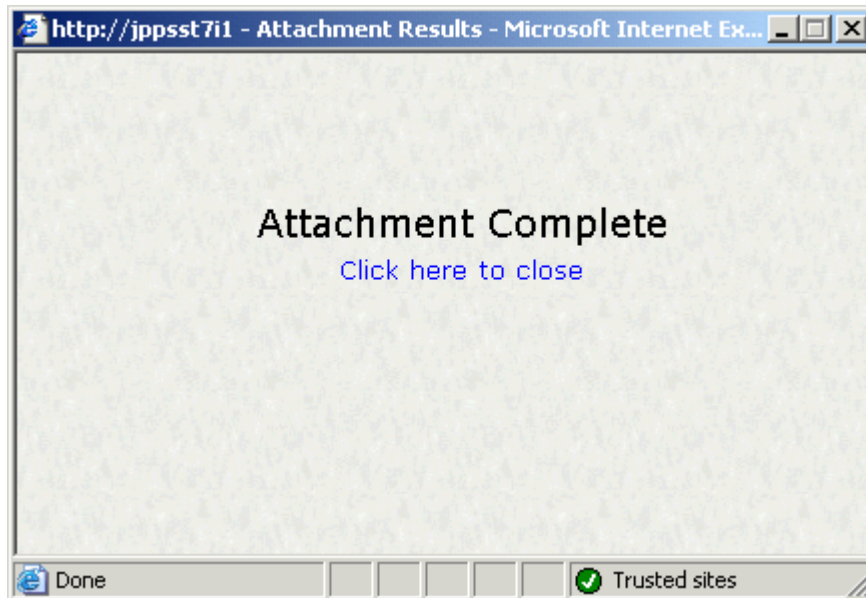
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After bringing in your attachment file, click on the Attach button.



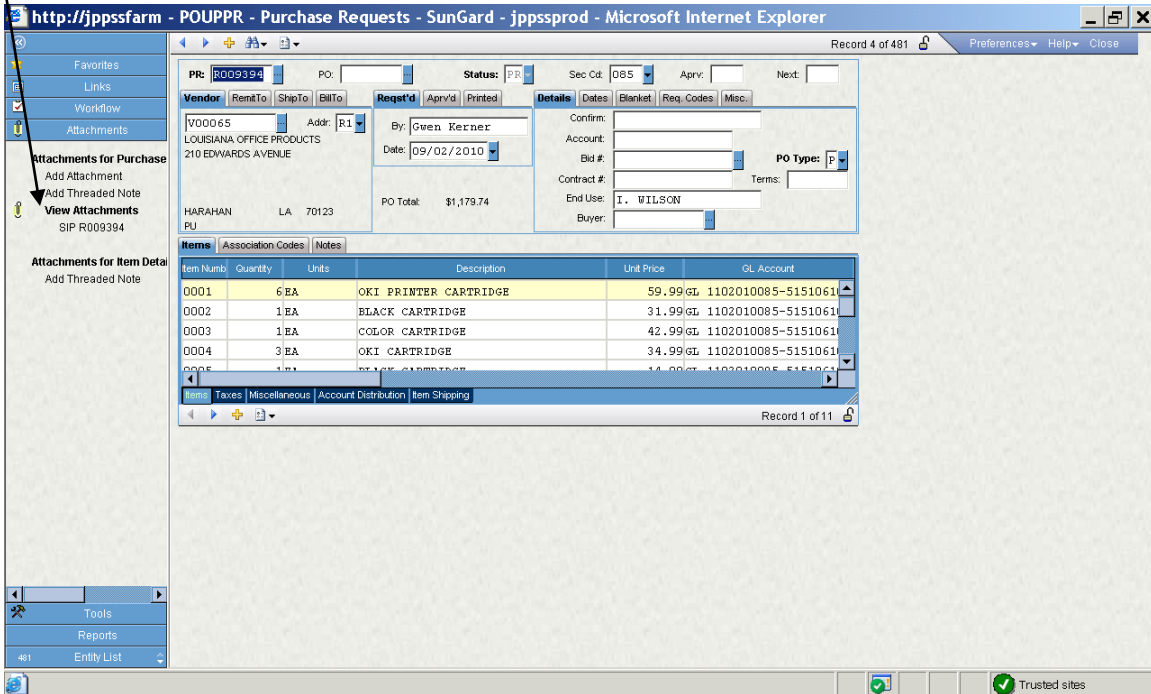
Another window will appear to confirm the attach has completed. Click the link saying "Click here to close".



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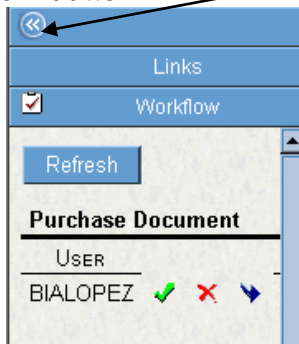
The attachment description will appear in the Option bar under Attachments. To view the attachment, click on your description under "View Attachments" .



PO Approvals

Once all items have been entered for the requisition, and any documents attached, the creator must approve it. Once this is done the requisition will be routed electronically to all necessary individuals prior to being routed to the Purchasing Dept where a purchase order number will be issued. Once a purchase order number has been issued, the purchasing department places the order with the vendor.

To approve, open the left side panel by clicking on the double arrow in the upper left corner. Click on the Workflow button.



Purchase Requests

It may be necessary to click the Refresh button if you don't see your User ID followed by the green check mark, etc...

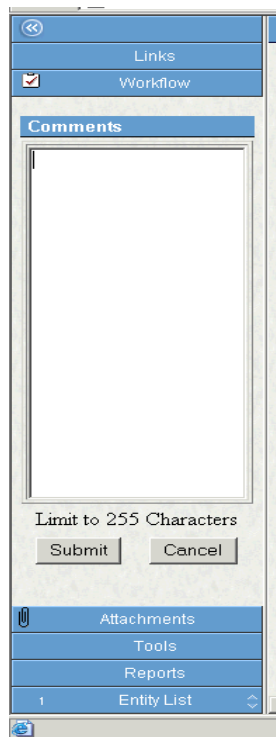
Clicking on the green check mark indicates approval of the requisition.

An approver can reject a requisition by clicking on the red X.

The blue arrow is used to delegate to another user, which currently is not in use.

If you have completed your requisition, attached any required documentation, and are ready to approve it, click on the green check. Once the green check mark has been clicked you will see a Comments box. You may enter a comment if desired, but this box is used mostly when an individual notes the reason for rejecting a requisition.

Click on the Submit Button to tell the system to route the requisition to the next approver.



The screenshot shows a vertical window with a blue header bar containing a back arrow and the text "Links". Below this is a "Workflow" section with a red checkmark icon. The main area is titled "Comments" and contains a large, empty text input box. Below the input box, it says "Limit to 255 Characters" and has "Submit" and "Cancel" buttons. At the bottom of the window, there are several menu items: "Attachments" (with a paperclip icon), "Tools", "Reports", and "Entity List" (with a dropdown arrow).

There is nothing more for you to do. IFAS will route your requisition for the required approvals and you will be notified via email from wfprod (IFAS email account) when your PO number has been issued.

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