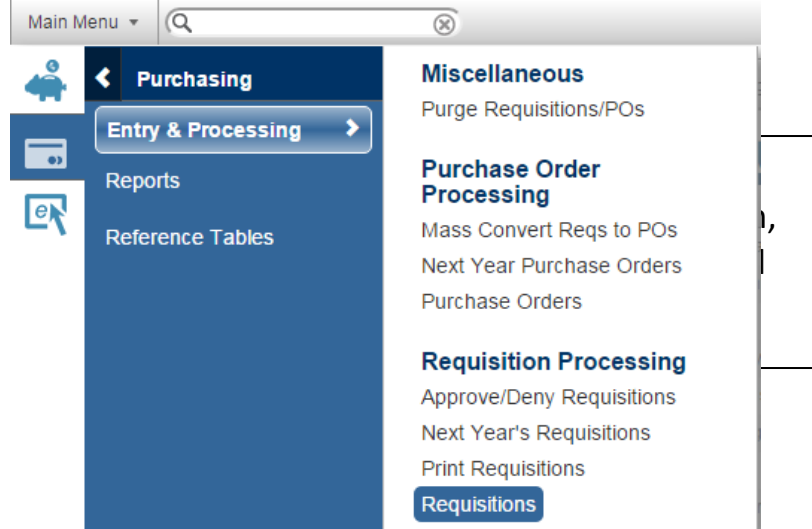


Steps to add a requisition with screen shots:

1. Open the **Requisition listing window**.
2. Main Menu → Purchasing → Requisition Processing → Requisitions (double click on Requisitions)



3. Click the toolbar's **New button**  to open the **New Requisition Information window**.

The screenshot shows the 'New Requisition Information window'. At the top is a toolbar with buttons for 'Copy', 'Print Requisitions', 'Budget Transfers', and 'Budget Adjustments'. Below the toolbar is a row of icons: a plus sign, a trash can, a printer, a checkmark, a 'BACK' button, a document, a folder, two stars, and a diamond. Below the icons, the 'Date' is set to 12/01/2016 and the 'Period' is 2/17. The 'Search Criteria' section contains the following fields:

Year	2017	Recommended Vendor	
Requisition		Ship To	
Buyer		*LOCATION*	
Date Requested		Attention	
Date Required		Status	

At the bottom of the search criteria are 'Find' and 'Advanced' buttons. Below the search criteria is a table header:

Requisition	Date	Fiscal Year	Vendor #	Vendor
-------------	------	-------------	----------	--------

Steps to add a requisition with screen shots:

4. In the Header tab complete the necessary fields.

Add Item

Date: 12/01/2016 Period: 2/17

Header Line Items

General Information

a Requisition * R1703007

b *LOCATION* * BUS - BUSINESS OFFICE

c Requested 12/01/2016

d Required 12/03/2016

e Vendor 83362

f Vendor Address WILTONS OFFICEWORKS
181 N EARL RUDDER FRWY
BRYAN TX 77802

g Add Attachment?

h Freight

i Comments REB#8-016

j

k Buyer CARMELLA

l Attention ACCOUNTING/CARMELLA

m Ship To * 744 - BUSINESS OFFICE
COLLEGE STATION I.S.D.
1812 WELSH STREET-STE 130
COLLEGE STATION, TX 77840

n. **NOTES** – Tells us where to send the purchase order to place the order.

FAX PO with/or without attach to (000-000-0000, with attachments or no/attachments. Be sure the email/fax number is correct. Remember to attach the items to be sent to the vendor.

Email PO with or without attach to (enter email address)

DO NOT ATTACH INVOICES.

IMPORTANT: IF THE NOTES DO NOT HAVE FAX, EMAIL OR OTHER INSTRUCTIONS, THE PURCHASE ORDER WILL BE SENT TO THE CAMPUS/DEPT TO PLACE THE ORDER WITH THE VENDOR.

- Requisition #** - Make note.
 - Location** – Select your location.
 - Requested** – Defaults to current date.
 - Required** – This is the date the items/service is needed by. ** Be sure to enter a date in the required field.
 - Vendor** – Enter Vendor number or click on magnifying glass to search for vendor name. Example: enter *wilton* and it will bring up any vendor with wilton in the name. Reminder: The vendor Must be an awarded/approved vendor on the Annual bid list or one of the Cooperatives list. If an awarded/approved vendor needs to be added please complete the new vendor request form and email to vendor@csisd.org.
 - Vendor Address** – Is vendor name and address correct?
 - Add Attachment?** – Check box if attachments will be added to the req. (quotes, cart, etc.). When the req. is saved the attachment window will automatically open.
 - Freight** – Leave Blank. This field defaults to F.O.B. Destination
 - Comments** – **Required** Enter the Bid or Coop and #.
 - **Missing Bid or Coop # will delay the approval**
 - Buyer** – Your name
 - Attention** – Who the Purchase order green/yellow will be sent to
 - Enter as “Dept/campus / Name / teacher”
 - Ship To** –
 - Use 923 for warehouse, or
 - Campus/Dept Location code for local orders/hand carry POs
 - Ship To Address** – Where items will be shipped.
 - Notes** – See box below
- Click OK** – To begin entering Line Items.

Steps to add a requisition with screen shots:

5. Notes – Enter one of the 3 required options.

The screenshot shows a software interface for adding a requisition. At the top, there is a toolbar with icons for 'OK', 'BACK', and document management. Below the toolbar, there are input fields for 'Req No' (containing 'R1703007'), 'PO No', and 'Change No'. The main area is a large text box for 'Notes'. The text in the notes field reads: 'FAX PO WITH/WITHOUT ATTACHMENTS 000-000-0000', 'EMAIL PO WITH/WITHOUT ATTACHMENT (email address).', and 'NO NOTES = WHITE COPY OF THE PO WILL BE SENT TO THE CAMPUS/DEPT TO PLACE THE ORDER WITH THE VENDOR.'

Notes – One of these 3 options must be entered in the Notes field, so we know how who will place the order with the vendor.

FAX PO with/without attach to (000)-000-0000 – Use for purchase orders that need to be faxed to the vendor. Be sure the fax number is correct. Purchasing will place order with vendor.

EMAIL PO WITH/WITHOUT ATTACHMENTS to (email@xxx.com) – Use for purchase orders that are to be emailed to the vendor. Purchasing will email the vendor and copy you to place the order with vendor.

NO NOTES = Purchasing will send the white copy of the PO to the campus/dept to place the order with the vendor or hand carry to the vendor.

Be sure to attach anything needed for Purchasing to **approve and place the order** (ie Quotes, Attached list, Sole Source, etc.).

DO NOT ATTACH INVOICES.

IMPORTANT: IF THE NOTES DO NOT HAVE OR FAX OR OTHER INSTRUCTIONS THE PURCHASE ORDER WILL BE SENT TO THE REQUESTOR TO PLACE THE ORDER.

Steps to add a requisition with screen shots:

6. In the Line Item tab complete the marked fields.

Approval Status Vendor Quotes Tax Rate Insert Row Delete Row

⊕ 🗑️ 📄 j OK BACK 📄 📄 ⏪ ⏩ k 📄 📄

Date: 12/01/2016 Period: 2/17

Header **Line Item (1 of 1)**

Detail Information

Requisition R1703007 1 **b** Shipping Charge **c** Continuous

Commodity 🔍

Stock Number 🔍

Bid Item

Fixed Asset

a Description * OFFICE SUPPLIES - ONLINE ORDER

Enter Detailed Description including Part #'s even if the quote is attached.

Please note: Only the first 21 characters print on vendor check and budget reports.

Pricing

d Measure Extended Amount * 359.96 Tax Total * 0.00

e Quantity * 1.00 Discount Percent * 0.0000 Total Price * 359.96

f Unit Price * 359.9600 Trade/Discount * 0.00 Distribution Method * A - Amount

g Shipping 0.00

BUDGET CODE	Account	PROJECT	Account	Percentage	Amount
h 1997410074499044 🔍	i 6399			1.00	359.96

- a. **Description** – Enter Detailed Description including Part #'s even if the quote is attached.
Please note: Only the first 21 characters print on vendor check and budget reports.
- b. **Shipping Charge** –Check if there will be shipping costs.
- c. **Continuous** – Check if there are more than one-line items to be entered
- d. **Measure** – Each, Case, Dozen, Etc.
- e. **Quantity** – Number of items being ordered
- f. **Unit Price** –Enter Price
- g. **Shipping** – Enter Shipping Cost
- h. **Budget Code** – Enter Budget
a. See important note below.
- i. **Account** – Enter Account
- j. **OK** – If more line items are to be entered.
- k. **Save** – When finished entering all line items.
- l. **Save In Progress** – saves the requisition so that it can be edited or finished later. It will not show up in the approval screen until the save icon is selected once finished.

IMPORTANT: Purchase order must be coded correctly according to TEA. Please do not use an incorrect budget/account just because it has funds, instead prepare a budget transfer to move the funds to the correct budget/acct.

***** Using an incorrect budget/account code will delay the processing of the PO. ****

Steps to add a requisition with screen shots:

7. Attachment Information Window

- Pops up automatically when the requisition is saved if the "Add Attachment?" box was checked on the header tab.

Attachment Information

Requisition Number

Add Attachment

Attachment Group- Leave REQUISITION

Attachment Group *

Requisition has been saved and routed for approval

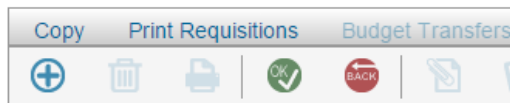
File Name – Click Choose File to search for the file (s) to be attached.

File Name * No file chosen

Title = Enter the title of the document.
(Quote, attachment list, registration, etc.)

Title *

8. Adding Attachments - After Saving if the "Add Attachment?" box was NOT checked on the header tab.



Date: 12/01/2016 Period: 2/17

Search Criteria

Year Re
Requisition Shi
Buyer *LC
Date Requested Att
Date Required Sta

In the Requisitions Listing Window search for the Requisition that needs attachments added

Enter the Requisition Number and Click Find

IMPORTANT:

Recommendation: Create a Folder on your Desktop called Requisition Attachments to save the files to be attached to requisitions.

Steps to add a requisition with screen shots:

IMPORTANT:

Recommendation: Create a Folder on your Desktop called Requisition Attachments to save the files to be attached to requisitions.

The screenshot shows a software interface with a top navigation bar containing 'Print Requisitions', 'Set Period', and 'Budget Transfer'. Below this is a toolbar with icons for adding, deleting, printing, OK, BACK, and attachments. The date is set to 12/01/2016 and the period to 2/17. A 'Search Criteria' section includes fields for Year (2014), Requisition (R1407981), Buyer, Date Requested, Date Required, Recon, Ship T, *LOCA, Attenti, and Status. There are 'Find' and 'Advanced' buttons. Below the search criteria is a table with the following data:

Requisition	Date	Fiscal Year
R1407981	07/22/2014	2014

Highlight the Requisition and Click Attachments

IMPORTANT:

Recommendation: Create a Folder on your Desktop called Requisition Attachments

Save the scanned attachments as requisition number, for example "R1407981" in your Desktop Folder called Requisition Attachments.

Steps to add a requisition with screen shots:

Attachment Information

Requisition Number R1407981

Add Attachment

Attachment Group * REQUISITION

File Name * Choose File R1407981 ATTACHMENTS.PDF

Title * Attachments

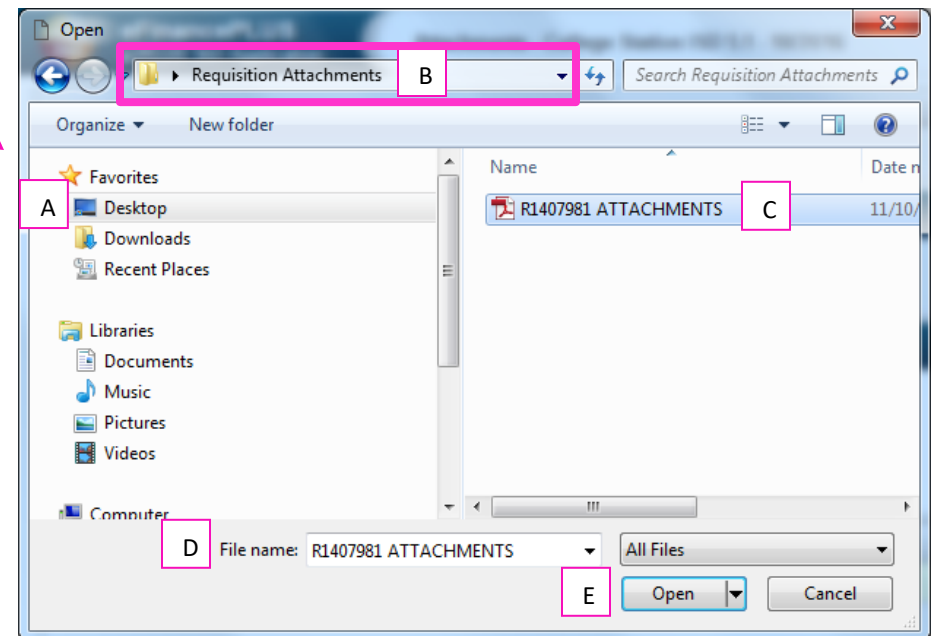
4th – Click Ok

1st - Click the Choose File icon to search for the saved attachments (R1407981 Attachments)

2nd – Locate File to Attach

- A. Select Desktop
- B. Select Requisition Attachments Folder
- C. Select file to attach (R# Attachments)
- D. File name = file to be attached to the Requisition
- E. Click Open

3rd – In the Title Box - Type "Attachments"



Steps to add a requisition with screen shots:










The screenshot shows a web application interface. At the top, there is a toolbar with icons for adding, deleting, printing, saving, and navigating back. Below the toolbar is a section titled "Attachment Information" with a text input field for "Requisition Number" containing "R1407981". Below that is a section titled "Add Attachment" with a dropdown menu for "Attachment Group" set to "REQUISITION", a "File Name" field with a "Choose File" button and the text "R1407981 ATTACHMENTS.PDF", and a "Title" field containing "Attachments". At the bottom, there is a table with two columns: "Attachment Group" and "Title". The first row of the table has "REQUISITION" in the "Attachment Group" column and "Attachments" in the "Title" column. This row is highlighted in yellow and enclosed in a pink rectangular box. A pink arrow points from the text below to this row.

Attachment Group	Title
REQUISITION	Attachments

The attachment shows up in the box under Attachment Group

Steps to add a requisition with screen shots:



Print Requisitions Set Period Budget Transfers Budget A

Date: 12/02/2016 Period: 2/17

Search Criteria

Year	2014	Recommended Vendor
Requisition	R1407981	Ship To
Buyer		*LOCATION*
Date Requested		Attention
Date Required		Status

 Find  Advanced

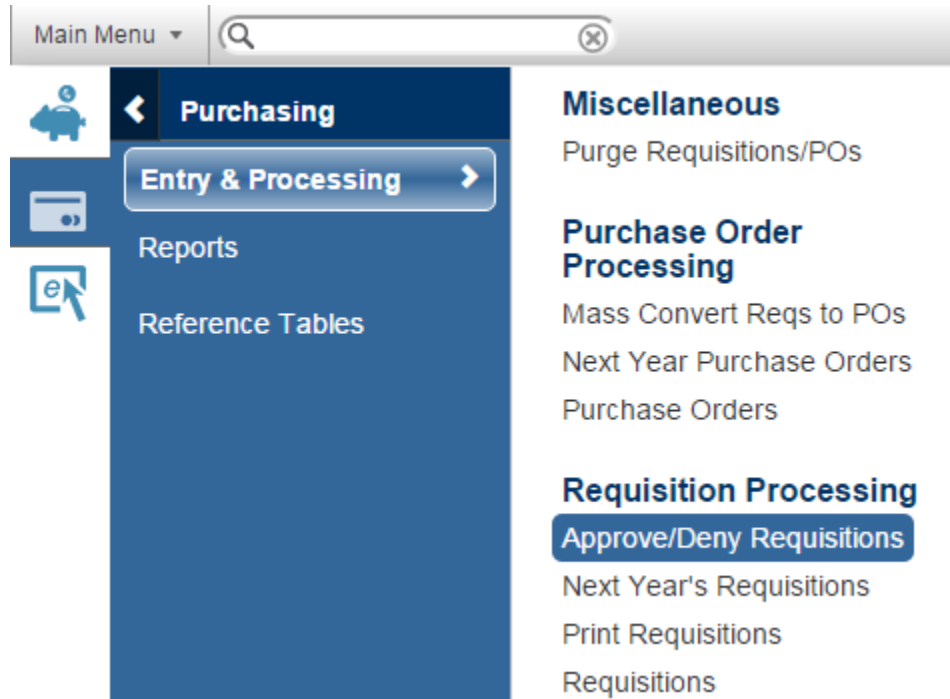
Requisition	Date	Fiscal Year	Vendor #
R1407981	07/22/2014	2014	6918

In the Requisition Listing Screen the Attachments button turns orange when the requisition has attachments.

Steps to add a requisition with screen shots:

9. Approving the Requisition

Purchasing → Entry & Processing → Requisition Processing → Approve/Deny Requisitions (double click)



Steps to add a requisition with screen shots:

10. In the **Approval Criteria section,**

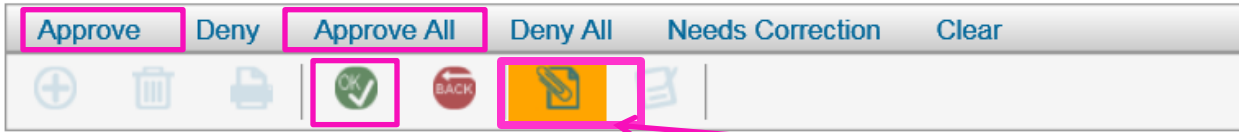
Leave all of the fields blank and Click "OK" 2 times to pull up the requisitions to be approved.

The screenshot shows a software interface with a top toolbar containing various icons. The 'OK' icon, which is a green checkmark inside a circle, is highlighted with a pink rectangular box. Below the toolbar, the date is set to 12/02/2016 and the period to 2/17. The main content area is divided into two sections:

- Approval Criteria:** This section has a blue header. It contains a dropdown menu labeled 'Approval Criteria *' with the value 'A - All Requisitions' selected. Below this is a 'Required' checkbox, which is currently unchecked.
- Additional Approval Criteria:** This section also has a blue header and contains several input fields:
 - 'Requisition': an empty text input field.
 - '*LOCATION*': a dropdown menu.
 - 'Vendor': a text input field with a magnifying glass icon to its right.
 - 'Requested': a text input field with a calendar icon to its right.
 - 'Ship Code': a dropdown menu.
 - 'Year': a dropdown menu with '2017' selected.

Steps to add a requisition with screen shots:

11. In the Requisitions for Approval Window



Notice the Attachments button is also orange in the Approval Screen since attachments were added to the Requisition.

Date: 12/06/2016 Period: 2/17

Status	Requisition	Requested	Vendor
Open	R1702696	10/24/2016	READ NATURALLY INC

Highlight the requisition(s) to be approved

Select – Approve to approve requisitions individually, or
Select – Approve All to approve all requisitions listed at one time

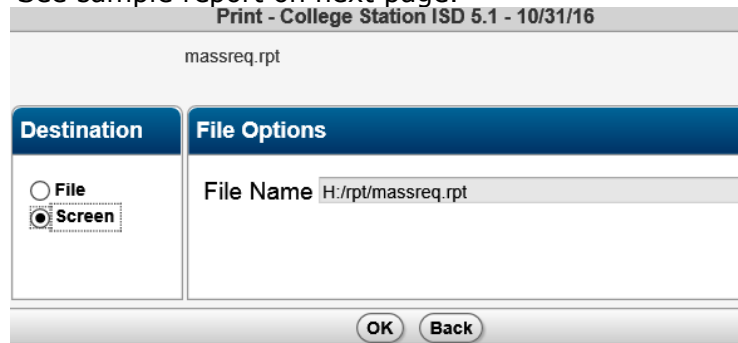
The Status field will change from Open to Approved.

Once all requisitions are approved **select OK until print window opens.**

In the print window select **OK** to generate the Requisition Approval/Denial Report and update the status of the requisitions.

Do not click back until report is printed!!! Otherwise the requisitions will have to be approved again.

See sample report on next page.



Steps to add a requisition with screen shots:

Sample Requisition Approval/Denial Report

COLLEGE STATION ISD
DATE: 12/06/2016
TIME: 14:21:10

COLLEGE STATION INDEPENDENT SCHOOL DIST
REQUISITION APPROVAL/DENIAL
RUN BY: bacarme1

PAGE NUMBER: 1
MODULE NUM: REQAPPR11
INFO: ALL RECORDS

SELECTION CRITERIA: requisit.yr='17'

LOCATION	REQ NUMBER	LINE ITEM	STATUS	AMOUNT	ERROR MESSAGE
ADMINISTRATIVE SERVICES	R1702696	1	A	599.10	
			TOTAL	599.10	

Steps to add a requisition with screen shots:

Important Items:

Pop up Blocker – Edit to allow eFinance screens to pop up

Google Chrome



If you see  the icon next to the star with the red X then the pop up was blocked.

Click on the Red x

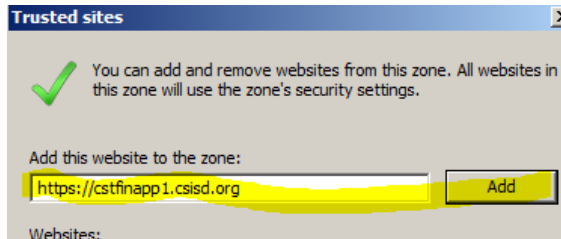
Check always allow pop ups from cstfinapp1.csisd.org

Click Done

Then double click on Requisitions again.

Explorer

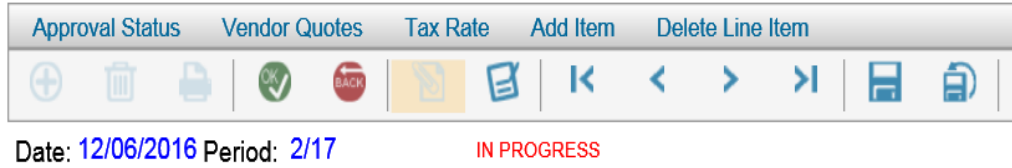
1. Launch an Internet Explorer browser window.
2. In the IE navigation bar click Tools > Internet options > select the second tab, Security.
3. In the Select a zone... box click the green check mark, Trusted sites and then click the button below that says Sites.
4. Under Add this website to the zone: should have <https://cstfinapp1.csisd.org>. If not add it.



5. Click the "Add" button, so that the cstfinapp1.csisd.org URL appears in the list of "Allowed sites."
6. Click Close to exit the window.
7. Click Ok to exit the window.

Steps to add a requisition with screen shots:

Items that were on the top are now are now at the top (see screen shot below)



Logging Out

Use the log out button (all the way to the right) when done.



If you don't see Log Out, make the screen bigger until you do.



eFinancePlus - College Station ISD 5.1 - 10/31/16

CARMELLA SHAFER

