



Requisitions

District personnel purchase items in the TEAMS system using the Requisitions module. Requisitions must be created, and then purchase order can then be created for the requisition, which is then received. An invoice must then be created for the requisition. This document describes this process.

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Introduction

Purchasing items in TEAMS is a seven-step process. The following chart illustrates this process.

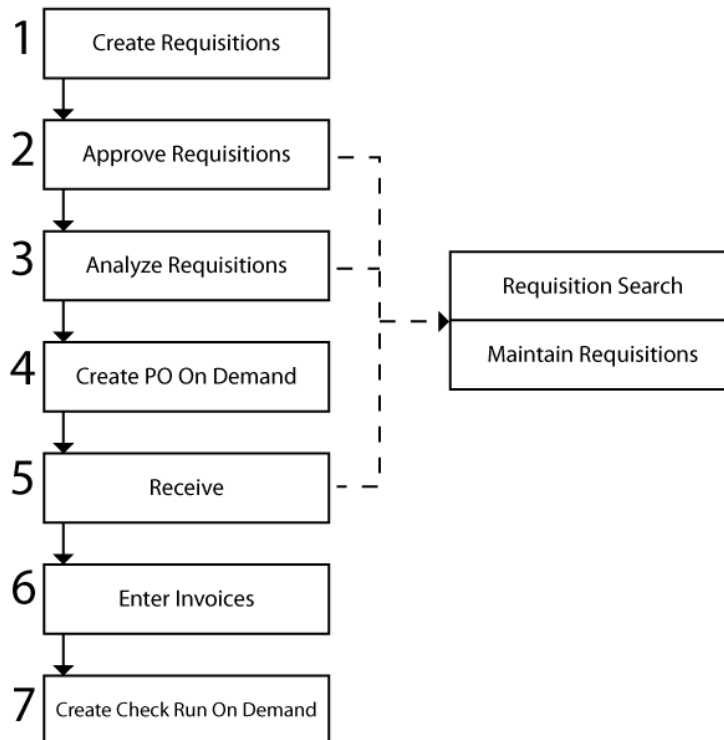


Figure 1: Requisitions workflow

Note: You can use the *Receive Requisitions* functions to search for requisitions you want to receive. If you want to modify a requisition you are about to receive, use the *Maintain Requisitions* function.

An overview of the information in this guide is below:

- **Create Requisitions** describes how to create traditional, not-to-exceed, project, and blanket requisitions.
- **Maintain Requisitions** describes how to edit or view information about requisitions.
- **Requisition Search** describes how to search for traditional, not-to-exceed, and blanket/project requisitions.
- **Receiving Requisitions** describes how to receive items bought through requisitions.
- **Appendix: Requisitions** provides supplementary information for requisition-related functions.

Create Requisitions

To purchase items using TEAMS, you must create and submit requisitions to be approved by approvers and analyzers so that it can be posted and invoiced. This document describes how to create and submit the following types of requisitions:

- Traditional Requisitions (below)
- Not-To-Exceed Requisitions (page 12)
- Project Requisitions (page 15)
- Blanket Requisitions (page 18)

How to Create a Traditional Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

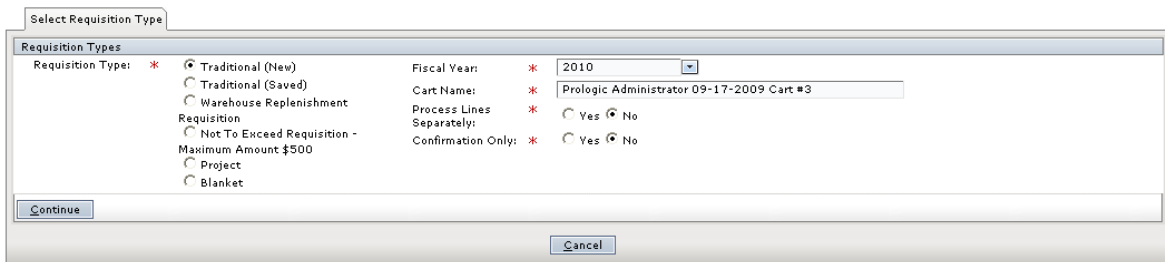


Figure 2: Select Requisition Type tab

3. In the **Requisition Type** field, Traditional (New) is the default selection. Leave Traditional (New) selected.

Note: Select Traditional (Saved) if you have already created the requisition and saved it as incomplete in the Line Items tab, and select the saved requisition from the **Cart Name** drop-down list.

4. The **Fiscal Year** defaults to the current year, but you can change this, if necessary.
5. In the **Cart Name** field, the following information is defaulted in:
 - The employee’s name who is logged in
 - Today’s date
 - The next cart number

You can change this information, if necessary.

Note: Cart Names are stored in numbered increments. If you change the Cart Name, the next requisition will default in using the same number as the number you change. For instance, if you change the Cart Name from Andrew 07-29-2008 Cart #4 to Office Chairs, the next requisition you create will default in the same Cart Number you changed: Andrew 07-29-2008 Cart #4.

6. Because the line items you add to the requisition can be approved individually, one item may be approved but not the other, or one item may be approved before the other. Use the **Process Lines Separately** field to indicate whether the items you add to the requisition must be purchased together. Select Yes if one item may be purchased without the other(s). Otherwise, select No.
7. Use the **Confirmation Only** field to indicate whether you are creating this requisition only to confirm it. For instance, select Yes if you already have the merchandise and only need to confirm the order. (No is the system default.)
8. Click the **Continue** Button. The Create Requisition tab is displayed, as in the following illustration.

Figure 3: Create Requisition tab

9. The **Category** and **Vendor** fields are related. You have the following options:
 - **Select a Category first:** If you enter a category first, the vendor drop-down list is populated with those vendors that are assigned to the category you selected.
 - **Select a Vendor first:** If you enter a vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.
10. Select a **Contract** from the drop-down list.
11. Select the **Order From** from the drop-down list.
12. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

Note: The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.

Note: The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.

Note: Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.

13. Select the **Ship-To Location** from the drop-down list.

Note: Depending on your selection, the *Ship-To Receiving Group* field is populated, and the *Delivery Location* and *Delivery Receiving Group* fields are displayed and populated on the tab. Select items from these drop-down lists.

14. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.

15. Select the **Delivery Location** from the drop-down list.

16. Select the **Delivery Receiving Group** from the drop-down list.

17. Click the ▲ on the Messages panel to add messages to the requisition. The expanded Messages panel is displayed in the following illustration.

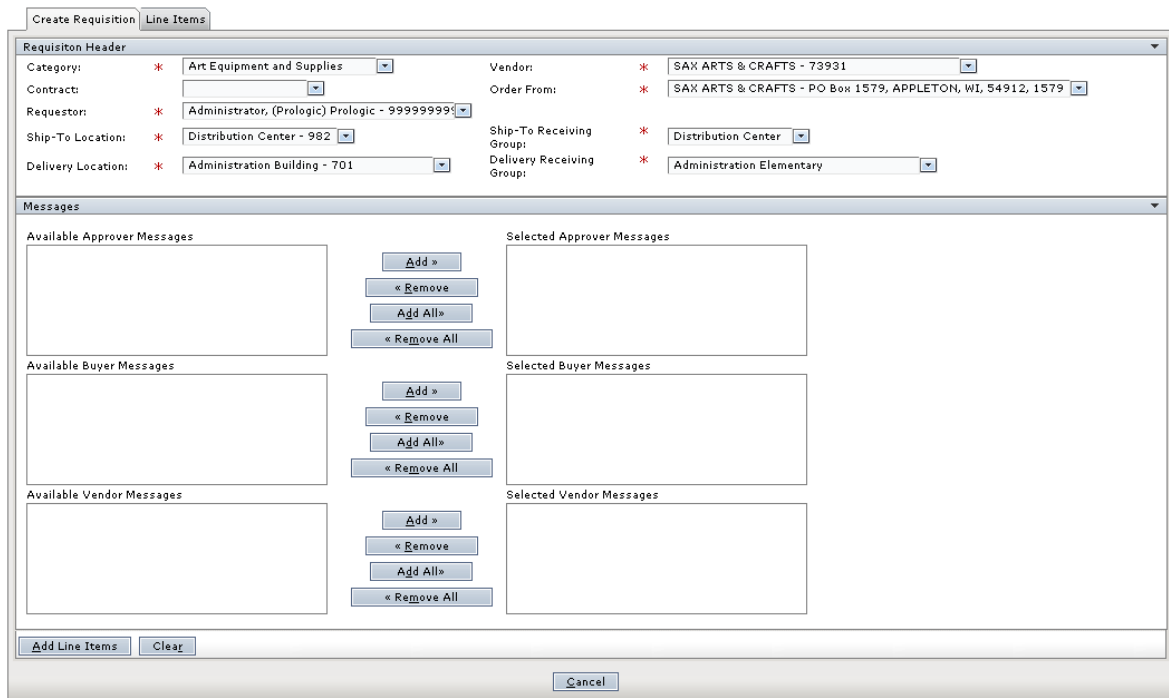


Figure 4: Create Requisition tab – Messages panel expanded

18. To include a message to Approvers, Buyers, or Vendors, highlight to select the appropriate message in the respective field and click the **Add** button.

Tip: Use the **Add All** button to move all of the items in one of the Available fields to its corresponding Selected field.

Note: Available messages are created in the *Requisition Options* function. For more information, see the *TEAMS Requisition Setup Guide*.

19. Click the **Add Line Items** button. The Line Items tab is displayed, as in the following illustration.

Figure 5: Line Items tab

Tip: Use the Add Line from Catalog button to add a line item from the catalog, from a list of items you have saved as a favorited item, or from a list of items you have added in the past. For more information about how to add these items, see "How to Add a Line from the Catalog" on page 8.

20. In the **Show Install?** field, indicate whether the item needs to be installed. If you select Yes, the Unit Install column is added to the table displaying the line items. Enter the amount the installation will cost in that cell of the appropriate line item.
21. In the **Show Freight?** field, indicate whether freight charges will be applied to the item. If you select Yes, the Freight column is added to the table displaying the line items. Enter the amount in that cell of the appropriate line item.
22. In the **Show Tax?** field, indicate whether taxes will be applied to the item. If you select Yes, the Unit Tax column is added to the table displaying the line items. Enter the amount the tax amount in that cell of the appropriate line item.
23. In the **Split Accounts By Type?** field, indicate whether the unit price, discount, or tax amounts need to be taken out of another account. If you select Yes, the Expense Accounts, Discount Accounts, and Tax Accounts columns are added to the table displaying the line items. Enter the amounts for each and add the account out of which to draw the funds.

Note: For more information about how to add an account, see step 25.

24. Use the information in the following table to configure the table in the Line Items tab.

Note: Click inside the cells under the relevant columns to enter information. The Total Line Amount cell cannot be edited, but is altered by what you enter in the Unit Price and Unit Discount fields, as well as the Install, Freight, and Unit Tax columns, if they are selected.

Column	Action
Save As Fav?	Checkmark the box in this column to save that line item as a favorite. The line item is added to the My Favorites tab when you click the Submit button. <i>Tip: When you need to add that item later, click the Add Line From Catalog button to access the Favorited Items tab. For more information about how to add favorited items, see "How to Add Items from the My History tab" on page 10.</i>
Quantity	Enter the number of items you want to purchase.
Item Number	Enter the item's number. <i>Note: Entering an item number that matches the item number used in the catalog populates all of the information for the line item except for the account. For more information about how to add an account, see step 25.</i>
Unit of Measure	Select how the items are grouped from the drop-down list.
Long Description	Enter a long description.
Justification	Enter an explanation for the purchase.
Special Instructions	Enter any special instructions.
Unit Price	Enter a price per unit.
Unit Dscnt.	Enter a unit discount.

25. Click the **(Click to add an account)** hyperlink to include an account from which to draw funds to pay for the item. The Edit Accounts box is displayed, as shown in the following illustration.

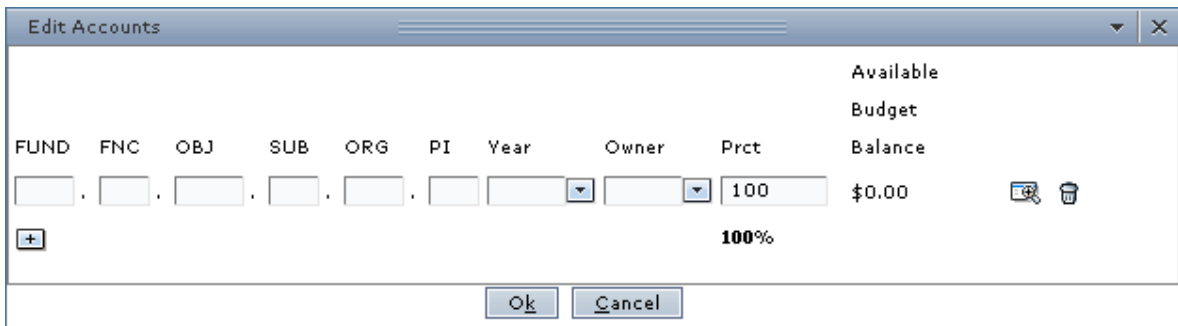



Figure 6: Edit Accounts box

26. Enter the account number, or click the  icon to select one from the Account Numbers tab.

Tip: Complete any of the boxes and click the  icon to filter the search.

27. Select the **Year** from the drop-down list.

28. Select the **Owner** from the drop-down list.

29. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.

Note: To delete an account, click the  icon.

30. **Optional.** Click the + icon to add another account number for the requisition. Repeat steps 25 through 29, and ensure that the Percentage fields for all accounts equals 100.

31. Click the **Ok** button. The account is added into the Accounts column in the Line Items tab.

32. Use the following information to add line items:

- Use the **Add Line from Scratch** button to add a new, blank line item.
- Use the **Add Line from Catalog** button to add a line with previously defined information.

Note: Clicking the Add Line from Catalog button opens the Purchasing Catalog tabs, which you can use to select catalog items, items you have saved as a favorite, and items you have added before. For more information about how to select these items, see "How to Add a Line from the Catalog" on page 8.

Note: Click the **Save Cart as Incomplete** button to save the requisition and complete it at another time. When you want to continue creating the requisition, select Traditional (Saved) from the Select Requisition type tab, and choose the requisition you created and saved from the drop-down list.

33. Click the **Submit** button. A message is displayed which tells you that the requisition was successfully created, and asks if you would like to create another requisition.

How to Add a Line from the Catalog

If the item you want to add can be found in the catalog, instead of manually entering the line item, you can save time by adding line items that have already been saved in the catalog.

1. On the Line Items tab, click the **Add Line from Catalog** button. The Purchasing Catalog tab is displayed, as in the following illustration.

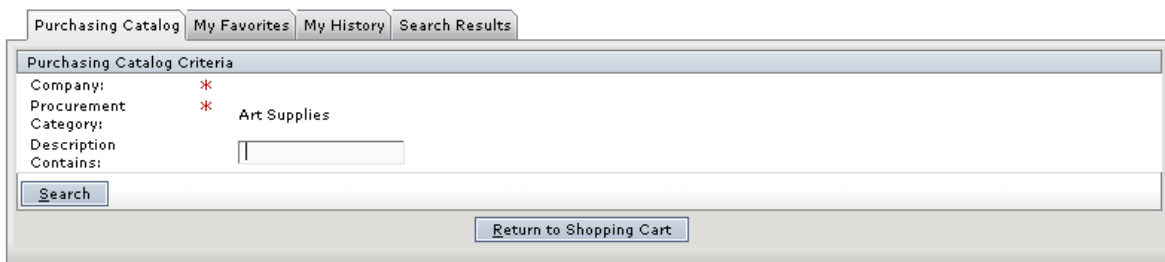


Figure 7: Purchasing Catalog tab

2. Enter information in the **Description Contains** field to search for items with a particular description.
3. Click the **Search** button. The Search Results tab is displayed, as in the following illustration.

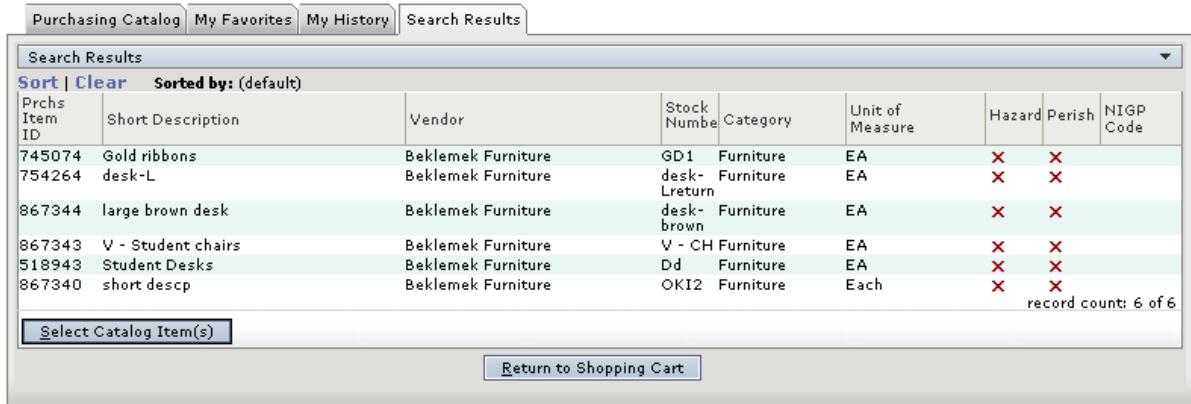


Figure 8: Search Results tab displaying results from a purchasing catalog search

4. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab is displayed with the item you selected added to the list.

How to Add Items from the My Favorites tab

When line items were originally entered, users have the option of saving it as a favorite by selecting the Save as Fav? field. Use the procedure below to select the items that have been saved as favorites.

1. Click the **My Favorites** tab to bring it forward. The My Favorites tab is shown in the following illustration.

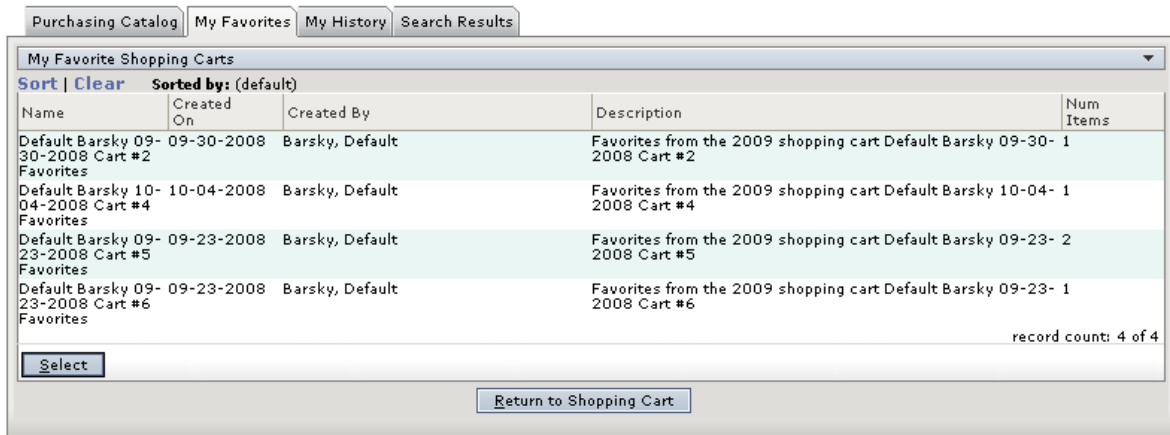


Figure 9: My Favorites tab

2. Highlight to select the item from the My Favorite Shopping Carts list, and click the **Select** button. The Search Results tab is displayed, as in the following illustration.

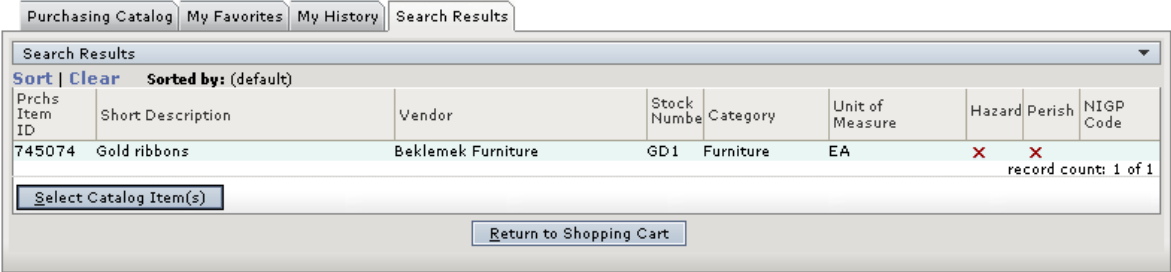


Figure 10: Search Results tab showing results for a favorited items search

- 3. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab is displayed with the item you selected added to the list.

How to Add Items from the My History tab

Use the following procedure to search for and select items that have been added before.

- 1. Click the **My History** tab to bring it forward. The My History tab is shown in the following illustration.

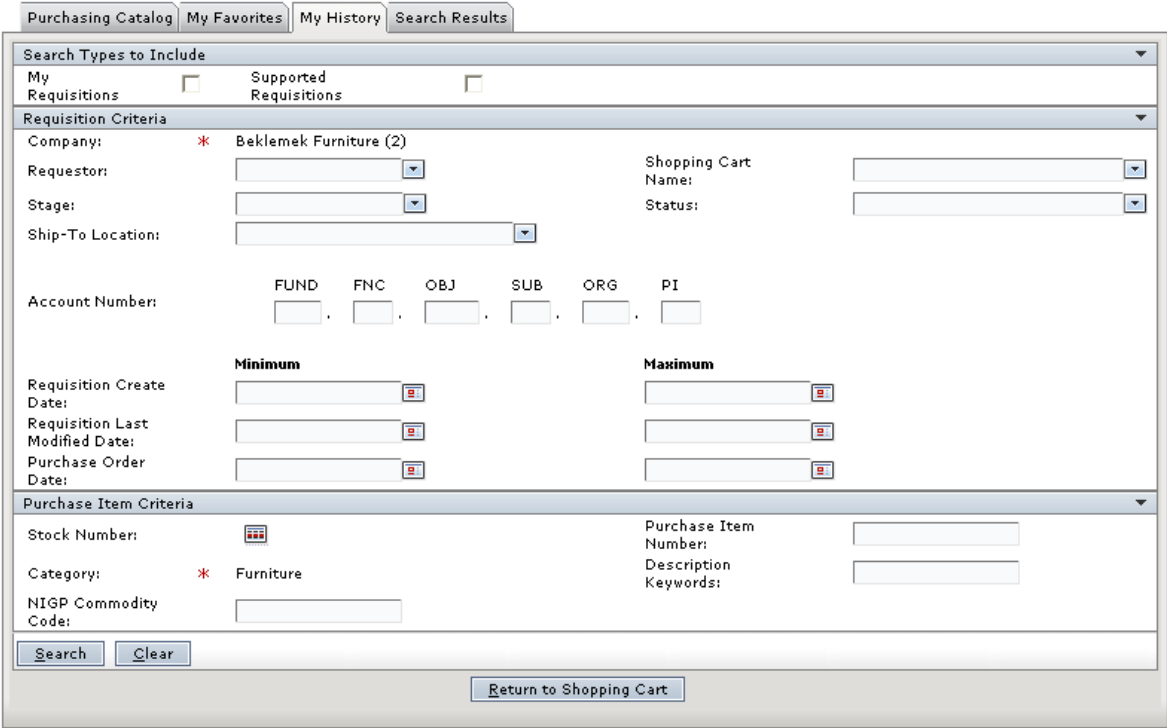







Figure 11: My History tab

2. In the Search Types to Include panel, select at least one of the following options:
 - **My Requisitions:** Select to search for requisitions that you created.
 - **Supported Requisitions:** Select to search for requisitions that were created for you by someone who supports you.
3. In the Requisition Criteria panel, enter information into at least one of the following fields:

Field	Action
Requestor	Select an item from the drop-down list.
Requisition Create Date (Minimum column)	Under the Minimum column, enter a date on or after which the requisition(s) for which you are searching were created, or click the  icon to select a date from the calendar. <i>Note: Enter a date in the Maximum column to search for requisitions that were created within a timeframe.</i>
Stock Number	Click the  icon to select a Stock Number from the Lookup Stock Number tab. <i>Note: In order to search for a stock number, you must first select a vendor. For more information about the Lookup Stock Number tab, see "Using the Lookup Stock Number Tab" on page 33.</i>
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.

4. To narrow your search results, enter information into any of the following fields:

Field	Action
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Enter the account number that was used to pay for the requisition for which you are searching.
Requisition Create Date (Maximum column)	Enter the date on or after which the requisition was created, or click the  icon to select a date from the calendar. <i>Note: If you entered a date in the Minimum column, you can search for a requisition that was created within a timeframe by entering a date in this field.</i>
Requisition Last Modified Date	Enter a date on or after which the requisition was last modified, or click the  icon to select a date from the calendar. <i>Note: Enter a date in the Maximum column to search for a requisition that was last modified within a timeframe.</i>

Purchase Order Date Enter the purchase order date for the requisition for which you are searching, or click the  icon to select a date from the calendar.

Note: Enter a date in the **Maximum** column to search for a requisition's purchase order date within a timeframe.

Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Description Keywords	Enter words that would match the description of the items on the requisition.
NIGP Commodity Code	Enter the NIGP Commodity code of the item of the requisition.

- Click the **Search** button. The results of your search are displayed on the Search Results tab, as in the following illustration.

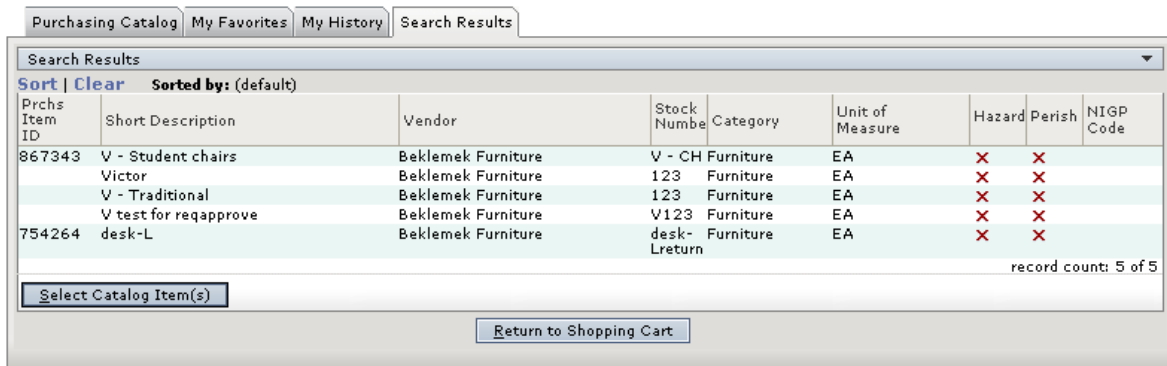


Figure 12: Search Results tab for items that have been ordered before

- Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab is displayed with the item you selected added to the list.

How to Create a Not-To-Exceed Requisition

- Navigate to the TEAMS Home page and locate the Requisition menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

- Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

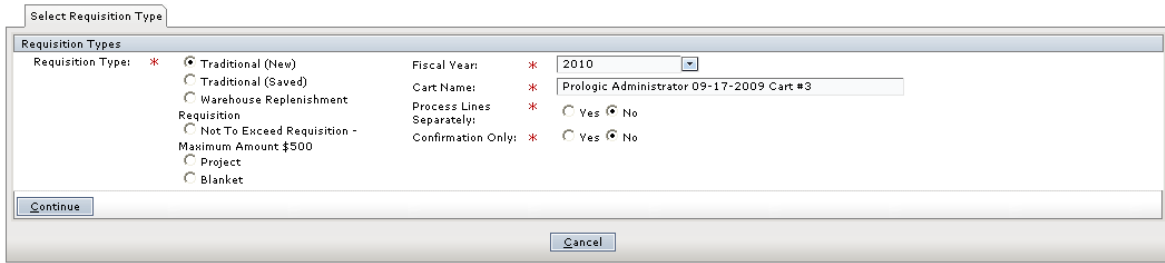


Figure 13: Select Requisition Type tab

- In the **Requisition Type** field, select the Not-To-Exceed Requisition option. The tab is redisplayed.

Note: The maximum amount the requisition is not to exceed is determined by a business rule. Business rules are high-level maintenance functions that allow districts to control certain aspects of how TEAMS will operate.

- Select a **Fiscal Year** from the drop-down list.
- Click the **Continue** button. The Not-To-Exceed Payment Authorization tab is displayed, as in the following illustration.

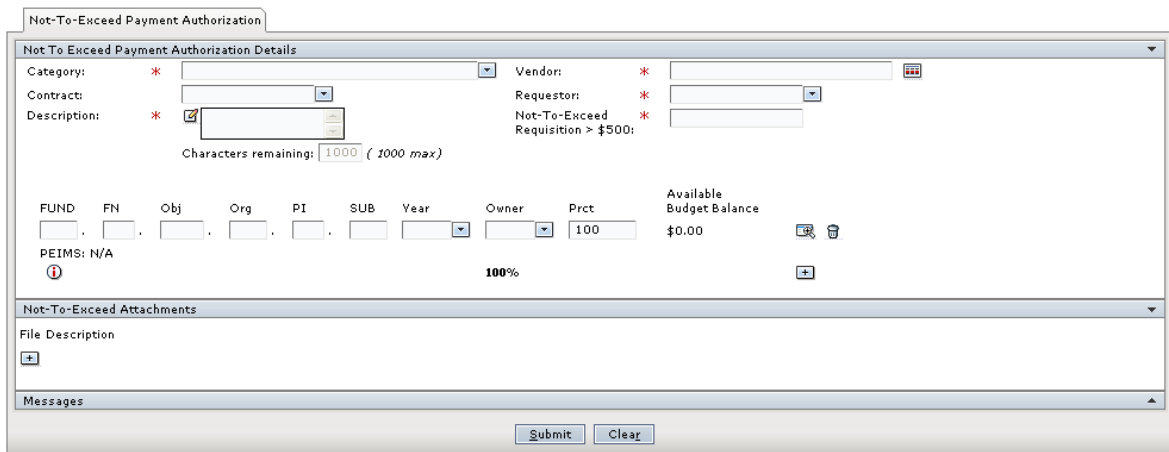


Figure 14: Not-To-Exceed Payment Authorization tab

- The **Category** and **Vendor** fields are related. You have the following options:
 - Select a Category first:** If you enter a category first, the vendor field is populated with those vendors that are assigned to the category you selected.
 - Select a Vendor first:** If you enter a vendor first, the category field is populated with those categories that are assigned to the vendor you selected.

Note: The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.


- Select a **Contract** from the drop-down list.

- The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

Note: The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.

Note: Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.

- Enter a **Description**.
- Enter an amount in the **Not-To-Exceed Requisition** field. The amount must not be more than the amount displayed in the field name.
- Enter or edit the account number, or click the + icon to select another one from the Account Numbers tab.

Tip: Complete any of the boxes and click the  icon to filter the search.

- Select the **Year** from the drop-down list.
- Select the **Owner** from the drop-down list.
- The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
- Optional.** To add another account to the requisition, repeat steps 11 through 14, and ensure that the Percentage fields for all accounts equals 100.
- Click the **Ok** button. The new account number is populated in the Account Number column.
- In the Not-To-Exceed Attachments panel, click the + icon to add an attachment. The File and Description fields are displayed, as in the following illustration.

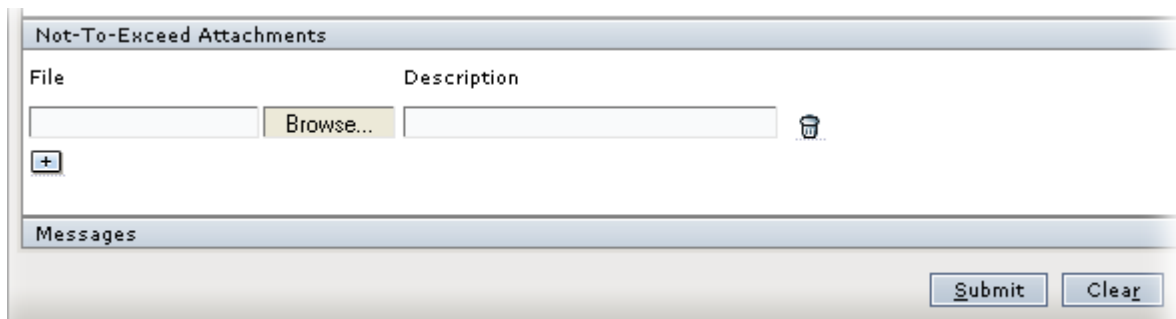



Figure 15: Not-To-Exceed Attachments panel with File and Description fields displayed

- Click the **Browse** button to navigate to the file location.
 - Enter a **Description**.
- Note:** To add attachments, click the + icon again. To delete additional attachments, click the  icon.
- Click the **Submit** button. A message is displayed which tells you that the requisition was successfully created, and asks if you would like to create another requisition.

How to Create a Project Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

Figure 16: Select Requisition Type tab

3. In the **Requisition Type** field, select the Project option. The tab is redisplayed.
4. Select a **Fiscal Year** from the drop-down list.
5. Click the **Continue** button. The Create Project Requisition tab is displayed, as in the following illustration.

Description	Total Amount	Released Amount	Balance Amount	Account Numbers	Action
	0.00	0.00	0.00	click to add an account	

Figure 17: Create Project Requisition tab

6. The Category and Vendor fields are related. You have the following options:
 - **Select a Category first:** If you enter a category first, the vendor field is populated with those vendors that are assigned to the category you selected.
 - **Select a Vendor first:** If you enter a vendor first, the category field is populated with those categories that are assigned to the vendor you selected.

Note: *The Contract and Requestor drop-down lists are populated with preferred contracts and vendors, respectively.*
7. Select a **Contract** from the drop-down list. The Category, Vendor, and Order From drop-down lists are populated with preferred Categories, Vendors, and Order From names, respectively.

Note: *Preferred Vendors and Categories are defined in the Maintain Procurement Contracts function.*
8. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

Note: *The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.*

Note: *Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.*
9. Select the **Ship-To Location** from the drop-down list.

Note: *Depending on your selection, the Ship-To Receiving Group field is populated, and the Delivery Location and Delivery Receiving Group fields are displayed and populated on the tab.*
10. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
11. Select a **Delivery Location** from the drop-down list.
12. Select the **Delivery Receiving Group** from the drop-down list.
13. Enter a **Description**.
14. Click the **Add New Description** button. An empty row is displayed.
15. Click in the cell under the **Description** column to enter the name of the milestone.
16. Click in the cell under the **Total Amount** column to change the total amount.
17. Click on the **(click to add account)** hyperlink to enter the account number. The Edit Accounts box is displayed, as in the following illustration.

FUND	FNC	OBJ	SUB	ORG	PI	Year	Owner	Prct	Available	Budget	Balance
								100			\$0.00
								100%			

Figure 18: Edit Accounts box

18. Enter the account number, or click the + icon to select another one from the Account Numbers tab.

Tip: Complete any of the boxes and click the icon to filter the search.

19. Select the **Year** from the drop-down list.

20. Select the **Owner** from the drop-down list.

21. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.

22. **Optional.** Click the + icon to add another account number for the requisition. Repeat steps 17 through 21, and ensure that the Percentage fields for all accounts equals 100.

23. Use the **Action** column to delete a line item.


24. Click the **Ok** button. The new account number is populated in the Account Number column.

25. In the Create Project Requisition Attachments panel, click the + icon to add an attachment. The File and Description fields are displayed, as in the following illustration.

Figure 19: Create Project Requisition Attachments panel with Browse and Description fields displayed

26. Click the **Browse** button to navigate to the file location.

27. Enter a **Description**.

Note: To add attachments, click the + icon again. To delete additional attachments, click the  icon.

28. Click the **Submit** button. The Select Requisition Type tab is displayed with a message that the project requisition was successfully saved.

How to Create a Blanket Requisition

1. Navigate to the TEAMS Home page and locate the Requisition menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Create Requisitions** link. The Select Requisition Type tab is displayed, as shown in the following illustration.

Figure 20: Select Requisition Type tab

3. In the **Requisition Type** field, select the Blanket option.

4. Select a **Fiscal Year** from the drop-down list.

5. Click the **Continue** button. The Blanket Requisition tab is displayed, as in the following illustration.


Figure 21: Blanket Requisition tab


6. The **Category** and **Vendor** fields are related. You have the following options:
 - **Select a Category first:** If you enter a category first, the vendor drop-down list is populated with those vendors that are assigned to the category you selected.
 - **Select a Vendor first:** If you enter a vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.

Note: The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.

7. Select the **Order From** from the drop-down list.
8. Select a **Contract** from the drop-down list.
9. Select the **Ship-To Location** from the drop-down list.

Note: Depending on your selection, the **Ship-To Receiving Group** field is populated, and the **Delivery Location** and **Delivery Receiving Group** fields are displayed and populated on the tab.



10. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
11. Select a **Delivery Location** from the drop-down list.
12. Select a **Delivery Receiving Group** from the drop-down list.
13. Enter a **Description**.
14. Enter the **Amount**.
15. Edit the **Expense Account**, or click the  icon to select another one from the Account Numbers tab.

Tip: Complete any of the boxes and click the  icon to filter the search.

16. Select the **Year** from the drop-down list.
17. Select the **Owner** from the drop-down list.
18. The Percent (**Prct**) field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
19. **Optional.** Click the + icon to add another account number for the requisition. Repeat steps 15 through 18, and ensure that the Percentage fields for all accounts equals 100.
20. Click the **Ok** button. The new account number is populated in the Account Number column.
21. In the Blanket Requisition Attachments panel, click the + icon to add an attachment. The File and Description fields are displayed, as in the following illustration.




Blanket Requisition Attachments

File	Description
<input type="text"/> Browse... 	<input type="text"/>
	

Submit Clear Cancel

Figure 22: Blanket Requisition Attachments panel with Browse and Description fields displayed

22. Click the **Browse** button to navigate to the file location.
23. Enter a **Description**.

Note: To add attachments, click the + icon again. To delete additional attachments, click the  icon.

24. Click the **Submit** button. A message is displayed which tells you that the requisition was successfully created, and asks if you would like to create another requisition.

Requisition Search

You can search for regular requisitions, not-to-exceed requisitions, and blanket/project requisitions.

How to Search for Traditional Requisitions

1. Navigate to the TEAMS Home page and locate the Requisition menu.





Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.


2. Select the **Requisition Search** link. The Requisition Search tab is displayed, as shown in the following illustration.

The screenshot shows the 'Requisition Search' tab interface. At the top, there are two tabs: 'Requisition Search' (active) and 'Requisition Search Results'. Below the tabs is a 'Search Types to Include' section with two radio buttons: 'My Requisitions' (checked) and 'All Requisitions'. The main area is titled 'Requisition Criteria' and contains several input fields and dropdown menus. On the left side, there are fields for 'Vendor', 'Requestor', 'Stage', and 'Ship-To Location'. On the right side, there are fields for 'Order From', 'Shopping Cart Name', and 'Status'. Below these is an 'Account Number' field with a grid of input boxes for FND, FN, OBJ, SO, ORG, PI, L, and PR. Further down, there are date fields for 'Requisition Create Date' (with 'Minimum' and 'Maximum' labels), 'Requisition Last Modified Date', and 'Purchase Order Date'. The bottom section is titled 'Purchase Item Criteria' and includes fields for 'Stock Number', 'Category', 'NIGP Commodity Code', 'Purchase Item Number', 'Description', and 'Keywords'. At the very bottom, there are 'Search' and 'Clear' buttons.

Figure 23: Requisition Search tab

3. In the Search Types to Include panel, select at least one of the following options:
 - **My Requisitions:** Select to search for requisitions that you created.
 - **All Requisitions:** Select to search for both requisitions that you created and requisitions that you approved.
4. Enter information into at least one of the following fields:

Field	Action
Vendor	Enter the name of a Vendor, or click the  icon to select one from the Vendor Lookup tab. <i>Note: For more information about the Vendor Lookup tab, see "Using the Vendor Lookup Tab" on page 33.</i>
Order From	Select the name of the person from whom the items on the requisition were ordered from the drop-down list.
Requestor	Select an item from the drop-down list.
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Requisition Create Date	Under the Minimum column, enter a date on or after which the requisition(s) for which you are searching were created, or click the  icon to select a date from the calendar. <i>Note: Enter a date in the Maximum column to search for requisitions that were created within a timeframe.</i>
Requisition Last Modified Date	Enter a date on or after which the requisition for which you are searching was last modified, or click the  icon to select a date from the calendar. <i>Note: Enter a date in the Maximum column to search for a requisition that was last modified within a timeframe.</i>
Purchase Order Date	Enter the purchase order date for the requisition for which you are searching, or click the  icon to select a date from the calendar. <i>Note: Enter a date in the Maximum column to search for a requisition's purchase order date within a timeframe.</i>

Field	Action
Stock Number	Click the  icon to select a Stock Number from the Lookup Stock Number tab. Note: In order to search for a stock number, you must first select a vendor. For more information about the Lookup Stock Number tab, see "Using the Lookup Stock Number Tab" on
Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Category	Select the requisition's category from the drop-down list.
Description Keywords	Enter words that would match the description of the items on the requisition.
NIGP Commodity Code	Enter the NIGP Commodity code of the item of the requisition.

- Click the **Search** button. The results of your search are displayed on the Requisition Search tab, as in the following illustration.

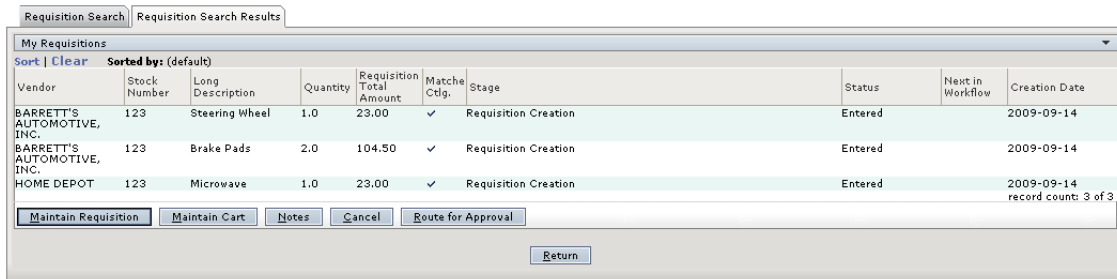


Figure 24: Requisition Search Results tab

How to Maintain Requisitions

Highlight to select the requisition you want to edit, and click the **Maintain Requisitions** or **Maintain Cart** button to edit the requisition or the cart, respectively. Both buttons open the Requisition Maintenance tab. For more information, see "Maintain Requisitions" on page 27.

How to Add Notes to Requisitions

Highlight to select the requisition to which you want to add a note, and click the **Notes** button. For more information, see "Using the Notes Tab" on page 31.

How to Cancel Requisitions

Highlight to select the requisition you want to cancel, and click the **Cancel** button. A message is displayed which tells you that the requisition was successfully canceled.

How to Route Requisitions for Approval

Highlight the requisition you want to route for approval, and click the **Route for Approval** button. The requisition is routed for approval.

How to Search for Not-To-Exceed and Blanket/Project Requisitions

Note: Because you use the same process to search for not-to-exceed requisitions as you use to search for blanket/project requisitions, the procedures in this section only cover how to search for not-to-exceed requisitions.


1. Navigate to the TEAMS Home page and locate the Requisition menu.

Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Select the **Not To Exceed Requisition Search** link. The Not-To-Exceed Requisition Search tab is displayed, as shown in the following illustration.

Figure 25: Not-To-Exceed Requisition Search tab

3. In the Search Types to Include panel, select at least one of the following options:
 - **My Requisitions:** Select to search for requisitions that you created.
 - **All Requisitions:** Select to search all requisitions.
4. Select a **Fiscal Year** from the drop-down list.
5. Enter information into any of the following fields:

Field	Action
Vendor	Enter the name of a Vendor, or click the  icon to select one from the Vendor Lookup tab. Note: For more information about the Vendor Lookup tab, see "Using the Vendor Lookup Tab" on page 33.
Category	Select an item from the drop-down list.
Limit to Releasable	Select Yes to search for releasable not-to-exceed requisitions. Select No to search for both releasable and non-releasable requisitions.

Field	Action
Min Amount	Enter the minimum amount for the requisition
Max Amount	Enter the maximum amount of the requisition
Description Contains	Enter a part of the description.
Stage	Select an item from the drop-down list.
Status	Select an item from the drop-down list.
Account Number	Enter the account number.

6. Click the **Search** button. The Results tab is displayed, as in the following illustration.

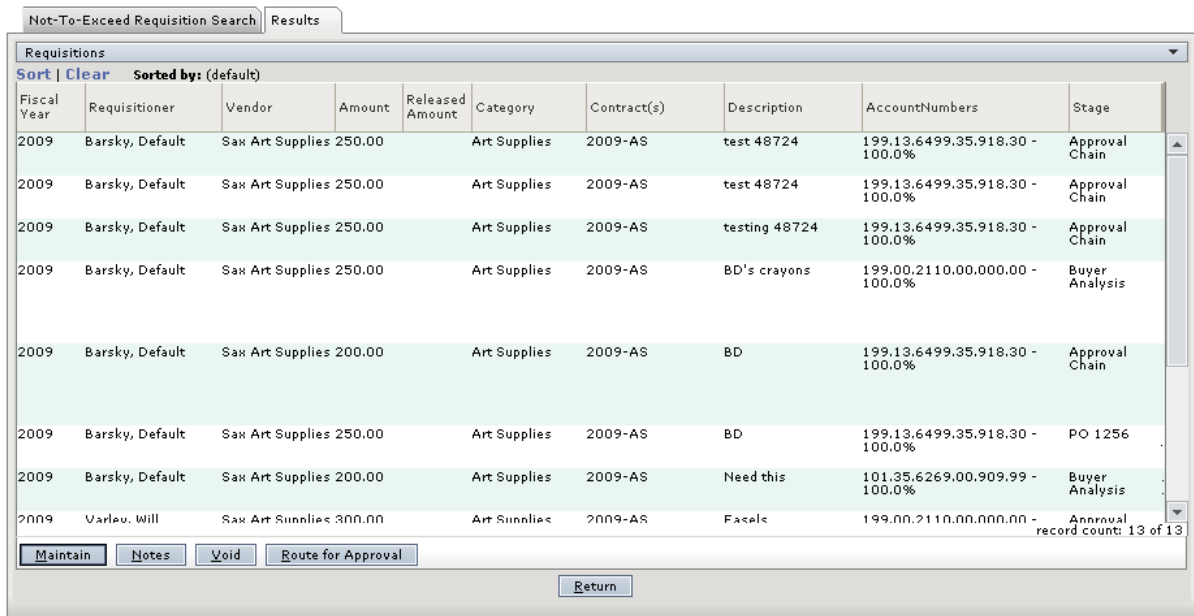


Figure 26: Results tab

How to Maintain Not-To-Exceed Requisitions

Highlight to select the requisition you want to edit, and click the **Maintain** button to edit it. This button opens the Not-To-Exceed Requisition Maintenance tab. For more information, see "How to Maintain Not-To-Exceed Requisitions" on page 25.

Note: If you are working in the Blanket/Project Requisition Search function, clicking on the **Maintain** button opens the Blanket/Project Requisition Maintenance tab. For more information about this tab and navigation bar, see "Maintain Requisitions" on page 27.

How to Add Notes to Not-To-Exceed Requisitions

Highlight to select the requisition to which you want to add a note, and click the **Notes** button. For more information, see "Using the Notes Tab" on page 31.

How to Void Not-To-Exceed Requisitions

Highlight to select the requisition you want to cancel, and click the **Void** button. A message is displayed which tells you that the requisition was successfully canceled.

How to Route Not-To-Exceed Requisitions for Approval

Highlight the requisition you want to route for approval, and click the **Route for Approval** button. The requisition is routed for approval.

Maintain Requisitions

After you create a requisition and it is submitted for approval, district personnel in the workflow have the option of editing it. Use the Requisition Maintenance tabs to review or edit traditional requisitions, use the Not-To-Exceed Requisition Maintenance tabs to review or edit not-to exceed requisitions, and use the Project Requisition tabs to review or edit Blanket or Project requisitions. The following topics describe how to maintain requisitions.

- How to Maintain Traditional Requisitions (below)
- How to Maintain Not-To-Exceed Requisitions (see page 25)

How to Maintain Traditional Requisitions

You can maintain requisitions from various requisition-related functions. Use the following procedure to maintain requisitions.

Note: Illustrations in this procedure show the Requisition Maintenance tabs accessed from the Approve Requisitions function. Button options will depend on the function from which you accessed the Requisition Maintenance tabs.

1. If you are in the Requisition Search function, select a requisition and click the **Maintain Requisitions** button. If you are using the Approve Requisitions or Analyze Requisitions functions, click the **Requisition Details** button. The Requisition Overview tab is displayed with the Requisition Maintenance navigation bar, as in the following illustration.

The screenshot displays the 'Requisition Overview' window. On the left is a 'Requisition Maintenance' navigation bar with tabs for Overview, Indicators, Attachments, Favorites, and Review. The main window is divided into several sections:



- Purchase Item Details:** Vendor: BARRETT'S AUTOMOTIVE, IN; Order From: BARRETT'S AUTOMOTIVE, INC. - 161; Item Number: BP123; Category: Auto Supplies; Contract: ; Unit of Measure: EACH; NIGP Code: ; Detailed Description: BRAKE PADS 0916; Special Instructions: ; Justification: ; Cart Name: Prologic Administrator 09-16-2009 Cart #9.
- Requisition Details:** Requestor: School Board; Ship-To Location: Distribution Center; Delivery Location: Administration Building; Needed By Date: ; Ship-To Receiving Group: Distribution Center; Delivery Receiving Group: Administration Elementary.
- Accounts:** Expense Accounts selected. FND: 199, FN: 51, OBJ: 6299, SO: 00, ORG: 180, PI: 99, L: 0, PR: 00, Year: 2010, Owner: 180, Prct: 100, Available Budget Balance: \$568.49.
- Cost:** Table with columns: Quantity, Unit Price, Unit Discount Amount/Pct, Unit Tax Amount/Pct, Unit Install Amount/Pct, Freight Amount, Total. Row 1: 1.0, 55.00, 0.00, 0.00, 0.00, 0.00, 55.00.

Buttons at the bottom include 'Save and Continue', 'Save and Restart Approval', and 'Return'.

Figure 27: Requisition Overview tab with the Requisition Maintenance navigation bar

Note: The buttons on the bottom of this tab depend on how you accessed the Maintain Requisitions function.

2. Use the following information to edit information in the Purchase Item Details panel:

Field	Action
Vendor	Enter a vendor, or click the  icon to select a vendor from the Vendor Lookup tab. Note: For more information about working with the Lookup Vendor tab, see "Using the Vendor Lookup Tab" on page 33.
Category	Select a category from the drop-down list.
Order From	Select the entity from which the item(s) will be ordered from the drop-down list.
Contract	Select the contract from the drop-down list.
Item Number	Enter the item number, or click the  icon to select one from the Lookup Stock Number tab. Note: For more information about working with the Lookup Stock Number tab, see "Using the Lookup Stock Number Tab" on page 33.
Unit of Measure	Select a unit by which to measure the item(s).
NIGP Code	Enter the NIGP Commodity code of the item of the requisition.
Detailed Description	Enter a detailed description.
Special Instructions	Enter any special instructions.
Justification	Enter a reason for the requisition.

Receiving Requisitions

Use the Receive function to receive requisitions.

How to Receive Requisitions

1. Navigate to the TEAMS Home page and locate the Requisitions menu.


Note: The exact name of the menu you use to access this function depends on how your district has configured its TEAMS Home page.

2. Click the **Receive** link. The Receiving Search tab is displayed, as in the following illustration.



The screenshot shows a web interface for 'Receiving Search'. At the top, there are two tabs: 'Receiving Search' (selected) and 'Purchase Order Receiving'. Below the tabs is a 'Search Criteria' section. It contains five input fields: 'Purchase Order Number', 'Description', 'Min Date', 'Vendor', and 'Part Number'. The 'Vendor' and 'Part Number' fields have a small icon to their right. At the bottom of the search criteria section are two buttons: 'Search' and 'Clear'.

Figure 28: Receiving Search tab

3. The current **Fiscal Year** is selected by default, but you can change this, if necessary.
4. Enter information into any of the following fields:

Use this filter	To search by
Purchase Order Number	The purchase order number
Description	The description of the requisition Note: You must enter at least three characters.
Part Number	The part number of the order Note: Click the  icon to select a part number from the Vendor Lookup tab. For more information about the Lookup Stock number tab, see "Using the Lookup Stock Number Tab" on page 33.

5. Use the following information to refine your search results:

Use this filter	To search by
Vendor	The name of a Vendor <i>Note: Click the  icon to select a vendor from the Vendor Lookup tab. For more information about the Vendor Lookup tab, see "Using the Vendor Lookup Tab" on page 33.</i>
Min Date	The date after which to search for requisitions <i>Note: Click the  icon to select a date from the calendar.</i>

6. Click the **Search** button. The results of your search are displayed in the Purchase Orders panel, as in the following illustration.

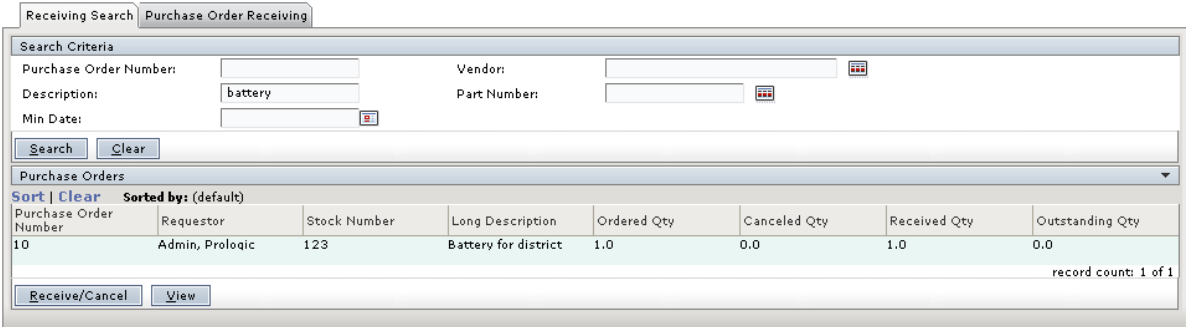


Figure 29: Receiving Search tab with results displayed

Note: The columns that are displayed in Figure 29 and Figure 30 depend on what is selected in the Requisition Options function. For more information about this function, see the TEAMS Requisition Setup User Guide.

7. Highlight to select the appropriate requisition, and click the **Receive/Cancel** button. The Purchase Order Receiving tab is displayed, as in the following illustration.

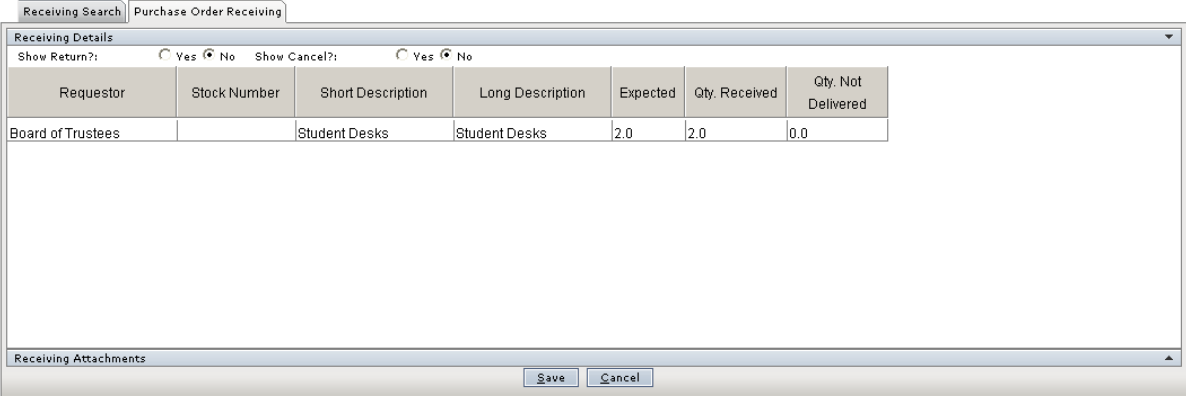



Figure 30: Purchase Order Receiving tab

Appendix: Requisitions

This appendix provides supplementary information for requisition-related functions, such as how to use the Notes tab and various Lookup tabs.

Using the Employee Lookup Tab

The Employee Lookup tab is accessed by clicking the  icon. The Employee Lookup tab is displayed.

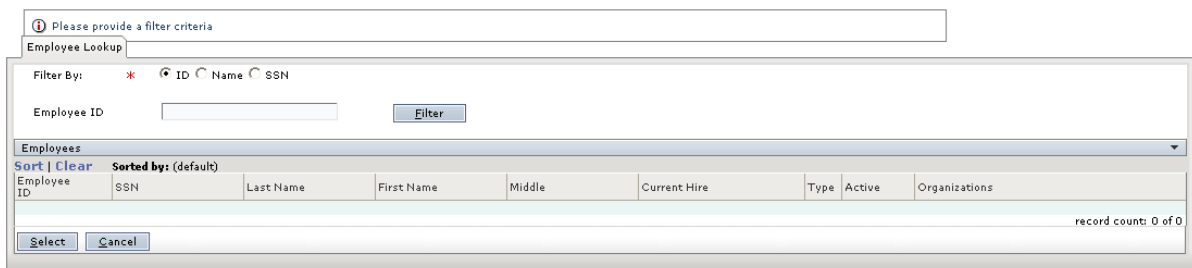


Figure 31: Employee Lookup tab

1. You have the following options:
 - **ID:** Enter the employee's Employee Identification Number.
 - **Name:** Enter the employee's Last Name, Middle Name, or First name.
 - **SSN:** Enter the employee's Social Security Number.
2. Click the **Filter** button. The results are displayed on the Employees list.
3. Highlight to select the employee, and click the **Select** button. The tab in which you were previously working is displayed with your selection.

Using the Notes Tab

The Notes tab is accessed by clicking the **Notes** button.

The screenshot shows the 'Notes' tab interface. At the top, there is a 'Notes' header. Below it is a form for adding a new note. The form includes a text area for the note, a 'Characters remaining' indicator (500 / 500 max), and radio buttons for 'Private' (Yes/No) and 'Internal Only' (Yes/No). A dropdown menu for 'Communication Method' is also present. Below the form are 'Add' and 'Clear' buttons. Underneath is a table with columns: 'Added On', 'Last Modified', 'Note', 'Added By', 'Private', 'Internal Only', and 'Note Operation'. The table is currently empty, with a 'record count: 0 of 0' displayed. Below the table are 'Edit' and 'Delete' buttons. At the bottom center is a 'Return' button.

Figure 32: Notes tab

How to Add Notes

1. In the **Notes** field, enter any free-text comments, up to 500 characters.
2. In the **Private** field, select Yes to indicate that this note is private; select No if the note is not private. No is the system default.

Note: If a note is designated as Private, then only the person entering the note has access to it. No information about the note is displayed for other users.

3. In the **Internal Only** field, select Yes to indicate that this note is for internal use only; select No if the note is not only for internal use. Yes is the system default.

Note: Selecting Yes in the Internal Only field indicates that only district employees have access to the note.

4. Select the **Communication Method** by which you received the information.
5. Click the **Add** button. The note is added to the Notes list.
6. Click the **Return** button to return to the tab on which you were working.


How to Edit an Existing Note

Highlight it in the Notes list and click the **Edit** button. Make any changes, and click the **Save** button.

How to Delete a Note

Highlight it in the notes list and click the **Delete** button. The system displays a message asking you to confirm the deletion action. Click **Yes** to delete the note.

Using the Lookup Stock Number Tab

The Lookup Stock Number tab is accessed by clicking the  icon next to the **Stock Number** field. The Lookup Stock Number tab is displayed.

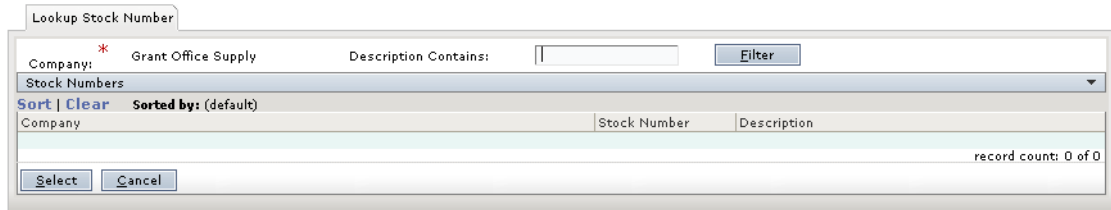



Figure 33: Lookup Stock Number tab

1. To filter the items in the Stock Numbers list, enter at least one character in the **Description Contains** field. The list is filtered by the Description of the item.
2. Highlight to select the appropriate item in the Stock Numbers list.
3. Click the **Select** button.
4. You are taken back to the appropriate tab, and the stock number you selected is populated next to the Stock Number label.

Using the Vendor Lookup Tab

The Vendor Lookup tab is accessed by clicking the  icon. The Lookup Vendor tab is displayed.

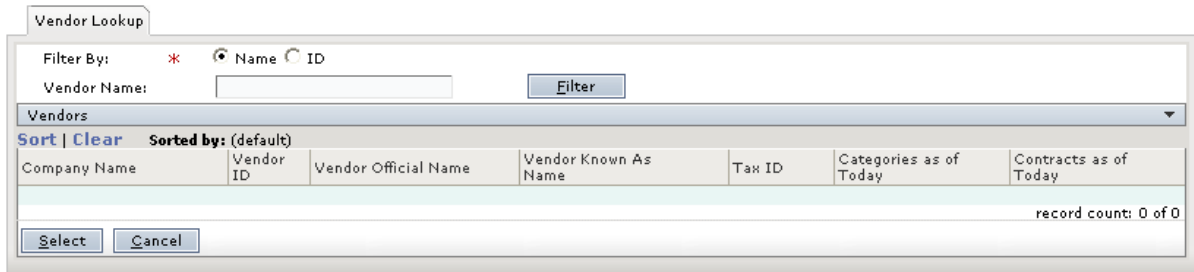


Figure 34: Vendor Lookup tab

1. In the **Filter By** field, select one of the following options:
 - **ID**: The Vendor ID field is displayed.
 - **Name**: The Vendor Name field is displayed.

Tip: If you are unsure of the spelling of the company name, enter at least one letter, and click the **Filter** button. For example, if you enter *Ed*, your search results could return companies containing the word *United*, as well as those containing the word *Red*.

2. If you selected the ID button, enter the vendor's identification number in the Vendor ID field. If you selected the Name button, enter the vendor's name in the Vendor Name field.

3. Click the **Filter** button. The search results are displayed.
4. Select the appropriate **Company**.
5. Click the **Select** button. The tab in which you were previously working is displayed with the Vendor's information populated in the appropriate field.