# Approve/Analyze Requisitions

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

**In this document**

# Introduction

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

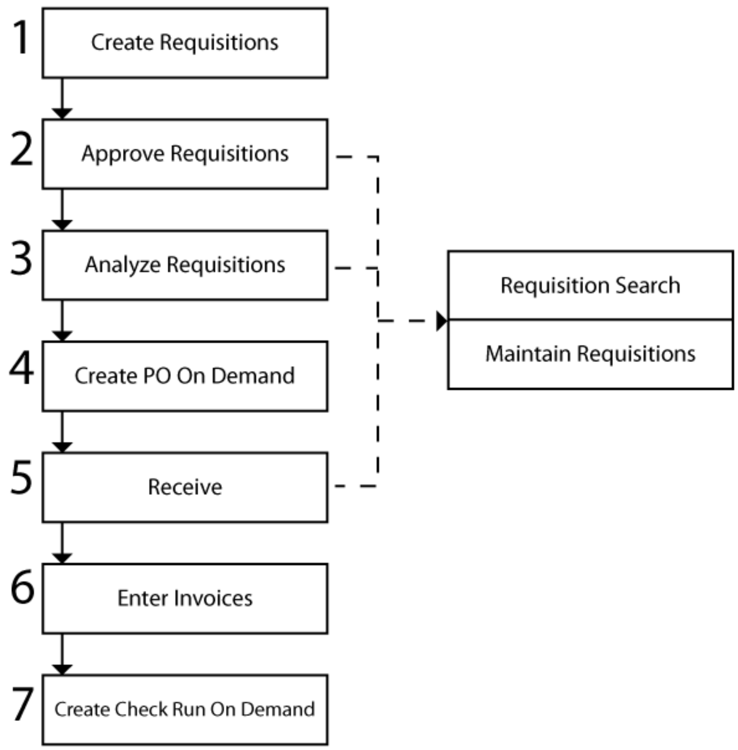



***Figure 1: Requisitions workflow***

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

An overview of the information in this guide is below:

- **Approve Requisitions** describes how to search for traditional, not-to-exceed, and blanket/ project requisitions.
- **Analyze Requisitions** describes how to analyze traditional, not-to-exceed, and blanket/ project requisitions.
- **Maintain Requisitions** describes how to edit or view information about requisitions.
- **Create Purchase Orders On Demand** describes how to create purchase orders for requisitions.
- **Appendix: Requisitions** provides supplementary information for requisition-related functions.

# Approve Requisitions

Once a requisition has been created, it needs to be approved. Use the following topics to approve traditional or warehouse requisitions, not-to-exceed requisitions, and blanket/project requisitions.

## How to Approve 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 **Approve Requisitions** link. The Traditional Requisition Approval tab is displayed, as shown in the following illustration.

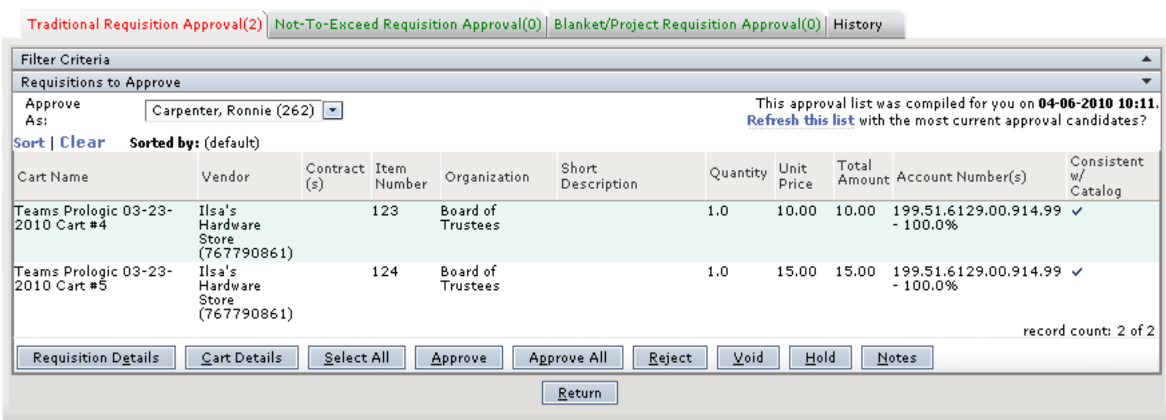



***Figure 2: Traditional Requisition Approval tab***

***Note:*** *Approval tabs are color-coded. Green indicates that there are no requisitions that need to be approved. Red indicates that there are requisitions that need to be approved. On each tab, the number of requisitions that need to be approved is displayed in parenthesis.*

***Note:*** *If you are approving Not-To-Exceed Requisitions or Blanket/Project Requisitions, bring that tab forward, and skip to step 5.*

3. Click the ▼ to expand the Filter Criteria panel.

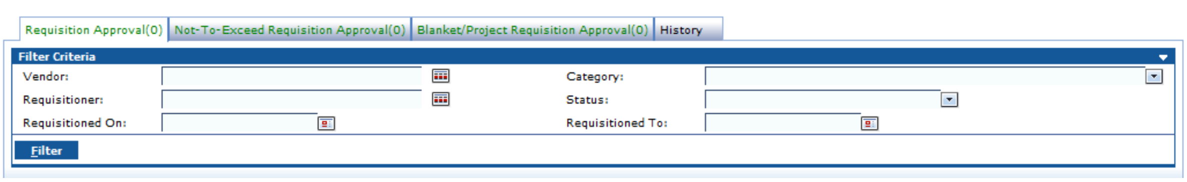



***Figure 3: Traditional Requisition Approval tab with Filter Criteria panel expanded***

| Field | Action |
|---|---|
| **Vendor** | Enter the name of the vendor by which to filter the list, or click the icon to select one from the Vendor Lookup tab.<br>***Note:*** *For more information about the Vendor Lookup tab, see "Using the Vendor Lookup Tab" on page 34.* |
| **Requisitioner** | Enter the name of the person who created the requisition, or click the icon to select one from the Employee Lookup tab.<br>***Note:*** *For more information about the Employee Lookup tab, see "Using the Employee Lookup Tab" on page 32.* |
| **Requisitioned On** | Enter a date on which the requisition was created, or click the icon to select one from the calendar. |
| **Status** | Select an item from the drop-down list to filter the list by the status of the requisition. |

4. Click the **Filter** button. The filtered Requisitions to Approve list is displayed.
5. Bring the appropriate tab forward, and highlight to select the requisition you want to approve.

   ***Tip:*** *If you want to approve all of the requisitions in the Requisitions to Approve list, and click the* ***Approve All*** *button. If you want to approve most of the items in the list, click the* ***Select All*** *button, and deselect the item(s) you do not want to approve, and click the* ***Approve*** *button.*

   ***Note:*** *To review and/or edit the requisition before approving it, click the* ***View*** *button. The Requisition Overview tabs are displayed. For more information about these tabs, see "Maintain Requisitions" on page 17.*
6. Click the **Approve** button. A message is displayed which tells you that the requisition(s) you selected were approved.

   ***Note:*** *Use the History tab to track the progress of the requisition you just submitted for approval.*

# How to View Requisition Details

***Note:*** *To view the details of Blanket/Project or Not-to-Exceed Requisitions, click the View button.*

To view the details of and/or edit a requisition before approving it, highlight to select the requisition in the Requisitions to Approve list, and click the **Requisition Details** button. The Requisition Overview tabs are displayed. For more information about this tab and navigation bar, see "Maintain Requisitions" on page 17.

***Note:*** *After viewing and/or editing information on the Cart tab, you can approve the requisition from any of the Requisition Maintenance tabs by clicking the* ***Approve and Return*** *button. Clicking the this button does not approve all of the requisitions in the cart. Only the requisition with which you are working is approved.*

# How to View Cart Details

***Note:*** *You can only view the cart details of a Traditional requisition.*

To view the details of and/or edit requisitions in a cart before approving the requisition, click the **Cart Details** button. The Cart tab is displayed with the Requisition Maintenance navigation bar. For more information about this tab and navigation bar, see "Maintain Requisitions" on page 17.

***Note:*** *After viewing and/or editing information on the Cart tab, you can approve the requisition from any of the Requisition Maintenance tabs by clicking the* ***Approve and Return*** *button. Clicking the this button does not approve all of the requisitions in the cart. Only the requisition with which you are working is approved.*

# How to Reject a Requisition

***Note:*** *Only Traditional requisitions can be rejected.*

***Note:*** *Rejecting a requisition returns it to the requisitioner for modification and can be resubmitted. To completely void a requisition so that it cannot be resubmitted, use the Void button. For more information about how to void requisitions, see the next section.*

1. On the Requisitions tab, highlight to select the requisition(s) you want to reject.

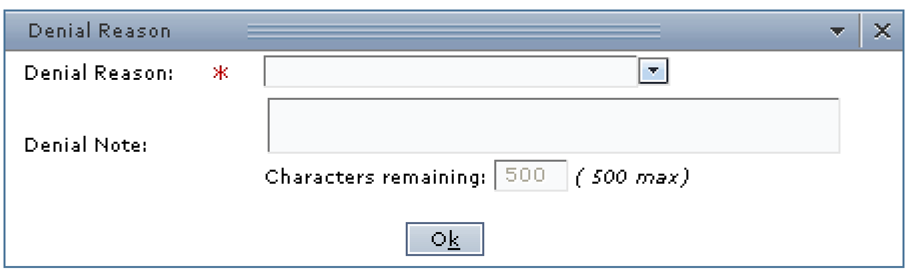



***Figure 4: Denial Reason box***

2. Select a **Denial Reason** from the drop-down list.
3. Enter a **Denial Note**.

   ***Note:*** *The note you enter is displayed in the report queue, which the requisitioner will access so that he or she can make modifications to rejected requisitions so that they can be resubmitted. Therefore, you can use this field to explain what modifications need to be made so that the requisition can be approved after it is resubmitted.*

4. Click the **Ok** button. The requisition is removed from the list.

# How to Void or Deny Requisitions

***Note:*** *Traditional requisitions are voided, and Not-To-Exceed and Blanket/Project requisitions are denied.*

1. Unlike rejecting a requisition, voiding a requisition means that it cannot be modified and resubmitted to the requisitioner.

   ***Note:*** *To return the requisition to the requisitioner for modifications, click the **Reject** button. For more information about the Reject button, see the previous section.*

2. On the Requisitions tab, highlight to select the requisition(s) you want to void.
3. Click the **Void** button. The Void Reason box is displayed, as in the following illustration.

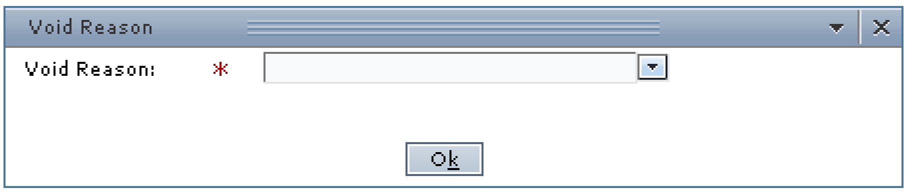



***Figure 5: Void Reason box***

4. Select a **Void Reason** from the drop-down list.
5. Click the **Ok** button. The requisition is removed from the list.

# How to Hold Requisitions

***Note:*** *Only Traditional requisitions can be held.*

1. On the Requisitions tab, highlight to select the requisition you want to hold.
2. Click the **Hold** button. The Hold Reason box is displayed, as in the following illustration.

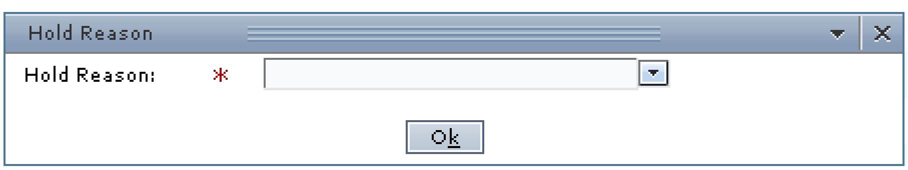



***Figure 6: Hold Reason box***

3. Select the **Hold Reason** from the drop-down list.
4. Click the **Ok** button. The requisition can no longer be approved.

# How to Add Notes to Requisitions

***Note:*** *You can only add notes to Traditional requisitions.*

Click the **Notes** button on the Requisitions tab. The Notes tab is displayed. For more information about how to work with the Notes tab, see "Using the Notes Tab" on page 32.

# Analyze Requisitions

Use the Analyze Requisitions function to send requisitions to the next stage in the requisitions workflow.

## How to Analyze 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. Select the **Analyze Requisitions** link. The Traditional Requisition Analysis tab is displayed, as in the following illustration.

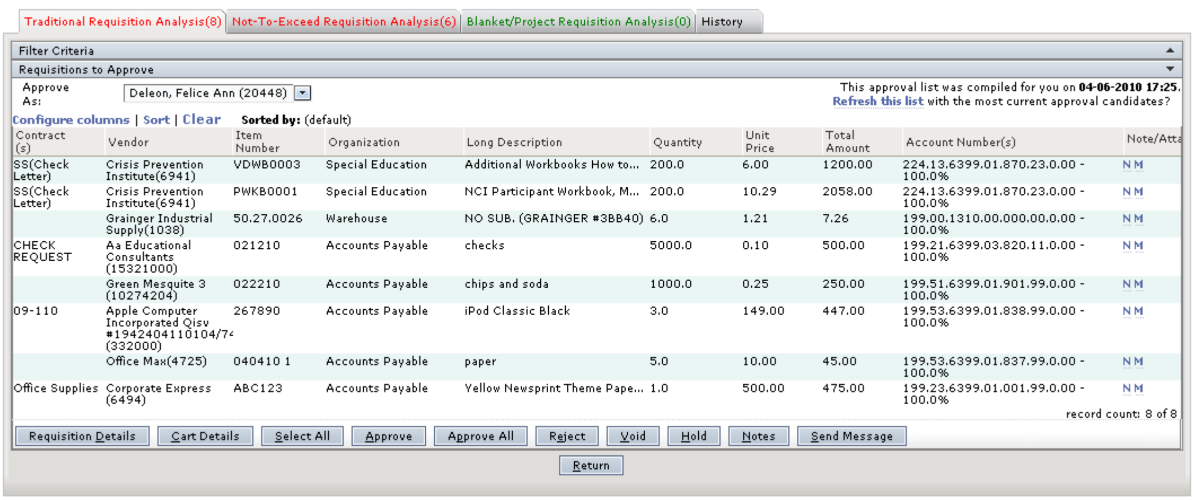



***Figure 7: Traditional Requisition Analysis tab***

***Note:*** *Approval tabs are color-coded. Green indicates that there are no requisitions that need to be analyzed. Red indicates that there are requisitions that need to be analyzed. On each tab, the number of requisitions that need to be analyzed is displayed in parenthesis.*

***Note:*** *If you are approving Not-To-Exceed Requisitions or Blanket/Project Requisitions, bring that tab forward, and skip to step 5.*

3. To filter the Requisitions to Approve list, click the ▲ on the Filter Criteria panel to expand it.

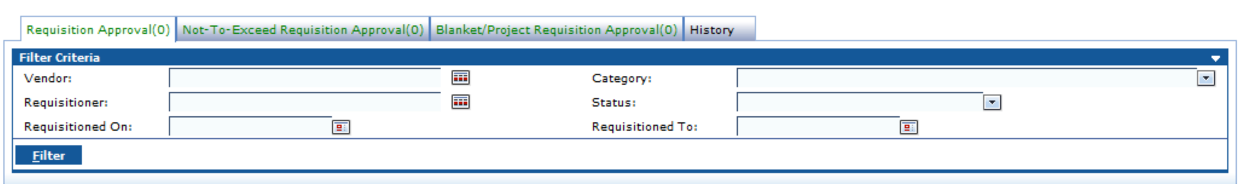



***Figure 8: Traditional Requisition Analysis tab with the Filter Criteria panel expanded***

| Field | Action |
|---|---|
| **Vendor** | Enter the name of the vendor by which to filter the list, or click the icon to select one from the Vendor Lookup tab.<br>***Note:*** *For more information about the Vendor Lookup tab, see "Using the Vendor Lookup Tab" on page 34.* |
| **Requisitioner** | Enter the name of the person who created the requisition, or click the icon to select one from the Employee Lookup tab.<br>***Note:*** *For more information about the Employee Lookup tab, see "Using the Employee Lookup Tab" on page 32.* |
| **Requisitioned On** | Enter a date on which the requisition was created, or click the icon to select one from the calendar. |
| **Status** | Select an item from the drop-down list to filter the list by the status of the requisition. |

4. Click the **Filter** button. The filtered Requisitions to Approve list is displayed.
5. Bring the appropriate tab forward, and highlight to select the requisition you want to approve.

   ***Tip:*** *If you want to approve all of the requisitions in the Requisitions to Approve list, and click the **Approve All** button. If you want to approve most of the items in the list, click the **Select All** button, and deselect the item(s) you do not want to approve, and click the **Approve** button.*

   ***Note:*** *To review and/or edit the requisition before approving it, click the **View** button.The Requisition Maintenance tab is displayed. For more information about this tab and navigation bar, see "Maintain Requisitions" on page 17.*
6. Click the **Approve** button. A message is displayed which tells you that the requisition(s) you selected were approved.

   ***Note:*** *Use the History tab to track the progress of the requisition you just submitted for approval.*

# How to View Requisition Details

***Note:*** *You can only view the details of a Traditional requisition.*

To view the details of and/or edit a requisition before approving it, highlight to select the requisition in the Requisitions to Approve list, and click the **Requisition Details** button. The Requisition Overview tab is displayed. For more information about this tab and navigation bar, see "Maintain Requisitions" on page 17.

***Note:*** *After viewing and/or editing the requisition, you can approve it from any of the Requisition Maintenance tabs by clicking the **Approve and Return** button.*

# How to View Cart Details

***Note:*** *You can only view the cart details of a Traditional requisition.*

To view the details of and/or edit requisitions in a cart before approving the requisition, click the **Cart Details** button. The Cart tab is displayed with the Requisition Maintenance navigation bar. For more information about this tab and navigation bar, see "Maintain Requisitions" on page 17.

***Note:*** *After viewing and/or editing information on the Cart tab, you can approve the requisition from any of the Requisition Maintenance tabs by clicking the* ***Approve and Return*** *button. Clicking the this button does not approve all of the requisitions in the cart. Only the requisition with which you are working is approved.*

# How to Reject a Requisition

***Note:*** *Only Traditional requisitions can be rejected.*

1. Rejecting a requisition returns it to the requisitioner for modification and can be resubmitted.

   ***Note:*** *To completely void a requisition so that it cannot be resubmitted, use the Void button. For more information about how to void requisitions, see the next section.*

2. On the Requisitions tab, highlight to select the requisition(s) you want to reject, and click the Reject button. The Denial Reason box is displayed, as in the following illustration.

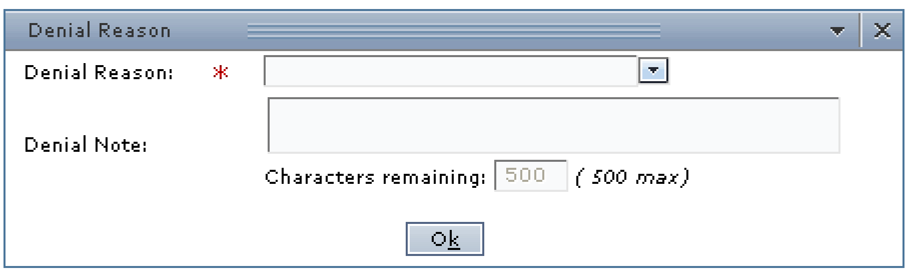



***Figure 9: Denial Reason box***

3. Select a **Denial Reason** from the drop-down list.
4. Enter a **Denial Note**.

   ***Note:*** *The note you enter is displayed in the report queue, which the requisitioner will access so that he or she can make modifications to rejected requisitions so that they can be resubmitted. Therefore, you can use this field to explain what modifications need to be made so that the requisition can be approved after it is resubmitted.*

5. Click the **Ok** button. The requisition is removed from the list.

# How to Void or Deny Requisitions

***Note:*** *Traditional requisitions are voided, and Not-To-Exceed and Blanket/Project requisitions are denied.*

1. Unlike rejecting a requisition, voiding a requisition means that it cannot be modified and resubmitted to the requisitioner.

   ***Note:*** *To return the requisition to the requisitioner for modifications, click the* ***Reject*** *button. For more information about the Reject button, see the previous section.*

2. On the Requisitions tab, highlight to select the requisition(s) you want to void.
3. Click the **Void** button. The Void Reason box is displayed, as in the following illustration.

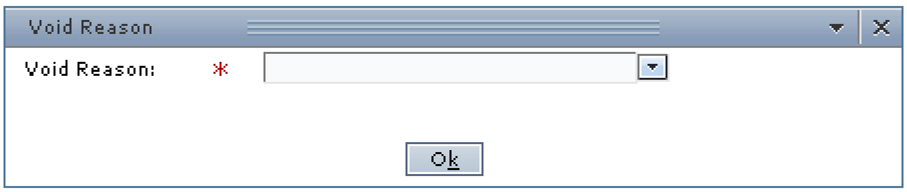



***Figure 10: Void Reason box***

4. Select a **Void Reason** from the drop-down list.
5. Click the **Ok** button. The requisition is removed from the list.

# How to Hold Requisitions

***Note:*** *Only Traditional requisitions can be held.*

1. On the Requisitions tab, highlight to select the requisition you want to hold.
2. Click the **Hold** button. The Hold Reason box is displayed, as in the following illustration.

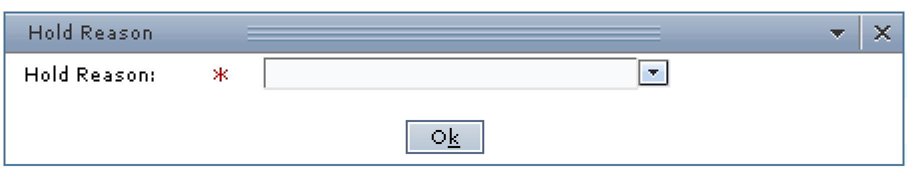



***Figure 11: Hold Reason box***

3. Select the **Hold Reason** from the drop-down list.
4. Click the **Ok** button. The requisition can no longer be approved.

# How to Add Notes to Requisitions

***Note:*** *You can only add notes to Traditional requisitions.*

Click the **Notes** button on the Requisitions tab. The Notes tab is displayed. For more information about how to work with the Notes tab, see "Using the Notes Tab" on page 32.

# 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.

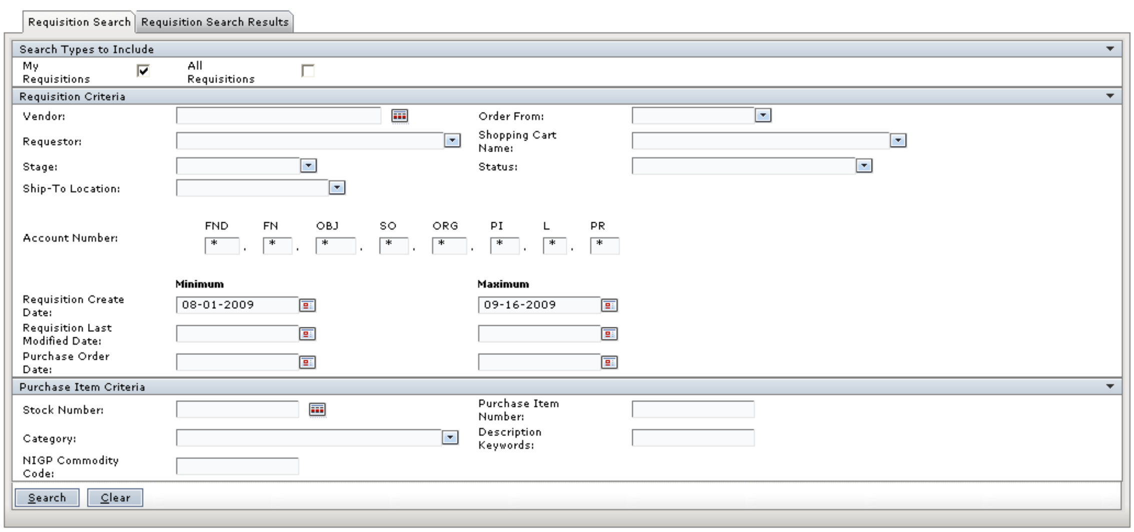



***Figure 12: Requisition Search tab***

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.<br>***Note:*** *For more information about the Vendor Lookup tab, see "Using the Vendor Lookup Tab" on page 34.* |
| **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.<br>***Note:*** *Enter a date in the* ***Maximum*** *column to search for requisitions that were created within a timeframe.* |
| **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.<br>***Note:*** *Enter a date in the* ***Maximum*** *column to search for a requisition that was last modified within a timeframe.* |
| **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.<br>***Note:*** *Enter a date in the* ***Maximum*** *column to search for a requisition's purchase order date within a timeframe.* |

| Field | Action |
|---|---|
| **Stock Number** | Click the icon to select a Stock Number from the Lookup Stock Number tab.<br>***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. |

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

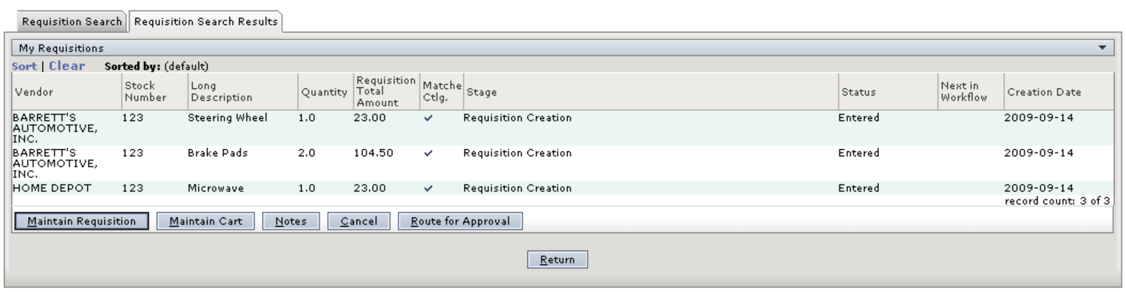



***Figure 13: Requisition Search Results tab***

## 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 17.

## 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 32.

## 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.

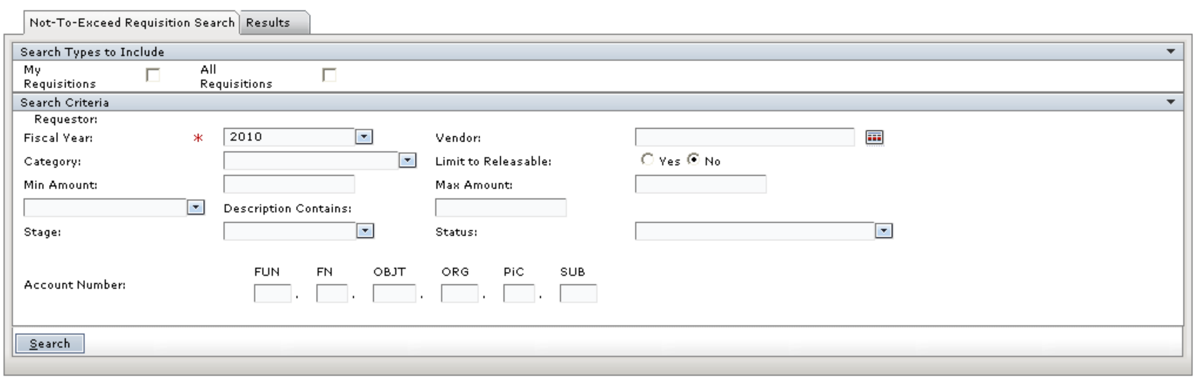



***Figure 14: Not-To-Exceed Requisition Search tab***

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 34.* |
| **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.

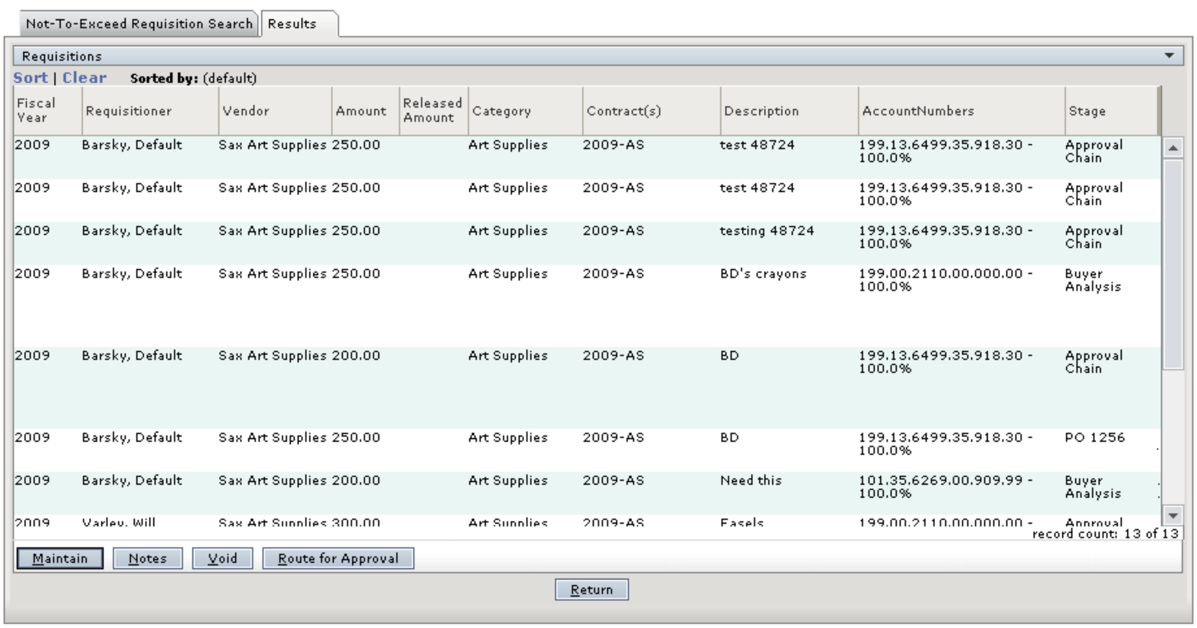


***Figure 15: Results tab***

## 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 15.

***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 17.*

## 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 32.

## 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 15)
- How to Maintain Blanket/Project Requisitions (see page 24)

## 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.

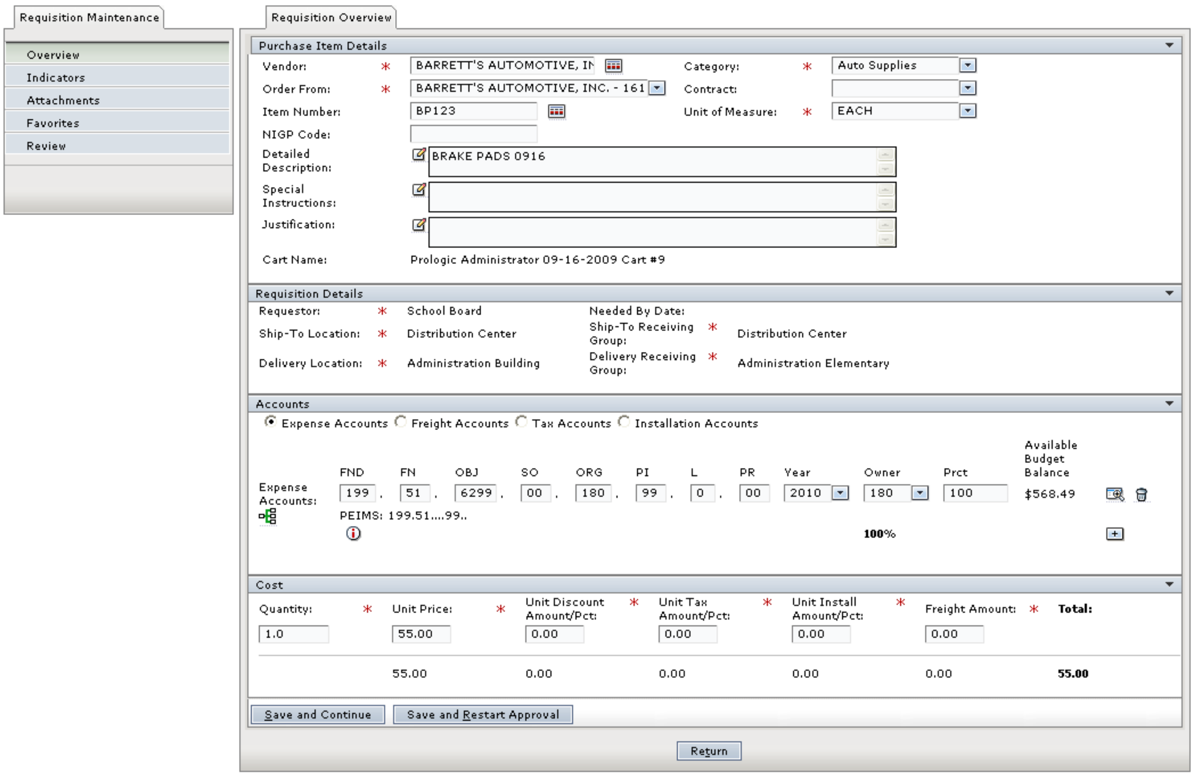



***Figure 16: Requisition Overview tab with the Requisition Maintenance navigation bar***

***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.<br><br>***Note:*** *For more information about working with the Lookup Vendor tab, see "Using the Vendor Lookup Tab" on page 34.* |
| **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.<br><br>***Note:*** *For more information about working with the Lookup Stock Number tab, see "Using the Lookup Stock Number Tab" on page 34.* |
| **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. |

3. Use the Accounts panel to select which account out of which to draw funds to purchase the item(s) being requisitioned. You have the following options:
   - Expense Accounts
   - Freight Accounts
   - Tax Accounts
   - Installation Accounts

   Once you select an account type, edit the account number by either manually entering it, or by clicking the icon to select one from the Account Numbers tab.

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

4. Use the following information to edit information in the Cost panel:

| Field | Action |
|---|---|
| **Quantity** | Enter a quantity. |
| **Unit Price** | Enter a price per unit. |
| **Unit Discount Amount/Pct** | Enter an amount or percent to be discounted per unit. |
| **Unit Tax Amount/ Pct** | Enter an amount or percent to be taxed per unit. |
| **Unit Install Amount/Pct** | Enter an amount or percent to be charged for installation per unit. |
| **Freight Amount** | Enter an amount to be charged for freight. |

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

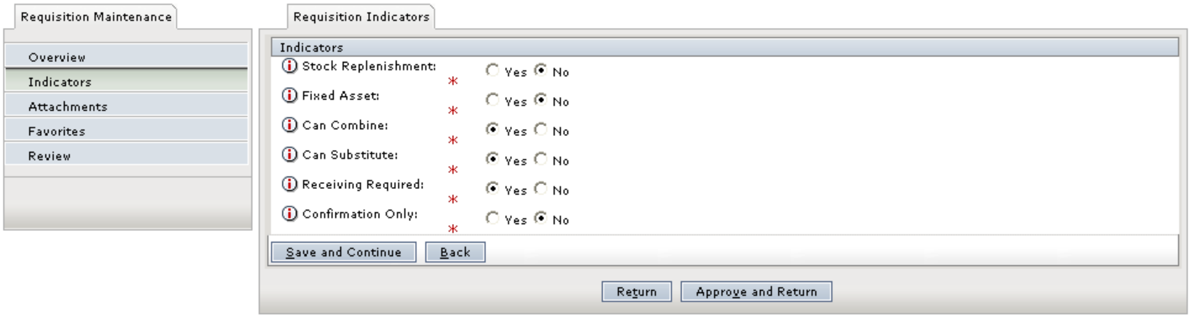



***Figure 17: Requisition Indicators tab***

6. Use the following information to edit information on the Requisition Indicators tab:

| Field | Action |
|---|---|
| **Stock Replenishment** | Indicate whether you want the item to be requisitioned again. |
| **Fixed Asset** | Indicate whether this requisition is a fixed asset. |
| **Can Combine** | Indicate whether this requisition can be combined with other requisitions. |
| **Can Substitute** | Indicate whether this requisition can be substituted. |
| **Receiving Required** | Indicate whether receiving is required for this requisition. |
| **Confirmation Only** | Indicate whether this requisition is only a confirmation. |

7. Click the **Save and Continue** button. The Requisition Attachments tab is displayed, as in the following illustration.

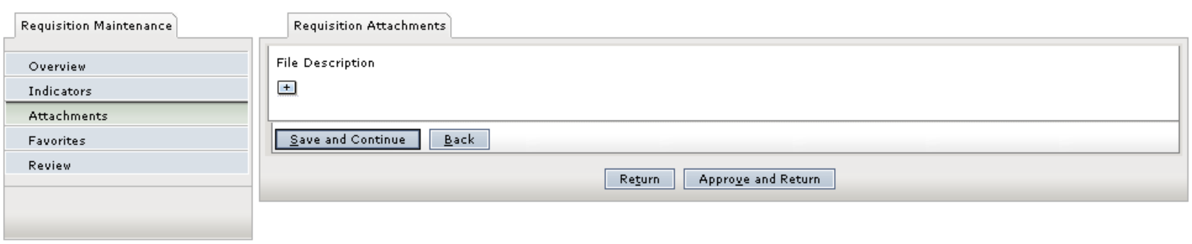



***Figure 18: Requisition Attachments tab***

8. To add an attachment to this requisition, click the + icon. The File and Description fields are displayed, as in the following illustration.

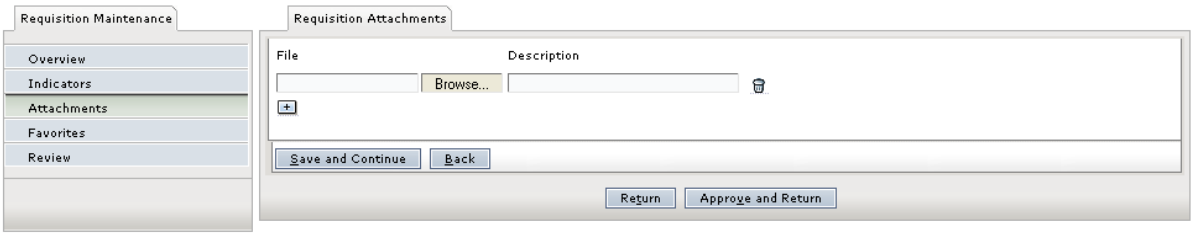



***Figure 19: Requisition Attachments tab with File and Description fields displayed***

9. Click the **Browse** button to navigate to the file location.
10. Enter a **Description**.

    ***Note:*** *Click the + icon to add another attachment.*

11. Click the **Save and Continue** button. The Requisition Favorites tab is displayed, as in the following illustration.

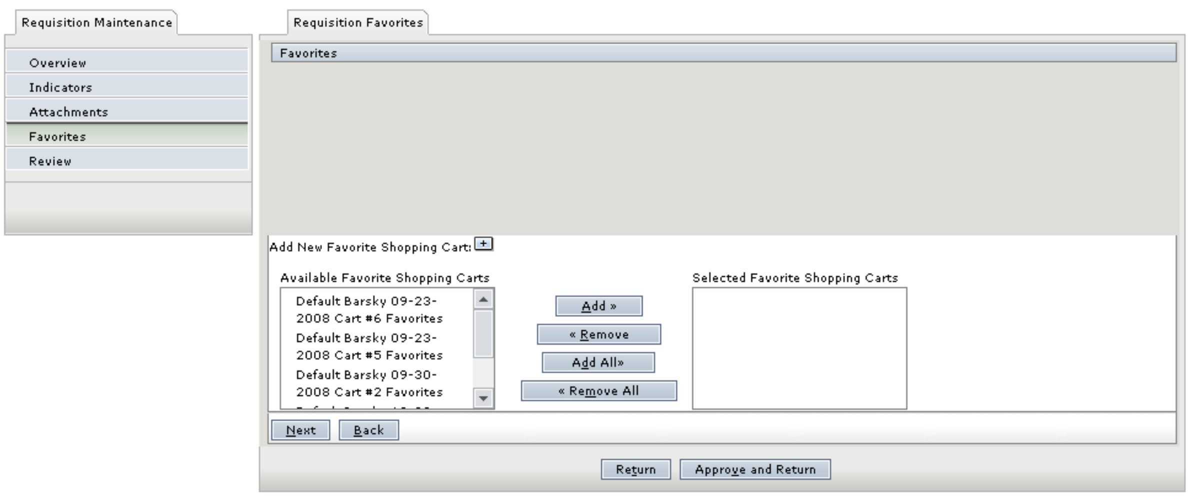



***Figure 20: Requisition Favorites tab***

12. Look through the list of available favorite shopping carts. If you do not want to use the items in this list, proceed to the next step to add a new shopping cart. If you want to use an existing favorite shopping cart or carts, proceed to step 17.
13. Click the + icon to add a new favorite shopping cart. The New Favorite Shopping Cart Info box is displayed, as in the following illustration.

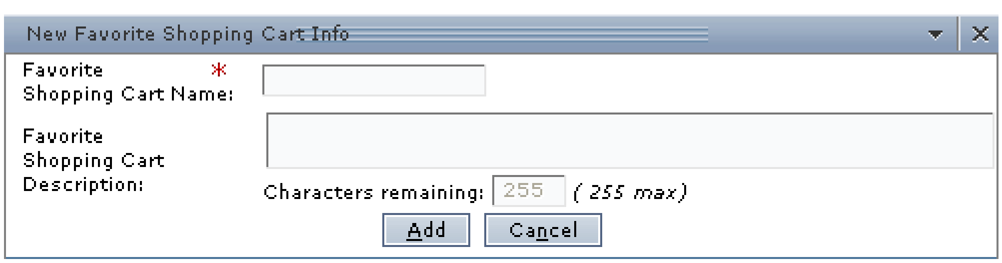



***Figure 21: New Favorite Shopping Cart Info box***

14. Enter the new **Favorite Shopping Cart Name**.
15. Enter a description in the **Favorite Shopping Cart Description** field.
16. Click the **Add** button. The new favorite shopping cart is added to the Available Favorite Shopping Carts list.
17. Highlight the appropriate item(s) from the Available Favorite Shopping Carts list, and click the **Add** button.

    ***Note:*** *To select all the available favorites, click the* ***Add All*** *button. To remove a favorite from the Selected Favorite panel, highlight the favorite's name and click the* ***Remove*** *button. To remove all selected favorites, click the* ***Remove All*** *button.*

18. Click the **Next** button. The Requisition Status tab is displayed, as in the following illustration.

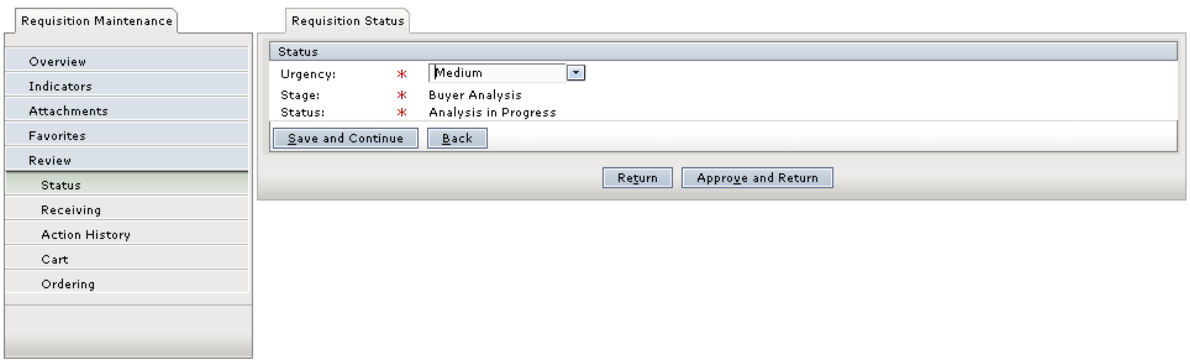



***Figure 22: Requisition Status tab***

19. Select an item from the **Urgency** drop-down list
20. Click the **Save and Continue** button. The Requisition Receiving tab is displayed, as in the following illustration.

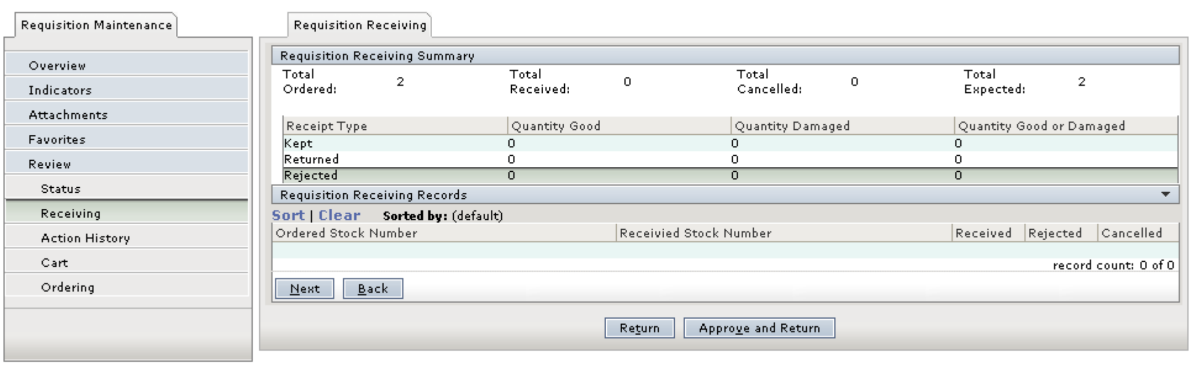



***Figure 23: Requisition Receiving tab***

21. Review the information on the Requisition Receiving tab.
22. Click the **Next** button. The Action History tab is displayed, as in the following illustration.

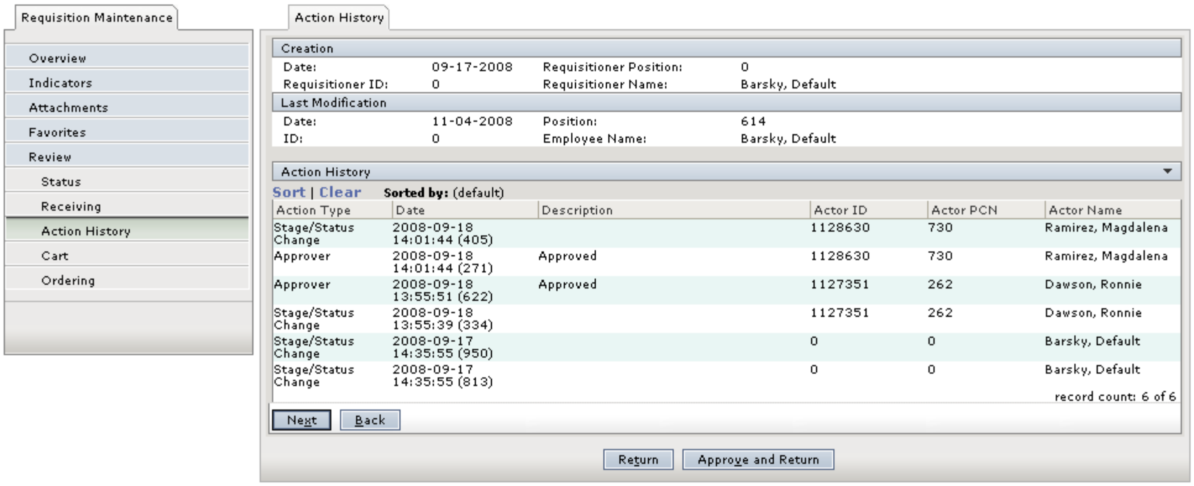


***Figure 24: Action History tab***

23. Review the information on the Action History tab.
24. Click the **Next** button. The Cart tab is displayed, as in the following illustration.

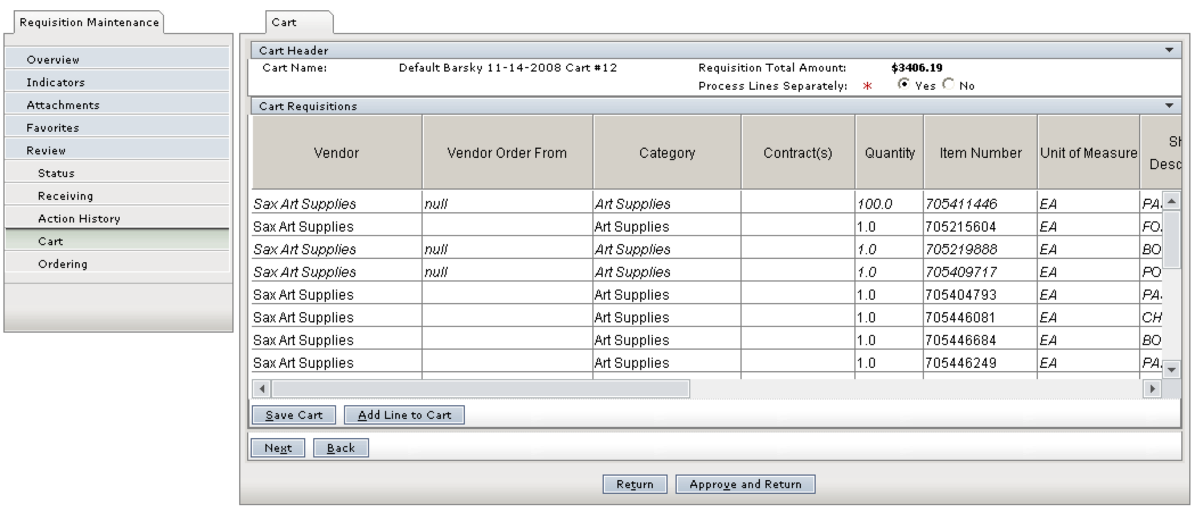


***Figure 25: Cart tab***

25. Use the **Process Lines Separately** field to indicate whether the items you add to the requisition must be purchased and delivered together. If necessary, select Yes if one item may be purchased without the other(s). Otherwise, select No.
26. Review the information in the Cart Requisitions list. To edit items in the cart, click once in the cell you want to change.
27. To add an item to the cart, click the **Add Line to Cart** button. A duplicated line is added to the bottom of the Cart Requisitions list. Click once in the cells to change information.
28. Click the **Save Cart** button to save your changes.
29. Click the **Next** button. The Ordering tab is displayed, as in the following illustration.

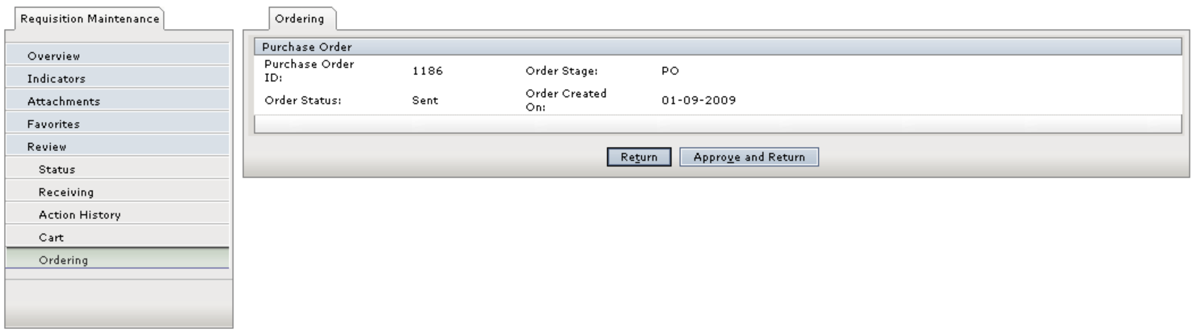



***Figure 26: Ordering tab***

30. Review the information on the Ordering tab.

# How to Maintain Blanket/Project Requisitions

1. If you are in the Blanket/Project Requisition Search function, click the **Maintain** button. If you are using the Approve Blanket/Project Requisitions or Analyze Blanket/Project Requisitions functions, click the **View** button. The Project Requisition Overview tab is displayed with the Project Requisition Maintenance navigation bar, as in the following illustration.

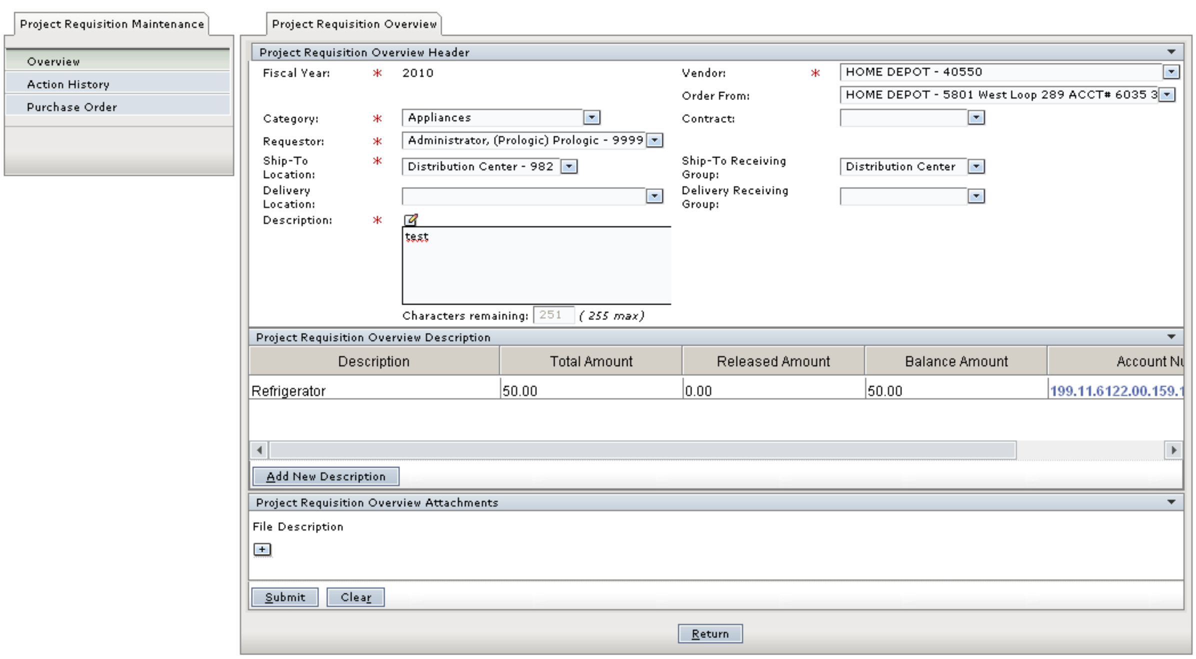



***Figure 27: Project Requisition Overview tab***

2. Select a **Category** from the drop-down list.
3. Select a **Vendor** from the drop-down list.
4. Select a **Contract** from the drop-down list.
5. 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.*

6. 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.*

7. 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.
8. Enter a **Description**.
9. Click in the cell under the **Description** column to change the description.
10. Click in the cell under the **Total Amount** column to change the total amount.

    ***Note:*** *If the requisition has been approved and analyzed, and a purchase order has been created for it, then the number in the Released Amount column is a hyperlink. To release funds, proceed to the next step. If you do not have this option, proceed to step 13.*

11. To release funds, click the hyperlinked amount in the Released Amount column. The Release Funds box is displayed, as in the following illustration.


***Figure 28: Release Funds box***

12. Enter the amount you want to release in the New Release Amount field, and click the **Release** button. The release is added to the Prior Releases list, and the amount is subtracted from the Released Amount field in the Project Requisition Overview tab.
13. Click on the **Account Number** hyperlink to change the account number. The Edit Accounts box is displayed, as in the following illustration.

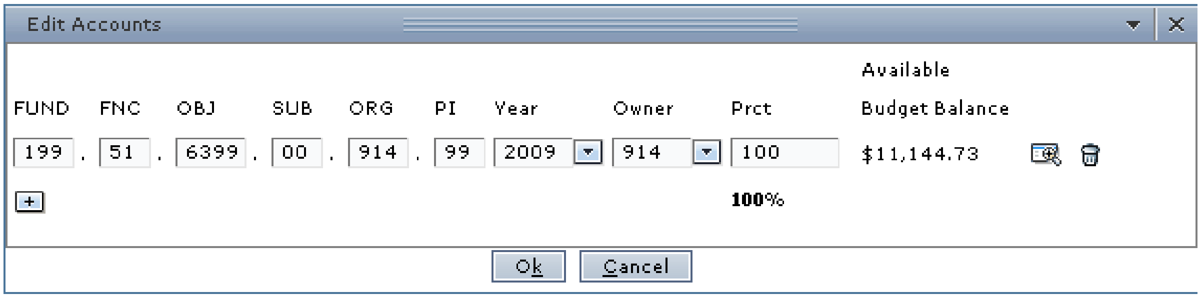



***Figure 29: Edit Accounts box***

14. 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.*

15. Select the **Year** from the drop-down list.
16. Select the **Owner** from the drop-down list.
17. 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.
18. **Optional.** To add another account, repeat steps 14 through 17, and ensure that the percentage for all accounts equals 100.
19. Click the **Ok** button. The new account number is populated in the Account Number column.
20. In the Project Requisition Overview Attachments panel, click the + icon to add an attachment. The Browse and Description fields are displayed, as in the following illustration.

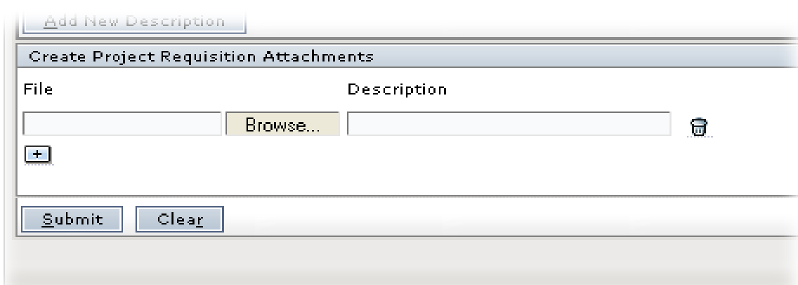



***Figure 30: Project Requisition Overview Attachments panel with Browse and Description fields displayed***

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

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

23. If you accessed the Project Requisition Maintenance function from the Approve or Analyze Requisitions functions, you have the following button options for submitting your changes:
    - **Submit:** Use to submit the requisition for approval to the next.
    - **Save and Restart Approval:** Use to save your changes and restart the approval process as though the requisition was just created.
    - **Approve and Return:** Use to approve the requisition and return to the function in which you were originally working.

    To continue viewing information about the requisition, proceed to the next step.
24. Click the **Action History** link in the Project Requisition Maintenance navigation bar. The Project Requisition Action History tab is displayed, as in the following illustration.

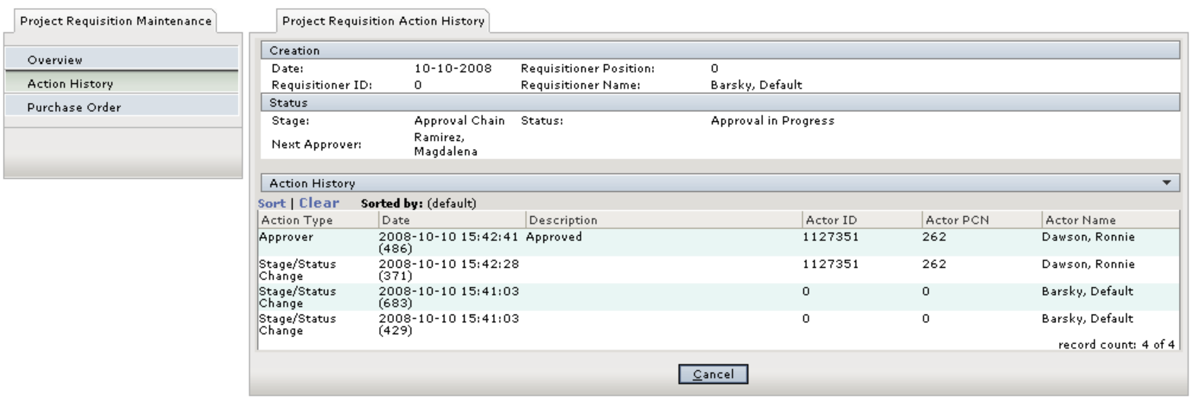



***Figure 31: Project Requisition Action History tab***

25. Review the information on the Project Requisition Action History tab.
26. Click the **Purchase Order** link on the Project Requisition Maintenance navigation bar. The Project Requisition Purchase Order tab is displayed.
27. Review the information about the purchase order.

# How to Maintain Not-To-Exceed Requisitions

You can maintain not-to-exceed requisitions from various not-to-exceed requisition-related functions. Use the following procedure to maintain not-to-exceed requisitions.

1. If you are in the Not To Exceed Requisition Search function, click the **Maintain** button. If you are using the Approve Not-To-Exceed Requisitions or Analyze Not-To-Exceed Requisitions functions, click the **View** button. The Not-To-Exceed Payment Authorization tab is displayed with the Not To Exceed Requisition Maintenance navigation bar, as in the following illustration.

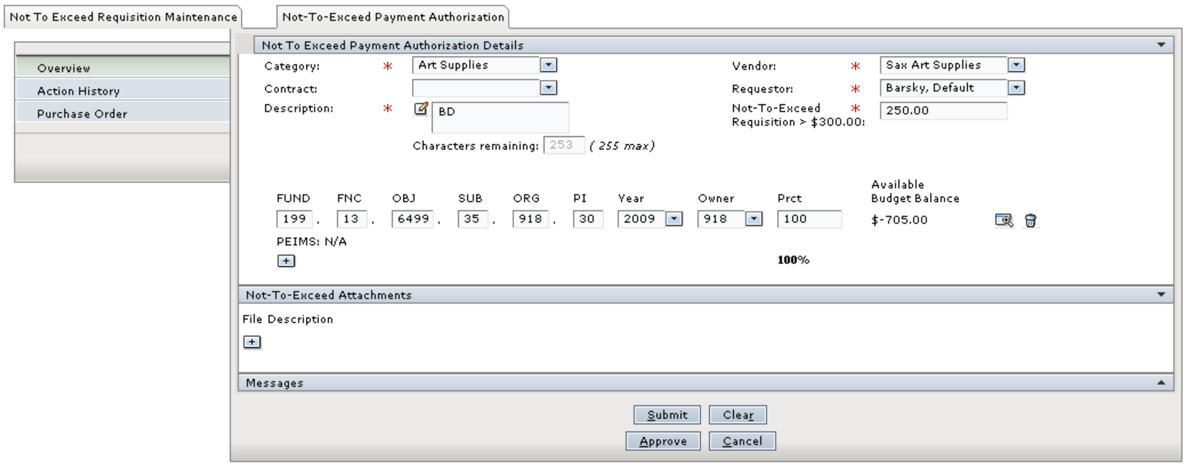



***Figure 32: Not-To-Exceed Payment Authorization tab***

***Tip:*** *If you are an Approver or a Buyer for this requisition, you can use the Approve button to submit it with a status of Approved or Analyzed, respectively.*

2. 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.*

3. Select a **Contract** from the drop-down list.
4. 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 User Guide.*

5. Enter a **Description**.
6. Enter an amount in the **Not-To-Exceed Requisition** field. The amount must be less than the amount displayed in the field name.
7. 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.*

8. Select the **Year** from the drop-down list.
9. Select the **Owner** from the drop-down list.

10. 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.
11. **Optional.** To add another account to the requisition, click the + icon, and repeat steps 7 through 10. Ensure that the Prct fields equal 100 for all accounts.
12. 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.

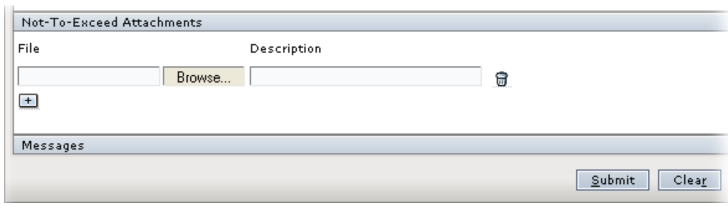



***Figure 33: Not-To-Exceed Attachments panel with File and Description fields displayed***

13. Click the **Browse** button to navigate to the file location.
14. Enter a **Description**.

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

15. Click the **Action History** link in the Not To Exceed Requisition Maintenance navigation bar. The Action History tab is displayed, as in the following illustration.

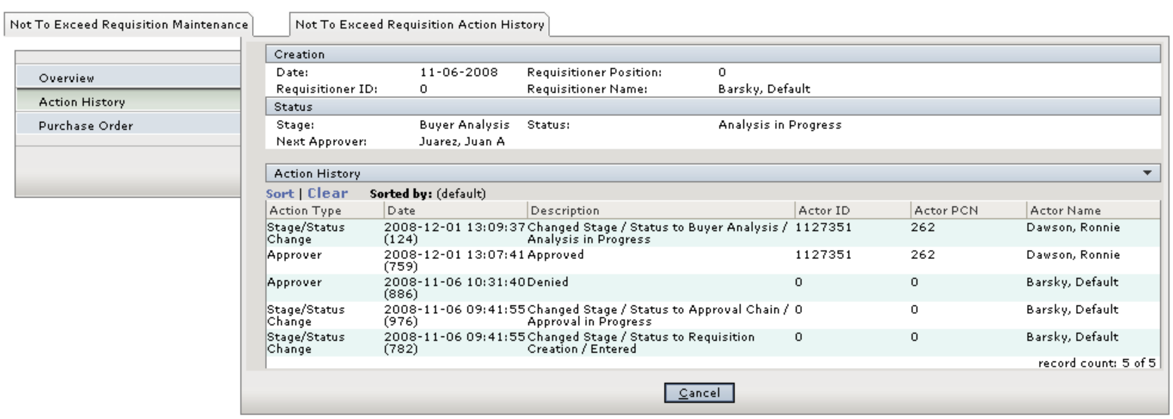



***Figure 34: Not To Exceed Requisition Action History tab***

16. Review the information on the Not To Exceed Requisition Action History tab, and click the **Purchase Order** link in the Not To Exceed Requisition Maintenance navigation bar. The Not To Exceed Requisition Purchase Order tab is displayed.
17. Review the information about the purchase order.

# Create Purchase Orders On Demand

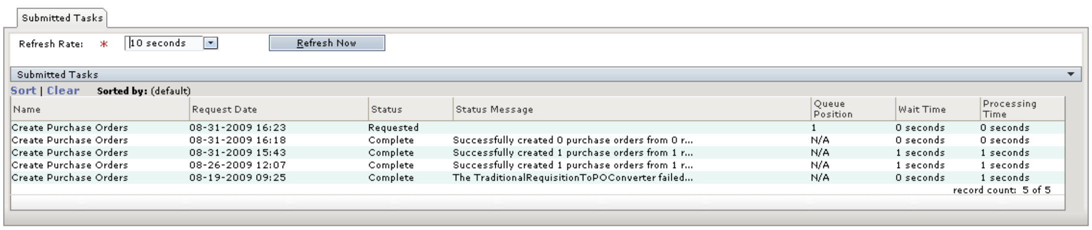
Use the Create Purchase Orders On Demand function to print purchase orders for requisitions.

## How to Print Purchase Orders for 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. Select the **Create Purchase Orders On Demand** link. The Submitted Tasks tab is displayed, as in the following illustration.


Submitted Tasks
Refresh Rate: * 10 seconds
Refresh Now
Submitted Tasks
Sort | Clear Sorted by: (default)

| Name | Request Date | Status | Status Message | Queue Position | Wait Time | Processing Time |
|---|---|---|---|---|---|---|
| Create Purchase Orders | 08-31-2009 16:23 | Requested | | 1 | 0 seconds | 0 seconds |
| Create Purchase Orders | 08-31-2009 16:18 | Complete | Successfully created 0 purchase orders from 0 r... | N/A | 0 seconds | 0 seconds |
| Create Purchase Orders | 08-31-2009 15:43 | Complete | Successfully created 1 purchase orders from 1 r... | N/A | 1 seconds | 1 seconds |
| Create Purchase Orders | 08-26-2009 12:07 | Complete | Successfully created 1 purchase orders from 1 r... | N/A | 1 seconds | 1 seconds |
| Create Purchase Orders | 08-19-2009 09:25 | Complete | The TraditionalRequisitionToPOConverter failed... | N/A | 0 seconds | 1 seconds |

record count: 5 of 5

***Figure 35: Submitted Tasks tab***

3. When the Status of the purchase order changes from Requested to Complete, you can print the checks using the My Report Profiles function.

   ***Note:*** *For more information about the My Report Profiles function, see TEAMS Online Help.*

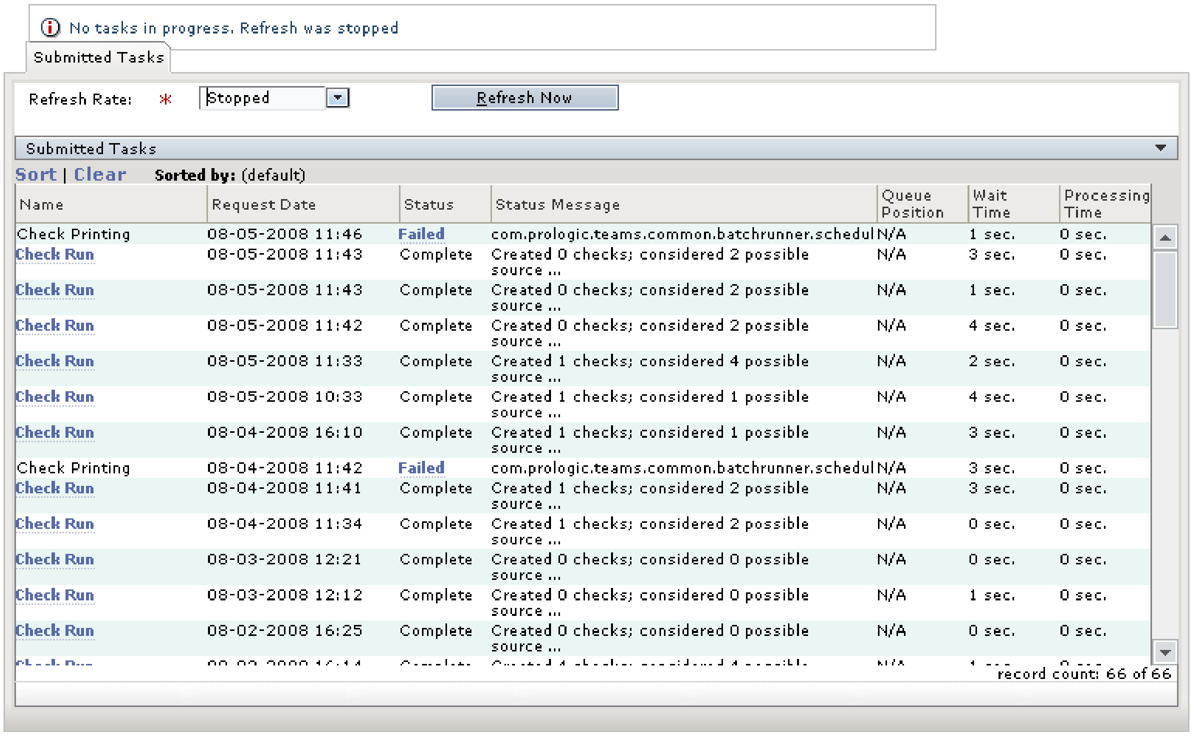



***Figure 36: Submitted Tasks tab***

4. In the Submitted Tasks panel of the Results tab, locate the check run you created. If the check run has a status of `Complete`, click the **Check Run** hyperlink under the Name column. The Results tab is displayed, as in the following illustration.

   ***Note:*** *You can also void, reissue, or create Automated Clearinghouse checks from this tab. Information about these processes will be available in a future edition of the documentation.*

# 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.

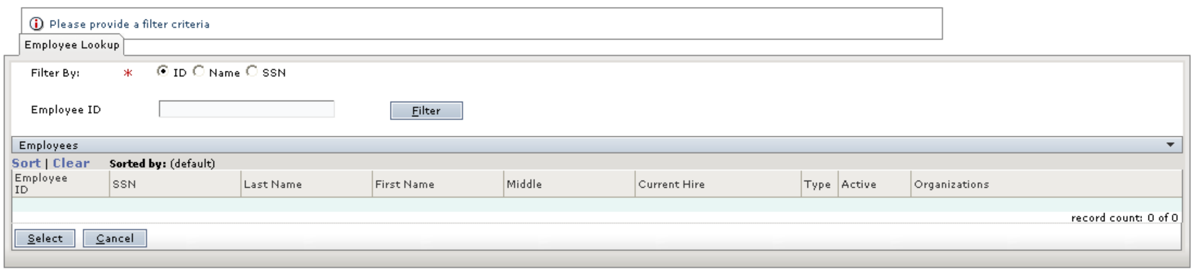



***Figure 37: Employee Lookup tab***

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.

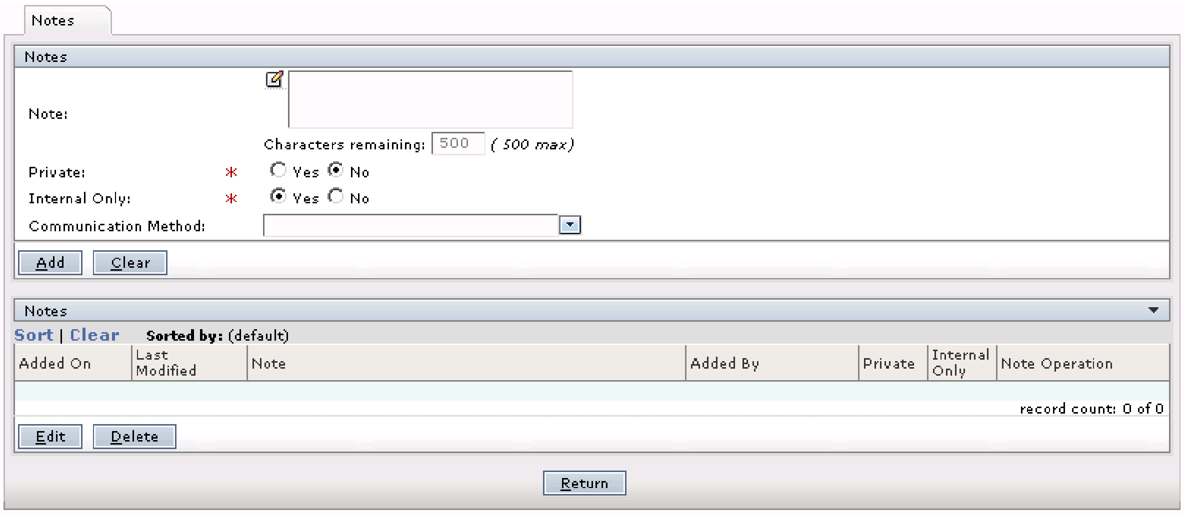



***Figure 38: Notes tab***

## 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.

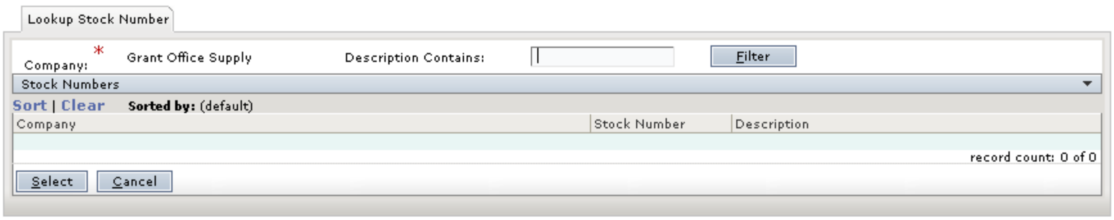



***Figure 39: Lookup Stock Number tab***

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.

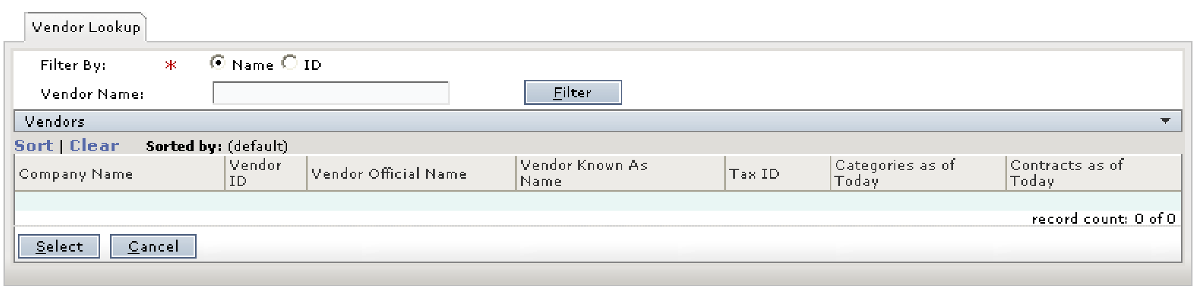



***Figure 40: Vendor Lookup tab***

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.