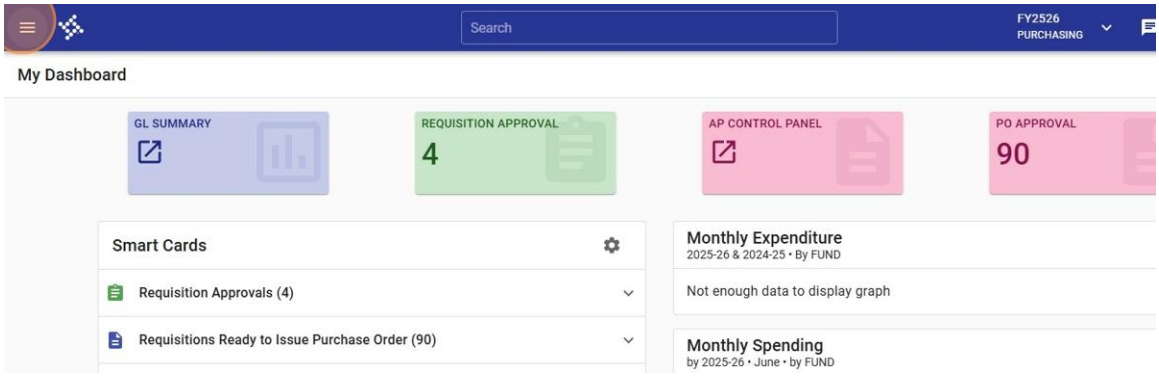
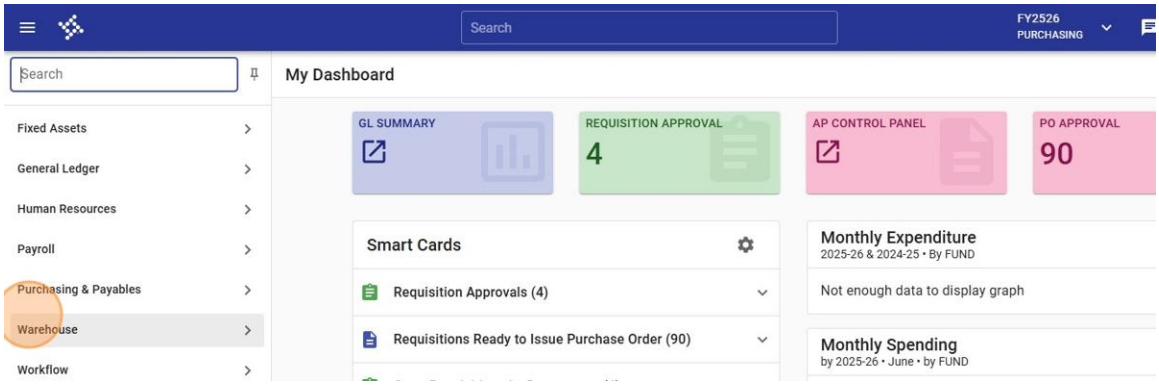
Creating a Warehouse Requisition in iVisions

FOR WAREHOUSE STOCK ITEMS FOUND IN THE WAREHOUSE CATALOG

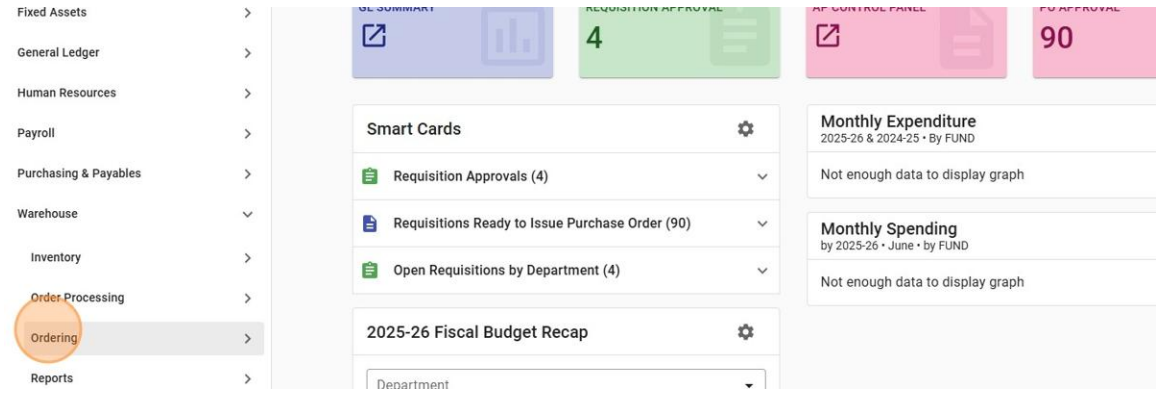
1. Click the menu on the top left (the three horizontal lines).



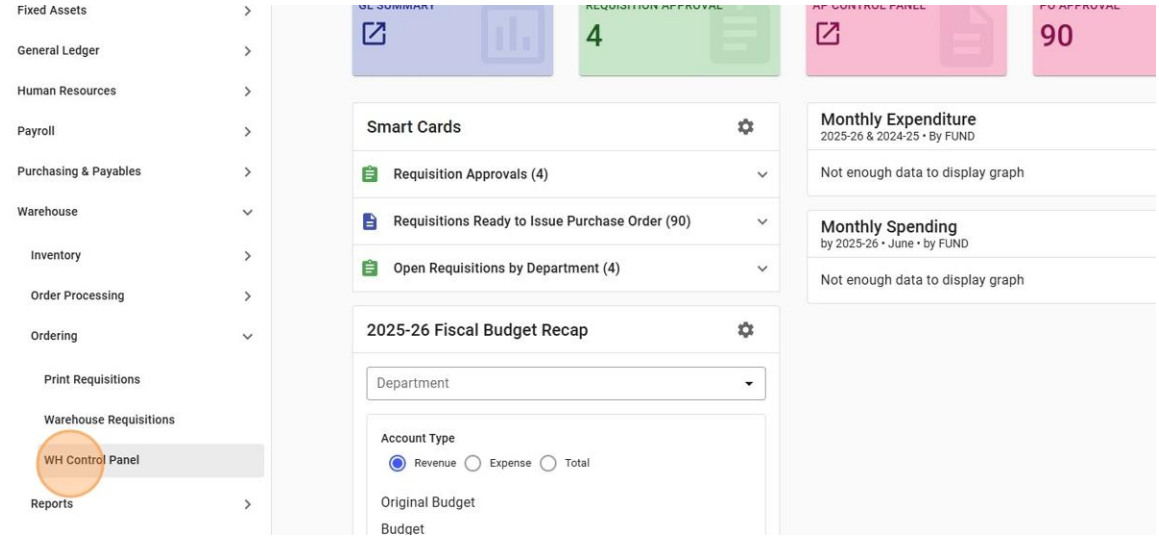
2. Click "Warehouse"



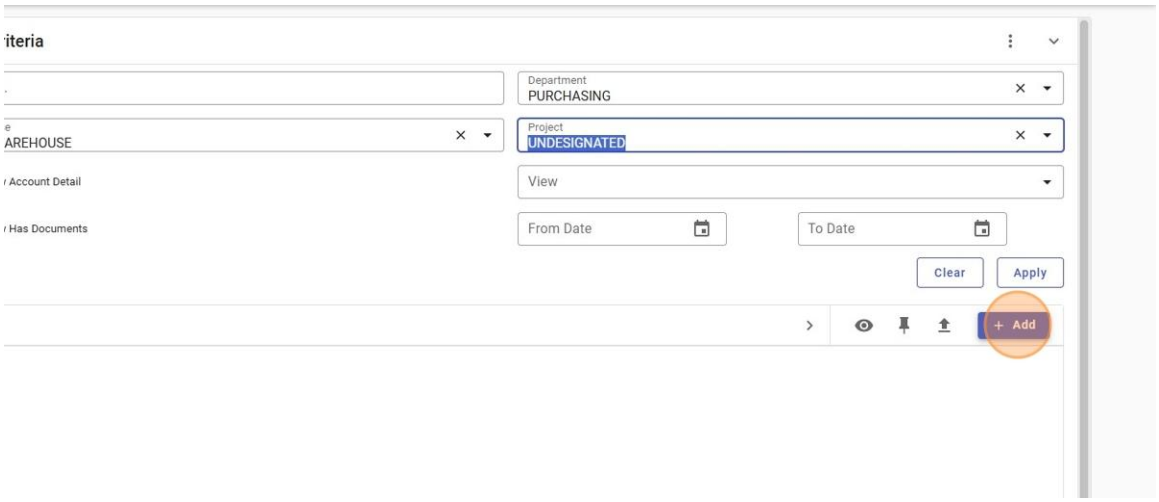
3. Click "Ordering"



4. Click "WH Control Panel"



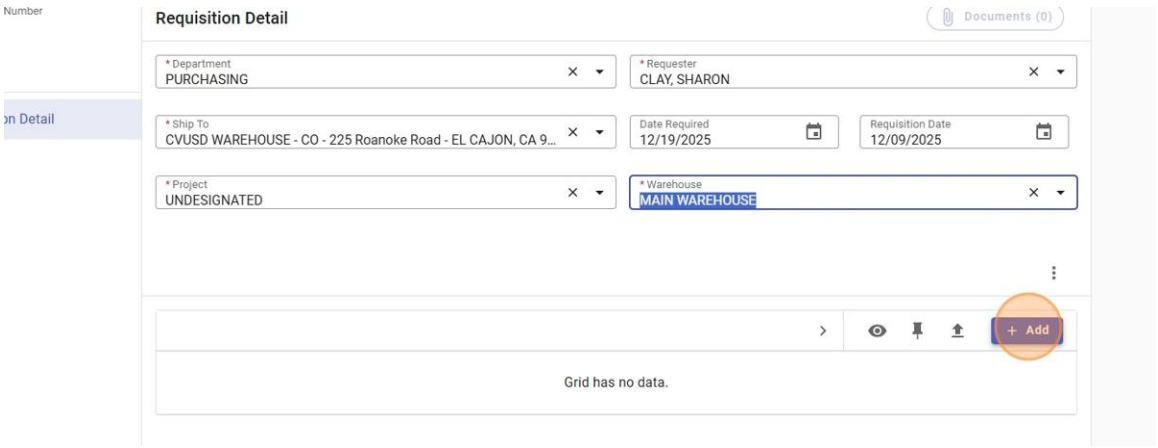
5. Click "Add"



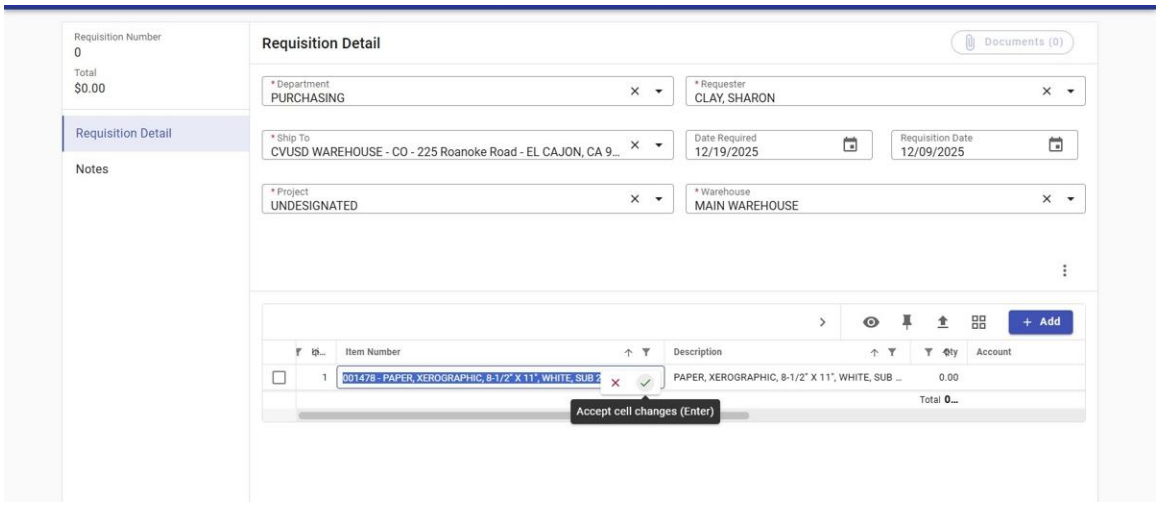
6. Fill in the applicable information in the Requisition Detail:

Department – This will default to your school site or department unless you have access to more than one
Requester – Select the staff member requesting these items
Ship To – Your school site or department
Project – Select Warehouse Stock Warehouse - This will default to the main warehouse.

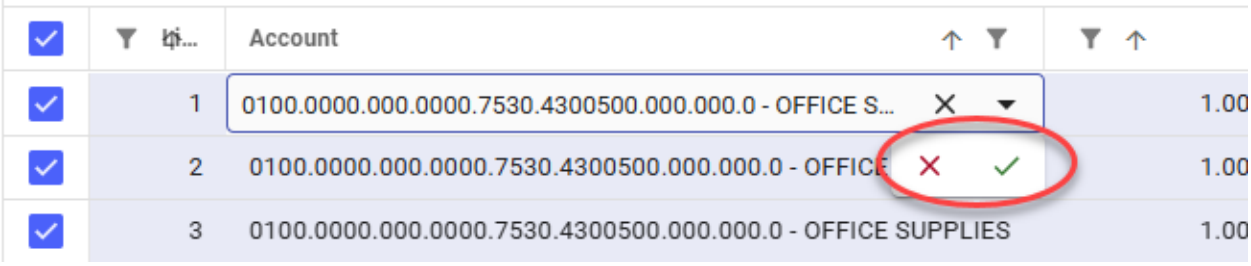
7. Click "Add" to enter your first line item



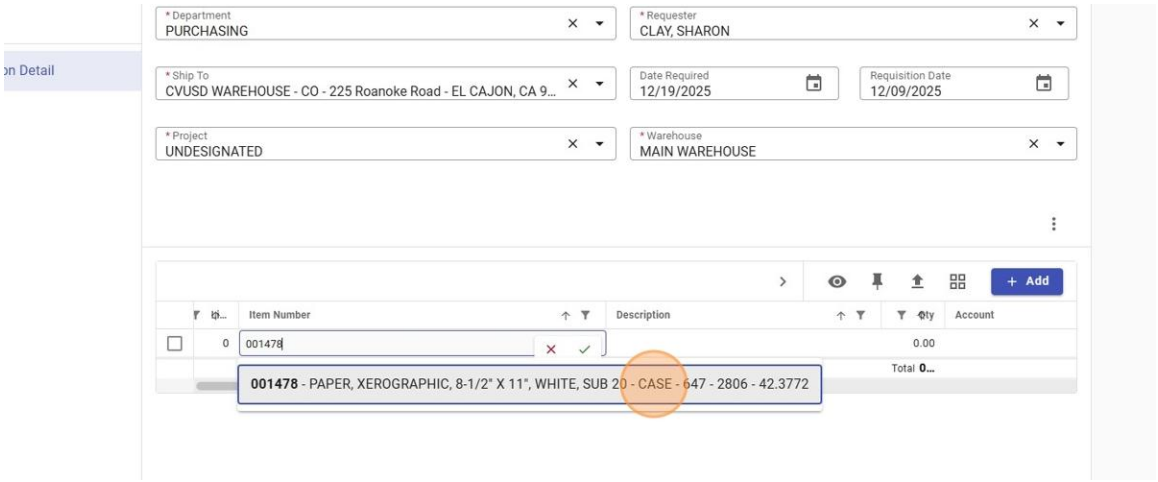
8. Start typing the six digit warehouse stock number starting with 00.



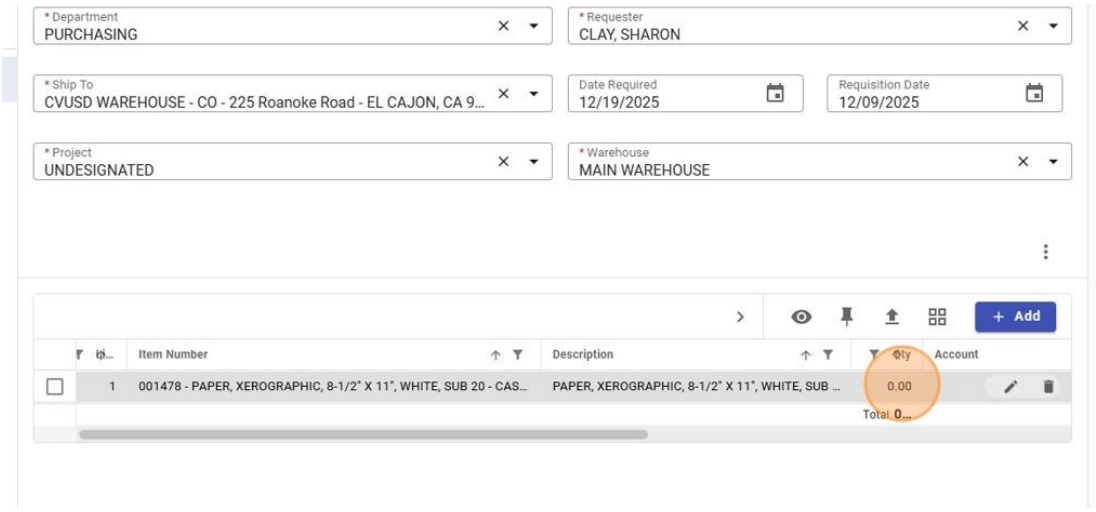
- Fyi...while filling out the requisition, a green checkmark or a red X will appear in cells. Clicking on the green checkmark accepts and saves the changes in that cell. The red X will cancel the changes made to that cell.



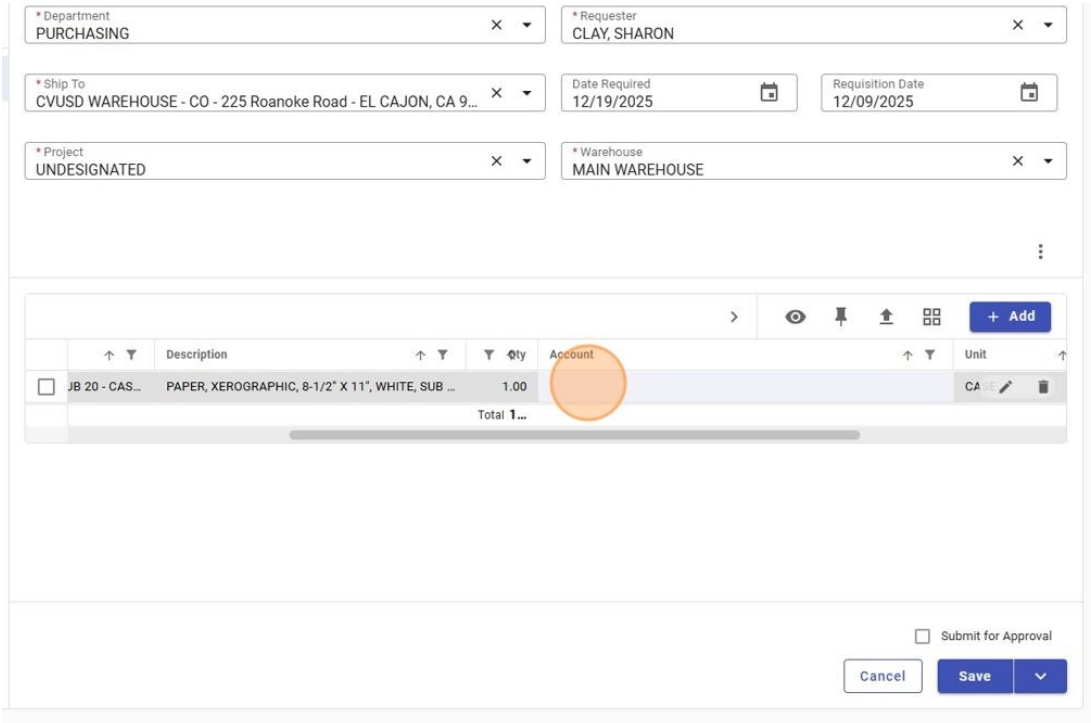
9. Click on the item once it shows up in the drop-down menu.



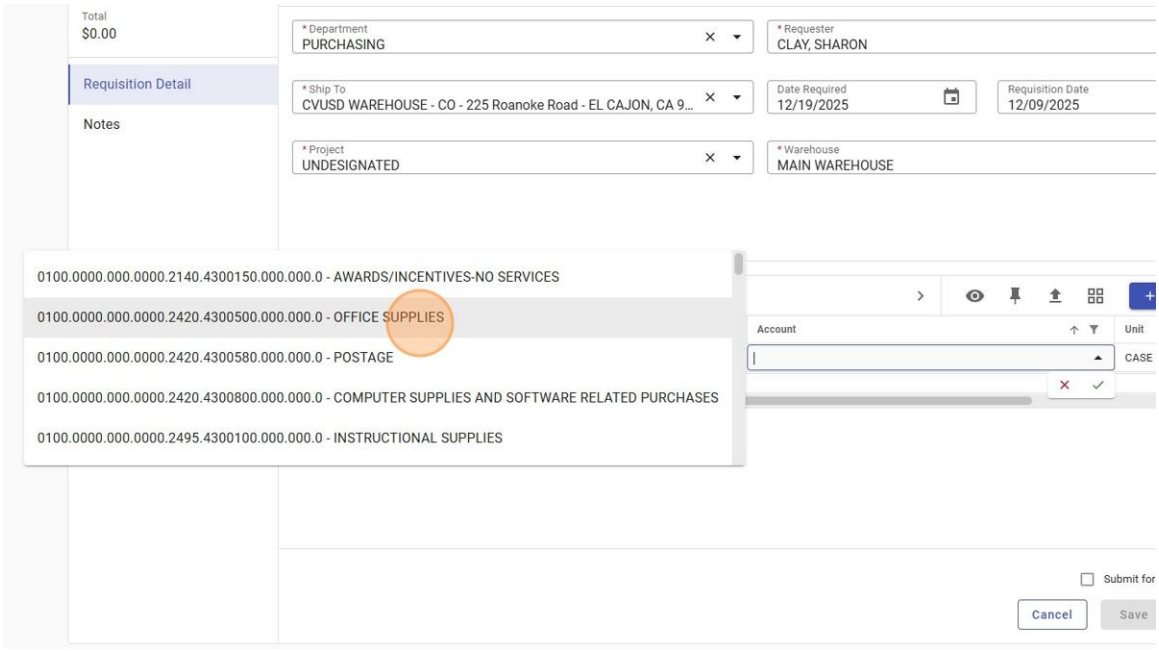
10. Tab through to the next field to enter the quantity:



11. Add the budget code:



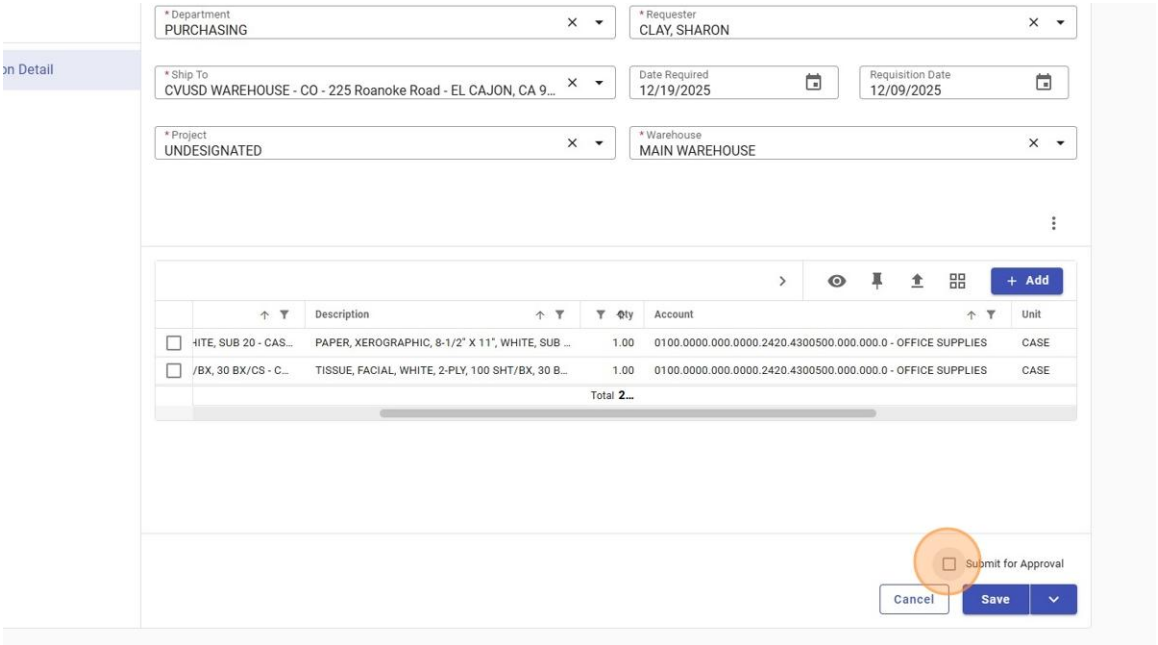
12. Once you start typing the budget code your account number will appear.



13. Either continue tabbing through to add additional line items by repeating these same steps.

14. If you need to save your requisition to continue working on it later, click the ‘Save’ button to save your requisition without submitting.

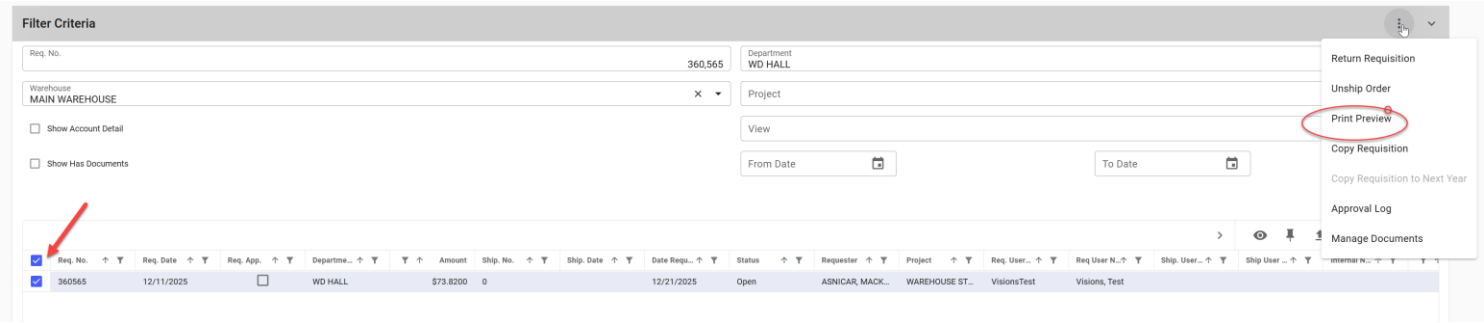
15. If the requisition is complete and ready to submit for approval Click "Submit for Approval" and then "Save".



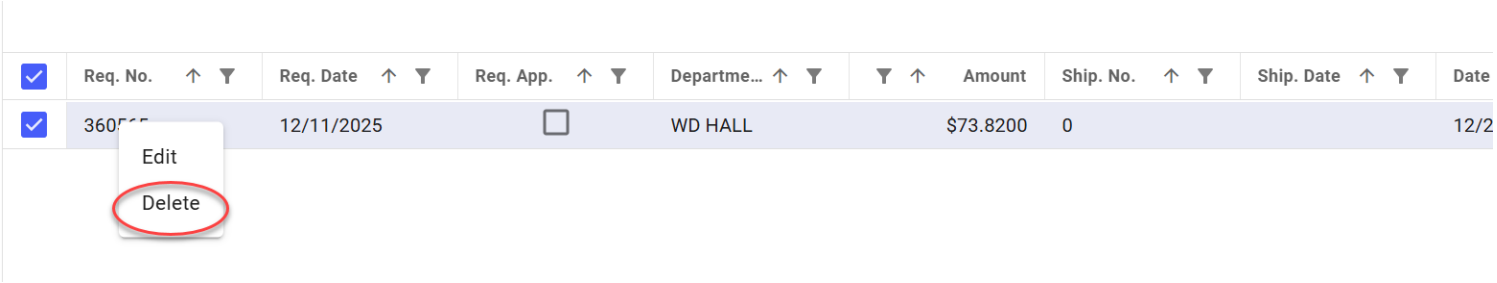
- Your requisition will now route through approvals and will be delivered on your next scheduled WH delivery day if submitted at least a week in advance and all approvers have approved the requisition.

- To check the status of your requisition in the approval workflow, go to the Warehouse Control Panel screen and enter your requisition number in the Req. No. field and click apply. Scroll to the right until you see the 'Next Approver' and 'Next Approver Name' columns. If your order is urgent and you see it is with your principal or other approver, contact them to request approval in iVisions. The Warehouse cannot ship any items until 'WH' is displayed as next approver.

- To print your requisition, highlight the req in your control panel grid by checking the box to the left of the Req No. Then click the 3 dots menu on the top right and select 'Print Preview'.



- To delete your requisition, highlight the req in your Warehous control panel grid by checking the box to the left of the Req No. Then right-click and select 'Delete'. You will be asked, 'Are you sure you want to delete this item?'. Verify you have selected the correct requisition then choose 'Yes'. Alternatively, you can also delete the requisition by hovering over the requisition and clicking on the trashcan icon.
- Once a requisition has been deleted it cannot be restored so be careful with this function.



- Keep a record log of all the requisitions you've submitted so you can track the status and verify receipt upon delivery.

Questions? Contact Kellie Lauhon-Pilchen in the Purchasing Department at (619)588-3266, lauhonpilchenk@cajonvalley.net