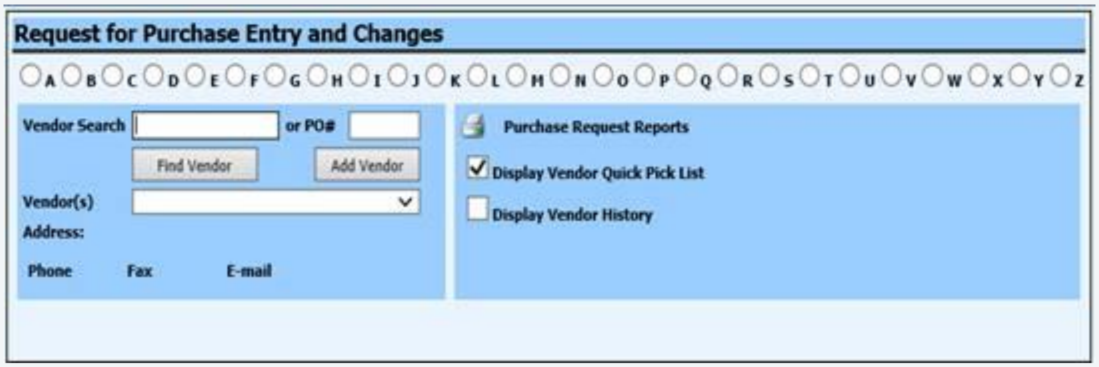
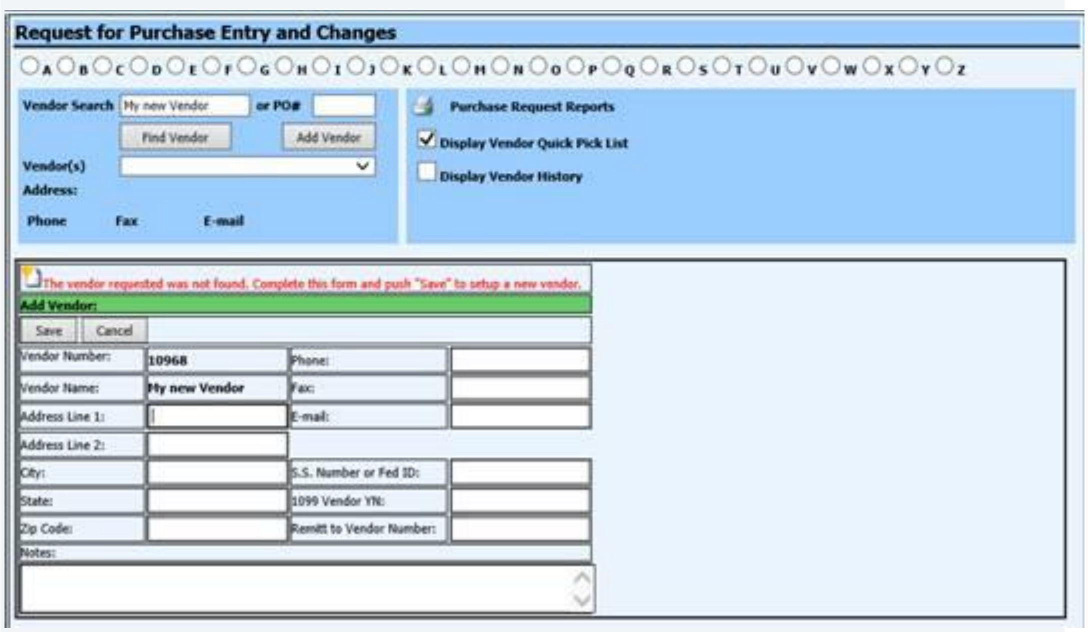
Entering in a Requisition

1. Select Purchasing
2. Select Request for Purchase Entry and Changes
3. **Vendor Search:** You can use either the bullets or enter in vendor name in the Vendor search field
4. Select "Find Vendor"



   a. If you need to add a new vendor, enter in the Vendor name in Vendor Search and select "Add Vendor".

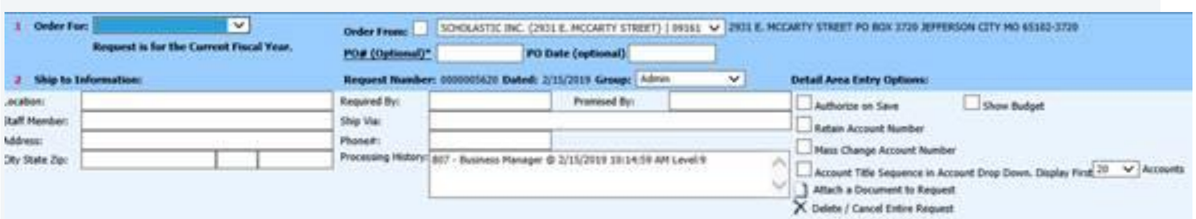


   b. Enter in required information for the new Vendor (address, phone, email, etc.)
   c. Select Save

5. If applicable; select Current or Next Fiscal Year---Should only need to watch in the month of JUNE- if unsure please contact the District Office for clarification.

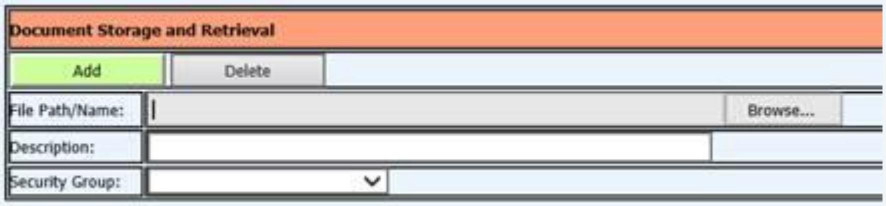
6. Select "New Request"

7. 1. **Order For**: Select the person or group placing the order- should be the same as Group
8. **Order From**: Vendor information
9. **PO# (Optional) and PO Date (optional)**: These fields are optional. Normal processing will assign a PO number and PO date when the request is authorized.
10. 2. **Ship to Information**: Verify the ship to information and make changes, if needed
11. **Request Number**: Requisition number assigned
12. **Dated**: Date Requisition was entered
13. **Group**: Authorization group required to approve Requisition – should be the same as Order For



a. **Authorize on Save**: DO NOT USE. To be used with supervisor status only; for the ability to override ALL other approvers upon Save
b. **Show Budget**: To display Budget for line item, upon data entry of requisition
c. **Retain Account Number**: Select to repeat Account Number for all line entries
d. **Mass Change Account Number**: Select to mass change multiple line entries with incorrect Account Numbers
e. **Account Title Sequence in Account Drop Down**. Display First "20 Accounts: Determine the amount of accounts to select from, upon data entry

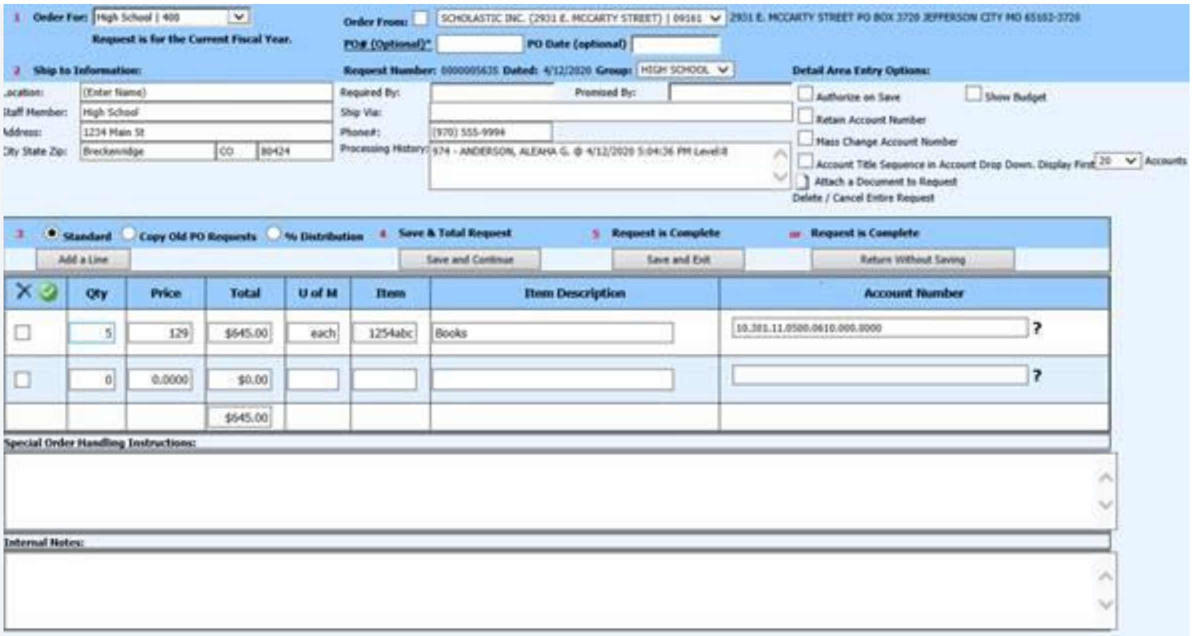
f. **Attach a Document to Request**: Select if you have a quote or other document to attach to the Requisition



i. Click Browse to locate the document on your computer
ii. Enter a Description such as "Quote for Instruments 3/17/2020"
iii. Select a Security Group (optional)
iv. Select Add

g. **Delete/Cancel Entire Request**: Select If you do not need the Requisition started you must use this to delete the full PO. If you just delete the lines it will stay out there.

14. 3. Select Requisition Entry option:
    a. **Standard**: New request entry
    b. **Copy Old PO Requests**: Prior POs entered you can choose to copy from
    c. **% Distribution**: allows you to setup request by percentage. After you select how many lines you wish to use then follow the instructions in red. You can then enter the account numbers, Save and Exit
15. Enter in details for the order: **Quantity, Price, U of M (Unit of Measurement), Item, Item Description and Account Number**. The Account Number can be added in using the Account Number or Account Description
16. **Special Order Handling Instruction:** Information to be relayed to Vendor
17. **Internal Notes:** Information to be relayed between users, related to the requisition
18. 4. "Save and continue" to enter in additional entries for this request or any delivery or internal notes. Allows you to enter more info at a later date If you ae totally done with this PO, use Save & Exit.
19. 5. "Save and Exit" once the request has been completed
20. or "Return without saving" use this option if you are an approver viewing the request without making any changes.



NOTE: Entering in Next Year PO's with a July date:
After selecting "Order For" click on PO# Optional and the program will assign a PO number and will fill in the date of entry. Change that date to a July date and then complete the request, Authorize on Save and then select Save and Exit. The PO will then print with the July date. The date of the request goes back to the entry date, but the PO will still have the July date.

Purchase Request Authorization

Once the request has been authorized by all approvers a purchase order number will be assigned and it will be printed in the District Office. Please send the invoice or any paperwork to the District Office. The PO will be returned to originator to place the order.