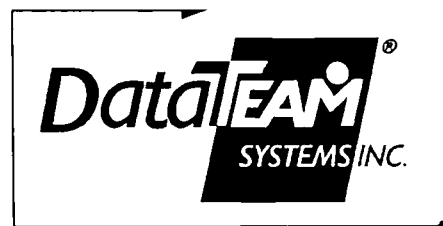


*Creating eRequisitions &
Checking Status of eRequisitions*



Creating E-Requisition

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **Create a purchase requisition**. This window opens.

NEW REQUISITION ?

New Requisition Originator: James, Helen (JamestH)
Jul 18, 2002

Approval Tree
District Office (DO)

Item Type Desired Delivery Date
---- Aug 18 2002

Order Information

Vendor Name	Item Number	Unit Cost	Quantity
<input type="text"/> <input type="button" value="Search"/>	<input type="text"/>	\$0.000	1

Description
Budget Purpose

Orders Entered

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
Totals					\$0.00

 Print comments

Comments

4. Use the pull-down menus to select an approval tree and desired delivery date.
5. Press **Search** to enter a vendor name. This window opens.

VENDOR SEARCH ?

Search

- Type a few letters from the vendor's name, then click the **Search** button to see a list of vendors whose names resemble what you typed. Press the **Select** button for the vendor you want to add to the eReq. You're returned to the New Requisition window.
- Or click the **Browse** tab to see the whole list of vendors. Click the first letter of the vendor's name to see that portion of the list. Press the **Select** button for the vendor you want to add to the eReq. You're returned to the New Requisition window.

Remember: First click the Search button in the new requisition window to select a vendor. Do not type a vendor name first.

6. Tab through the fields entering the item number, unit cost, quantity and description. Enter the budget purpose if you want.
7. Press **Add Item**.
8. Repeat step 6 through step 7 until you have finished adding items to this requisition.

NEW REQUISITION

New Requisition Originator: James, Helen (JamestH)
 Jul 18, 2002

Approval Tree
 Budget - Curriculum (MHS)

Item Type Desired Delivery Date
 Budget - Curriculum Aug 18 2002

Order Information

Vendor Name	Item Number	Unit Cost	Quantity
MacMillan Moore Publis...		\$0.000	1

Description


Budget Purpose

Orders Entered

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
1	MacMillan Moore Publis...	123-456	\$18.750	28	\$525.28
	History Textbooks				
2	MacMillan Moore Publis...	456-789	\$17.120	29	\$496.48
	History Workbooks				
Totals					\$1,021.76

Print comments

Comments

Note: You may *change* an item by pressing the  beside the item. When you press the icon the information for that item is displayed in the Order Information section. Make the needed changes, and press Update Item.

To *delete* an item, press the  beside the item, and press Delete Item.

9. (Optional) Enter comments in the Comments box. Check the **Print Comments** box if you want the comments to be printed on the eReq. **Note:** The comments are printed only when the output is RTF. They are not imported into FA².
10. When you've completed entering the requisition, press **Submit Requisition**. You'll see this message.

CONFIRMATION

Requisition #168 Originator: James, Helen (JamestH)
 Jul 18, 2002

Requisition Submitted on Jul 18, 2002
 Thank You, Helen

Note: If you want to complete the requisition later, press Save Draft.

11. Press **Done**. You're returned to the Procurement menu.

Checking the status of an eRequisition

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **View status of my purchase requisitions**. This window opens.

Req #	Approver	Approval Tree	Status	Total
144	Haaack, Roger (HaaackR1)	District Office	Pending	\$170.00
152	DRAFT	District Office	RETURNED	\$350.00
156	Procurement Clerk	District Office	Approved	\$5.00
157	Haaack, Roger (HaaackR1)	District Office	Rejected	\$25.00
163	Haaack, Roger (HaaackR1)	District Office	Rejected	\$537.57
164	Haaack, Roger (HaaackR1)	District Office	Pending	\$203.97
165	DRAFT	District Office	RETURNED	\$100.00
166	Haaack, Roger (HaaackR1)	District Office	Pending	\$10.00
167	Procurement Clerk	District Office	Pending	\$25.00
168	Farris, Randy (FarrisR)	Budget - Curriculum	Pending	\$1,021.76
169	DRAFT	District Office	DRAFT	\$200.00

BACK

There are several ways you can review the eReqs.

- Click the to view the eReq detail. This option allows you to see comments that have been added or edits that have been made during the approval process.
- Click the beside your draft eReqs to edit and/or complete them. **Note:** There are two different types of draft — those the originator saved during creation and those an approver has returned to the originator for additions or editing.
- Click the *approver's name* to send him an eNote.
- Click the *approval tree* to view the entire approval route and eReq status at each point.

NEW REQUISITION Originator: Teache, Randy (TeacherR)

New Requisition
 Jun 28, 2002
 Approval Tree
 Teaching/Coaching Approval Tree (CO)

Item Type
 Curriculum

Desired Delivery Date
 Jul 20 2002

Vendor Name	Item Number	Unit Cost	Quantity
		\$0.0000	1

Description

Budget Purpose

Add Item Delete Item Cancel

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
Totals					\$0.00

Vendor Selection Process

When creating an eRequisition, you may choose a vendor by first selecting the SEARCH button.

A new window will open in your browser, providing an opportunity to SEARCH or BROWSE for a vendor in your district's approved list.

SEARCH. In the new window, you may type in some (or all) of the vendor name, and then select SEARCH. You will be provided a list of those vendors which closely resemble what you type. Choose the SELECT button for the vendor you wish add to the eRequisition.

Great Progress Schools

SEARCH

VENDOR SEARCH

Search

BROWSE. You may also select the BROWSE button. This will present the vendor list alphabetically. Select the first letter of the vendor's name to see that portion of vendor list. Choose the SELECT button for the vendor you wish to add to the eRequisition.

Great Progress Schools

VENDOR SEARCH RESULT

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z - All

Vendor Name	Select
Zaner-Bloser Educational Pub.	<input type="button" value="Select"/>
Zenger Video	<input type="button" value="Select"/>
Zoobooks	<input type="button" value="Select"/>

The Life of a DataTeam eRequisition



A **teacher** creates an eReq. She/he can see the status throughout the life of the eRequisition. No need to call the Clerk anymore! Online eNotes makes it easy to communicate with approvers!



A **principal** approves/rejects/returns the eReq. No looking for papers on a busy desk; they wait for his/her attention in the electronic file. She/he can even do the work from home when dialed in to the Internet! He's glad all the info is stored on DataTeam's computers; no need to buy new machines!



The **clerk** processes the eReq, and imports the data into Fund Accounting 2. He/she doesn't have to retype the info to create a PO. She/he doesn't receive calls about "where is my order?" She has time to do all the other things on her list.