Creating a Requisition

1. From Maintenance > Create/Modify Requisition, click the Add – Clear All button. This will open a blank requisition screen into which you will enter your new requisition information.

V EIS	Version: 3.4 Build: 0111 User: pprovan Host: 10.52.4.141 Browser: GC 75.0 Maintenance Inquiry Next Year Utilities Reports
Maintenance > Cre	reate/Modify Requisition SessionTimer: 59 min and 54 sec
Save Requisition Nbr:	Delete Directory
Add - Clear	ar All Add - Clear Vendor Add - Clear Detail Vendor Notes Comments Uniform Acct Distr Print Submit

Note: Though they are seldom used, there are two other options for creating requisitions:

- Add Clear Vendor: Creates a new Requisition reproducing the same item detail information from a previously saved or returned Requisition.
- Add Clear Detail: Creates a new Requisition reproducing the same Originator, shipping, and vendor information from a previously saved or returned Requisition.

2. Complete the information for the Requisition. There are three sections to the Requisition screen. Each of the three sections (top, middle, and bottom) is detailed below:

	Version 3.4 Build 0111 User: pprovan Hosts 10.52.4.141 Browser: GC 75.0
	Maintenance Inquiry Next Year Ublities Reports Maintenance CreatModB Regulation SessionTimer 59 min and 46 sec
	Save Delete Requisition Nbr: Retrieve Directory
Section 1	Add - Clear Vendor Add - Clear Vendor Add - Clear Vendor Add - Clear Vendor Originator: Comments Uniform Acct Distr Print Submit Requisition Number: Originator: 000422 - Phyllis Provan Requestor: 000422 - Phyllis Provan Order For: Requisition Per: 07 Date Request: 07-30-2019 Date Required: (77-30-2019) Reason: Reference Nbr: Reference Nbr: Print Sint Key/Vendor Name: Campus/Dept: Bid Category: Endot Sint Foreight Annt Confirm Only: Attachments: Requisition Total: 0.000 Priority: R Regular Y Work Order: Freight Cost: 0.00 Istr Freight Annt Confirm Only: Attachments: Requisition Total: 0.00
	Priority. Rikegular Volk Order. Pregin Cost. 0.00 Districting Committionly, Cost Attachments: Committion of Attachments: Committi
Section 2	Product Pregit Cost OUT Pregit Cost Commodity Code Delete Note Rem Catalog Nbr Description Quantity Unit Price Status Discourt % Discourt %<

Section 1 (Top)

Version: 3.4 Build: 0111 User: pprovan Host: 10.52.4.141 Browser:		
Maintenance Inquiry Next Year Utilities	Reports	
Maintenance > Create/Modify Requisition	SessionTimer: 55 min and 52 sec	
Save Delete		
Requisition Nbr: Retrieve Directory		
Add - Clear All Add - Clear Vendor Add - Clear Detail	Vendor Notes Comments Uniform Acct Distr Print Submit	
Requisition Number: Originator:	000422 - Phyllis Provan Requestor: 000422 - Phyllis Provan Order For: Jackie Chan Requisition P	er: 07
Date Request: 07-30-2019 Date Required:	07-30-2019 Reason: High School Supplies Reference Nbr:	
Sort Key/Vendor Name: QUILL CORPORATION / QUIL Shipping Addr:	ADMINISTRATION - BUSINESS OFFICE - Bid Category:	
Vendor Nbr: 00129 ··· Campus/Dept:	001 - TEST HIGH Bid Nbr:	
Credit Card Code	:	
Priority: R Regular V Work Order:	Freight Cost: 0.00 Distr Freight Amt Confirm Only: Attachments: Requisition T	otal: 86.97

- **Requisition numbers:** if the field is Blank, the system will automatically assign a number upon saving. If the field is open, a number must be manually entered.
- Originator: the name of the logged-on user is displayed.
- **Requestor:** defaults to the originator. You will only need to change if additional requestors have been established. There is a separate space to indicate who the Order is for.
- **Order For:** indicates the name of the person or group you are ordering for. This information will be printed on the PO.
- Dates Requested and Required: default to today's date. Change as desired.
- **Reason:** type the reason for submitting the requisition or edit the current reason. The field can be a maximum of 30 characters.
- This information is displayed on various reports and on the general ledger.
 Reference Number, Work Order, Bid Category and Bid Number : optional fields that may be utilized as needed. We recommend coding to CIP/DIP using these fields.
- Sort Key/Vendor Name: begin typing the vendor name to view a list of vendors beginning with those letters. Select from the dropdown. The Vendor Number will populate when a vendor is selected from the dropdown. If the Vendor that you need is not available, it will have to be built or reactivated in Finance.



- **Shipping Address:** will automatically populate the default address that was set up for the Requestor/Originator. By Typing the address where the requisition is to be shipped.
- **Campus/Dept:** select the campus or department for whom the requisition is being **submitted**. As you type the data, a drop-down list of corresponding data is displayed. Select the desired campus/department. This selection will determine

the First Approver of the requisition. Clicking the Space bar will provide a dropdown to select from.

- Credit Card Code: Click space bar. Available credit Cards will display. Select if appropriate.
- **Priority:** defaults to Regular but may be changed to Urgent if desired.
- **Freight Cost:** freight can be handled two different ways. Use this box if you want freight charged to one or more items specifically. If freight will be charged to all items equally, click the Distr Freight Amt link. Otherwise the freight will be charged proportionately to items marked as Freight Eligible in Section 2 (middle portion). The second way to charge freight is to add a separate line for freight in section 2.
- **Confirm Only:** select this box to alert vendors that the PO refers to an order already placed. this information will be printed on the PO.
- Attachments: select to alert approvers and vendors who receive the PO that additional information should be attached to the PO.
- **Requisition Total:** the calculated total cost for each item in the requisition based on the quantity ordered and unit price per item is displayed.

Section 2 (middle)

Delete Note	ltem	Catalog Nbr	Description	Quantity Unit of Issue		Unit Price	SubTotal		Commodity Cod	e	
			Long Description	Status		Discount %	Discount Amt	Freight Elig	Freight %	Freight Amt	Totals
Note Note	001	123444	FILING FOLDERS	3.00 EA Each Each	۲	28.99000	86.97				
Accounts			Heavy-Duty Manila File Folde	Y - Approved 🔻		0.00%	0.00	V	0.00%	0.00	86.97

Note: displays a pop-up box. Click to add or read a note for the concerning the item. If a paper clip is displayed next to the Note button, an item note exists. In the note window, review the existing notes or type new or additional notes (justification or instructions) about the line item. This information is for internal use only. This will NOT be printed on the PO. Click OK to save the requisition note and close the window. Otherwise, click Cancel to close the window.

Item Note - Item: 002	×
MS SMITH NEEDS HEAVY DUTY SCISSORS FOR AN UPCOMING PROJECT	
	OK Cancel

)elete	Note	Item	Catalog Nbr	Description	Quantity	Unit of Issue	Unit Pric	e SubTotal		Commodity Cod	e	
				Long Description		Status	Discount	6 Discount Amt	Freight Elig	Freight %	Freight Amt	Totals
1	Note	001	123444	FILING FOLDERS	3.00	EA Each Each 🔻	28.99000	86.97				
A	Accounts			Heavy-Duty Manila File Folde		Y - Approved 🔻	0.009	0.00	✓	0.00%	0.00	86.97
1	0 Note	002	45678	SCISSORS	6.00	EA Each Each	5.4900	32.94				
1	Accounts					Y - Approved 🔻	0.00%	0.00	V	0.00%	0.00	32.94

- **Catalog Number:** part number of item number listed by the vendor to identify the item(s).
- **Description:** field holds 30 characters. If the description requires more characters, use the Long Description field.
- Quantity: quantity per unit of issue
- **Unit of Issue:** select from the dropdown
- Unit Price: price per unit of issue
- **Subtotal:** automatically calculated
- Commodity Code: optional field this is used to create and manage a list of commodity codes. Commodity codes allow for the grouping of "like-types" of items and the tracking of those items/purchases in Purchasing applications. Begin typing a commodity code or description. As you type the data, a drop-down list of corresponding data is displayed. Select the applicable commodity code. If no codes display skip this filed. The commodity codes are maintained on the District Administration > Tables > Commodity Codes page. The commodity code can be selected and changed on a saved requisition and also by an approver once submitted. For additional information, reference the Using Commodity Codes in TxEIS document.
- Accounts: Click the Accounts to select a line item. The line item is highlighted for edit and you can view or add accounts for the selected line item in the Accounts section at the bottom of the page.
- **Long Description:** available for extended description if the 30 characters in the original Description field were not enough.
- **Status:** defaults to Y-Yes, Approved. Can be changed to indicate item is F-Free. Requisition will not save if item has a status of Y but has no total dollar amount.
- **Discount % and Discount Amount:** if a discount is to be given fill in a percent or amount. You need only fill in one of the fields. The other will be autopopulated for you.

- Freight Eligible, Freight % and Freight Amount: if freight cost was entered in section 1 and the item on this line is freight eligible, check the box and enter the freight percent OR amount. You need only fill in one of the fields. The other will be auto-populated. If you are entering freight as a separate line item or the item is not charged freight, leave the box unchecked.
- **Totals:** amount is auto-calculated based on Unit Price, Quantity, Discounts, and Freight.

***Important: Click to update the totals if any amounts are changed in the grid after all items have been entered in Section 2 to get the Total amount up-to-date. This must be done before any account codes are assigned.

Section 3 (bottom)

There are two options for entering account codes for requisitions. You may only use one of the options. Option 2 is recommended.

Option 1: After each item is entered add an account line in the bottom section. Click +Add in the bottom of section 3. If the account code is not known, click . The Accounts Codes lookup is displayed. Type data in the individual account code component fields and click **Search**. A list of account codes matching your search components is displayed. Select the desired account code from the list. Otherwise, click **Cancel** to close the Account Codes lookup. The Description will populate based on the account code selected.

Delete	Note	ltem	Catalog Nbr	Description		Quantity	Unit of Issue			Unit Price	SubTotal		Commodity Co	de	
				Long Description			Status			Discount %	Discount Amt	Freight Elig	Freight %	Freight Amt	Totals
Ŵ	Note	001	123444	FILING FOLDERS		3.00	EA Each Each		•	28.99000	86.97				
	Accounts			Heavy-Duty Manila File	e Folde		Y - Approved ▼			0.00%	0.00	✓	0.00%	0.00	86.97
Ŵ	0 Note	002	45678	SCISSORS		6.00	EA Each Each		•	5.49000	32.94				
	Accounts						Y - Approved 🔻			0.00%	0.00	 Image: A set of the set of the	0.00%	0.00	32.94
Refrest	<u>n Totals</u>	_			_										+ į
	<u>n Totals</u> nts for item (001			_										+ /
Accour Delete	nts for item A	ccount Cod			Balance	Amt	Pct	Amount			_			_	+ į
Accour	nts for item	ccount Cod		scription N SUPPLIES -HS REG ED			Pct 100.000%	Amount 86.97	_	_			_	_	+ į
Accour Delete	nts for item (A 199-11-639	ccount Cod 9	GE	•											+ <u>/</u>
Accour Delete	nts for item (A 199-11-639 199-11-639	ccount Cod 9 9.00-001-91	GE	N SUPPLIES -HS REG ED PLIES -HS REG ED			100.000%	86.97	_	_		_			+ /
Accour Delete	nts for item (A 199-11-639 199-11-639 199-11-639 199-11-639	ccount Cod 9. 9.00-001-91 9.00-001-92	GE	N SUPPLIES -HS REG ED PLIES -HS REG ED PLIES - G/T			100.000%	86.97 86.97			_	_			+ į
Accour Delete	nts for item (A 199-11-639 199-11-639 199-11-639 199-11-639	ccount Cod 9 9.00-001-91 9.00-001-92 9.00-001-92	GE 1000 : GEN SUP 1000 : GEN SUP	n Supplies -HS reg ed Plies -HS reg ed Plies - G/T Plies - SP ed			100.000%	86.97		_			_		+ į

The balance in the Budget for the account code displays. (*Note: a negative amount means there is money in the budget.*) Items may be charged to one or more account codes. Enter either the percent **or** amount of the item to be charged to that account code. Add additional account code lines as desired.

Once the account information has been entered, click on the **Refresh Totals** link to get totals in both percent and amount and to verify 100% of the line has been expensed.

Important Note: This option is line item driven, so the account information being entered will tie solely to the item that was clicked that was selected in Section 2.

Option 2: Option 2 is much simpler as it will distribute costs uniformly across all items based on the percent or amount indicated. After entering all items and before you enter any account codes in the bottom section, select the **Uniform Account Distribution** button at the top of the screen.



A pop-up box will display in which you will enter the Account code for the entire requisition. If unsure of the Account Code click on the Ellipses button and start entering the account code. After entering a portion, you will be able to click on Search and narrow down your account code. Click the blue account code and it will auto fill the account code. The balance for this account, you must assign the percent or amount of the entire requisition you want charged to that account. Add additional account codes as desired.

Delete		Oodo		Description	Balance Amt	Pct	Amount
1	199-11-6399.00		•••			0.000%	0.00
- L						0.000%	0.00
Refresh	Totals <u>Calculate Percer</u>	<u>nt</u> <u>Calculate Amou</u>	nt				+ <u>Add</u>
Refresh ⁻	Totals <u>Calculate Percer</u>	nt <u>Calculate Amou</u>	nt				+ Add

count Codes		
Fund Func Obi Sobi O 199 ••• 11 •• 6399 ••• XX ••• XXX	ra Prog	
Search:		
<u>ID</u>	Description	
<u>199-11-6399.00-001-911000</u>	GEN SUPPLIES -HS REG ED	
<u>199-11-6399.00-001-921000</u>	GEN SUPPLIES - G/T	
199-11-6399.00-001-923000	GEN SUPPLIES - SP ED	
199-11-6399.00-001-924000	GEN SUPPLIES - COMP	
199-11-6399.00-001-931000	HIGH SCHOOL ALLOTMENT	
199-11-6399.00-041-911000	GEN SUPPLIES	
199-11-6399.00-101-911000	GEN SUPPLIES - ELEM REG ED	
199-11-6399.00-101-921000	GEN SUPPLIES - G/T	
199-11-6399.00-101-923000	GEN SUPPLIES - SP ED	
199-11-6399.00-101-930000	GEN SUPPLIES- COMP	
199-11-6399.01-101-923000	ADDITIONAL SP ED SUPPLIES	
199-11-6399.09-001-911000	GEN SUPPLIES - BAND	
199-11-6399.13-001-922000	GEN SUPPLIES- VOC AG	
199-11-6399.17-001-922000	GEN SUPPLIES-VOC BUSINESS	

Once all account codes have been entered, enter the Calculate Percent. Then click on the Calculate Amount link. (If you entered by amount, calculate the percent. If by percent, calculate amount.) Your percent must equal 100% and the amount must equal the total for the requisition. Once it does, click OK.

Uniform A	ccount Distribution					×
Delete	Account Code		Description	Balance Amt	Pct	Amount
Ŵ	199-11-6399.00-001-911000	•••	GEN SUPPLIES -HS REG ED	-38.78	50.000%	59.95
Ŵ	199-11-6399.00-001-921000	•••	GEN SUPPLIES - G/T	-49.84	50.000%	59.95
					100.000%	119.90
Refresh	Totak Calculate Percent Calculate Amount					+ <u>Add</u>
						OK Cancel

3. Review the Requisition and consider the buttons along the top of the screen.

Add - Clear All Add - Cle	ear Vendor Add - Clear Detail	Vendor Notes Comments	Uniform Acct Distr P	rint Submit

• **Vendor Notes:** Any message typed in this box will display on the PO for the vendor to see. The text is limited to three lines that are each approximately 3 inches in length. If a Vendor Note is added, a paper clip will display on the button.

CERTOR OTHER ORDER AG	AP. THANK YOU.		

- **Comments:** Any message typed in this box will NOT be printed on the PO but will be available for approvers to see and will display on District Copy of the Purchase Order. We recommend that approvers use this area to explain any issues that caused a requisition to be returned. If a Comment is added, a paper clip will display on the button.
- **Print:** this button will print a copy of the requisition information. Note: This is not the PO. This is the same report that will print anytime you Save or Submit your Requisition and answer Yes when asked if you would like to print the Requisition.

Date Run: 07-3 Cnty Dist: 030	-903		TES	TISD				Page: 1 of	1
-		.		_				-	
Req Nbr: PO Nbr:		Requestor: 00	0422 - Phyllis F		Sor	t Key/Vendor N	name:QUIL rNbr:0012		ION / QUILL
Reg Total:		Order For: Ja		rovan					- BUSINESS OFF
Date Request			gh School Supp	olies		Bid Cate		INISTRATION	- BUSINESS OF
Date Required:		Campus/Dept 00					d Nbr:		
	R - Regular	Credit Card Code:					Only:		
Work Order:	-	Reference Nbr:				Attachn	nents: 🗆		
Freight Cost:	.00	Req Per: 07							
Vendor Notes:									
Comments:									
Item Unit of Issue	Quantity	Unit Price	SubTotal		Discount Am		Freight %	Freight Am	
001 EA - Each	3.00	28.99000	86.97	.00%	.00		.00%	.00	0 86.9
Des	cription: FILING FOLDE	RS							
	cription: FILING FOLDE		leavy-weight, 2-	-Ply, 1/					
Long Des	•	nila File Folders; 14pt H	leavy-weight, 2- ommodity: UN					Status	:Y - Approved
Long Des	cription: Heavy-Duty Mar	nila File Folders; 14pt H						Status	s:Y - Approved
Long Des	cription: Heavy-Duty Man log Nbr: 123444	nila File Folders; 14pt H C	ommodity: UN			Balance	Amt	Status	:Y - Approved
Long Des Cata	cription: Heavy-Duty Mai log Nbr: 123444 Note:	nila File Folders; 14pt H C de Descrip	ommodity: UN	IGROUPED					
Long Des Cata	cription: Heavy-Duty Mar Ilog Nbr: 123444 Note: <u>Account Cos</u> 199-11-6399.00-001-9110	nila File Folders; 14pt H C de <u>Descrip</u> 000 GEN SU	tion	IGROUPED		-3	8.78 4	Pct	Amour 43.4
Long Des Cata	In the avy-Duty Main In the Account Cost of the Account A	nila File Folders; 14pt H C de <u>Descrip</u> 000 GEN SU	ommodity: UN	IGROUPED		-3	8.78 4 9.84 5	Pct 49.994% 50.005%	Amour 43.4 43.4
Long Des Cata	cription: Heavy-Duty Mar Ilog Nbr: 123444 Note: <u>Account Cos</u> 199-11-6399.00-001-9110	nila File Folders; 14pt H C de <u>Descrip</u> 000 GEN SU	tion	IGROUPED		-3	8.78 4 9.84 5	Pct	Amour
Long Dec Cata Item Unit of Issue	cription: Heavy-Duty Mai log Nbr: 123444 Note: <u>Account Cor</u> 199-11-6399.00-001-911(199-11-6399.00-001-921(Quantity	nila File Folders; 14pt H C de Descrip 000 GEN SL 000 GEN SL Unit Price	tion JPPLIES -HS F JPPLIES - G/T SubTotal	REG ED	Discount Am	-3 -4 Freight Elig	8.78 4 9.84 9 Freight %	Pct 49.994% 50.005% Total: Freight Am	Amour 43.4 43.4 86.9 t Total
Long Der Cata Item Unit of Issue 002 EA - Each	cription: Heavy-Duty Mai log Nbr: 123444 Note: <u>Account Cor</u> 199-11-6399.00-001-9110 199-11-6399.00-001-9210 <u>Quantity</u> 6.00	nila File Folders; 14pt H C de Descrip 000 GEN SU 000 GEN SU	tion JPPLIES - HS F	IGROUPED	Discount Am .00	-3 -4	9.84	Pct 49.994% 50.005% Total: Freight Am	Amour 43.4 43.4 86.9 t Total
Long Der Cata Item Unit of Issue 002 EA - Each Der	cription: Heavy-Duty Mai log Nbr: 123444 Note: Account Cor 199-11-6399.00-001-911(199-11-6399.00-001-921(Quantity 6.00 cription: SCISSORS	nila File Folders; 14pt H C de Descrip 000 GEN SL 000 GEN SL Unit Price	tion JPPLIES -HS F JPPLIES - G/T SubTotal	REG ED		-3 -4 Freight Elig	8.78 4 9.84 9 Freight %	Pct 49.994% 50.005% Total: Freight Am	Amour 43.4 43.4 86.9 t Total
Long Der Cata Item Unit of Issue 002 EA - Each Der Long Der	cription: Heavy-Duty Mai log Nbr: 123444 Note: <u>Account Cos</u> 199-11-6399.00-001-911(199-11-6399.00-001-921(<u>Quantity</u> 6.00 cription: SCISSORS cription:	nila File Folders; 14pt H C de Descrip 000 GEN SL 000 GEN SL Unit Price 5.49000	tion JPPLIES -HS F JPPLIES - G/T SubTotal 32.94	REG ED Discount % .00%		-3 -4 Freight Elig	8.78 4 9.84 9 Freight %	Pct 19.994% 50.005% Total: Freight Am .00	Amour 43.4 43.4 86.9 t <u>Total</u> 0 32.9
Long Der Cata Item Unit of Issue 002 EA - Each Der Long Der	cription: Heavy-Duty Mai log Nbr: 123444 Note: Account Cor 199-11-6399.00-001-911(199-11-6399.00-001-921(Quantity 6.00 cription: SCISSORS	nila File Folders; 14pt H C de Descrip 000 GEN SL 000 GEN SL Unit Price 5.49000	tion JPPLIES -HS F JPPLIES - G/T SubTotal	REG ED Discount % .00%		-3 -4 Freight Elig	8.78 4 9.84 9 Freight %	Pct 19.994% 50.005% Total: Freight Am .00	Amour 43.4 43.4 86.9 t Total
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Long Der Cata Item Unit of Issue 002 EA - Each Der Long Der	cription: Heavy-Duty Mail log Nbr: 123444 Note: <u>Account Cor</u> 199-11-6399.00-001-9110 199-11-6399.00-001-9210 <u>Quantity</u> 6.00 cription: SCISSORS cription: log Nbr: 45678	nila File Folders; 14pt H C de Descrip 000 GEN SL 000 GEN SL Unit Price 5.49000 C CDS HEAVY DUTY SCI:	ommodity: UN tion JPPLIES -HS F JPPLIES - G/T SubTotal 32.94 ommodity: UN SSORS FOR A	Discount %	.00	-3 -4 Freight Elig	8.78 4 9.84 8 Freight %	Pct 19.994% 50.005% Total: Freight Am .00	Amour 43.4 43.4 86.9 t <u>Total</u> 0 32.9
Long Der Cata Item Unit of Issue 002 EA - Each Der Long Der Cata	cription: Heavy-Duty Mai log Nbr: 123444 Note: <u>Account Coo</u> 199-11-6399.00-001-9110 199-11-6399.00-001-9210 <u>Quantity</u> 6.00 cription: SCISSORS cription: log Nbr: 45678 Note: MS SMITH NEE	nila File Folders; 14pt H C de Descrip 000 GEN SL 000 GEN SL 000 GEN SL 000 GEN SL 000 GEN SL 000 GEN SL 000 C C DS HEAVY DUTY SCI: de Descrip	ommodity: UN tion JPPLIES -HS F JPPLIES - G/T SubTotal 32.94 ommodity: UN SSORS FOR A	IGROUPED REG ED Discount % .00% IGROUPED N UPCOMING	.00	-3 -4 Freight Elig Ø Balance	Amt	Pct 49.994% 50.005% Total: Freight Am .00 Status	Amour 43.4 43.4 43.4 86.9 86.9 1 Total 0 32.9 1 5 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1<
Long Der Cata Item Unit of Issue 002 EA - Each Der Long Der Cata	cription: Heavy-Duty Mai log Nbr: 123444 Note: <u>Account Cor</u> 199-11-6399.00-001-9110 199-11-6399.00-001-9210 <u>Quantity</u> 6.00 cription: SCISSORS cription: log Nbr: 45678 Note: MS SMITH NEE <u>Account Cor</u>	nila File Folders; 14pt H C de Descrip 000 GEN SU 000 GEN SU Unit Price 5.49000 C EDS HEAVY DUTY SCI: de Descrip 000 GEN SU	ommodity: UN tion JPPLIES - HS F JPPLIES - G/T SubTotal 32.94 ommodity: UN SSORS FOR A tion	IGROUPED REG ED Discount % .00% IGROUPED N UPCOMING	.00	-3 -4 Freight Elig Ø Balance -3	8.78 4 9.84 5 Freight % 00% .00% 4 Amt 8.78	Pct 49.994% 50.005% Total: Freight Am .00 Status Pct	Amour 43.4 43.4 86.9 4 Total 0 32.9 xY - Approved Amour

- **Submit:** will send the requisition to the next approver. You will be unable to pull the Credit/Modify Requisition unless the Approver sends it back to you to change an item.
 - Save: A Requisition can be saved at any time by clicking the SAVE button in the top left corner. The Requisition can be retrieved at a later date if necessary. Saving will NOT send the Requisition to the next approver. You must Submit to send it on.

		Next Year Utilities	Reports					
intenance > Create/Mc	dify Requisition				SessionTimer: 59 min and	56 sec		
Save ave successful	Delete							
equisition Nbr: 01142	Retrieve	Directory						
Add - Clear All	Add - Clear Vendor	Add - Clear Detail	Vendor Notes Comment	s Uniform Acct Distr	r Print	Submit		
Requisition Number:	011423	Originator:	000422 - Phyllis Provan	Requestor: 00042	2 - Phyllis Provan	Order For:	Jackie Chan	Requisition Per: 0
Date Request:	07-31-2019	Date Required:	07-31-2019	Reason:		Reference Nbr:]
ort Key/Vendor Name	QUILL CORPORATION / (QUIL Shipping Addr:	ADMINISTRATION - BUSINESS OFFI	CE - Bid Category:				
endor Nbr:	00129	Campus/Dept:	001 - TEST HIGH	Bid Nbr:				
		Credit Card Code	:					
Priority:	R Regular 🔻	Work Order:		Freight Cost:	0.00 Distr Freight Ar	mt Confirm Only	Attachments:	Requisition Total: 2-
Delete Note	Item Catalog Nbr	Description	Quantity Unit of Issue		Unit Price	SubTotal	Commodity Code	
Mote		Long Description	Status			liscount Amt Freight E	lig Freight % Freigh	nt Amt Totals
Mote Note	001	Legal Pads	2.00 EA Each Each		 12.49000 	24.98		

If document(s) need to be attached, such as quotes or order forms, you must save the requisition. Upon save, the Documents button becomes available. See additional document.

Treis	Version : 3.4 Build: 0111 User: pprovan Host: 10.52.4.32 Browser: GC 75.0	
V	Maintenance Inquiry Next Year Utilities Reports	
Maintenance > Cre	eate/Modify Requisition	SessionTimer: 59 min and 56 sec
Save Save successful	Delete	
Requisition Nbr:	020474 Retrieve Directory	
Add - Clear	r All Add - Clear Vendor Add - Clear Detail Vendor Notes Comments Unifor	m Acct Distr Print Documents Submit

Other information on this screen

- Saved or Returned Requisitions may be Retrieved by number (if known). Type the Requisition number and Retrieve.
- If the Requisition Number is unknown, the Directory may be used to retrieve Saved or Returned Requisitions. From Maintenance > Create/Modify Requisition, select the Directory button.

KEIS	Purchasi	ing ^{Versi}	on : 3.4 Build: 0111 : pprovan Host: 10.		er: GC 75.0
V	Maintenance	Inquiry	Next Year	Utilities	Reports
Maintenance > Cre	ate/Modify Requis	sition			
Save	Delete		_		
Requisition Nbr:		Retriev	e Di	rectory	

In the popup box, enter information to use in the search for a saved Requisition, or leave criteria blank and select Search. Requisitions meeting the Search criteria (or all Requisitions if criteria were left blank) appear in the list.

Requisitions						
Req Number:	Requestor:	Vendor Sort Key:			Search	
From Date:	To Date:	Vendor Name:			Cancel	
		Vendor Number:				
Reg Nbr Date Regu	ested <u>Requestor</u> <u>Ve</u>	ndor Nbr <u>Vendor Name</u>	Vendor Sort Key	Priority	Reason	Status
<u>011423</u> 07-31-20	19 Phyllis Provan	00129 QUILL CORPORATIO	N QUILL CORPORATION	R - Regular	N - N	lot submitted

Select the link for the Requisition Number desired and the saved Requisition will display. You may review and modify as needed and Submit. Submitted requisitions will no longer be displayed in the Directory.

• Unless express permission is granted, the Purchasing system will not allow users to go over budget. Users who attempt to submit a Requisition for more than the amount available will receive a message to let them know and will not allow them to submit. The account codes may be removed and the requisition saved until a budget amendment has been made to increase the account.

	: 3.4 Build: 0111 provan Host: 10.52.4.141 Browser: GC 75.0			
Maintenance Inquiry	Next Year Utilities Reports			
Maintenance > Create/Modify Requisition			SessionTimer: 59 min and 39 sec	
Save Delete				
The current requisition amount is greater than	the max limit for for the Requestor.			
		1		
Requisition Nbr: 011424 Retrieve	Directory			
Add - Clear All Add - Clear Vendor	Add - Clear Detail Vendor I	Notes Comments Uniform Acc	t Distr Print Submit	
Requisition Number: 011424	Originator: 000422 - P	hyllis Provan Requestor:	000422 - Phyllis Provan Order For:	BAND DIRECTOR Requisition Per: 07
Date Request: 07-31-2019	Date Required: 07-31-201	Reason:	Reference Nb	
Sort Key/Vendor Name: WAL-MART STORE #01-	0535 ···· Shipping Addr: ADMINIST	RATION - BUSINESS OFFICE - Bid Category:		
Vendor Nbr: 00710	Campus/Dept: 001 - TEST			
	Credit Card Code:			
Priority: R Regular V	Work Order:	Freight Cost:	0.00 Distr Freight Amt Confirm Or	ly: Attachments: Requisition Total: 10.00
Delete Note Item Catalog Nbr		antity Unit of Issue Status	Unit Price SubTotal	Commodity Code t Elig Freight % Freight Amt Totals
🕅 Note 001	Long Description	1.00 EA Each Each	Discount % Discount Amt Freigh 100.00000 100.00	t Elig Freight % Freight Amt Totals
Accounts		Y - Approved 🔻	0.00% 0.00	0.00% 0.00 100.00
Refresh Totals				+ Add
Accounts for item 001				·
Delete Account Code De	scription Balance Amt	Pct Amount		
199-11-6399.00-001-911000 GE	N SUPPLIES -HS REG ED 21.17	100.000% 100.00 100.000% 100.00		
		100.000% 100.00		

• To Delete a Requisition, retrieve the requisition desired and select DELETE. You will be prompted to verify the deletion.

T _{xEIS}	Durchasing	3.4 Build: 0111 ovan Host: 10.52.4.141 Browser:	GC 75.0					
	Maintenance Inquiry N	lext Year Utilities	Reports					
Maintenance > 0	reate/Modify Requisition				SessionTimer: 59 min	and 56 sec		
Save	Delete							
Requisition Nb	r: 011423 Retrieve	Directory						
Add - Cle	ar All Add - Clear Vendor	Add - Clear Detail	Vendor Notes Comments	Uniform Ad	cct Distr Print	Submit		
Requisition N	lumber: 011423	Originator:	000422 - Phyllis Provan	Requestor:	000422 - Phyllis Provan	Order For:	Jackie Chan	Requisition Per: 07
Date Reques	: 07-31-2019	Date Required:	07-31-2019	Reason:		Reference Nbr:]
Sort Key/Ven	dor Name: QUILL CORPORATION / Q	UIL Shipping Addr:	ADMINISTRATION - BUSINESS OFFICE	- Bid Category	c			
Vendor Nbr:	00129	Campus/Dept:	001 - TEST HIGH	Bid Nbr:				
		Credit Card Code	:					
Priority:	R Regular 🔻	Work Order:		Freight Cost:	0.00 Distr Freig	ht Amt Confirm Only	: 🔲 Attachments: 🔲	Requisition Total: 24.98

Requisition Status Inquiry

To check the Status of your Requisition, go to **Inquiry** > **Requisition Status Inquiry**. If you know the Requisition number or date range, enter information at the top of the screen

and Retrieve. If not, use the Directory or leave the options blank and Retrieve the see all of your Requisitions.

Select the desired Requisition by clicking on the Spyglass.

- The status of the Requisition is noted in Section 1.
 - Pending to be Approved
 - Approved
 - Not Submitted.
- Click the spyglass on a particular requisition to see the Status details in Section 2. You can click on Account to view the account code that was assigned.
- Section 3 will show the details, such as when the Requisition was submitted, who has approved, and who has it now. When the Requisition has been approved, you will see a PO number assigned and all the approvals will show in the bottom screen with dates.

> Requ	uisition Sta	tus Inquiry								SessionTim	er: 59 min and	51 sec						
Nbr:		PO N	or:	Fro	n Date:		To D	ate:]								
us:		Vende	or Number:	Vor	dor Name:		Rea	estor Name:		Pid C	ategory:		R	etrieve		rint		
L		· Venu	i Number.	Vei			Kequ	lestor Name.						etheve	J		,	
sition	Informati	on									_ 1							
	eq Nbr PC	Nbr Request		Date Requested			r Nbr Vend		<u>Bic</u>	I Category A	mount Status		<u>Req F</u>	er <u>Priority</u>			Originator	Vendor Note
	00001		K, SANDRA	05-15-2013				EGION 14			50.00 Not su		05		Board Train		BULLOCK, SAN	DRA
0	11422	Provan,	Phyllis	07-30-2019	001 - TEST H	HIGH 001	29 QUIL	L CORPORATION			119.91 Pendi	ng to be appro	ved 07	Regular	High Schoo	ol Supplies	Provan, Phyllis	
	11424	Provan,	Phyllis	07-31-2019	001 - TEST H	HGH 007	10 WAL-	MART STORE #01	1-0535		10.00 Not st	ubmitted	07	Regular			Provan, Phyllis	_
4	1▼/1)) M																
_	1 🔻 /1 👔												_					
quisiti lote A	on Nbr: 01	1422 em Item App		Recy Stat Cata				e Unit Price Q										
quisiti lote A	on Nbr: 01 Accounts It	1422 em Item App 101 Approved	I N/A	1234	44 FILIN	IG FOLDERS	EA - Each	28.99000	3.00	86.97	0.00%	0.00	Y	0.00%	0.00	86.97		
quisiti lote A	on Nbr: 01 Accounts It	1422 em Item App	I N/A		44 FILIN									0.00%	0.00	86.97 32.94		
quisiti lote A	on Nbr: 01 Accounts It	1422 em Item App 101 Approved	I N/A	1234	44 FILIN	IG FOLDERS	EA - Each	28.99000	3.00	86.97	0.00%	0.00	Y	0.00%	0.00	86.97		
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quisiti ote A <u>A</u> otes A	ion Nbr: 01 Accounts It Accounts (1422 sem Item App 001 Approved 002 Approved	I N/A	1234 4567	44 FILIN 8 SCIS:	IG FOLDERS	EA - Each EA - Each	28.99000 5.49000 Date	3.00	86.97	0.00%	0.00	Y	0.00%	0.00	86.97 32.94		
quisiti ote A <u>A</u> otes <u>A</u> proval	ion Nbr: 01 Accounts It Accounts (Accounts	1422 term Item App 101 Approved 202 Approved al User trovan	d N/A d N/A Title undefined	1234 4567 A	44 FILIN 8 SCIS:	VG FOLDERS SORS Print name Y	EA - Each EA - Each Status Submitted	28.99000 5.49000	3.00	86.97	0.00%	0.00	Y	0.00%	0.00	86.97 32.94		
quisiti ote A <u>A</u> otes A	on Nbr: 01 Accounts it Accounts (Accounts (1422 term Item App 101 Approved 202 Approved al User trovan	3 N/A 3 N/A Title undefined HIGH SCHO(1234 4567 A DL PRINCIPAL	44 FILIN 8 SCIS:	IG FOLDERS SORS	EA - Each EA - Each	28.99000 5.49000 Date	3.00	86.97	0.00%	0.00	Y	0.00%	0.00	86.97 32.94		