



Entering Requisitions (Building Personnel)

Revised October 2016

Configuration/Preferences

Having your preferences set will help speed up the entry process and cause less data entry on each requisition.

Update Requisition & Purchase Order Options	
User Name	TESTUSER
Default Deliver-to Vendor	845759 Sample District High School
Delete Req or Set Posted	Set_To_Posted <input type="button" value="v"/> Purchase Order Date Default
Use User highest Requisition	User <input type="button" value="v"/> Use District/User highest PO
User highest Requisition#	MRH00000
Always use highest Req#	Yes <input type="button" value="v"/>

By entering your building vendor number as the Default Deliver-to Vendor, you do not have to enter this every time.

Make sure this says User.

Enter a starting requisition number using three initials and numbers. Your Requisition # will populate when you hit post. You don't have to enter this every time.

Make sure this says Yes.

Enter Requisitions

New Requisition	
Requisition #	<input type="text"/> Auto Assign
Vendor #	0
Vendor	
Requested PO Date	12/10/2015 <input type="button" value="calendar"/>
Terms	<input type="text"/>
Total	\$.00
Deliver By Date	<input type="text"/> <input type="button" value="calendar"/>
Deliver To Vendor #	845759
Deliver To	Sample District High School 1234 Main Street Anywhere OH 43055
Requisition Description	<input type="text"/>
Attention	<input type="text"/>
Type	<input type="text"/> Enter T for Template

#	Quantity	Unit	Description	Unit Price	Total	Fund	Func	Obj	SCC	Subj	OPU	IL	Job
+	Total				\$.00								

Enter the vendor number or click on the binoculars to search for a vendor.

Click the plus sign to open an entry line and add items you wish to purchase.

Enter your name.

Enter Quantity, Price, and Description.

#	Quantity	Unit	Description	Unit Price	Total	Fund	Func	Obj	SCC	Subj	OPU	IL	Job
✓ ✕	Edit Item #1: Quantity: <input type="text"/> Units: <input type="text"/> Price: <input type="text"/> Description: <input type="text"/>												
						Fund	Func	Obj	SCC	Subj	OPU	IL	Job
						<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
										Split: <input type="text"/> Price <input type="text"/> Qty			
					Total							\$0.00	

Enter the account code or click on the binoculars to search for an account.

Functions			
Validate	Post	Cancel	Save Draft

Functions

Find Clear

Use * as a wildcard to represent any character in fields flagged with *

Budget Account Query									
	Fund	Func	Obj	SCC	Subj	OPU	IL	Job	
Account # :	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Description:	<input type="text"/> *								
Status:	Active ▾								
Maximum Accounts Displayed:	50								

Select	Fund	Func	Obj	SCC	Subj	OPU	IL	Job	Description	Remaining Balance	Available Percent
✓	018	7990	899	0000	0000000000	00	000		Supply Account	\$0.00	0

If searching for an account, click Find to see all available accounts. You can enter a partial account number before clicking Find to narrow the results. You can also search by description using * as a wildcard (i.e. *supply*). Click on the green checkmark next to the correct account.

Click Validate. Resolve any warnings or errors. Then click Post.