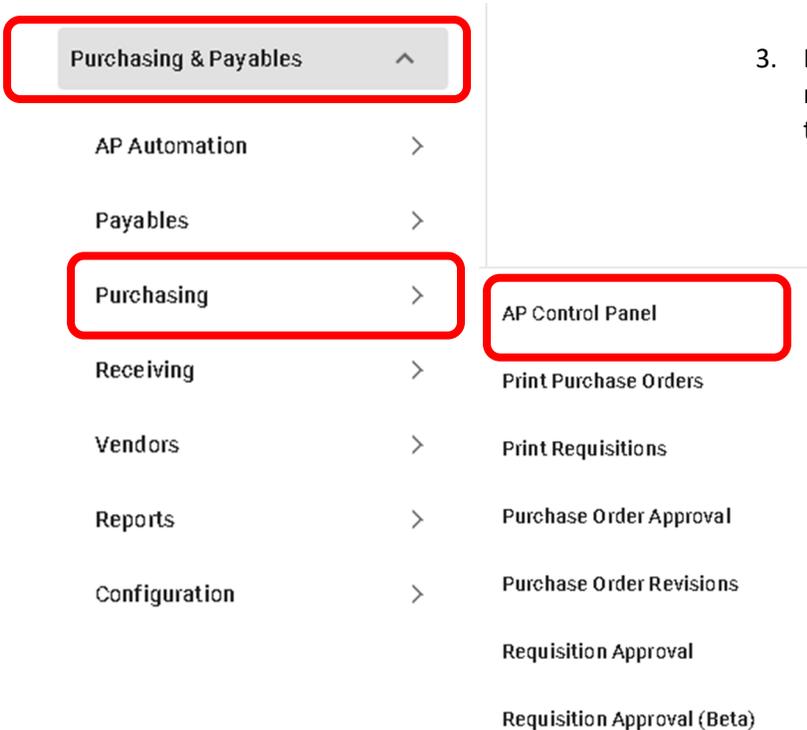
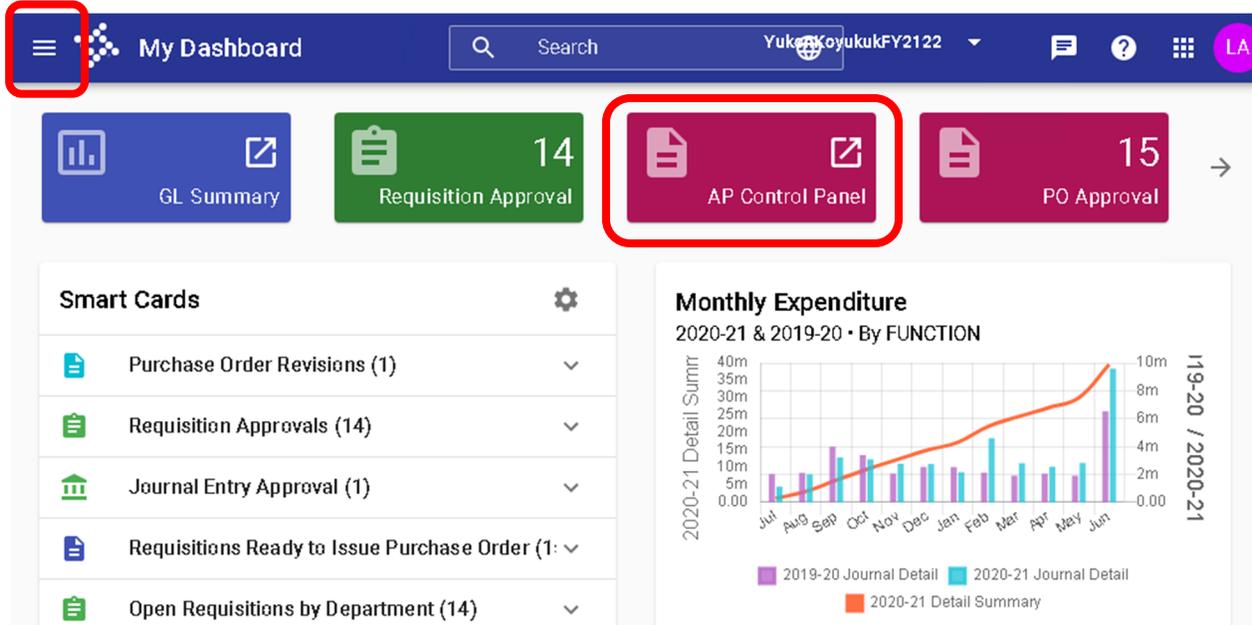


# iVisions Tips & Tricks

## Attaching Documents to Requisitions

1. [Log into iVisions/School ERP](#)
2. From the Dashboard click on the three horizontal lines on the left side of the menu bar to go to the Purchasing & Payables Control Panel or select it from the shortcut box on the main screen.

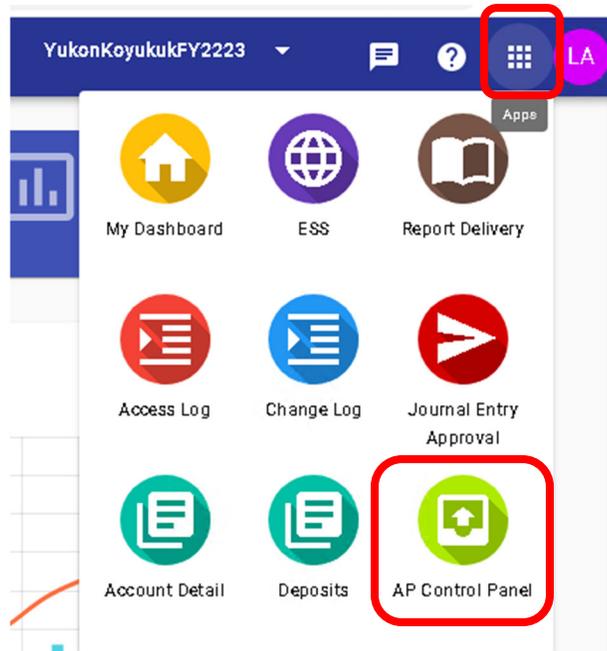


3. Expand the Purchasing & Payables menu, expand the Purchasing menu, then select the AP Control Panel

## iVisions Tips & Tricks

### Attaching Documents to Requisitions

4. You can also right click on the AP Control Panel menu option to save it to your favorites. It would then show up on your 9-square to make navigating to it much easier.



5. Create your Purchase Requisition as normal, but before you submit it you can attach documents.

# iVisions Tips & Tricks

## Attaching Documents to Requisitions

6. With your Req open, go to Actions and select Manage Documents.

**Requisition Detail** 📎 Manage Documents

Vendor \*   W9 received Date  📅

Department \*  X Requester \*  X

Ship To \*  X Reference  28/30

**Order Information** ^

Date Required  📅 Order Type\*  Order Via\*  Project\*

Award Number  Buyer  X Sales Tax Percent

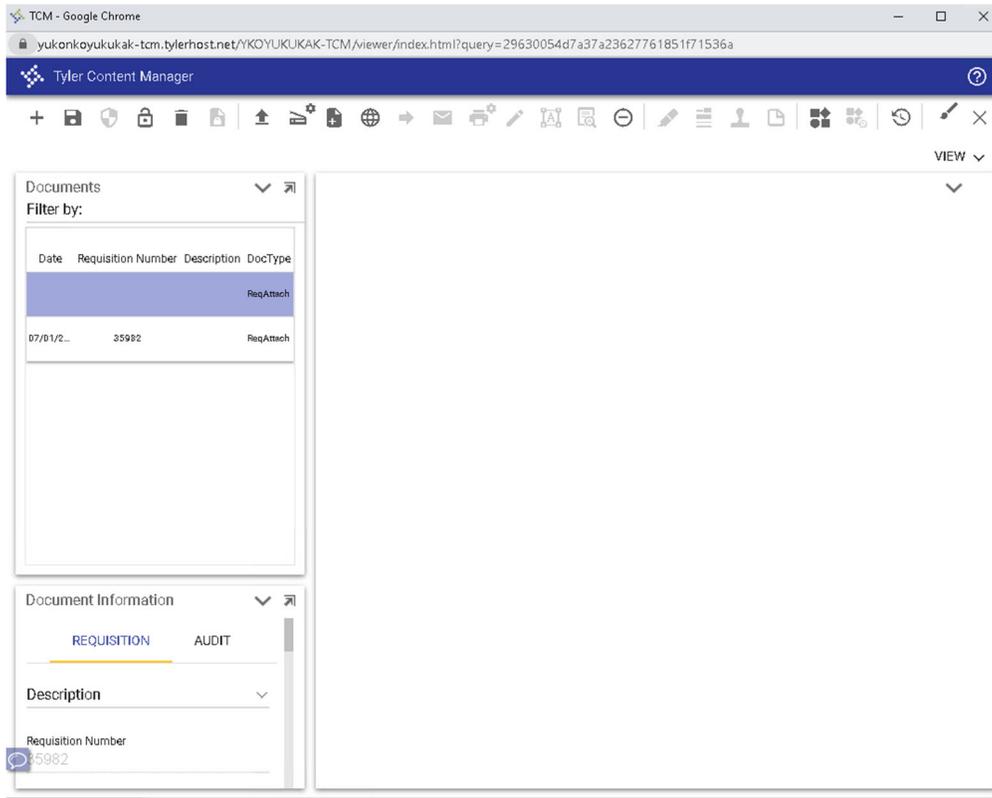
**Line Items** ⋮

<input type="checkbox"/>	↑ Li...	Description	↑ ▼	Account	↑ ▼	↑ Q...	U... ↑	Part Number	↑ ▼	▼ ↑	Unit Price	▼ ↑	Ext Pr
<input type="checkbox"/>	1	Chuck Backe RT Fairbanks-Koyukuk		360 500 100 0000		1	FA	5478752			\$500.0000		\$500

- 7.
8. After selecting “Manage Documents” you’ll be brought to Tyler Content Manager or TCM. From this screen you can attach any document you’d like by uploading/importing it or by scanning it.

# iVisions Tips & Tricks

## Attaching Documents to Requisitions



9. If your buttons on the menu bar are already highlighted you can go right ahead and scan or import your document. If your buttons are greyed out you'll have to click the plus icon to create a new document.



10. Before you scan your document, click the Gear icon just to the top right of the scanner icon to set your default scan settings.

**PaperStream IP fi-7140 Scanner Settings:** Make sure you load your documents face down. By having Duplex selected and Auto-Remove Blank Pages selected you'll ensure you always get all sides of a document captured and any that are only one-sided will have the blank page removed. This does not slow down the speed of the scan at all as it captures both sides in one feed.

# iVisions Tips & Tricks

## Attaching Documents to Requisitions

### Scan Settings

Scanner PaperStream IP fi-7140	Duplex <input checked="" type="checkbox"/>
DPI 200	Auto Rotate <input type="checkbox"/>
Image Type Black & White	Auto Deskew <input checked="" type="checkbox"/>
Paper Source Autfeeder	Show Scanner Dialog <input type="checkbox"/>
Paper Size US Letter	Auto-Remove Blank Pages <input checked="" type="checkbox"/>
Prompt to Name File <input checked="" type="checkbox"/>	Blank Page Std Dev 0.1
Scan to TIFF or PDF <input type="radio"/> TIFF <input checked="" type="radio"/> PDF	

Note: Only the settings supported by the scanner will be used

CANCEL

OK

11. Place your documents in your scanner and click the scan icon. It will prompt you to name the document. You can name it anything you like, but it helps if it's relevant to what it is – Quote #, PCard Statement w/ date range, etc.
12. If you want the document to be included, or sent, with the Purchase Order you'll need to scroll down in the Document Information window and check the box "Send document with Purchase Order."

# iVisions Tips & Tricks

## Attaching Documents to Requisitions

The screenshot shows the iVisions interface for attaching documents to a requisition. On the left, the 'Documents' section is active, displaying a table with columns: Date, Requisition Number, Description, and DocType. A row is highlighted with a blue background, showing '07/01/2...' for Date, '35982' for Requisition Number, and 'ReqAttach' for Description. Below this, the 'Document Information' section is visible, with fields for Requisition Number (35982), PO Number, Amount (\$840.00), Contract, Vendor Name (HARRIS BANK - BMO), DAC (Business), Date Ordered, and Date Required (07/14/2021). A red box highlights the checkbox 'Send document with Purchase Order', which is checked. Below this is a 'Notes' section.

The main area shows a scanned document titled 'Requisition Attachment - 35982'. The document content includes a date '6/22/2021', a title 'Payment Detail - Alaska Notary Commissions', and a message: 'Thank you, your payment has been received.' Below this, the 'Payment Details' section lists: Method: Credit, Status: Paid, Trans #: G4ZSBQ0IWMLM, and Date: 6/22/2021 03:28 PM. A table titled 'Commission fees included in this transaction:' shows a fee for ANDREA L LEVESQUE, Regular, for \$40.00. The total amount is \$40.00. Handwritten text '100.000.551.0.491' and a signature are visible on the document.

13. When done with that scan you can click the floppy disk icon to save it and then close the window.



14. You can then submit your Requisition for approval as normal.



# iVisions Tips & Tricks

## Attaching Documents to Requisitions

15. When the Requisition is converted to a PO it will be emailed to you as two PDFs. One is the PO and the second is the Attachment.

----- Forwarded message -----

From: <[vpatsy@yksd.com](mailto:vpatsy@yksd.com)>

Date: Mon, Jun 14, 2021 at 11:17 AM

Subject: Your Copy of PO Number : 217129

To: <[hshier@yksd.com](mailto:hshier@yksd.com)>

### 2 Attachments

