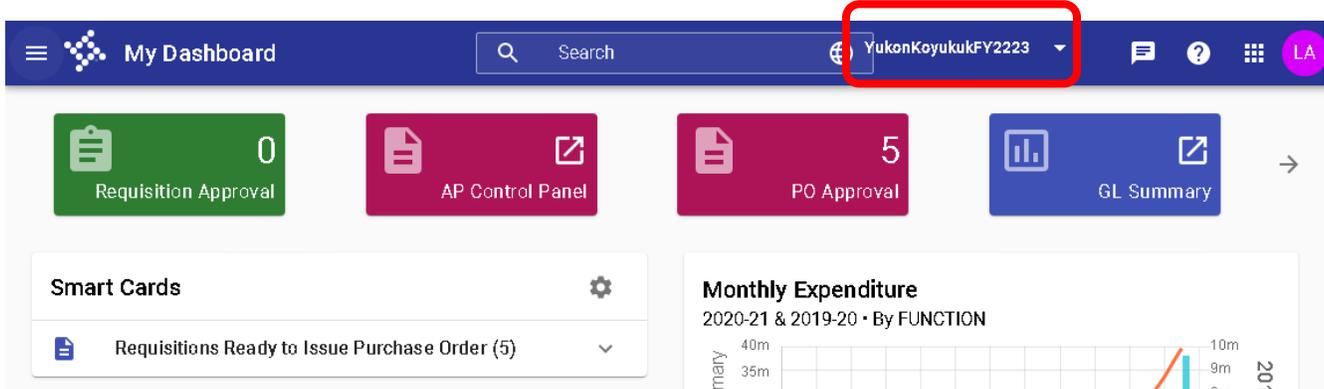


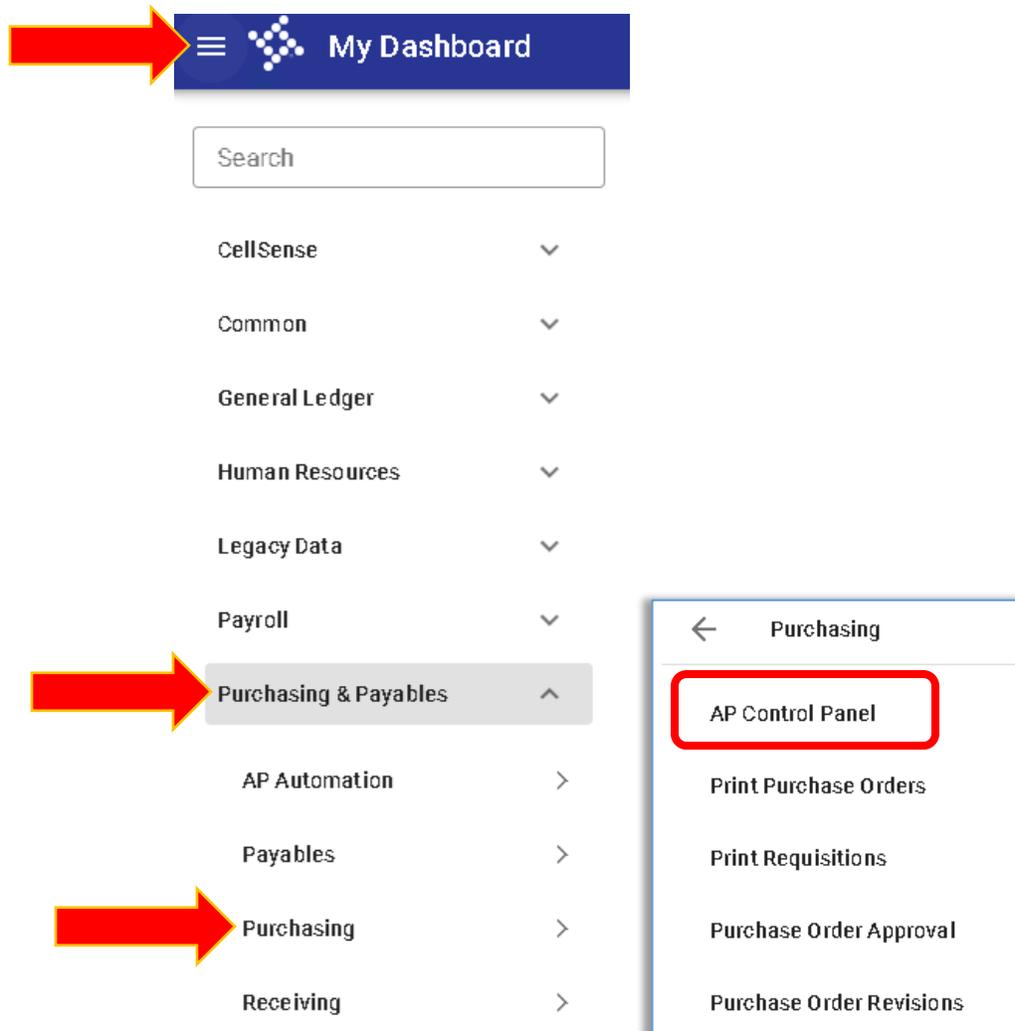
# iVisions/School ERP

## Entering a Purchase Requisition

Purchase Requisitions must be entered in iVisions/School ERP workflow for approval. You can access iVisions/School ERP by following the login instructions found here: [Guide to iVisions Access and Login](#) Once logged in, your dashboard should look similar to this. Make sure the connection group you are in is the current fiscal year.



Expand your menu by selecting the three horizontal lines on top left of your screen, then navigate to Purchasing & Payables → Purchasing → AP Control Panel



# iVisions/School ERP

## Entering a Purchase Requisition

The following window will open. Click on the “plus” sign to add/create a new requisition.

**Control Panel**

File Actions Help

Show Paid Column

Show Account Detail

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Process	Req. No.	Req. Date	Req. App.	Vendor Name	PO No.	R	PO Date	Amount

The following requisition screen will open up on the “Requisition Detail” tab. The fields outlined in red are required by the system. The District also requires information in the “Buyer” field, which is highlighted in orange here.

**Add Requisition**

Actions Help

REQUISITION DETAIL
ADDRESSES
NOTES
PO BOARD REPORT
PROPOSED VENDOR

**REQUISITION INFORMATION**

**ORDER INFORMATION**

**PO INFORMATION**

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Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax	Freight	Line Total
			EA							

No records to display.

\$0.00

Hold Account
  Submit for Approval

See the example below as you complete the fields in the “Requisition Information” and “Order Information” areas.

- DATE: Defaults to current date. If needed, change the date to the date you actually “Submit” the requisition for approval.

Revised 08/17/2022

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# iVisions/School ERP

## Entering a Purchase Requisition

- **VENDOR:** Choose the vendor from the drop down menu. If you can find the vendor you are looking for contact Purchasing for the procedure to add a vendor.
- **SHIP TO:** Select the YKSD location the order needs to be shipped to (or Raven family address for family orders).
- **DAC:** From the drop down menu select the DAC appropriate to the requisition. In most cases you will only have one DAC to select.
- **REQUESTER:** From the drop down menu select the person requesting the order (i.e. Teacher, Principal or Director).
- **BUYER:** From the drop down menu select yourself. The person entering the requisition is the “Buyer,” who is also called the “Originator.”
- **ORDER VIA:** Do not change. Keep the default “N/A.”
- **PROJECT:** Do not change. Keep the default “Undesignated.”
- **DATE REQUIRED:** Unless you have another required date you can leave the default date, which is 15 days from the date of the requisition (in the example the requisition date is 8/17/2022 and the default required date is 9/1/2022)
- **ORDER TYPE:** Keep the default order type “Purchase Order”, unless you know the PO should be a “Blanket” purchase order. If you are unsure you can contact the appropriate person in the Business Office.
- **REFERENCE:** This field is used to enter quote, proposal or contract numbers. Raven will use this field to record the family name and five-digit number.
- **AWARD NUMBER:** Leave blank.

The screenshot shows the 'Add Requisition' form with the following fields:

REQUISITION INFORMATION		ORDER INFORMATION		PO INFORMATION	
Req. Number	Date: 8/17/2022	Vendor: RAVEN - MIFI INTERNET	Order Via: N/A	Project: Undesignated	PO Number
Ship To: YUKON KOYUKUK SCHOOL DIST	DAC: Raven	Date Required: 9/1/2022	Order Type: Purchase Order	Revision	PO Date
Requester: Heidi Richards	Buyer: Julie Szidloski	Reference: Laasaga Tart #8361	Award Number	Req. App.	Closed Date
<input type="checkbox"/> W9 Rcvd				Status	

You will not enter any information in the “PO Information” area. The information will be auto filled by the software.

Once you have completed the “Requisition Detail” tab you can start entering the information about the items you want to purchase from the vendor. You must click the “floppy disk” icon at the end of the row to save that data entered on that line. To add additional lines, click on the “plus” symbol on the menu bar. See example below as you go through each field.

- **ACCOUNT:** Enter the account code to be charged for the item (i.e. 100.500.600.000000.410).
- **QTY:** Enter the number of the item you are ordering.
- **UNIT:** Field is not required, but defaults to EA.
- **PART NUMBER:** Field is not required, but suggested. By entering the vendor’s number for the item the vendor will know the exact item you are ordering.
- **DESCRIPTION:** Enter the description of the item you are ordering. Be specific as this information is viewed in reports.

# iVisions/School ERP

## Entering a Purchase Requisition

- UNIT PRICE: Enter the price per unit.
- EXT PRICE: This field will auto fill using the Quantity entered multiplied by the Unit Price.
- TAX and FREIGHT: Leave these fields blank.

**REQUISITION INFORMATION**

Req. Number:  Date: 8/17/2022

Vendor: RAVEN - MIFI INTERNET

Ship To: YUKON KOYUKUK SCHOOL DIST

DAC: Raven

Requester: Heidi Richards  W9 Rcvd

Buyer: Julie.Szidloski

**ORDER INFORMATION**

Order Via: N/A

Date Required: 9/1/2022

Reference: Laasaga Tart #8361

**PO INFORMATION**

Project: Undesignated

Order Type: Purchase Order

Award Number:

---

+

Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax	Freight	Line Total
<input type="text"/>	<input type="text"/>	0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
100.427.145.083611.451	1.000000	EA		Continuing MIFI service - July 2022 - June 2023	660.0000	\$660.00	\$0.00	\$0.00	\$660.00
						1.000000		\$660.00	\$660.00

Hold Account   
  Submit for Approval   
 Sales Tax Percent:

Close after update?   
 Cancel   
 Save

**IMPORTANT:**

Once you finish entering the information for an item you must click on the “Floppy Disk” icon to save the record. If you do not click on the “Floppy Disk” your item will disappear when you save or submit the requisition. You need to click the “Floppy Disk” for each line of an item you enter.

Once the record is saved by clicking the “Floppy Disk” the line drops into the body of the requisition below the blank fields in the top row.

+

Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax	Freight	Line Total
<input type="text"/>	<input type="text"/>	0	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
100.427.145.083611.451	1.000000	EA		Continuing MIFI service - July 2022 - June 2023	660.0000	\$660.00	\$0.00	\$0.00	\$660.00

When you are finished entering items for that Requisition you will need to either save the requisition or submit it for approval.

If you are not ready to submit the requisition for approval you can save it by checking the “Close after update?” box, then clicking on “Save.”

If you want to actually submit the requisition for approval check the boxes “Submit for Approval,” “Close after update?” and click “Save” button. Congratulations...the requisition is submitted into the workflow for approval!



# iVisions/School ERP

## Entering a Purchase Requisition

**Add Requisition**

Actions Help

REQUISITION DETAIL ADDRESSES **NOTES** PO BOARD REPORT PROPOSED VENDOR

PO Notes

Internal Notes

Append Internal Notes

The information you enter in the “PO Notes” field will print on the Purchase Order. The notes are to provide additional information to the vendor.

You can add an internal note to the purchase order record that will be permanently saved with the PO record. Often, the internal note is used by a “Buyer” to provide information to the “Approver” or used by an “Approver” to provide information to the “Buyer.” To use this feature, you will enter the note in the “Append Internal Notes” field. Once you save the requisition your note will transfer to the “Internal Notes” field as a permanent record. As the requisition goes through the process others can add notes to the “Append Internal Notes” that will be saved in the permanent record of the “Internal Notes” field.

- It’s recommended if you ever need to send a Requisition back to the buyer/originator to always put in an internal note so the reason for the return can be tracked.