REQUISITION ENTRY

1) Search
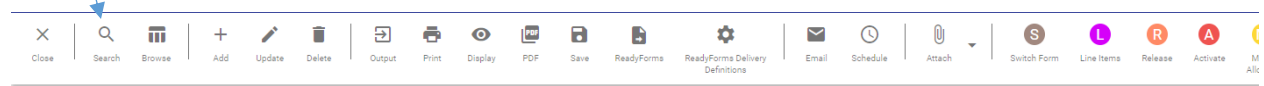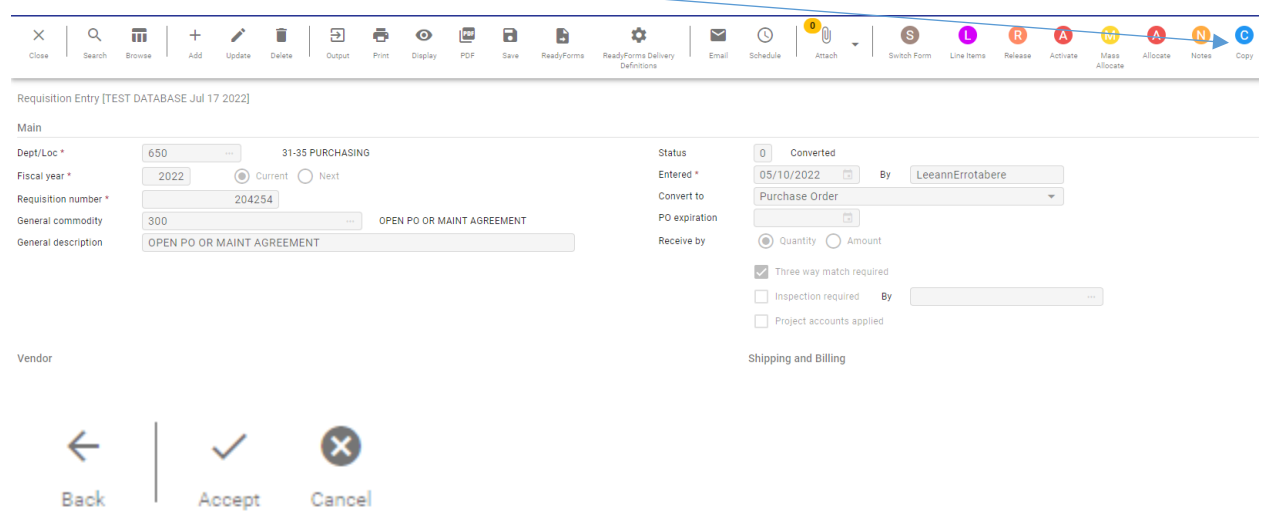

2) Enter the Requisition # you want to COPY.   3) Accept

4) Select COPY

5) This box will appear, click on down arrow, select "N" for next year and TAB.

6) The year changes to 2023. The entry date will self-populate with current date. When copying requisitions at the end-of-the-year for the next fiscal year, make sure to change the dated to July 1, 2023. If copying to submit in same fiscal year, no date change is required.

7) Accept

Back   Accept   Cancel
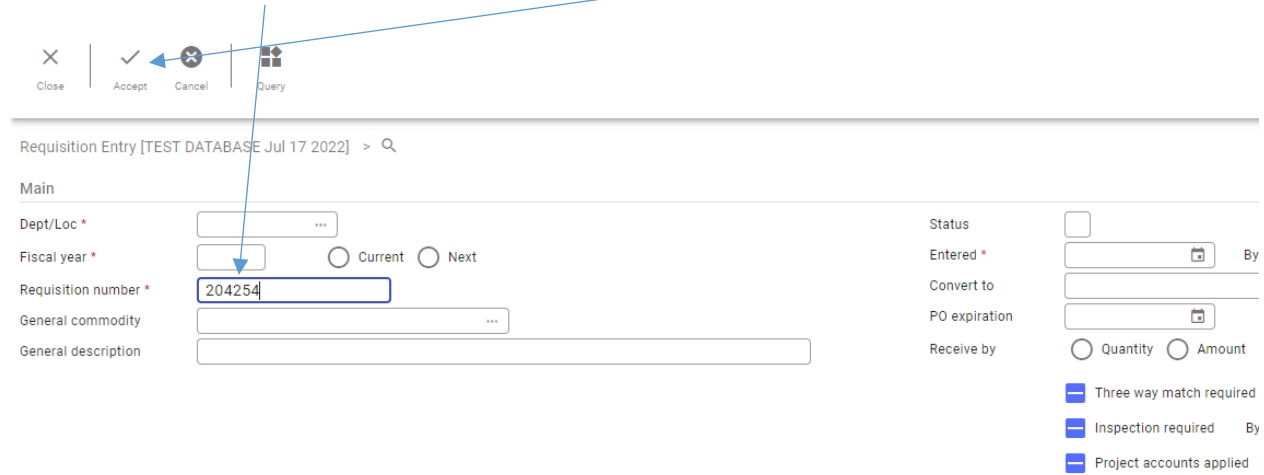
Requisition Entry [TEST DATABASE Jul 17 2022] > Requisition Copy >

Copy

Fiscal year for new requisition   2023

Entry date for new requisition   08/31/2022

8) New Requisition # Assigned   9) Verify FY is correct   10) Status should be 4

Close   Search   Browse   Add   Update   Delete   Output   Print   Display   PDF   Save   ReadyForms   ReadyForms Delivery Definitions   Email   Schedule   Attach   Switch Form   Line Items   Release   Activate

Requisition Entry [TEST DATABASE Jul 17 2022]

Main

Dept/Loc *	650	31-35 PURCHASING	Status	4	Allocated
Fiscal year *	2023	Current ○ Next ●	Entered *	08/31/2022	By	TracyOgle
Requisition number *		212194	Convert to	Purchase Order
General commodity	300	OPEN PO OR MAINT AGREEMENT	PO expiration	
General description	OPEN PO OR MAINT AGREEMENT		Receive by	● Quantity ○ Amount

☑ Three way match required
☐ Inspection required   By
☐ Project accounts applied

Vendor   Shipping and Billing

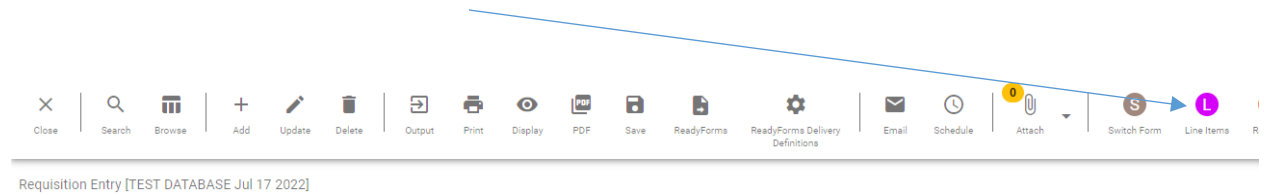| Vendor	30070	☐ Committed	Ship to *	OP
Name	OFFICE DEPOT		Address	OPEN PURCHASE ORDER

11) Select Update to make changes   12) Uncheck Three Way Match for Open PO's.
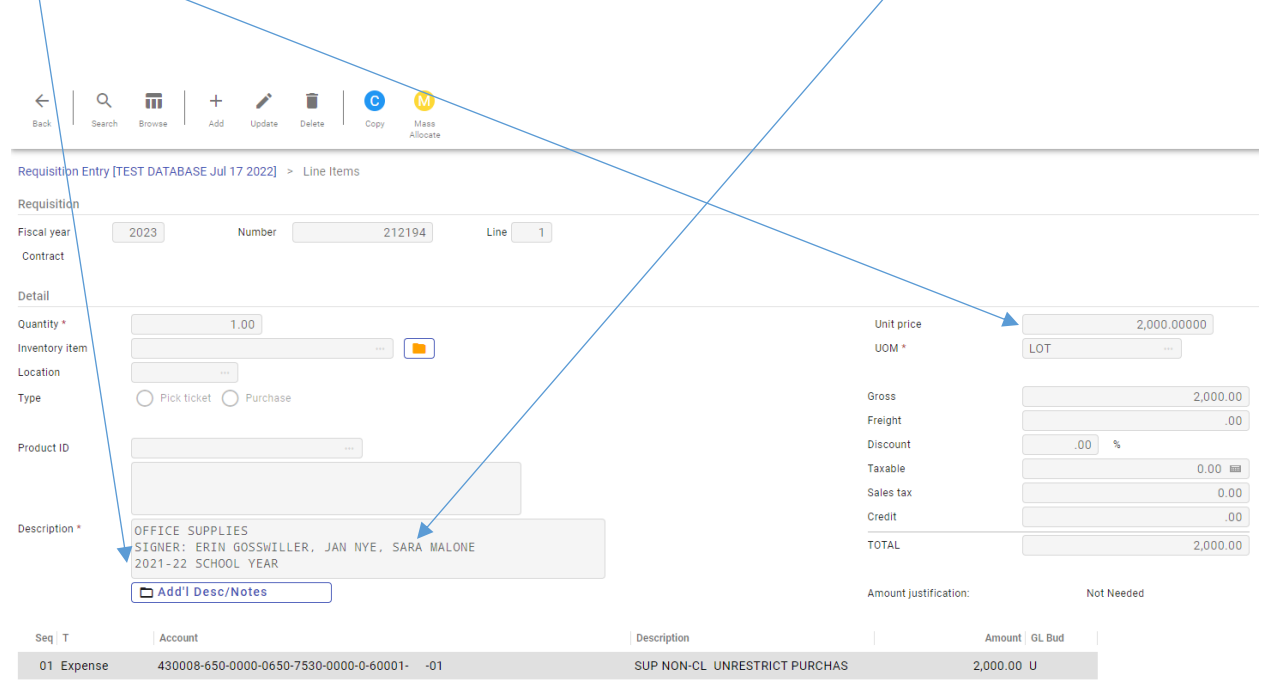
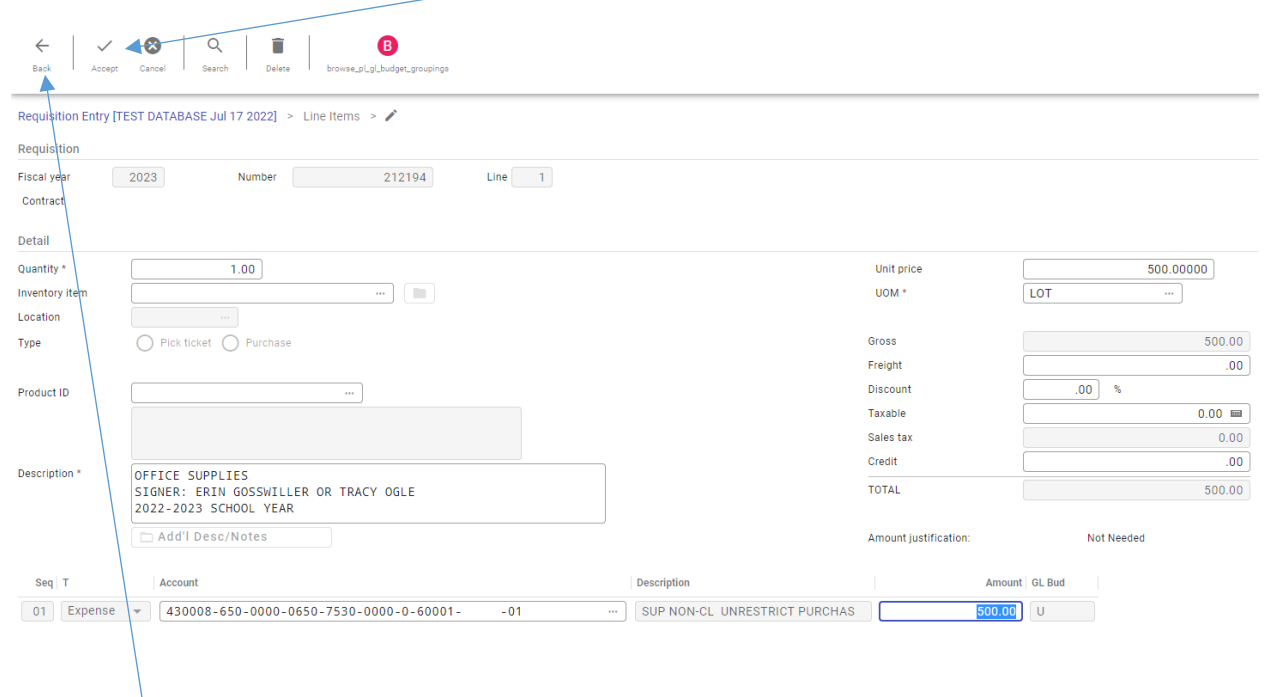13) Change Vendor if needed.

14) Accept

Close   Accept   Cancel

15) Select Line Items to go to Line Item Screen

															0				
✕	Q	▥	+	✎	🗑	➔	🖶	◉	PDF	🖫	🗎	⚙	✉	◷	📎	▾	Ⓢ	Ⓛ	
Close	Search	Browse	Add	Update	Delete	Output	Print	Display	PDF	Save	ReadyForms	ReadyForms Delivery Definitions	Email	Schedule	Attach		Switch Form	Line Items	R

Requisition Entry [TEST DATABASE Jul 17 2022]

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16) Select Update to make necessary changes to new requisition. (Example: change authorized signers, school year, dollar amount, etc.)

←	Q	▥	+	✎	🗑	Ⓒ	Ⓜ
Back	Search	Browse	Add	Update	Delete	Copy	Mass Allocate

Requisition Entry [TEST DATABASE Jul 17 2022] > Line Items

Requisition

Fiscal year	2023	Number	212194	Line	1
Contract					

Detail

Quantity *	1.00		Unit price	2,000.00000
Inventory item		📁	UOM *	LOT
Location				
Type	○ Pick ticket ○ Purchase		Gross	2,000.00
			Freight	.00
Product ID			Discount	.00 %
			Taxable	0.00 ⌨
			Sales tax	0.00
Description *	OFFICE SUPPLIES		Credit	.00
	SIGNER: ERIN GOSSWILLER, JAN NYE, SARA MALONE		TOTAL	2,000.00
	2021-22 SCHOOL YEAR			
	📂 Add'l Desc/Notes		Amount justification:	Not Needed

Seq	T	Account	Description	Amount	GL Bud
01	Expense	430008-650-0000-0650-7530-0000-0-60001- -01	SUP NON-CL UNRESTRICT PURCHAS	2,000.00	U

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17) Once changes are made select Accept

←	✓	⊗	Q	🗑	Ⓑ
Back	Accept	Cancel	Search	Delete	browse_pl_gl_budget_groupings

Requisition Entry [TEST DATABASE Jul 17 2022] > Line Items > ✎

Requisition

Fiscal year	2023	Number	212194	Line	1
Contract					

Detail

Quantity *	1.00		Unit price	500.00000
Inventory item			UOM *	LOT
Location				
Type	○ Pick ticket ○ Purchase		Gross	500.00
			Freight	.00
Product ID			Discount	.00 %
			Taxable	0.00 ⌨
			Sales tax	0.00
Description *	OFFICE SUPPLIES		Credit	.00
	SIGNER: ERIN GOSSWILLER OR TRACY OGLE		TOTAL	500.00
	2022-2023 SCHOOL YEAR			
	📂 Add'l Desc/Notes		Amount justification:	Not Needed

Seq	T	Account	Description	Amount	GL Bud
01	Expense ▾	430008-650-0000-0650-7530-0000-0-60001- -01	SUP NON-CL UNRESTRICT PURCHAS	500.00	U

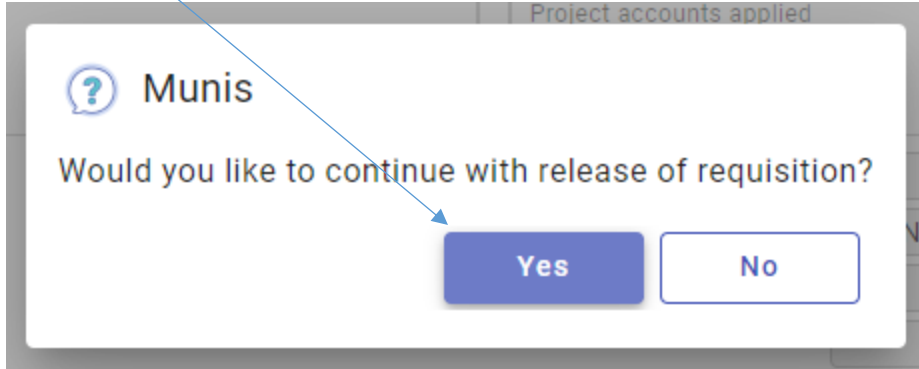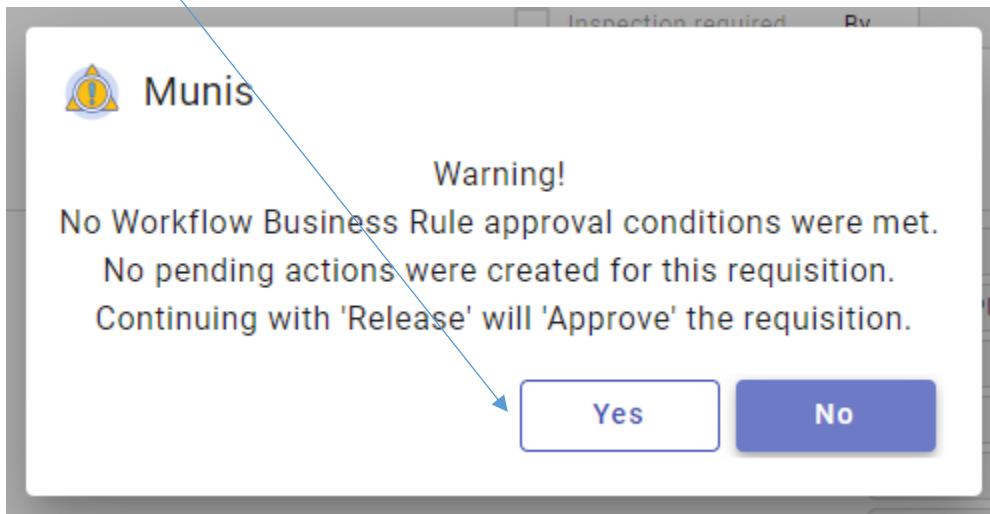**18) Select Back to return to the Main Entry Screen**

19) Release your Requisition

20) Select YES to continue with Release of Requisition

21) Select YES

22) Check your status. Status 8- Approved, your requisition is complete and will release to Purchasing the next day.

23) Status 6-Released, an Administrator at your site needs to approve. Purchasing cannot process requisitions in Status 6.

Requisition Entry [TEST DATABASE Jul 17 2022]

Main

Dept/Loc *	650	31-35 PURCHASING	Status	8	Approved
Fiscal year *	2023	○ Current ● Next	Entered *	08/31/2022	By
Requisition number *	212194		Convert to	Purchase Order	
General commodity	300	OPEN PO OR MAINT AGREEMENT	PO expiration	06/30/2023	
General description	OPEN PO OR MAINT AGREEMENT		Receive by	● Quantity ○ Amount	
				☐ Three way match required	