

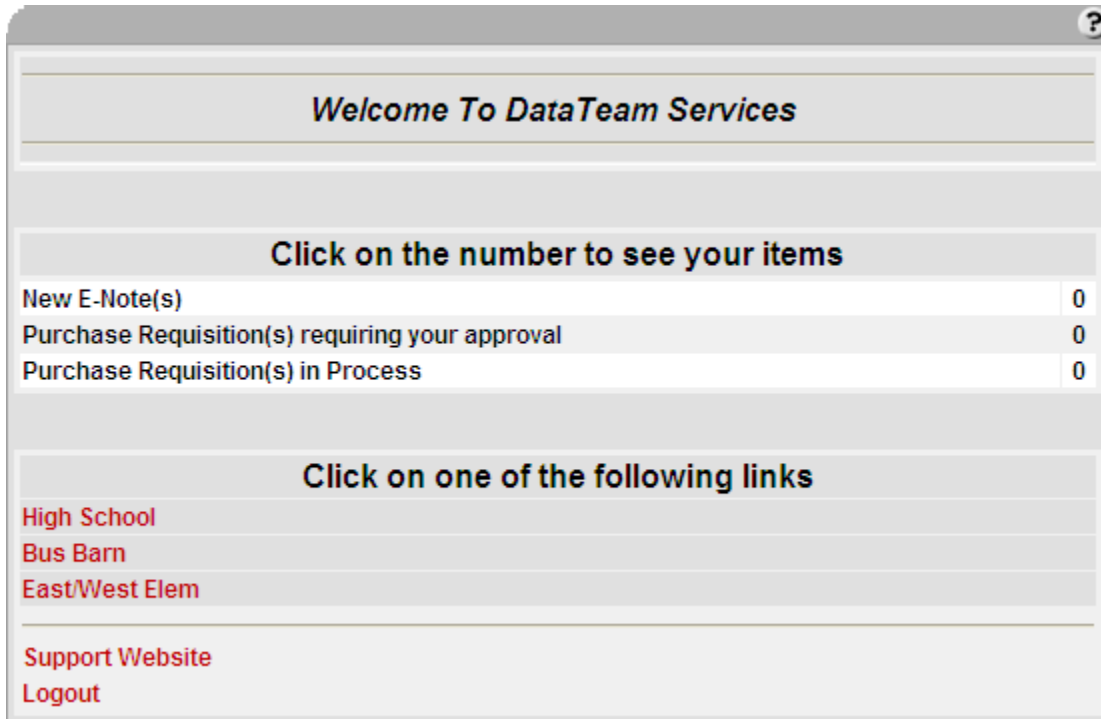
Creating eRequisitions & Checking Status of eRequisitions

If you do not know your login or password contact Elizabeth at the District Office or your school secretary.



Edited by ER 6/9/09

1. Login to the site and choose the school you are ordering for (in red). Most of you will only have one option.



The screenshot shows a web interface for 'DataTeam Services'. At the top, it says 'Welcome To DataTeam Services'. Below that, it prompts the user to 'Click on the number to see your items' and lists three categories: 'New E-Note(s)' with a count of 0, 'Purchase Requisition(s) requiring your approval' with a count of 0, and 'Purchase Requisition(s) in Process' with a count of 0. Further down, it says 'Click on one of the following links' and lists several options: 'High School', 'Bus Barn', 'East/West Elem', 'Support Website', and 'Logout'. The text for 'High School', 'Bus Barn', 'East/West Elem', 'Support Website', and 'Logout' is highlighted in red.

Click on the number to see your items	
New E-Note(s)	0
Purchase Requisition(s) requiring your approval	0
Purchase Requisition(s) in Process	0

Click on one of the following links

- High School
- Bus Barn
- East/West Elem
- Support Website
- Logout

Continue with step 2 under "Creating E-Requisition" on the next page.

Remember: Ask someone in the district office or your school secretary or principal if you need any assistance or would like someone to walk you through a requisition.

Creating E-Requisition

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **Create a purchase requisition**. This window opens.



If you begin entering a requisition and decide you want to complete it at a later time, press the **Save Draft** button.

You must search for the vendor name and select it. If you just type the name in it does not link the address information correctly.

If you search for a vendor name and cannot find it use a broader search. Such as the first letter or one word in the name.

If you absolutely cannot find the vendor it may not be in our system. Search for AAA. Select it and put the correct vendor info in the comments section.


4. Use the pull-down menus to select an approval tree and desired delivery date.
5. Press **Search** to enter a vendor name. This window opens.


- Type a few letters from the vendor's name, then click the **Search** button to see a list of vendors whose names resemble what you typed. Press the **Select** button for the vendor you want to add to the eReq. You're returned to the New Requisition window.
- Or click the Browse tab to see the whole list of vendors. Click the first letter of the vendor's name to see that portion of the list. Press the **Select** button for the vendor you want to add to the eReq. You're returned to the New Requisition window.

Remember: First click the Search button in the new requisition window to select a vendor. Do not type a vendor name first.

6. Tab through the fields entering the item number, unit cost, quantity and description. Enter the budget purpose if you want.
7. Press **Add Item**. Even if you only have one item.
8. Repeat step 6 through step 7 until you have finished adding items to this requisition.

Make sure shipping charges are added as a line item.

Note: You may *change* an item by pressing the  beside the item. When you press the icon the information for that item is displayed in the Order Information section. Make the needed changes, and press Update Item.

To *delete* an item, press the  beside the item, and press Delete Item.












9. (Optional) Enter comments in the Comments box. Check the **Print Comments** box if you want the comments to be printed on the eReq. **Note:** The comments are printed only when the output is RTF. They are not imported into FA².
10. When you've completed entering the requisition, press **Submit Requisition**. You'll see this message.

Note: If you want to complete the requisition later, press Save Draft.

11. Press **Done**. You're returned to the Procurement menu.



Checking the status of an eRequisition

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **View status of my purchase requisitions**. This window opens.

MY REQUISITION STATUS				
Req #	Approver	Approval Tree	Status	Total
 144	Haaack, Roger (HaaackR1)	District Office	Pending	\$170.00
 152	DRAFT	District Office	RETURNED	\$350.00
 156	Procurement Clerk	District Office	Approved	\$5.00
 157	Haaack, Roger (HaaackR1)	District Office	Rejected	\$25.00
 163	Haaack, Roger (HaaackR1)	District Office	Rejected	\$537.67
 164	Haaack, Roger (HaaackR1)	District Office	Pending	\$203.97
 165	DRAFT	District Office	RETURNED	\$100.00
 166	Haaack, Roger (HaaackR1)	District Office	Pending	\$10.00
 167	Procurement Clerk	District Office	Pending	\$25.00
 168	Farris, Randy (FarrisR)	Budget - Curriculum	Pending	\$1,021.76
 169	DRAFT	District Office	DRAFT	\$200.00


BACK

There are several ways you can review the eReqs.


- Click the  to view the eReq detail. This option allows you to see comments that have been added or edits that have been made during the approval process.
- Click the  beside your draft eReqs to edit and/or complete them. **Note:** There are two different types of draft — those the originator saved during creation and those an approver has returned to the originator for additions or editing.
- Click the *approver's name* to send him an eNote.
- Click the *approval tree* to view the entire approval route and eReq status at each point.

Edit draft eReqs: There are two different types of draft:

- those the originator saved during creation,
- and those an approver has returned to the originator for additions or editing.

Click the  beside draft eReqs to edit, delete or complete them.

- To edit the draft, see "Editing the eReq" on page 4-7,
- To delete the draft eReq, click **Delete Draft**.
- To complete the eReq, click **Submit Requisition**.

View eReq detail: Click the  to view the eReq detail.

This option allows you to see comments that have been added or edits that have been made during the approval process.

Editing & approving eRequisitions

There are several different actions available through the *Approve purchase requisitions* window. You may:



Quick Tip

All approvers can edit an eReq or return it to the originator for editing.

- reject it,
- return it to the originator,
- edit it, and/or
- approve it.

1. Login to a school at which you're authorized to create eReqs.
2. Click on the **Procurement** tab at the top of the window.
3. Select **Approve purchase requisitions**. This window opens.

ID	Originator	APPROVER	AMOUNT	STATUS
271	Grom, Rebecca (GromR)	BES Staff (DES) - Any	\$500.00	<input type="checkbox"/>
275	Stewart, Karen (StewartK2)	BES Staff (DES) - Any	\$150.00	<input type="checkbox"/>
278	Stewart, Karen (StewartK2)	BES Staff (DES) - Any	\$288.50	<input type="checkbox"/>

Approve Selected Requisitions Select All

BACK

- You may click the *approver's name* to send him an eNote.
- You may click the *approval tree* to view the entire approval route and eReq status at each point.

Rejecting the eReq


Rejecting the eReq sets the status to Rejected and notifies the originator.

1. Click the  beside the eReq number. This window opens.



Quick Tip

We recommend that approvers put a note in the Comments box or send an eNote to the originator when rejecting an eReq.

REQUISITION APPROVAL 

Requisition #276 Originator: Stewart, Karen (StewartK2)

Sep 27, 2005

Approval Tree
BES Staff (BES) - Any

Item Type Desired Delivery Date
Any Oct 27, 2005

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
1	Ben's Hardware	12225	\$50.000	3	\$150.00
	test description				
	no budget purpose				\$150.00
Totals					\$150.00

Print comments

Comments

2. Press the **Reject** button.

Returning the eReq


This action returns the eReq to the originator, who can then edit and resubmit it.

1. Click the  beside the eReq number. This window opens.



Quick Tip

We recommend that approvers put a note in the Comments box or send an eNote to the originator when returning an eReq.

REQUISITION APPROVAL 

Requisition #271 Originator: Grant, Rebecca (GrantR)

Sep 23, 2005

Approval Tree
BES Staff (BES) - Any

Item Type Desired Delivery Date
Any Oct 23, 2005

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
1	Ben's Hardware	123	\$500.000	1	\$500.00
	misc items				
	custodial				\$200.00
	repairs				\$300.00
Totals					\$500.00

Print comments

Comments

Please provide more specific description of the item.

2. Press the **Return** button.

Approving the eReq

If you need to edit the eReq before you approve it, see "Editing the eReq" on page 4-7.

1. To approve the eReq without editing it, check the box beside the eReq total.


Req #	Originator	Item Description	Unit Cost	Quantity	Subtotal	Check
271	Gron, Rebecca (GronR)	BES Staff (DES) - Any	\$500.00	1	\$500.00	<input checked="" type="checkbox"/>
276	Stewart, Karen (StewartK)	BES Staff (DES) - Any	\$150.00	1	\$150.00	<input type="checkbox"/>
278	Stewart, Karen (StewartK)	BES Staff (DES) - Any	\$28.50	1	\$28.50	<input type="checkbox"/>

Approve Selected Requisitions Select All

BACK

2. Repeat step 1 for each eReq you want to approve.
3. Press the **Approve Selected Requisitions** button. You're asked to confirm the approval of the eReq(s).
4. Press **Done**.

Editing the eReq

1. Click the  beside the eReq number to edit the eReq. The Requisition Approval window opens.

REQUISITION APPROVAL

Requisition #271 Originator: Gron, Rebecca (GronR)

Sep 23, 2005

Approval Tree
BES Staff (DES) - Any

Item Type Desired Delivery Date
Any Oct 23, 2005

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
1	Ben's Hardware	123	\$500.000	1	\$500.00
	misc items				\$200.00
	custodial				\$300.00
	repairs				
Totals					\$500.00

Edit Approve Reject Return Update


Print comments

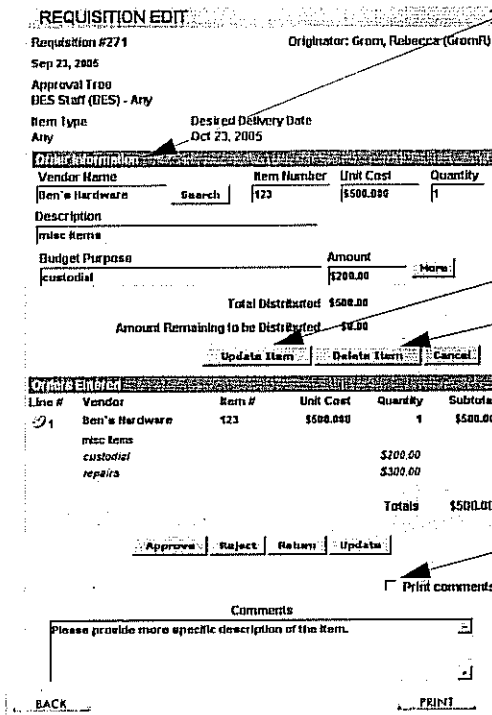
Comments
Please provide more specific description of the item.

BACK PRINT

2. Press the **Edit** button. The Requisition Edit window opens.

Change an item on the eReq:

To *change* an item, press the  beside the item. When you press the icon the information for that item is displayed in the Order Information section.



REQUISITION EDIT
 Requisition #271 Originator: Grom, Rebecca (GromR)
 Sep 21, 2005
 Approval Tree
 BES Staff (BES) - Any
 Item Type Desired Delivery Date
 Any Oct 23, 2005

Order Information

Vendor Name	Item Number	Unit Cost	Quantity
Ben's Hardware	123	\$500.00	1

Description
 misc items

Budget Purpose Amount More

custodial	\$200.00	
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Total Distributed \$500.00
 Amount Remaining to be Distributed \$0.00

Update Item Delete Item Cancel

Order's Entered

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
1	Ben's Hardware	123	\$500.00	1	\$500.00
	misc items				
	custodial				\$200.00
	repairs				\$300.00
Totals					\$500.00

Approve Reject Return Update

Print comments

Comments
 Please provide more specific description of the item.

BACK PRINT


Update Item button

Delete Item button

Print comments box

- If you need to add, edit or delete budget purposes, see step 8 in , "Creating eRequisitions".
- Make the needed changes, and press the **Update Item** button.

Delete an item from the eReq:

To *delete* an item, press the  beside the item, and press the **Delete Item** button.

Comments:

Enter comments in the Comments box, if you want.

- You may use the comments box to designate this eReq for the *next fiscal year*. See "Future fiscal year" on page 4-9.
- Check the **Print Comments** box if you want the comments to be printed on the eReq. **Note:** The comments are printed only when the output is RTF. They are *not* imported into FA².

Finish editing the eReq:

3. (Optional) Print the eReq by pressing the **Print** button.
4. Press **Update** to save the changes. A note is added to the Comments field stating the date the item was edited and the name of the person who edited it.
5. To save the eReq *without approving* it, press **Update**. To *approve* the eReq, press **Approve**. You'll be returned to the *Requisitions to Approve* window.