

*Creating eRequisitions &  
Checking Status of eRequisitions*



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## 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.

**NEW REQUISITION** ?

New Requisition Originator: James, Helen (JamesH)  
Jul 18, 2002

Approval Tree  
District Office (DO)

Item Type Desired Delivery Date  
Aug 18 2002

**Order Information**

Vendor Name	Item Number	Unit Cost	Quantity
<input type="text"/> Search	<input type="text"/>	\$0.000	1

Description

Budget Purpose

Add Item Delete Item Cancel

**Orders Entered**

Line #	Vendor	Item #	Unit Cost	Quantity	Subtotal
Totals					\$0.00

Save Draft

Print comments

Comments

BACK

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.

SEARCH BROWSE

**VENDOR SEARCH** ?

Search

Search Cancel

- 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.


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

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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**.
8. Repeat step 6 through step 7 until you have finished adding items to this requisition.

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**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.

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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 FA<sup>2</sup>.
10. When you've completed entering the requisition, press **Submit Requisition**. You'll see this message.

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

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

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## 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.