

Approve/Reject Requisitions

Upon logging in to nVision Requisitioning, the Requisitioning Dashboard window will display a summary of information related to requisitions specific to the user. As a requisition approver, the Requisitions Awaiting My Approval section will display those requisitions awaiting your approval.

Requisitioning Dashboard	×							
Requisitioning								
Requisition Status				Requisitions Awaiting My	y Approval			
O seculations and submitted				Requisition Number	Description	Requestor Name	Submitted Date	Vendor
O requisitions not submitted	-			11	Baseball Bag For Varsit	Requser, John	10/22/2013	ABC SPORTS & FITNESS
O submitted pending approv				12	Basketball Ball Rack fo	Requser, John	10/22/2013	ABC SPORTS & FITNESS
0 requisitions approval in pr	ocess			24		Requser, John	03/24/2016	NAPA AUTO PARTS
U requisitions disapproved				25		Requser, Ann	03/24/2016	NAPA AUTO PARTS
4 requisitions awaiting your	approvai							
Submitted for Approval				Disapproved				
Requisition Number	Description	Submission Date	Current Approver	Requisition Number	Description	Disapprove Date	Disapproved By	Comment

The Approve Requisitions routine is used to approve submitted requisitions based on the different approval paths defined for the requestor in the Approval Path Setup File.



To approve requisitions, open the Approval menu tree and select Approve/Reject Requisitions. The listing of requisitions to be approved or rejected is displayed.

Ap	prove/Reject	Requisitions									
										Print	Requisitions
Sea	rch 🔻		Requestor: (All)		Building Name: (All)		◄ Арр	proval Path: (All)		-
Dra	Drag a column header here to group by that column.										
Ê	Reg Number /	Requestor	Reg Date	Vendor Name	Building Name	Approval Path	Approval Level	Approval Status	Comment	Account	Req Total
	11	Requser, John	04/09/2014	ABC SPORTS & FITNE	ADMINISTRATIVE CE	Middle School Approval	1	Pending Approval	Please approve mell!	A1010438110000	144.00
	12	Requser, John	04/09/2014	ABC SPORTS & FITNE	MIDDLE SCHOOL #70	Middle School Approval	1	Pending Approval	Please approve mell	A1010490110000	199.98
	24	Requser, John	01/22/2016	NAPA AUTO PARTS	TRANSPORTATION	Middle School Approval	1	Pending Approval		A1040479110000	336.55
	25	Requser, Ann	01/22/2016	NAPA AUTO PARTS	MAINTENANCE BUIL	Middle School Approval	1	Pending Approval		A1621200440000	353.42

The Approve/Reject Requisitions screen displays those requisitions that are in a 'Pending Approval' or 'Approval in Process' status for the logged in user. The information in the list includes and can be sorted in any of the following ways: requisition number, requestor, requisition date, vendor name, building name, approval path, approval level, approval status, comment, account code, or requisition total.

Use the Approve/Reject Requisition routine to update, approve, disapprove, or print those requisitions that are currently pending approval.



Previewing/Printing the Requisition

nVision allows you to preview and then print a copy of <u>one</u> selected requisition at a time.

1. From the Approve/Reject Requisitions listing window, highlight the appropriate requisition.

pprove/Reje	ct Requisitions	5										
											Print	Requisiti
rch •		2 0	🦓 🔹 Requestor:	(All)		 Building Na 	ime: (All)		• 0	Approval Path: (All)		Λ
g a column he	ader here to group	by that column.										47
Rea Number	A Requestor		Reg Date	Vendor Name	Building Name	Approval Path		Approval Level	Approval Status	Comment	Account	
21	Requser, Dian	2	08/03/2015	ABC SCHOOL SUP.	MIDDLE SCHOOL #70	Middle Schoo	l Approval Under 1K	1	Pending Approval		A2020500660000	
22	Requser, Dian	2	08/03/2015	ACADEMIC BOOK SE.	. MIDDLE SCHOOL #70	Middle Schoo	I Approval Under 1K	1	Pending Approval		A2110500661600	
23	Requser, Dian	:	08/03/2015	ADVANTAGE SPORT	MIDDLE SCHOOL #/0	Middle School	I Approval Under 1K	1	Pending Approval		A2110500661500	
ck 🕒	Print Re	quisitions										
	DEOU	ISITIO	N	Demo	CSD		RO#	24				
	REQU	151110		10 SCHO	OL WAY		REQ DATE 01	22/2016				
				NEW YORE	K, NY 14444		VENDOR # 11 FAX #	77				
							REQUESTOR Re	quser, Jahn				
	Order To:]	Shin To:							
	NAPA AUTO PA	JRTS			TRANSPORTATI	ON LSCHOOLS						
	GLOVERSVILLE	LNY 12078			10 DEMO WAY NEW YORK, NY	10052						
	Bid: 012216								$=$ \square			
i i	Order Quantity	Description			Unit Cost	Discount	Shipping Ch	aga Exter	uded Cosi			
	2.00 EA 2.00 SET	TANK CHECK VAL BRAKE SHOE, BOJ	LVE KSET INCLUDING	HARDWARE-	16.000 49.040	00.0 00.0	1	0.00	32.00 98.08			
	1.00 EA	EATON - 4724 ALTERNATOR, 185	5 AMP - CAT/MERO	- 120-067-0008	21.030	0.00		00.0	21.03			
	5.00 EA	FUEL FILTER - NA - 3585	PA OR HASTINGS	- NO SUBSTITUTES	11.010	00.0	I	0.00	55.05			
	4.00 EA	OIL FILTER - NAPA 1553	A OR HASTINGS - 1	10 SUBSTITUTES -	4.140	00.0	I	0.00	16.56			
	1.00 EA 1.00 EA	MOTOR, FAN - 12V FUEL TRANSFER F	7-BSM 203397 PUMP - 3936316		36.950 76.880	00.0		00.0	36.95 76.88			
		ADDITIONAL SHI	PPING				I	00.0	0.00			
	Budget Code		20 Amound Bude	et Code	PO Amami		TO	TAL	\$336.55			
	A104047911000)	336.55									
	Budget Code A1040479110000))	20 Amouni Budg 336.55	et Code	PO Amouni							
								1	Page 1 of 1			

FINANCE MANAGER

2. Use the Print options in the toolbar at the top of the window to print the requisition.

Reviewing the Requisition Detail Record

1. Double-click on a record in the Approve/Reject Requisitions listing to view the requisition detail.

Denio CSD - Net	quisition - 24							
e <u>E</u> dit <u>V</u> iew	<u>H</u> elp	Discourse		Cause and Cl.			Count of	<u>aa</u> _
opdate 🛄	Approve 🌱	Disapprove	a save	save and Cit	ose 💟 N		Search *	ara *
Requisition ———								
Req Number:	24					Transaction Date:	01/22/2016	
Vendor ID:	1177	÷ (A)				Req Source:	Bid	
Vendor Name:	NAPA AUTO) PARTS				Bid Number:	012216	(A)
Description:					~	Ship To Building:	TRANSPORTATIO	N 🚽
						Ship To Contact:	<none></none>	
Requestor:	Requser, Jo	hn			V	Req Amount:		336.55
Approval Path:	Middle Scho	ol Approval			-	Approval Status:	Pending Approval	
<u>A</u> ddresses Req	uisition Items	A <u>c</u> count Distribu	ion Sh <u>i</u> pping	Distribution	File Attachments	<u>R</u> equisition Histo	pry	
Req Address —					Ship To Address			
120 OAKLAND								
130 OAKLANL	JAVE			-	DEMO CENTR	AL SCHOOLS		
130 OARLANL	JAVE			•	DEMO CENTR	AL SCHOOLS		

- 2. Click each folder Addresses, Requisition Items, Account Distribution, Shipping Distribution, File Attachments, Requisition History and review information as needed.
- 3. **Update**, **Approve**, or **Disapprove** the selected requisition by choosing the appropriate option in the maintenance toolbar.



Updating a Requisition

- 1. Highlight the appropriate requisition record in the listing <u>or</u> double-click on a record to view the requisition detail.
- 2. Enter **Update** mode. The requisition detail record displays.

R Demo CSD - Re	equisition - 24						
<u>F</u> ile <u>E</u> dit <u>V</u> iew	<u>H</u> elp						
🥖 Update 🏻 🗳	Approve 🖓	Disapprove 🛛 🛃 S	ave 📕 Save and Cl	ose 🚫 🕅	< ▶ N @	Search *	番 -
Requisition ——							
Reg Number:	24				Transaction Date:	01/22/2016	-
Vendor ID:	1177				Req Source:	Bid	-
Vendor Name:	NAPA AUTO	PARTS			Bid Number:	012216	(Ath)
Description:				ABC	Ship To Building:	TRANSPORTATIO	N
					Ship To Contact:	William Decker	*
Requestor:	Requser, Jo	hn		-	Req Amount:		336.55
Approval Path:	Middle Scho	ol Approval		-	Approval Status:	Pending Approval	
Requisition Detai	I						
Addresses Re	quisition Items	Account Distribution	Shipping Distribution	File Attachments	Requisition Histo	ory	
				1			
Req Address —				Ship To Address			
130 OAKLAN	ID AVE		•	DEMO CENTRA	AL SCHOOLS		
				10 DEMO WAY			
GLOVERSVI	NY	▼ 12078	US 💌	NEW YORK	NY	10052	US 👻

- 3. Update the requisition information as needed.
- Click each folder Addresses, Requisition Items, Account Distribution, Shipping Distribution, File
 Attachments and update information as needed. Refer to the topic titled Requisitioning Entry and Printing for
 field definitions and instructions on updating a requisition.

 NOTE: If the Req Source is from a Bid, the Bid Number and Requestor are displayed and cannot be updated.
- 5. **Save** the record.

Click the Requisition History tab to view the transactions for this requisition. The screen provides a quick analysis of the requisition entry, submission, and approval dates/times, along with the name of the user who performed each action and the current requisition status.



R Demo CSD - R	equisition - 24				. 🗆 🗙
<u>File E</u> dit <u>V</u> iew	<u>H</u> elp				
🥖 Update 🛛 👍	Approve 👎 Disapprove 🛛 💭 Save 💭 Save and Close 🛛 🔇	9 N -	< ▶ N @	Search 🝷	待 -
Requisition ——					
Req Number:	24		Transaction Date:	01/22/2016	T
Vendor ID:	1177 🕑 🕅	I	Req Source:	Bid	-
Vendor Name:	NAPA AUTO PARTS		Bid Number:	012216	(AB)
Description:		ABC	Ship To Building:	TRANSPORTATION	-
		:	Ship To Contact:	<none></none>	-
Requestor:	Requser, John 💌	I	Req Amount:		336.55
Approval Path:	Middle School Approval		Approval Status:	Approval In Process	
Requisition Detai					
Addresses Re	quisition Items Account Distribution Shipping Distribution File At	tachment <u>s</u>	Requisition Histo	ry	

					-	
Jser		Action	Status	Level	Comment	Date
Support, FN	4	Entered	Not Submitted			01/22/2016 10:41 AM
Support, FN	И	Submitted	Pending Approval	1		03/24/2016 09:13 AM
Principal, A	lan	Approved	Approval In Process	2	Approved Requisition	03/24/2016 10:01 AM



Approving Requisitions

nVision Requisitioning allows the user to approve each individual requisition or multiple requisitions at one time.

1. From the Approve/Reject Requisitions listing, highlight the appropriate requisition record(s). Multiple requisitions may be selected by clicking a record in the listing, then holding the Shift key down and clicking the last record in the consecutive range of requisitions <u>OR</u> by clicking a record in the listing, then holding the Ctrl key down and clicking the next record in the nonconsecutive range of requisitions.

ls <u>)</u>	<u>Window</u> Help											
d	🕘 🥖 <u>U</u> pdate	Record 🔥 Approve Record	👎 Disapprove Record 🗌	Column Chooser 🛛 🙆	Refresh 🕅 🖣	e N e						
/6	Requisitioning Deshboard 🗴 Requisitions 🗴											
A	Approve/Reject Requisitions											
	Print Requisitions											
Se	arch 🔻) 👫 🍂 🔹 Requestor: (All)		 Building Name: (All) 		▼ App	proval Path: (All)		-	
D	ag a column head	er here to group by that colum	n.									
ť	Req Number	Requesto	Reg Date	Vendor Name	Building Name	Approval Path	Approval Level	Approval Status	Comment	Account	Req Total	
	11	Requser, John	04/09/2014	ABC SPORTS & FITNE	ADMINISTRATIVE CE	Middle School Approval	1	Pending Approval	Please approve mell!	A1010438110000	144.00	
	12	Requser, John	04/09/2014	ABC SPORTS & FITNE	MIDDLE SCHOOL #70	Middle School Approval	1	Pending Approval	Please approve mell	A1010490110000	199.98	
	24	Requser, John	01/22/2016	NAPA AUTO PARTS	TRANSPORTATION	Middle School Approval	1	Pending Approval		A1040479110000	336.55	
	25	Requser, Ann	01/22/2016	NAPA AUTO PARTS	MAINTENANCE BUIL	Middle School Approval	1	Pending Approval		A1621200440000	353.42	

Click

in the toolbar. The Approve Requisition – Transaction Comment record displays.

<u>OR</u>

Approve Record

From the Requisition detail window,

Update 🗳	Approve 0	👂 Disapprove 🛛 🛃 🤮	Save 📕 Save and Cl	ose 🚫 🕅	4 🕨 🕅 🍪	Search 🔻	æ
equisition							
Req Number:	11				Transaction Date:	04/09/2014	Ţ
Vendor ID:	14	- M			Req Source:	Sole Source	-
Vendor Name:	ABC SPOR	RTS & FITNESS			Bid Number:		(A)
Description:	Baseball E	ag For Varsity Team		ABG	Ship To Building:	ADMINISTRATIVE	CENTER 💂
					Ship To Contact:	John Requser	÷
Requestor:	Requser, J	ohn		-	Req Amount:		144.00
Approval Path:	Middle Sch	ool Approval		-	Approval Status:	Pending Approval	
equisition Detai	l	Account Distribution	Shipping Distribution	File Attachments	Requisition Hist	DIV	
equisition Detai	l	Account Distribution	Shipping Distribution	File Attachments	<u>R</u> equisition Hist	ory	
Addresses Re Req Address - CROSSROA	quisition Items	Account Distribution	Shipping Distribution	File Attachments Ship To Address	AL SCHOOLS	ory	
equisition Detai Addresses Re Req Address — CROSSROA 3 JOHNSON	quisition Items D PLAZA ROAD	Account Distribution	Shipping Distribution	File Attachments Ship To Address DEMO CENTR 500 BROADW/	AL SCHOOLS	ory	

SINANCE MANAGER



The Approve Requisition – Transaction Comment record displays.

2. Use this window to enter any necessary comments for the approval process.

Demo CSD - Transaction Comment	t	? <mark>x</mark>									
Approve Requisition Please enter comment(s) to be used in approving Requisition(s). Transactions to process:											
Transactions to process:											
Requisition No.	Comment										
12	Approved Requisition										
24	Approved Requisition										
	ОК Са	ncel									

Type a comment (informational only) for each requisition as needed. Click **OK**.

3. The following confirmation is displayed.

Approve/Reje	ct Requisitions
<u> </u> A	re you sure you want to approve the selected item(s)?
	Yes No

Click **Yes** to approve the requisition.



Please note: nVision Requisitioning will check to ensure that there are still sufficient funds in the account to accommodate the requisition. If there are NOT sufficient funds, an error message displays indicating so and a different account code with sufficient funds must be selected in order to approve, otherwise the requisition will need to be disapproved. If required, the budget transfer routine in nVision Accounting can be used to transfer funds to cover the requisition, and this would then enable the approver to approve the requisition. If there are sufficient funds, once the requisition is approved it is removed from this approver's listing and is sent to the next approver for approval. At this point, the record is also removed from the requestor's listing in the Enter Requisitions routine.

Once approved, the requisition moves along the approval path to the next approver. Once the final approver in the path has approved the requisition, the requisition can be converted to a purchase order.



Disapproving Requisitions

nVision Requisitioning allows the user to disapprove an individual requisition or selected multiple requisitions at one time. Upon disapproval, the requisition is returned to the original requestor.

1. From the Approve/Reject Requisitions listing, highlight the appropriate requisition record(s) to disapprove. Multiple requisitions may be selected by clicking a record in the listing, then holding the Shift key down and clicking the last record in the consecutive range of requisitions <u>OR</u> by clicking a record in the listing, then holding the Ctrl key down and clicking the next record in the nonconsecutive range of requisitions.

d	🕖 🥖 🖉 Update	Record 🔥 Approve Record	👎 Disap	prove Record	🛾 Column Chooser 🛛 🙆	Refresh 🚺 🖣 🛛	× N _₹					
<u> </u> k	🔀 Requisitioning Dashboard 🗙 🕅 Approve/Reject Requisitions 🗴											
A	Approve/Reject Requisitions											
											Print	Requisitions
Se	arch 🕶		å 14	🕹 🔹 Requestor:	(All)		Building Name: (All)		▼ App	roval Path: (All)		•
Dr	ag a column heade	er here to group by that column.										
t	Req Number	Requestor		Req Date	Vendor Name	Building Name	Approval Path	Approval Level	Approval Status	Comment	Account	Req Total
	11	Requser, John		04/09/2014	ABC SPORTS & FITNE	ADMINISTRATIVE CE	Middle School Approval	1	Pending Approval	Please approve melli	A1010438110000	144.00
	25	Requser, Ann		01/22/2016	NAPA AUTO PARTS	MAINTENANCE BUIL	Middle School Approval	1	Pending Approval		A1621200440000	353,42

Click in the toolbar. The Disapprove Requisition – Transaction Comment window displays.

<u>OR</u>

From the Requisition detail window,

e Edit view	Help											
Update 💧 🙆	Approve 0	Disapp	rove	🚽 Save	🚽 Save	and Close	I Ø I M	4		🎸 Sear	ch 🕶	<i>#</i> 4 ·
Requisition ——												
Req Number:	11							Tra	nsaction Da	te: 04/09	/2014	-
Vendor ID:	14		÷ (#					Req	Source:	Sole	Source	
Vendor Name:	ABC SPO	RTS & FITI	NESS					Bid	Number:			(A)
Description:	Baseball B	Bag For Var	rsity Tea	m			ABU	Ship	o To Buildin	ac ADM	NISTRATI	VE CENTER 💌
								Ship	o To Contac	t: John	Requser	÷.
Requestor:	Requser,	John					-	Req	Amount:			144.00
Approval Path:	Middle Scl	nool Approv	/al				-	Арр	roval Status	: Pend	ing Approv	al
Requisition Detail		1.										
Requisition Detail	quisition Items	A <u>c</u> coun	t Distribu	ition Sh <u>i</u>	pping Distr	ibution F	ile Attachmer	nt <u>s R</u>	equisition H	istory		
Requisition Detail	quisition Items	A <u>c</u> coun	t Distribu	tion Sh <u>i</u>	pping Distr	ibution F	ile Attachmer hip To Addres	nt <u>s R</u>	equisition H	istory		
Requisition Detail Addresses Req Address CROSSROAD	quisition Items	A <u>c</u> coun	t Distribu	ition Sh <u>i</u>	pping Distr	ibution F	ile Attachmer hip To Addres DEMO CEN1	nt <u>s R</u>	equisition H	istory		
Requisition Detail Addresses Rec Req Address — CROSSROAD 3 JOHNSON	Quisition Items	A <u>c</u> coun	t Distribu	ition Sh <u>i</u>	pping Distr	ibution F	ile Attachmer hip To Addres DEMO CEN1 500 BROAD\	nt <u>s R</u> ss RAL S	equisition H	istory		
Requisition Detail Addresses Red Req Address - CROSSROAD 3 JOHNSON LATHAM	Quisition Items D PLAZA ROAD	Accoun	t Distribu 2110	ition Shi	pping Distr	ibution F SI	ile Attachmer hip To Addres DEMO CENT 500 BROAD\ SCHOOLVIL	rral s NAY	equisition H CHOOLS	istory	15555	US ¥
Requisition Detail Addresses Red Reg Address - CROSSROAD 3 JOHNSON LATHAM	Quisition Items	Accoun	t Distribu	ition Shi	pping Distr	ibution F SI 	ile Attachmer hip To Addres DEMO CENT 500 BROADI SCHOOLVIL	nt <u>s R</u> ss rral s vay	equisition H CHOOLS	istory	15555	US ¥
Requisition Detail Addresses Rec Req Address — CROSSROAD 3 JOHNSON LATHAM	D PLAZA ROAD	Agcoun	t Distribu 2110	ition Shi	pping Distr	ibution F	ile Attachmer hip To Addres DEMO CENT 500 BROAD SCHOOLVIL	ITE RAL S	equisition H CHOOLS	istory	15555	US ¥





The Disapprove Requisition – Transaction Comment window displays.

2. Use this window to enter any necessary comments for the disapproval.

🖁 Demo CSD - Transaction Comme	nt 🤋	х
Disapprove Requisition Please enter comment(s) to be us	sed in disapproving Requisition(s).	
Transactions to process:		_
Requisition No.	Comment	
11	Requestor needs to add more items to this requisition	
	OK Cancel	

Type a comment (informational only) for each disapproved requisition as needed. Click **OK**.

3. The following confirmation will appear.



Click **Yes** to disapprove the requisition.

The requisition will be disapproved and returned back to the original requestor. The requestor is able to see the disapproved requisition in the Disapproved area on the Requisitioning Dashboard. The disapproved requisition is highlighted in red on the Enter Requisitions window. The requestor can then make changes to the disapproved requisition and resubmit for approval via the Enter Requisitions window.

C FINANCE MANAGER

Print Requisitions

To preview and/or generate a printout of the requisition(s) that either you entered <u>or</u> that were entered by other requestors whose requisitions you approve, you may do so through the Print Requisitions routine. This routine prints any requisition regardless of the current status. You can choose to print one or multiple requisitions based on all or a selected approval path, building, and/or requestor. Only one requisition at a time can be previewed.

To Print Requisitions

1. Open the Requisitioning menu tree and click the Print Requisitions option. The Print Requisitions window displays.

R Demo CSD - Print R	equisition					? ×
Print Requisition						
Search 🕶	🎒 🖄 🕶 Approval Path: (All)	▼ Building Nam	ne: (All) 💌	Requestor: (All)	Converted: No	•
Requisition Number	Vendor Name	Building Name	Requestor	Description	PO Total	Approval Path
8	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requser, John	Football Equipment For Varsity	144.00	Middle School Ap
11	ABC SPORTS & FITNESS	ADMINISTRATIVE CENTER	Requser, John	Baseball Bag For Varsity Team	144.00	Middle School Ap
12	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requser, John	Basketball Ball Rack for Middle S	199.98	Middle School Ap
13	ABC SCHOOL SUP.	ELEM SCHOOL #66	Requser, John	Glue	14.76	Middle School Ap
14	ABC SPORTS & FITNESS	ADMINISTRATIVE CENTER	Requser, John	Baseball Bag For Varsity Team	144.00	Middle School Ap
15	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requser, John	Basketball Ball Rack for Middle S	199.98	Middle School Ap
16	ABC SCHOOL SUP.	ELEM SCHOOL #66	Requser, John	Glue	14.76	Middle School Ap
25	NAPA AUTO PARTS	MAINTENANCE BUILDING	Requser, Ann		353.42	Middle School Ap
28	ABC SCHOOL SUP.	HIGH SCHOOL #77	Requser, Bob		25.00	Middle School Ap
Print Progress			Print To	·	· · · · ·	
		0/1	\\fmdc1\1720dn-QA	 Preview 	Print	Close
					-	

The window displays summarized requisition information – requisition number, vendor name, building, requestor, description, PO total, and approval path. Use this window to select the requisition(s) to be previewed or printed.

- 2. Use the filters at the top of the window to restrict the listing to requisitions linked to a selected approval path, building, or requestor. You can also choose to print only requisitions that were converted to a purchase order by changing the Converted filter to Yes.
- 3. To print a requisition(s), highlight the requisition(s) to print. Hold down the Ctrl key and click with the mouse to highlight nonconsecutive requisitions. Hold down the Shift key and click with the mouse to highlight consecutive requisitions. Using the drop-down, select the **printer** to which documents are to be printed. You may also

Print

to print the requisition to the selected printer or to a



to open the report viewer.

4. To preview a requisition, highlight the requisition. Click

Report Viewer			- C X
😸 🍜 💏 🗣 🛜 🧰 🛃 💌 🔜 🖬 🖾 🛅 🛅 🖼 • 🔟 💽 1/1	🖸 🖾 🖄 🖏 🕅 🕨 🚳 🔯		
	REQUISITION Den 10 SCH NEW YOI	no CSD R Q #25 IOOL WAY REDATE 202006 RK, NY 14444 Research 1077 RECATE Repart, Am	-
	Order Te: Note Aftro PART Note Aftro PART I BOARD AND CLOWERSVILLE, NY LWB	Ship Te: MARTROAVEZ BELIANO MARTROAVEZ BELIANO IN DENOVILLE ROAD DENOVILLE, NY 1111	
	Bid: 012216		
	Order (genate) Description 4.00 ET Description 4.00 ET Description 2.00 FA ALTENATOR - 1734 4.00 ET Description 4.00 ET Description 4.00 ET Description 4.00 EA ALTENATOR - 1734 4.00 EA ALTENATOR - 1734 4.00 EA DESCRIPTION - 1744 4.00 EA LUONT, LEFTOCHER - 1913 4.00 EA DESCRIPTION - 1844 ADDITIONAL SIGPPLO Height Cale Bidget Cale TO Americal Bidget Cale 2033 4.01	Cuit Ceut Deneral Skiping Charg Extended Ceut 40.64 0.6 0.66 0.66 10.00 0.06 0.06 0.64 0.06 0.06 0.06 0.108 0.06 0.06 0.06 0.06 0.07 0.06 0.06 0.128 0.300 0.06 0.06 0.06 0.300 0.06 0.06 0.06 0.300 0.06 0.06 0.06 0.300 0.06 0.06 0.06 0.300 0.06 0.06 0.06 0.300 0.06 0.06 0.06 0.300 0.06 0.06 0.06 0.06 0.06 0.06 0.06 0.06 0.06 0.06 0.06 0.07 0.06 0.06 0.06 0.08 0.06 0.06 0.06 0.09 0.06 0.06 0.06	
	Continued	Page 1 of 1	

Preview

If desired, click the Print Report button at the top right-hand side of the toolbar. Select the **printer** to which the requisition is to be printed. When you are finished close the report viewer.

If the requisition originated from a Bid, the bid number is displayed beneath the section labeled **Order To** and the vendor item reference number is displayed in the section labeled **Description**.

If the requisition **Source** is flagged as **State Contract**, the State Contract # and Description are displayed beneath the section labeled **Order To**.



Remove Requisition

This routine provides a way to permanently remove requisitions linked to users who may no longer work for your facility. The routine is used to select any requisition in an Unsubmitted, Pending Approval, Approval in Process, Disapproved, or Approved status and delete the requisition(s) completely.

On the Approval menu, click Remove Requisition. The Remove Requisition window displays.

2 Demo	CSD - Remove Requisi	tion					? <mark>x</mark>
Remov	e Requisition						
Please	select Requisition(s) that	you wish to remove ar	nd press <remove>.</remove>				
M -	🔹 🕨 Search 🕶		🏙 🆄 🕶 Vendor Name:	(All) 👻	Building: (All)		
Q	Reg Num	Req Date 🖉 🛆	Vendor Name	Building	Current Owner	Status	Req Total 🔺
► Q	8	10/18/2013	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requser, John	Disapproved	144.00
	11	04/09/2014	ABC SPORTS & FITNESS	ADMINISTRATIVE CENTER	Requser, John	Disapproved	144.00
	12	04/09/2014	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Purchasing Official, Jane	Approved	199.98
	13	04/09/2014	ABC SCHOOL SUP.	ELEM SCHOOL #66	Requser, John	Not Submitted	14.76
	14	04/09/2014	ABC SPORTS & FITNESS	ADMINISTRATIVE CENTER	Requser, John	Not Submitted	144.00 📃
	15	04/09/2014	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requser, John	Not Submitted	199.98
	16	04/09/2014	ABC SCHOOL SUP.	ELEM SCHOOL #66	Requser, John	Not Submitted	14.76
	20	10/06/2014	ADAMS BOOK CO INC	ADMINISTRATIVE CENTER	Approver, Lori	Not Submitted	67.95
	21	08/03/2015	ABC SCHOOL SUP.	MIDDLE SCHOOL #70	Approver, Lori	Pending Approval	200.91
	22	08/03/2015	ACADEMIC BOOK SERVICE INC	MIDDLE SCHOOL #70	Approver, Lori	Pending Approval	628.20
	23	08/03/2015	ADVANTAGE SPORT & FITNESS	MIDDLE SCHOOL #70	Approver, Lori	Pending Approval	262.99
	25	01/22/2016	NAPA AUTO PARTS	MAINTENANCE BUILDING	Purchasing Official, Jane	Approval In Process	353.42
	26	04/11/2016	ABEKA BOOK, INCORPORATED	ADMINISTRATIVE CENTER	Approver, Lori	Pending Approval	173.85
	27	04/13/2016	ABC SCHOOL SUP.	ADMINISTRATIVE CENTER	Approver, Frank A	Approved	10.49 🚽
Sele	ect All					Remove	Close

This window displays the requisition number, requisition date, vendor name, building, current owner, current status, and requisition total dollar amount.

To view the requisition, highlight the appropriate requisition and click the lookup button 🕓 that displays to the right of

the line indicator **\Delta**. The requisition detail window is displayed. The requisition detail is broken out into 6 parts: Requisition Address, Requisition Line Items, Account Distribution, Shipping Distribution, File Attachments, and Requisition History. The Requisition History folder shows the Actions and Status history for the requisition. Click on the folders to review the information before removing requisitions.

Remove Requisition

This option is used to remove or delete a selected requisition(s).

1. Highlight a requisition in the listing window. Select more than one requisition by using the mouse and Shift or Control key. Check the **Select All** box to select **all** requisitions in the listing window.

2. Click Remove

Confirm that you wish to delete the selected requisition(s).





Click **Yes** to delete the requisition(s). Otherwise, click **No**.

Demo CSD - Remove Requisition	×
2 Requisition(s) were successfully remo	ved.
	ок

Click OK on the message window that indicates that the requisitions were successfully removed.



Convert Requisition to PO

The Convert Requisition to PO routine is used to choose an open schedule on which you wish to place selected requisitions that have final approval. The requisitions can then be converted into purchase orders.

When you first access the routine, the Convert Requisition to Purchase Order window displays.

R Demo CSD - Convert Req	uisition to Purchase O	rder		? ×				
Convert Requisition to Purchase Order This report will allow the user to select the Requisitions that could be converted to Purchase Orders from a schedule and do so.								
None Selected>	ch •			New Schedule				
Requisition Number	Date	Vendor	Creator	Building				
Select All			Conv	vert Close				

You may place converted POs on an existing schedule or choose to add a new purchase order schedule, provided that you have permissions to do so.



Step 1: Choose an existing computer purchase order schedule or add a new schedule

Choosing an Existing Schedule

1. To select an existing schedule in which to add purchase orders, use the drop-down arrow in the Schedule field

Schedule: A - 1
that displays at the top of the Convert Requisition to PO listing.

The Schedule Selection window displays.

₩ ◀ ▶	Search 🕶	A 🐴	▼ Status: Ope	n	-
Schedule	Name	Start Date	End Date 👘 🕅	Mixed Funds	Status
A - 10	POs March 2012	03/01/2012	03/31/2012	V	Open
A - 9	PO's Feb 2012	02/01/2012	02/01/2012		Open
				ОК	Cancel

2. Highlight the appropriate schedule record in the listing and click **OK**. nVision Requisitioning returns the Convert Requisition PO listing, with the selected schedule displayed at the top of the window and a listing of any requisitions that could be converted to purchase orders.



Adding a New Schedule

1. Click New Schedule that displays at the top right-hand side of the Convert Requisition to PO listing window. The New Transaction Schedule window displays. This window is used to create and maintain the open schedules used to record the computer POs.

le <u>E</u> dit <u>V</u> iew <u>H</u> el	p				
🛚 New 🥒 Update	🗈 Copy 🛛 🛃 Save 🛃	Save and Close	\otimes \times	₩ 4 ►	🕅 🔯 Refresh
Transaction Schedule					
Schedule Number:	(New - Not Saved)			Start Date:	04/01/2012 💌
Schedule Type:	Purchase Order 🔍			End Date:	04/30/2012 💌
Description:	POs April 2012		ABU	Fund:	A
				Mixed Funds	: 🔽
				Clo	se Schedule
Transaction Schedule	Detaile			Clo	se Schedule
Transaction Schedule Custom Fields	Details Search •			Clo A	se Schedule
Transaction Schedule Custom Fields	Details Search ▼ eld Name		Value	Cio	se Schedule
Transaction Schedule Custom Fields	Details Search • eld Name		Value	Cio	Use grid to update value(s).
Transaction Schedule Custom Fields	Search • eld Name		Value	Clo	Use grid to update value(s).
Transaction Schedule Custom Fields	Details Search • eld Name		Value	Cio	Use grid to update value(s).
Transaction Schedule Custom Fields	Details Search - eld Name		Value	Cio	Use grid to update value(s).

Enter all appropriate information regarding the schedule.

Schedule Number - When adding a new schedule, nVision assigns the next sequential number for the fund and fiscal year. You cannot modify the default number. The schedule type and number displays on transaction reports in Accounting and on the Computer PO.

Schedule Type - When adding a new schedule, this field defaults to Purchase Order and is not modifiable.

Description - (REQUIRED) When adding a new schedule, this field defaults to" Purchase Order". You can change the default value as needed to further identify the contents of the schedule (i.e., January Computer Purchase Orders). Entering a meaningful description will help you identify the contents of the schedule when running reports.

Start Date/End Date - (REQUIRED) When adding a new schedule, this field defaults to the current month. You can change the default dates as needed by typing in the appropriate dates or using the drop-down arrows to choose the dates from the on-line calendar. The Date Range could be for a specific day(s), month(s), or fiscal year. The Start and End Dates MUST be in the same fiscal year.



Fund – (REQUIRED) Use the drop-down to enter the code that identifies the particular fund associated with this schedule. Fund Codes are defined in the Fund Setup File. Use the drop-down to display and choose from a listing of valid fund codes.

Mixed Funds - This field indicates whether accounts from different funds are allowed on the schedule. When adding a new schedule, this field defaults to being unchecked (no mixed funds for this schedule). Leave the box unchecked if only account numbers associated with the specified fund are allowed on this schedule. Place a check in the box if account numbers from different funds are allowed on this schedule. **NOTE**: When entering detail for each accounting entry on the schedule, nVision checks this field. If the Mix Funds flag is unchecked and you try to add an account number that is not associated with the specified fund, a warning message is displayed.

- 2. Save the record.
- 3. Close the New Transaction Schedule window. The new schedule number displays at the top of the Convert Requisition to Purchase Order window.

Step 2: Choose the Requisitions to be Converted to Computer POs

4. After selecting the schedule, you can proceed to convert requisitions into POs on the selected schedule. nVision displays a list of requisitions that could be converted to POs. The listing contains those requisitions whose dates coincide with the date range of the schedule. NOTE: The date of the requisition must fall within the date range of the selected purchase order schedule. For example, you cannot add a November requisition to a schedule with an October date range.

R Demo CSD - Convert Requisition to Purchase Order									
Convert Requisition to Purchase Order This report will allow the user to select the Requisitions that could be converted to Purchase Orders from a schedule and do so.									
Schedule: A - 7	Schedule: A - 7 March 2016 Reqs to POs 3/1/2016 - 3/31/2016 Schedule: A - 7 March 2016 Reqs to POs 3/1/2016 - 3/31/2016								
Requisition Number	Date 01/22/2016	Vendor	Creator Reguser John	Building					
			. Require, some						
Select All				Convert Close					

Highlight the requisition(s) that you want to convert. Hold down the **Ctrl** key and click with the mouse to highlight nonconsecutive requisitions. Hold down the **Shift** key and click with the mouse to highlight consecutive requisitions. Check the **Select All** box if you want to convert all the requisitions displayed in the listing.



5. Click Convert



Choose **Yes** to convert the requisitions to purchase orders. Once you process the requisition conversion, the requisition is removed from the listing and can be seen in NVision Accounting on the selected schedule in the Computer Purchase Order routine.

Con	nputer PO							
	Schedule: A - 7 🔹	March 2016 Reqs to POs				3/1/20	16 - 3/31/2016	👍 New Schedule
Sear	ch •	20 A	Suilding: (All)		▼ Ship	To Contact: (All)		-
Drag	a column header here to group by that columr	l.						
	PO Number	Vendor ID	Vendor Name	PO Date	Ship To Contact	Building	Requisition Number	PO Total
	14	1177	NAPA AUTO PARTS	03/01/2016		TRANSPORTATION	24	336.55

Refreshing the Window

The Refresh button on the Convert Requisition to PO window is used to refresh the requisition listing with new information. If additional requisitions had been approved **after** you opened the Convert Requisition to PO window, click

💈 Refresh

to have nVision refresh the window with those requisitions that are ready to be converted to purchase orders **without** the need to exit this routine.

8/5/2016

