



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

Approve/Reject Requisitions											
											Print Requisitions
Search	Requestor: (All)		Building Name: (All)		Approval Path: (All)						
Drag a column header here to group by that column.											
Req Number	Requestor	Req Date	Vendor Name	Building Name	Approval Path	Approval Level	Approval Status	Comment	Account	Req Total	
11	Requer, John	04/09/2014	ABC SPORTS & FITNE...	ADMINISTRATIVE CE...	Middle School Approval	1	Pending Approval	Please approve me!!!	A1010438110000	144.00	
12	Requer, John	04/09/2014	ABC SPORTS & FITNE...	MIDDLE SCHOOL #70	Middle School Approval	1	Pending Approval	Please approve me!!	A1010490110000	199.98	
24	Requer, John	01/22/2016	NAPA AUTO PARTS	TRANSPORTATION	Middle School Approval	1	Pending Approval		A1040479110000	336.59	
25	Requer, 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 one selected requisition at a time.

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

Approve/Reject Requisitions										
<b>Print Requisitions</b>										
Search	Requestor: (All)			Building Name: (All)			Approval Path: (All)			
Drag a column header here to group by that column.										
Req Number	Requestor	Req Date	Vendor Name	Building Name	Approval Path	Approval Level	Approval Status	Comment	Account	Req Total
21	Requer, Diane	08/03/2015	ABC SCHOOL SUP.	MIDDLE SCHOOL #70	Middle School Approval Under 1K	1	Pending Approval		A2020500660000	200.91
22	Requer, Diane	08/03/2015	ACADEMIC BOOK SE.	MIDDLE SCHOOL #70	Middle School Approval Under 1K	1	Pending Approval		A2110500661600	628.20
23	Requer, Diane	08/03/2015	ADVANTAGE SPORT..	MIDDLE SCHOOL #70	Middle School Approval Under 1K	1	Pending Approval		A2110500661500	262.99

Click

**Print Requisitions**

## REQUISITION

Demo CSD  
10 SCHOOL WAY  
NEW YORK, NY 14444

R Q #24

REQ DATE 01/22/2016  
VENDOR # 1177  
FAX #  
PHONE #  
REQUESTOR Requer, John

**Order To:**  
NAPA AUTO PARTS  
130 OAKLAND AVE  
GLOVERSVILLE, NY 12078

**Ship To:**  
TRANSPORTATION  
DEMO CENTRAL SCHOOLS  
10 DEMO WAY  
NEW YORK, NY 10052

Bid: 012216

Order Quantity	Description	Unit Cost	Discount	Shipping Charge	Extended Cost
2.00 EA	TANK CHECK VALVE	16.000	0.00	0.00	32.00
2.00 SET	BRAKE SHOE BOX SET INCLUDING HARDWARE - EATON - 4724	49.040	0.00	0.00	98.08
1.00 EA	ALTERNATOR, 185 AMP - CAT/MERC - 120-067-0008	21.030	0.00	0.00	21.03
5.00 EA	FUEL FILTER - NAPA OR HASTINGS - NO SUBSTITUTES - 3585	11.010	0.00	0.00	55.05
4.00 EA	OIL FILTER - NAPA OR HASTINGS - NO SUBSTITUTES - 1553	4.140	0.00	0.00	16.56
1.00 EA	MOTOR, FAN - 12V - BSM 203397	36.950	0.00	0.00	36.95
1.00 EA	FUEL TRANSFER PUMP - 3936316	76.880	0.00	0.00	76.88
	ADDITIONAL SHIPPING			0.00	0.00
<b>TOTAL</b>					<b>\$336.55</b>

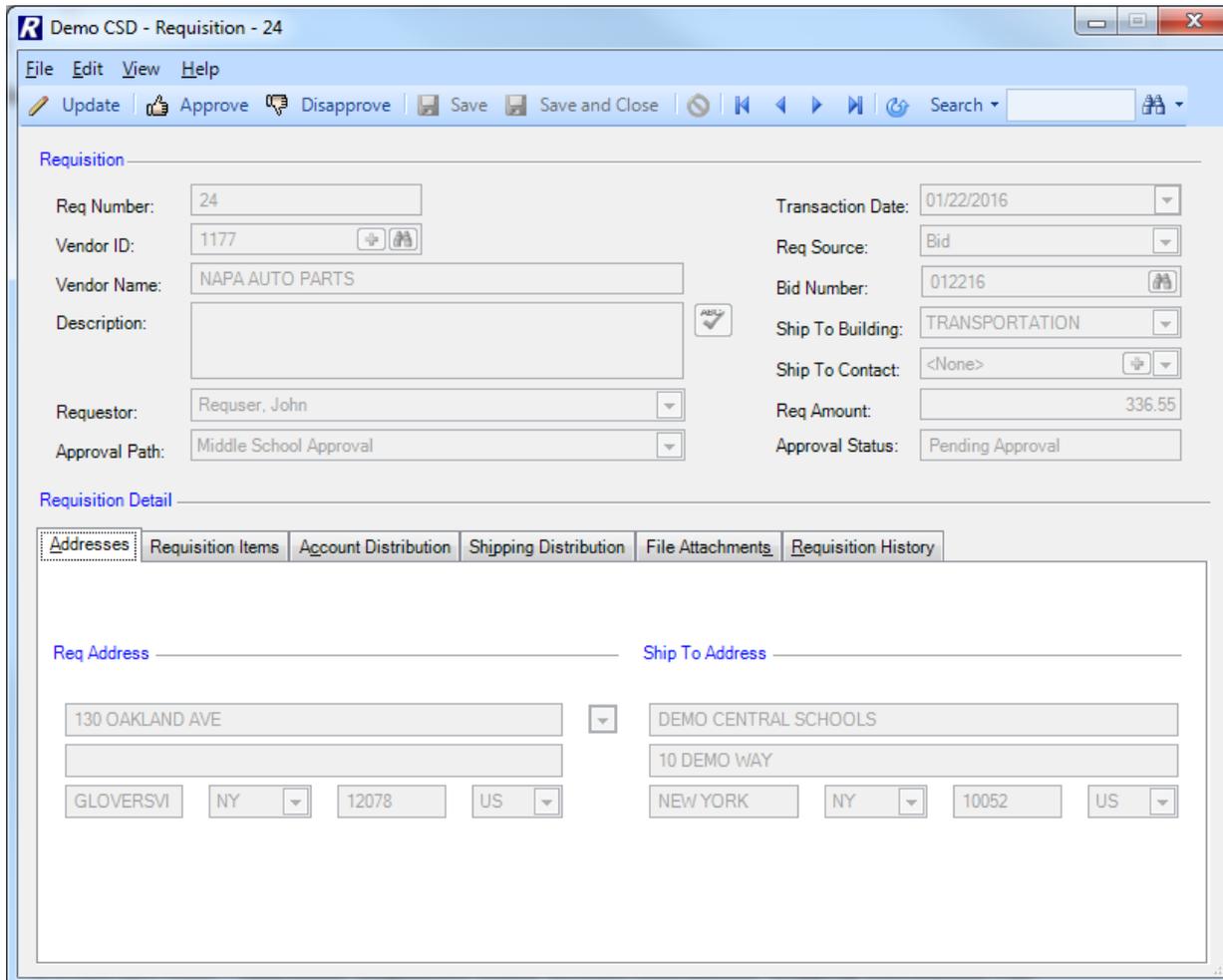
<b>Budget Code</b>	<b>PO Amount</b>	<b>Budget Code</b>	<b>PO Amount</b>
A1040479110000	336.55		

Page 1 of 1

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.



**Requisition**

Req Number: 24  
 Vendor ID: 1177  
 Vendor Name: NAPA AUTO PARTS  
 Description:  
 Requirer: Requer, John  
 Approval Path: Middle School Approval

Transaction Date: 01/22/2016  
 Req Source: Bid  
 Bid Number: 012216  
 Ship To Building: TRANSPORTATION  
 Ship To Contact: <None>  
 Req Amount: 336.55  
 Approval Status: Pending Approval

**Requisition Detail**

Addresses | Requisition Items | Account Distribution | Shipping Distribution | File Attachments | Requisition History

**Req Address** | **Ship To Address**

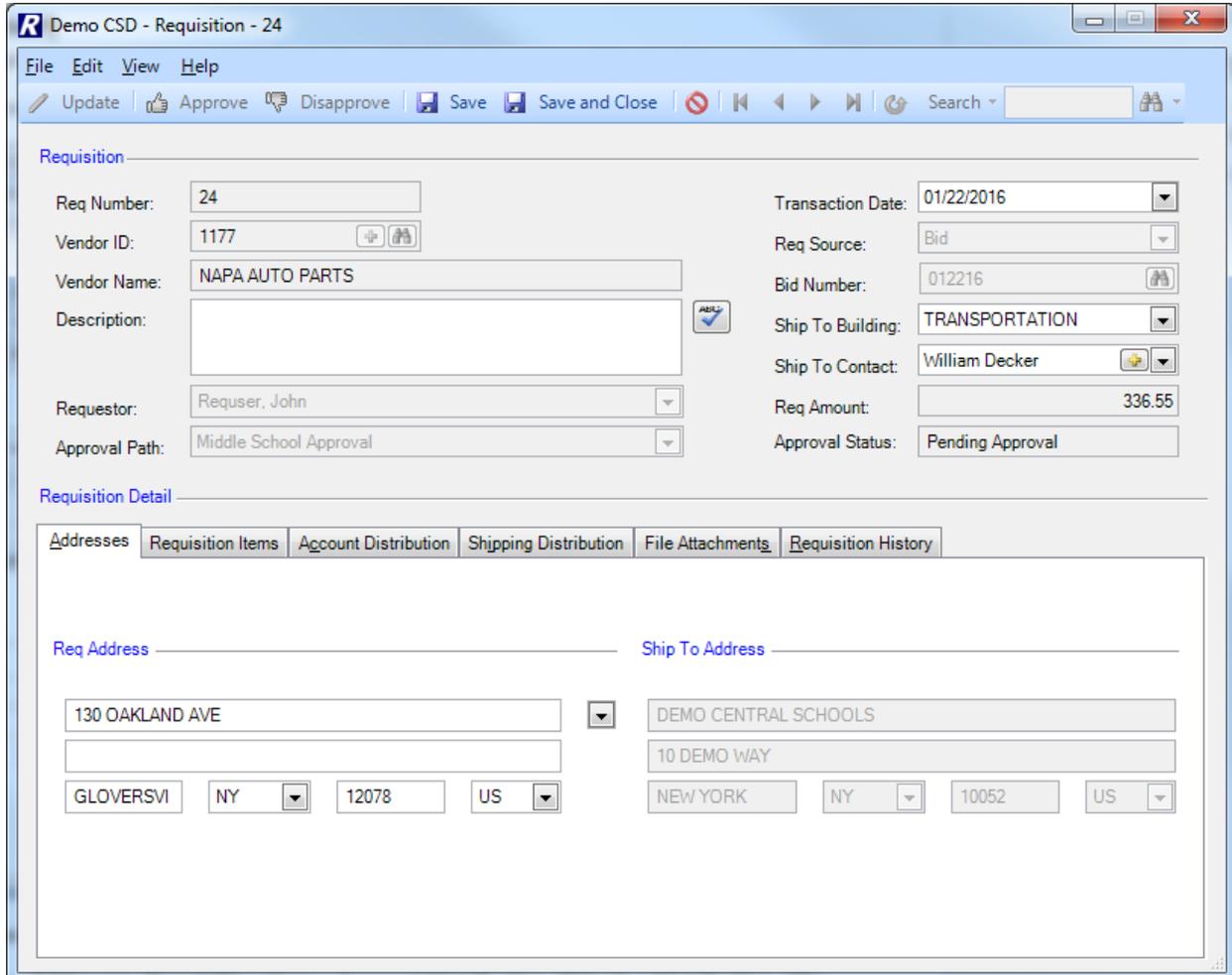
130 OAKLAND AVE  
 GLOVERSVI NY 12078 US

DEMO CENTRAL SCHOOLS  
 10 DEMO WAY  
 NEW YORK NY 10052 US

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 or double-click on a record to view the requisition detail.
2. Enter **Update** mode. The requisition detail record displays.



3. Update the requisition information as needed.
4. 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 Requirer 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 - Requisition - 24
 \_ □ ×

File Edit View Help

Update | Approve | Disapprove | Save | Save and Close | ⏪ | ⏩ | ↺ | ↻ | Search

**Requisition**

Req Number: <input style="width: 100%;" type="text" value="24"/> Vendor ID: <input style="width: 80%;" type="text" value="1177"/> <span style="font-size: x-small;">⊕ ⊞</span> Vendor Name: <input style="width: 90%;" type="text" value="NAPA AUTO PARTS"/> Description: <input style="width: 95%; height: 30px;" type="text"/> <span style="font-size: x-small; color: blue;">APR</span> Requestor: <input style="width: 80%;" type="text" value="Requirer, John"/> <span style="font-size: x-small;">▼</span> Approval Path: <input style="width: 80%;" type="text" value="Middle School Approval"/> <span style="font-size: x-small;">▼</span>	Transaction Date: <input style="width: 80%;" type="text" value="01/22/2016"/> <span style="font-size: x-small;">▼</span> Req Source: <input style="width: 80%;" type="text" value="Bid"/> <span style="font-size: x-small;">▼</span> Bid Number: <input style="width: 80%;" type="text" value="012216"/> <span style="font-size: x-small;">⊞</span> Ship To Building: <input style="width: 80%;" type="text" value="TRANSPORTATION"/> <span style="font-size: x-small;">▼</span> Ship To Contact: <input style="width: 80%;" type="text" value="&lt;None&gt;"/> <span style="font-size: x-small;">⊕ ▼</span> Req Amount: <input style="width: 80%;" type="text" value="336.55"/> Approval Status: <input style="width: 80%;" type="text" value="Approval In Process"/>
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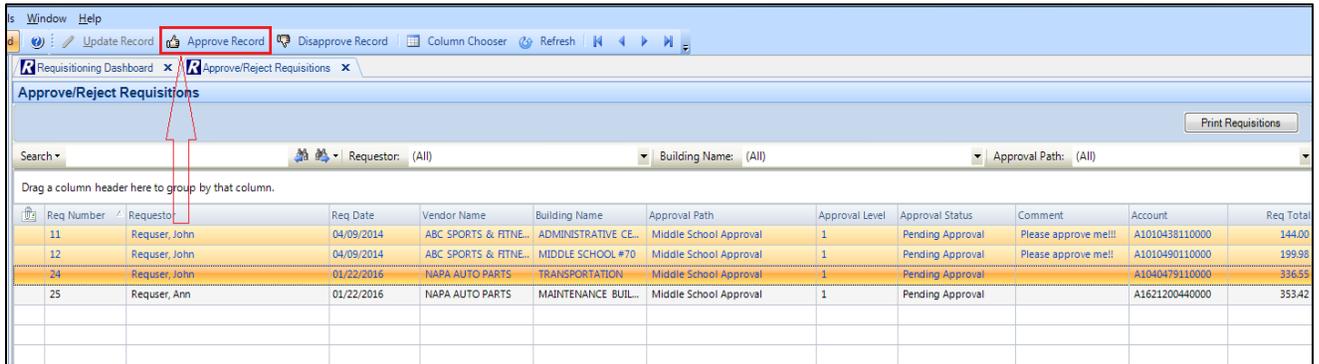
**Requisition Detail**

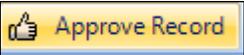
Addresses	Requisition Items	Account Distribution	Shipping Distribution	File Attachments	Requisition History																																																																		
<table style="width: 100%; border-collapse: collapse; border: 1px solid gray;"> <thead> <tr style="background-color: #e0e0e0;"> <th style="width: 25%;">User</th> <th style="width: 15%;">Action</th> <th style="width: 15%;">Status</th> <th style="width: 5%;">Level</th> <th style="width: 30%;">Comment</th> <th style="width: 10%;">Date</th> </tr> </thead> <tbody> <tr style="background-color: #ffcc00;"> <td>Support, FM</td> <td>Entered</td> <td>Not Submitted</td> <td></td> <td></td> <td>01/22/2016 10:41 AM</td> </tr> <tr> <td>Support, FM</td> <td>Submitted</td> <td>Pending Approval</td> <td>1</td> <td></td> <td>03/24/2016 09:13 AM</td> </tr> <tr> <td>Principal, Alan</td> <td>Approved</td> <td>Approval In Process</td> <td>2</td> <td>Approved Requisition</td> <td>03/24/2016 10:01 AM</td> </tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>						User	Action	Status	Level	Comment	Date	Support, FM	Entered	Not Submitted			01/22/2016 10:41 AM	Support, FM	Submitted	Pending Approval	1		03/24/2016 09:13 AM	Principal, Alan	Approved	Approval In Process	2	Approved Requisition	03/24/2016 10:01 AM																																										
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Principal, Alan	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.

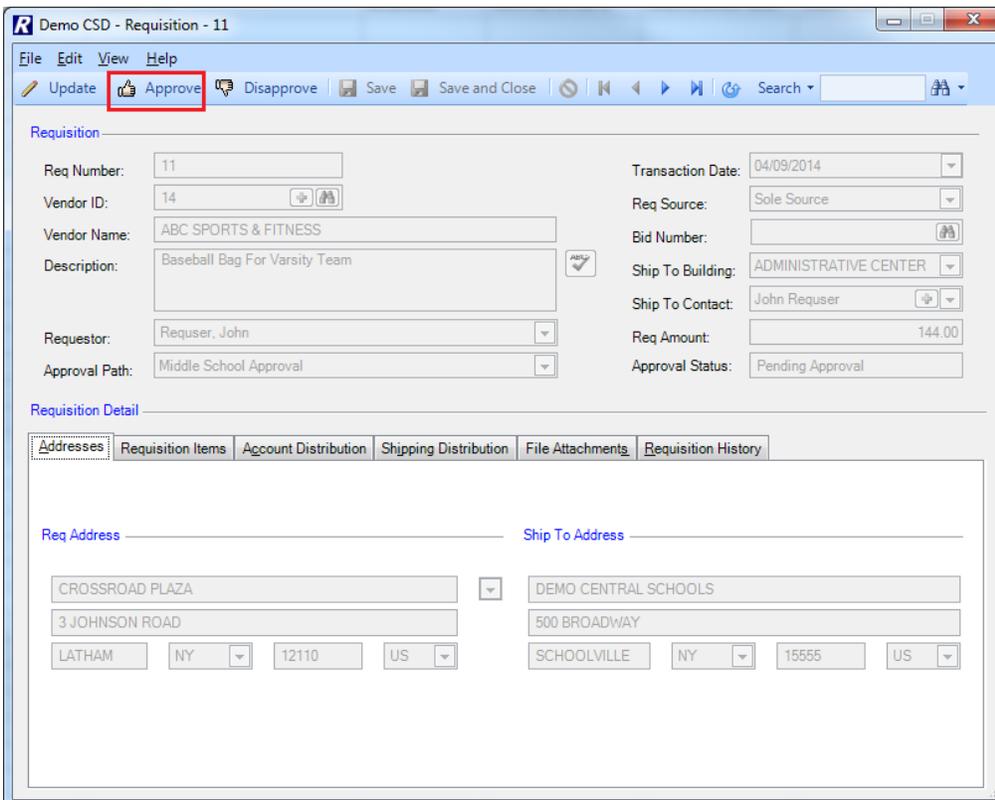
- From the Approve/Reject Requisitions listing, highlight the appropriate requisition record(s). Multiple requisitions may be selected by clicking a record in the listing, then holding the Shift key down and clicking the last record in the consecutive range of requisitions **OR** by clicking a record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



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

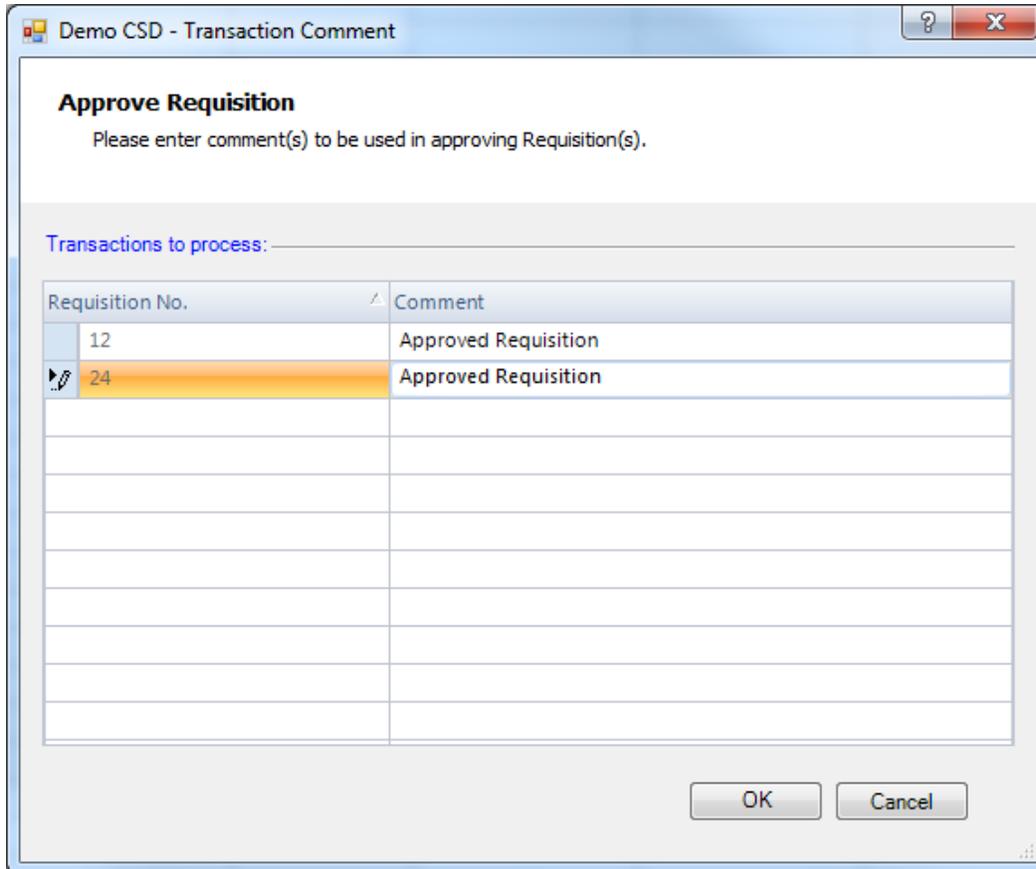
**OR**

From the Requisition detail window,



click . The Approve Requisition – Transaction Comment record displays.

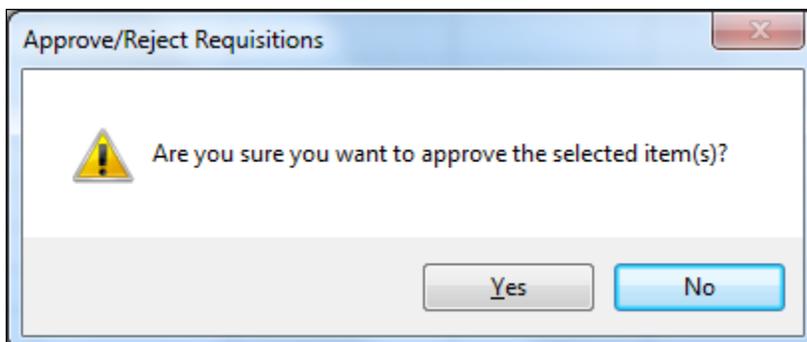
2. Use this window to enter any necessary comments for the approval process.



Requisition No.	Comment
12	Approved Requisition
24	Approved Requisition

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

3. The following confirmation is displayed.



Click **Yes** to approve the requisition.

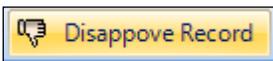
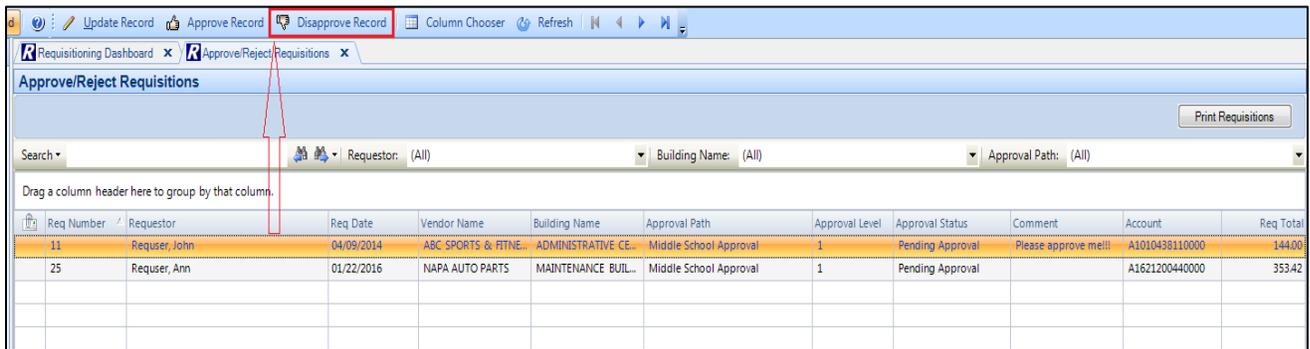
**Please note:** nVision Requisitioning will check to ensure that there are still sufficient funds in the account to accommodate the requisition. If there are NOT sufficient funds, an error message displays indicating so and a different account code with sufficient funds must be selected in order to 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.

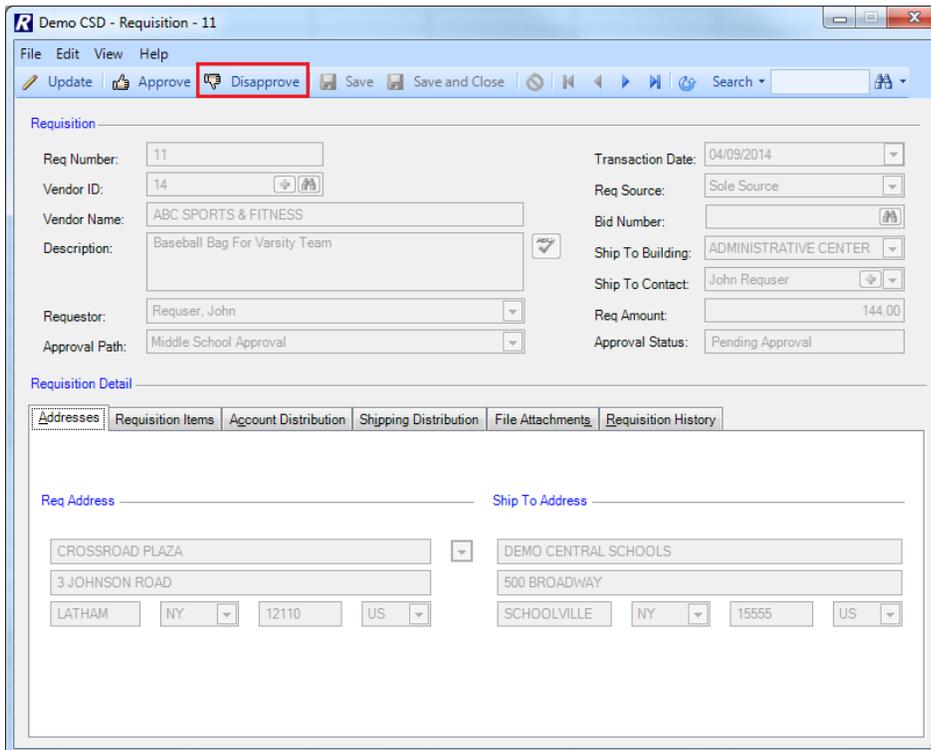
- From the Approve/Reject Requisitions listing, highlight the appropriate requisition record(s) to disapprove. Multiple requisitions may be selected by clicking a record in the listing, then holding the Shift key down and clicking the last record in the consecutive range of requisitions OR by clicking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

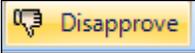


Click **Disapprove Record** in the toolbar. The Disapprove Requisition – Transaction Comment window displays.

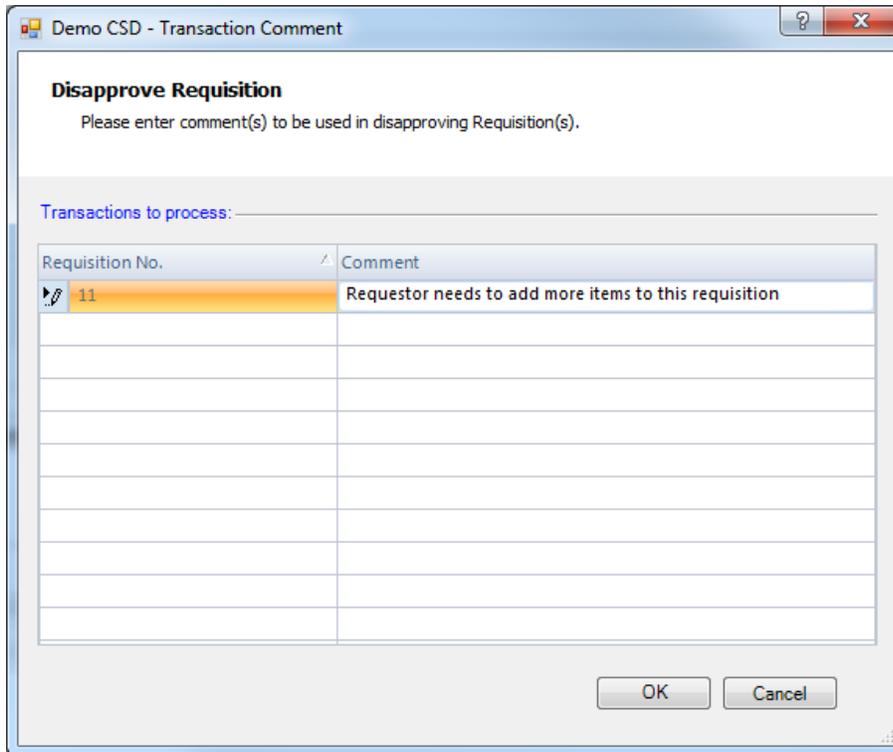
**OR**

From the Requisition detail window,



click . The Disapprove Requisition – Transaction Comment window displays.

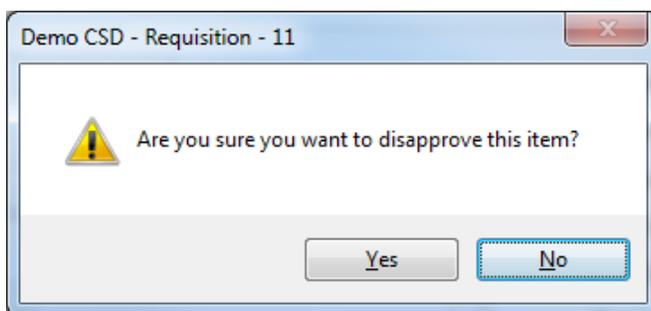
- Use this window to enter any necessary comments for the disapproval.



Requisition No.	Comment
11	Requestor needs to add more items to this requisition

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

- 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.

## Print Requisitions

To preview and/or generate a printout of the requisition(s) that either you entered or 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.

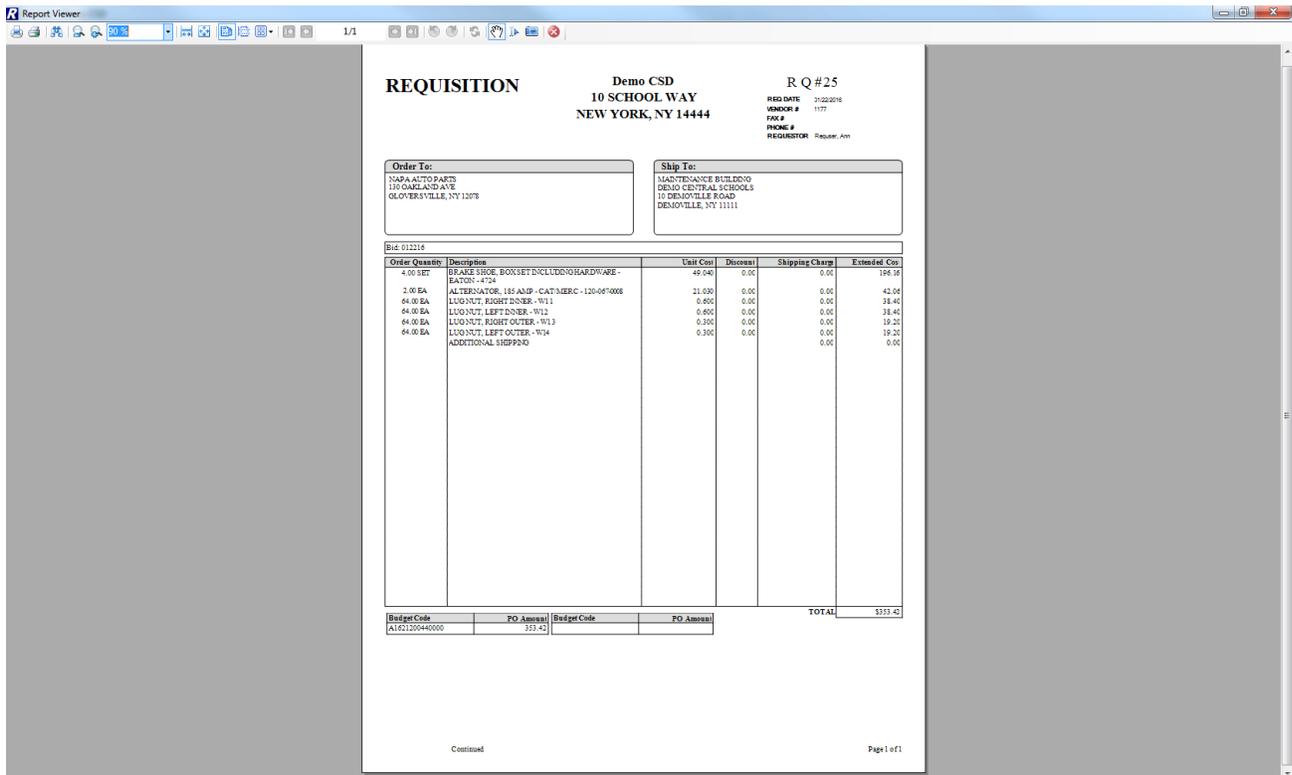
Requisition Number	Vendor Name	Building Name	Requestor	Description	PO Total	Approval Path
8	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requirer, John	Football Equipment For Varsity...	144.00	Middle School Ap...
11	ABC SPORTS & FITNESS	ADMINISTRATIVE CENTER	Requirer, John	Baseball Bag For Varsity Team	144.00	Middle School Ap...
12	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requirer, John	Basketball Ball Rack for Middle S...	199.98	Middle School Ap...
13	ABC SCHOOL SUP.	ELEM SCHOOL #66	Requirer, John	Glue	14.76	Middle School Ap...
14	ABC SPORTS & FITNESS	ADMINISTRATIVE CENTER	Requirer, John	Baseball Bag For Varsity Team	144.00	Middle School Ap...
15	ABC SPORTS & FITNESS	MIDDLE SCHOOL #70	Requirer, John	Basketball Ball Rack for Middle S...	199.98	Middle School Ap...
16	ABC SCHOOL SUP.	ELEM SCHOOL #66	Requirer, John	Glue	14.76	Middle School Ap...
25	NAPA AUTO PARTS	MAINTENANCE BUILDING	Requirer, Ann		353.42	Middle School Ap...
28	ABC SCHOOL SUP.	HIGH SCHOOL #77	Requirer, Bob		25.00	Middle School Ap...

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

choose to save the file as a .pdf file. Click  to print the requisition to the selected printer or to a .pdf file.

4. To preview a requisition, highlight the requisition. Click  to open the report viewer.



**REQUISITION** Demo CSD R Q #25  
 10 SCHOOL WAY  
 NEW YORK, NY 14444

ORDER DATE: 3/22/2016  
 VENDOR # 1177  
 PO #  
 REQUISITOR Requisition

**Order To:** 1549A HUNTO PARTS  
 110 GARLAND AVE  
 GLOVERSVILLE, NY 12078

**Ship To:** TEACHERS UNITE LOCAL  
 DEMO CENTRAL SCHOOLS  
 10 DEMOVILLE ROAD  
 DEMOVILLE, NY 11111

Bid: 012216

Order Qty	Description	Unit Cost	Discount	Shipping Charge	Extended Cost
4.00	REF. BLAKE S/SIDE, BOX SET INCL. 10000 HARDWARE - RAYON - 4724	49.00	0.00	0.00	196.00
2.00	EA ALTERNATOR, 125 AMP - CAT. 388C - 120-0670000	21.00	0.00	0.00	42.00
64.00	EA LUG NUT, ROSET DINNER - W11	0.600	0.00	0.00	38.40
64.00	EA LUG NUT, LEFT DINNER - W12	0.600	0.00	0.00	38.40
64.00	EA LUG NUT, ROSET OUTER - W13	0.300	0.00	0.00	19.20
64.00	EA LUG NUT, LEFT OUTER - W14	0.300	0.00	0.00	19.20
	ADDITIONAL SHIPPING			0.00	0.00
<b>TOTAL</b>					<b>\$353.40</b>

Budget Code	PO Amount	Budget Code	PO Amount
A1621200440000	353.40		

Continued Page 1 of 1

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.

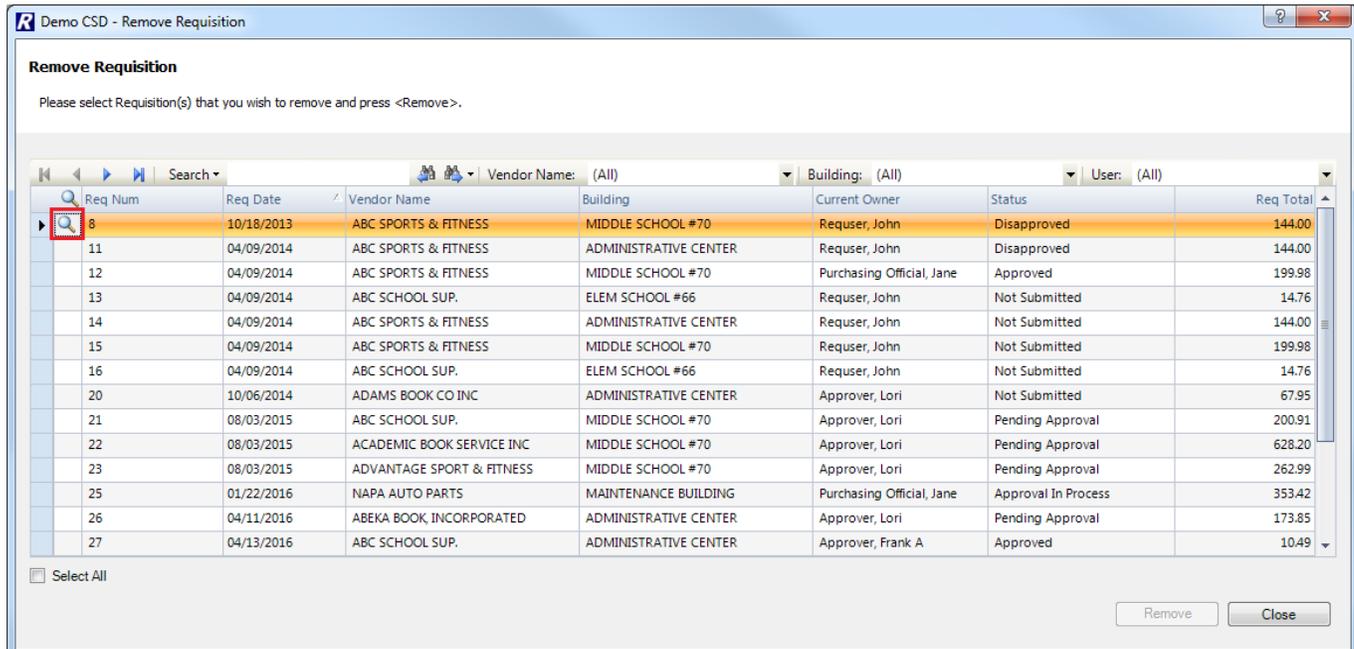
If the requisition originated from a Bid, the bid number is displayed beneath the section labeled **Order To** and the vendor item reference number is displayed in the section labeled **Description**.

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.



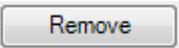
This window displays the requisition number, requisition date, vendor name, building, current owner, current status, and requisition total dollar amount.

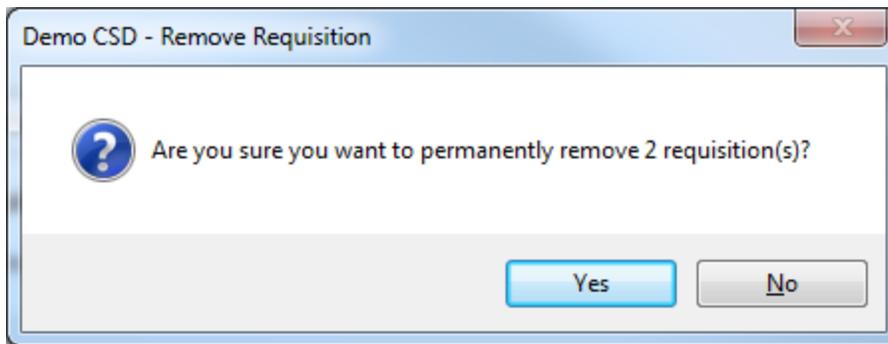
To view the requisition, highlight the appropriate requisition and click the lookup button  that displays to the right of the line indicator . The requisition detail window is displayed. The requisition detail is broken out into 6 parts: Requisition Address, Requisition Line Items, Account Distribution, 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

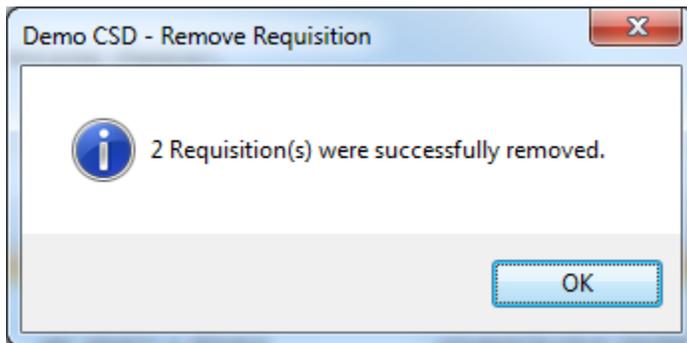
This option is used to remove or delete a selected requisition(s).

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



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

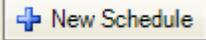


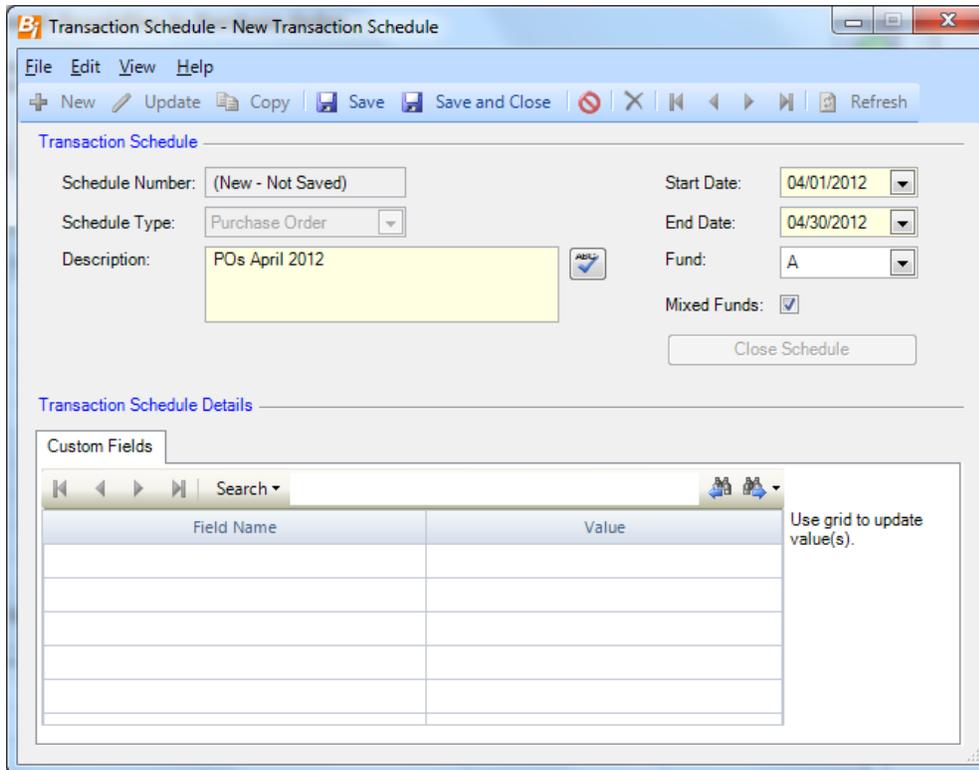
Click OK on the message window that indicates that the requisitions were successfully removed.





## Adding a New Schedule

1. Click  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.



**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 Fund: A

Mixed Funds:

Close Schedule

**Transaction Schedule Details**

Custom Fields

Field Name	Value

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.**

**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    March 2016 Reqs to POs    3/1/2016 - 3/31/2016    + New Schedule

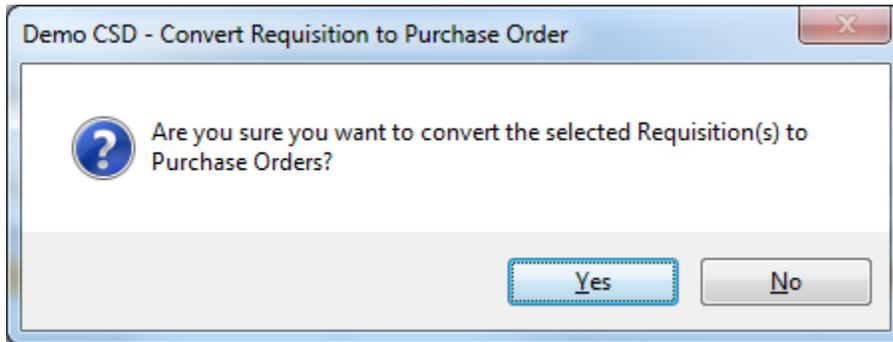
Search    Refresh

Requisition Number	Date	Vendor	Creator	Building
24	01/22/2016	NAPA AUTO PARTS	Requirer, John	TRANSPORTATION

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 .

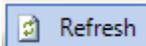


Choose **Yes** to convert the requisitions to purchase orders. Once you process the requisition conversion, the requisition is removed from the listing and can be seen in nVision Accounting on the selected schedule in the Computer Purchase Order routine.

Computer PO							
Schedule: A - 7		March 2016 Reqs to POs		3/1/2016 - 3/31/2016		New Schedule	
Search		Building: (All)		Ship To Contact: (All)			
Drag a column header here to group by that column.							
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



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