

School Administrative Assistant Instructions for eProcurement Requisitions

(Creating a requisition for yourself)

Before starting, please make sure your browser settings are set to allow pop-ups:

- Click the Chrome menu on the browser toolbar.
- Select Settings.
- Click Show advanced settings.
- In the "Privacy" section, click the Content settings button.
- In the "Pop-ups and redirects" section, click the toggle switch to change from blocked to allowed

You will access an online marketplace through a requisition in iVisions, using the eProcurement option.

Log into iVisions (eProcurement is only available in the iVisions web portal)

- 1. Go to My Workflow
- 2. Select Connection Group
- 3. Go to Purchasing and Payables
- 4. Purchasing
- 5. Control Panel

Click the green + sign to create a new requisition

🖱 Contro	Panel
File A	ctions Help
Req. No.	
PO No.	
Vendor	
	Show Paid Colur
?	æ 🔳 🔳 🕂 🕞 🔍 🚜 🔍
Reg	No Reg Date Reg App

In the Vendor field, use 'EqualLevel' as a placeholder. Later you will go back into the requisition and enter the specific supplier that you are purchasing your items from. Fill out the 'Ship-to' and 'Requester' fields. Enter "EPROCUREMENT" in the 'Order Via' **AND** 'Project' fields. See a sample of the Requisition information below:

Requisition De	tail	Addresses	Notes	PO Board R	leport					
Requisition Info	orma	ation	_			Orc	ler Informatio	on		_
Req. Number			Date	7/31/2019		Or	der Via	EPROCUREN	1ENT	-
Vendor	EQL	JALLEVEL INC.			-	Pro	oject	EPROCUREN	1ent	-
Ship To	CVL	JSD WAREHO	USE - PUF	२	-	Da	te Required	8/15/2019		
DAC	PUR	RCHASING			-	Or	der Type	Purchase Or	der	-
Requester	CLA	Y, SHARON		🚽 🗌 W9 R	cvd	Re	ference			
Buyer					-	Ам	vard Number			-

Click 'Actions' and select 'eProcurement'.

c	tions Help	
	Split Fund	
	Copy Line	
	Recalculate Tax & Freight	
	Distribute Tax & Freight	
	Apply Discount	
	Import from Excel	
	Validate Requisition	
	Check Budget	
	Vendor Web Site	
	eProcurement	
	Accept Proposed Vendor	
	Insert Warehouse Items	

You will now start your shopping from our new Guided Buying Marketplace.

		Welcome to	the Cajon Valle	y Union Scho	ol District Marketplace.
		?	\bigcirc		-
Announcements	User Documentation	Shipping Information	Audiovisual Equipment	Books	Classroom/Office Supplies
Early Childhood	Industrial & Operations	Ink & Toner	PE Supplies	Printers	Science
	A mart		2:-?-?		
	CA.				
Seasonal & Motivational	Sensory & Special Needs	Warehouse Stock	Miscellaneous		

There will no longer be a search bar shown at the top of the screen.



The new tiles will make it easy to shop by category. Within each category, you will find the contracted suppliers with the best value items.

To start shopping, just click on any of the category tiles.





Make sure to check out the Announcements tile for any news or updated information regarding the marketplace.

Once in a category tile, you will be provided with the approved supplier's informational homepage, catalog of items or if there are multiple approved suppliers, you will be directed to a page of approved suppliers for the category. From there, you can shop for your items, add them to your cart and check out.



As always, Pay careful attention to the unit of issue; whether the item is sold as a package, by the dozen, each, etc. Items from multiple suppliers may be added to the same cart, however, a separate requisition for each supplier will need to be created. Be sure to check the shipping policy for each supplier, which may include minimum order requirements to avoid shipping fees.

Add items to your cart on that supplier's site as you would during a typical online shopping experience. **Please make sure quantities are correct as this is the last time changes will be able to be made.** If you are using Amazon, please select free shipping to avoid being charged for shipping costs, ignore the shipping address and proceed through to checkout. At checkout, you will transfer/submit the cart back to EqualLevel. Once transferred back to EqualLevel, complete the checkout process as specified below.

Once you've finished adding all your items from various suppliers, click "View Cart". Review the list of items in your cart and verify the quantities. If you need to remove an item from your cart, click the checkbox on the left and click "Remove Selected". To adjust the quantities, enter the new quantity and click "Update Quantities". Then click "Checkout".

EqualLe	evel	Sharon Clay	Transferred Carts 🕕	Quotes	Support	-0-	Return to Application
All • Search	by keyword or part number		٩				Supplier Sites +
Shopping Ca	art						
Displaying 1 - 1	of 1 results						
Restore Last Cart					Emailin	ms Expo	t PDF Export C\$V
0	Item				Price	Quantity	Item Total
. 1	Power Pent Lakeshore Learning (Supplier Part # BD530)			51	0.44 EA	1	\$10.44
Copy Selected +	Remove Selected						Update Quantities
					Total:		\$10.44

Choose the first supplier you want to import to iVisions.

Single Vendor Checkout

Your ERP system is configured for single vendor requisitions. Select below which supplier's items you would like to checkout back to your ERP system. The other items will remain in your cart and can be checked out on your next visit.



Click Checkout.



You will be notified that your items have been submitted to Infinite Visions.

eProcurement - Cart Received - Google Chrome





Your items have been submitted to Infinite Visions. Once in Infinite Visions, open the Purchasing & Payables Control Panel to continue with your Requisition. It is okay to close this page.

Go back into your iVisions Control Panel.

Search for EqualLevel in the Vendor field and hit apply. You will see the requisition you just created at the top of your grid.

Contr	ol Panel																			+	9 - 0
File	Actions H	elp																			
Req. No.	6				DAC				2		Apply										
PO No.					Project				2	Ē	Clear										
Vendor	SCHOOL S	PECIALTY		-	View	All		k	2												
	Show Pa	iid Column				Show Account D	etail		-												
* *	2 🖬 1	•	٩.1	🕻 🔍 Exp	oort To 👻 🛄	- 8 -															
Re	eq. No.	Reg. Date		Req. App.	Vendor Name		PO No.	R	PO Date		Amount		Status		Next Approver		Next Approver Name		DAC		Requester
	1		m 🝸	5	1	T.	1			m 🝸		1		T	5	T I		7		7	6
1	2901976	09/12/2018		No	SCHOOL SPECIA	ITY		3 0	1			\$0.00	Open		Orig			1	PURCHASING		VEGA, DAWN

Double click to open the requisition.

Make sure to change the vendor name to the supplier you are checking out with at this time

Double-click on the first line item, add your budget code to the account field, tab through the other fields, zero out freight and save.

Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	ice Tax		Line Total	Item Number	-
	0100.0000.000.00000000.000.000.0	1	EA	1468086	RUBBERBANDS 17IN 55 GALLON C#	\$5.47		\$0.45	\$0			

To add the same budget code to the rest of the line items, click once on line one, hold down shift and click on the last item. Go to 'Actions' and select 'Assign account to selected lines'.

	Board Report											
opy Line	-	Order Information			O Information							
ecalculate Tax & Freight	2018	Order Via	PROCUREMENT	-	PO Number 0							
istribute Tax & Freight	~	Project	PROCUREMENT	-	PO Date							
pply Discount	SE 😴	Date Required 9/	28/2018		Revision 0							
nport from Excel	*	Order Type	urchase Order		Req. App. No							
alidate Requisition	W9 Rovd	Reference			Closed Date							
heck Budget		Award Number			Status Open							
isert Warehouse Items		Qty	Unit	Part Numbe	r Description	Unit Price	Ext Price	Тах	Freight	Line Total	Item Number	
ingle Line Entry	Norman and American		0					-				8
lanage Documents	0.0	1.00000	0 EA	008979	GLUE ELMER'S SCHOOL GALLON	8.6300	\$8.63	\$0.71	\$0.00	\$9.34		-
		1.00000	0 EA	008151	ARTISTA II PINT	1.3600	\$1.36	\$0.00	\$0.00	\$1.36		
fanage Vendor Documents			0 54	006186	TISSUE SPECTRA 20X30 WHITE 24 SHEETS (OLIIRE)	0.7600	\$0.76	\$0.00	\$0.00	\$0.76		
anage Vendor Documents isign account to selected lines		1.00000			ALLERIA DECIMAL	140 M AS 1						
lanage Vendor Documents ssign account to selected lines		1.00000	0 EA	160-1456	PENCIL CRAYOLA COLORED FULL SIZE PK/12	1.0000	\$1.00	\$0.00	\$0.00	\$1.00		
anage Vendor Documents		1.00000	0 EA 0 EA	160-1456 017670	PENCIL CRAYOLA COLORED FULL SIZE PK/12 PENCIL LADDIE W/ERASER NO.2 SOFT YELLOW DIX13304 PACK OF 12	1.0000	\$1.00 \$2.19	\$0.00 \$0.00	\$0.00 \$0.00	\$1.00		
anage Vendor Documents		1.00000 1.00000 1.00000 1.00000 1.00000 1.00000	0 EA 0 EA 0 EA	160-1456 017670 027343	PENCIL CRAYOLA COLORED FULL SIZE PK/12 PENCIL LADDIE W/ERASER NO.2 SOFT YELLOW DIX13304 PACK OF 12 PEN GREEN BALLPOINT WRITE BROS STUCK MERLING MEAN OF 10	1.0000 2.1900 0.9700	\$1.00 \$2.19 \$0.97	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00	\$1.00 \$2.19 \$0.97		

You will need to recalculate tax. Go to 'Actions' select 'Recalculate tax & freight' and check the Tax box to calculate.

When finished click 'Submit for approval", then click 'OK'.

3		8.000000		\$20.93	\$0.71	\$0.00	\$21.64		
Hold Account	Submit for Approval	Sales Tax Percent 8.2500%	Use Tax Percent 8.2500%						
10 C Mode: Edit	(1 of 1)						\rightarrow	OK	Cancel
-									2.2

The requisition will now route through the typical approval process. Once approved, Purchasing will send the order electronically and the order will ship to your site. Please import the shopping lists and have them approved as soon as possible so your order can be expedited.

Print *or* save a copy of the requisition for your records.

Since a separate requisition is needed for each vendor, you will need to create another requisition for each remaining supplier you shopped with.

Once you have created your new requisition and are back in the Marketplace, you will click on my cart, check the box for one of the remaining suppliers, and proceed to check out.

EqualLevel	Dawn Vega Transferred Carls 10 Quotes Survey E 2 - Return to Application
All - Search by keyword or part number	Q My Cart \$26%3 Shopping Lists Supplier Sites •
Shopping Cart	
Displaying 1 - 2 of 2 results	
0 ym	ertail items Export PUP Export CSV Price Quantity Item Total
Jumbo Pencils Lakeshore Learning (Supplier Part # MN5)	\$14.24 EA 1 \$14.24
ECLIPSE BALL GAME BALL BSN Sports / US Games (Supplier Part # 1298055)	\$12.59 EA 1
Copy Selected Remove Selected	Update Quantities
	Total: \$26.83
	Checkout

You will be notified again that your items have been submitted to Infinite Visions. Go back in, find your newly created requisition, and complete the steps to submit it.

Notes:

- Amazon only holds pricing and availability of items for 7 calendar days after a shopping cart is created. The cart needs to be imported to a requisition and through the approval process within the 7 day window, otherwise pricing and availability will fluctuate.
- For a quick reference list of best value items comparable to those previously stocked in the Warehouse, please visit the School Specialty site in the 'Classroom/Office Supplies' Category and click on My List.



Once items are received, please post your receiving in iVisions so Purchasing can process the invoice for payment.

Electronic Receiving

Beginning with the 23/24 iVisions year, paper "Receiving Reports" will no longer be accepted. All receiving must be posted electronically in iVisions. For all orders delivered directly to your school site by a vendor (UPS, FedEx, Amazon courier, etc), orders must be checked for accuracy and posted to iVisions within one week of receipt. Items that are posted will indicate your approval to process payment. Orders delivered by CVUSD Warehouse/Logistics staff should not be posted by sites. Logistics staff will post orders delivered to the warehouse.

Instructions

- In iVisions, go to the 'Purchasing & Payables' menu, then:
 - o 'Receiving' Menu
 - 'Purchase Order Receiving' screen
- Press the Green '+' button to add a new receiving transaction
 - Enter the PO # in the "PO Number" field (choose PO from drop-down). Note: you will only be able to select open PO's. PO's that have been closed (already received and paid) cannot be selected for receiving.
- The PO details will be displayed as shown below.

Actions Help											
PO Number 12400737	- · ·	/endor		AMAZON	COM						
		Ship To		CVUSD W	AREHOUS	SE - FH					
	1	DAC		FLYING H	ILLS						
	1	Req		TRO,	ARIELA						SAVE when
Description of item(s) ordered, verify items received match items ordered	× ∦ ⊀	(par	ck, each ,	etc)	Qty=Qty to post now					Add notes if posting a correction	editing individual
Description	Part Number	GFA	Unit	YTD	Qty	Qty Ordered	ltem Number	Case Pack	Item Cost	Notes	
			YTD= qty al	year-to-date ready posted		Qty ordered		-			
Educational Insights Alphabet Beanbags, Learn Letters, Toddler Learning Toy, Preschool Toys, Set of 26 Beanbags, Ages 3+	B0009JI3S8		EA	↓ _{0.00}	0.00	■ qty on PO		1.00	\$20.34		
Gamenote Double Sided Magnetic Letter Board - 2 in 1 Alphabet Magnets Tracing Board for Toddlers ABC Letters Uppercase & Lowercase Practicing	B081GTG1ZW		EA	0.00	0.00	1.00		1.00	\$21.64		
Crazy Aaron's Hide Inside! Mixed Emotions Thinking Putty	B08XK3P5LZ		EA	0.00	0.00	1.00		1.00	\$15.86		
LovelnUSA Punch Craft Set, 6PCS Hole Punch Shapes Hole Puncher for Crafts Paper Punches Decorative Snowflake Star Circle Hole Puncher for Crafting Scrapbook Nail Designs	B096XSLQ39		EA	0.00	0.00	1.00		1.00	\$10.80		
Crazy Aarons Doodle Putty with Puppy Mold	B097NP7SHC		EA	0.00	0.00	1.00		1.00	\$16.18		

- <u>Carefully compare</u> each line item on the PO, compared to items you have physically received at your site.
 - o Did you receive the correct quantity of each item?
 - Do the descriptions match?
 - Are the items in good condition with no damage?
- If the answer to all these questions is yes, and your order has been received **COMPLETE with no missing or damaged items**:
 - o Go to the 'Actions' menu and click 'Receive all Remaining Items'

- If the answer to any of these questions is no and you only received a **PARTIAL order**:
 - You will enter the quantity of each line item received.
 - Check the 'YTD' column to verify any quantities that were already posted.
 Double-click the line item you need to receive.
 - Enter the quantity in the 'Qty' Field. You may add notes if needed. <u>Click the save (disk) icon to save that line.</u>
 - Repeat for each line that has quantities received, saving each line.
 - Review the quantities in the Qty column to make sure they are correct for each item.
 - Click "Save" at the bottom right of the screen.
 - <u>OR</u> If you have received a partial order but it is mostly complete:
 - You can use the "Receive all Remaining Items" feature, but then remove the items not received.
 - For example, if your PO has 10 line items and you received 9 out of 10 lines, to save time, choose receive all remaining items, then before hitting "save", double-click the one line item you did not receive and change the qty on that line to 0 (or whatever # you received) and <u>click the save (disk) icon to save that line.</u>
 - Then click "Save" at the bottom right of the screen. Even if you saved each line, you also need to hit 'Save' on the bottom of your screen when you're finished editing line items.



- Pack slips / receiving paperwork may be attached in this screen using "Manage Documents". This is not a requirement, but remember, your posting must be accurate in order to ensure accurate payment processing.
- If you have damaged or wrong items:
 - Do not post receiving for those items in iVisions. For example, if you ordered 5 and you received 5 but 1 was damaged: only post the 4 items you received in good condition. Add a note 1 was damaged or wrong. Email <u>receiving@cajonvalley.net</u> to report details of the issue. Reference the PO # in the subject and add pictures/details so Purchasing can work with the vendor for a credit or replacement.
- If you MAKE A MISTAKE on your receiving:
 - Try to avoid errors but don't worry, you can fix your mistakes!
 - Example: You receive all then realize you are missing qty 1 of Line 1 of the PO.
 - Double click on that line item and enter "-1" in the quantity.
 - This will reduce the number received by 1 to reflect the accurate quantity.
 - Example: You realized you have double posted (received an item twice).
 - Double click on that line item and enter "-1, -2, etc" in the quantity.
 - The Qty Ordered should match the YTD if done correctly.
- Always double-check your entries. Remember, we will be using this information to confirm what you have received in order to pay vendor invoices. Please make sure it's correct so we don't pay for items that were not received. All receiving must be posted electronically. No paper receiving reports are to be completed. NO receiving needs to be when your items are delivered by district staff.

- Special Scenarios

- Field Trips After the field trip is complete, post the receiving with the number of students that actually attended the trip on the student line item. Post the number of chaperones on the chaperone line item. Depending on the policy of the venue, we may be required to pay for the total reservation, a flat fee, or only the number that actually attended. If you received an invoice from the vendor, please review it for accuracy then email it to invoices@cajonvalley.net with a message that it's approved for payment.
- <u>Software</u> For digital software, the download information will be emailed to the end user that was specified on the P.O. (teacher, principal, etc.). Please follow up with the end user to confirm they received the software. Once they have access, the receiving should be posted as complete.
- Services (assemblies, ICA's, contracts, subscriptions, etc) For one-time services that are fully complete such as one day assemblies, please post the receiving as complete as soon as the service is finished.
- For ongoing services (recurring, repeated services such as 549 Sports or magazines), do not post the receiving since it will not be complete after the first service. Instead, the invoices will need to be reviewed/approved and emailed to <u>invoices@cajonvalley.net</u> as the vendor invoices you. No services will be paid without an approved invoice.
- <u>Shopping PO's</u> No need to post receiving electronically. Receipts must be emailed to <u>invoices@cajonvalley.net</u> as soon as the shopping has occurred. Please specify the PO# in the subject line.
- <u>Cancelled Items</u> If Purchasing is aware that an item was cancelled by the vendor, the item will be removed from the PO and noted in the internal notes. Do not post items that you did not receive. If there is a cancelled item still showing on the PO, don't post that item.
- <u>Items delivered by Warehouse</u> If your order is delivered by District
 Warehouse/Logistics/Purchasing staff you do not need to post the receiving. It has already been posted.
 - Please contact the Purchasing Department with any questions. We are here to help!