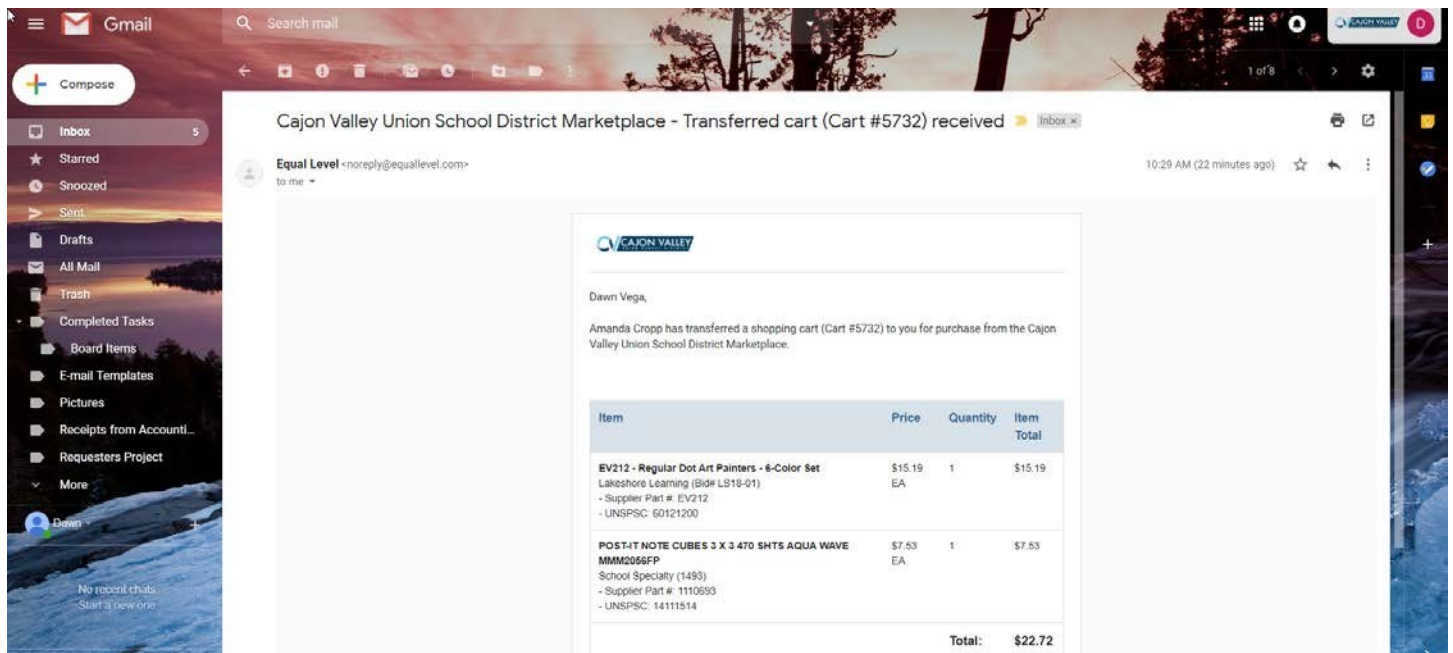




## School Administrative Assistant Instructions for eProcurement Requisitions

(Creating a requisition for a teacher or staff member)

When creating a requisition for a teacher or staff member, you will receive an email from EqualLevel stating that you have been transferred a shopping cart.



You will access the requesters shopping cart through a requisition in iVisions, using the eProcurement option.

(Note: If the shopping cart is compiled of items from different suppliers like the example above, you will need to create a separate requisition for each supplier, one at a time.)

### 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.

#### Suppliers

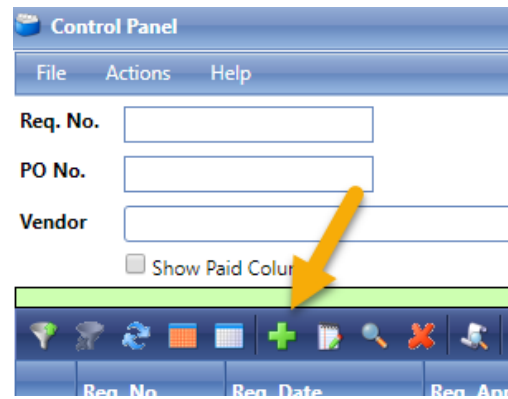
☒ BSN Sports / US Games (1 item)

☐ Lakeshore Learning (1 item)

Checkout

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



Control Panel

File Actions Help

Req. No.

PO No.

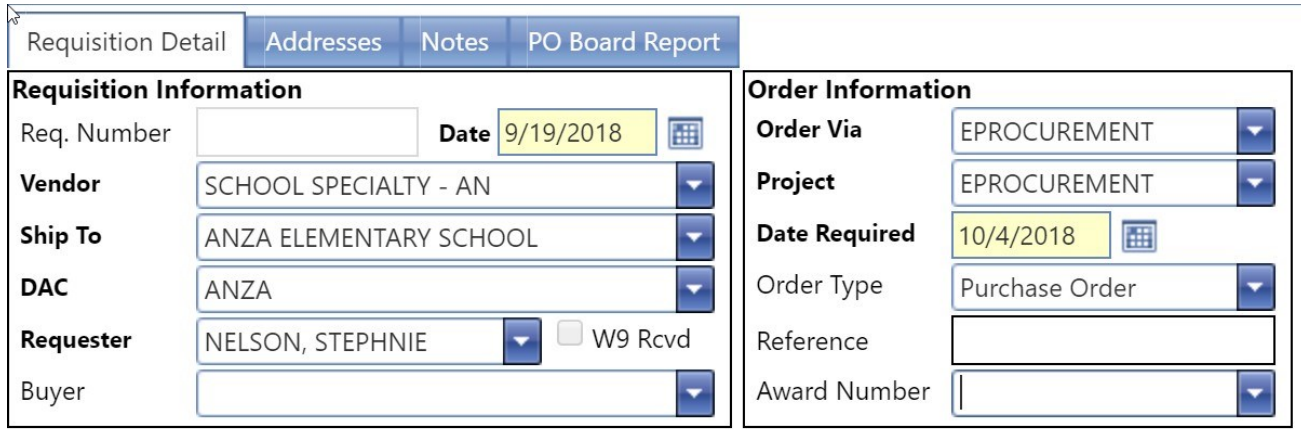
Vendor

☐ Show Paid Columns

Reg. No. Reg. Date Reg. App.

Click the green + sign to create a new requisition

In the Vendor field, enter a supplier that is specified in the requester's cart. 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 Detail Addresses Notes PO Board Report

**Requisition Information**

Req. Number  Date

Vendor

Ship To

DAC

Requester  ☐ W9 Rcvd

Buyer

**Order Information**

Order Via

Project

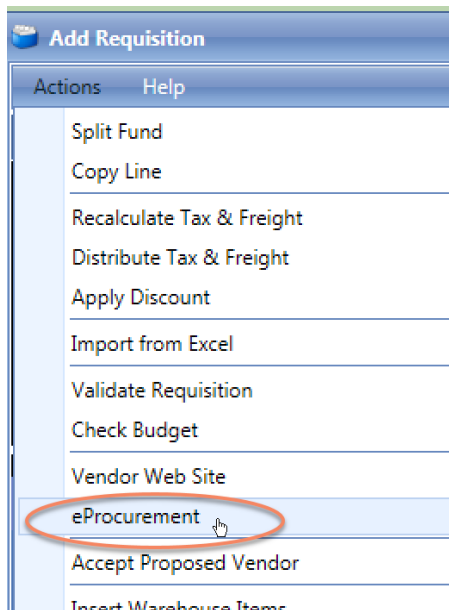
Date Required

Order Type

Reference

Award Number

Click 'Actions' and select 'eProcurement'.



Add Requisition

Actions 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

This will take you to EqualLevel where you will access the carts that have been transferred to you.

All Search by keyword or part number



## Transferred Carts

You have received 2 transferred carts that require checkout

Displaying 1 - 2 of 2 results

|                   |                |                  |                |                                   |             |              |                         |                  |                            |
|-------------------|----------------|------------------|----------------|-----------------------------------|-------------|--------------|-------------------------|------------------|----------------------------|
| All               |                | From: 02/04/2019 | To: 02/04/2019 | Search                            | Filter      | Export Carts |                         | Export Item Data |                            |
| Checkout Selected |                | Decline Selected |                |                                   |             |              |                         |                  |                            |
|                   | Name           | Items            | Total          | Suppliers                         | Status      | Created By   | Created On              | Purchased On     |                            |
|                   | Cart #5732 - 1 | 1                | \$15.19        | Lakeshore Learning (Bid# LS18-01) | Transferred | Amanda Cropp | 02/04/2019 10:28 AM PST |                  | <div>CheckoutDecline</div> |
|                   | Cart #5732 - 2 | 1                | \$7.53         | School Specialty (1493)           | Transferred | Amanda Cropp | 02/04/2019 10:28 AM PST |                  | <div>CheckoutDecline</div> |

Choose the cart that corresponds to the supplier you selected for the 'vendor field' in your requisition and click check out.

Click  again.

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

eProcurement - Cart Received - Google Chrome

<https://iv.cajonvalley.net/EIW/landing/eProReceived.aspx?EPRO=A2E56B48-F808-415A-B845-56A5C39FBF74>

 **iVisions® Web Portal**  
Online Workflow

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 the supplier in the Vendor field and hit **APPLY**.

You will see the requisition you just created at the top of your grid.

Control Panel

File Actions Help

Req. No.

DAC

Apply

PO No.

Project

Clear

Vendor

View

☐ Show Paid Column

☐ Show Account Detail

Export To

|   | Req. No. | Req. Date  | Req. App. | Vendor Name      | PO No. | R | PO Date | Amount | Status | Next Approver | Next Approver Name | DAC        | Requester  |
|---|----------|------------|-----------|------------------|--------|---|---------|--------|--------|---------------|--------------------|------------|------------|
| 1 | 2901976  | 09/12/2018 | No        | SCHOOL SPECIALTY |        | 0 | 0       | \$0.00 | Open   | Orig          |                    | PURCHASING | VEGA, DAWN |

Double click to open the requisition.

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 | Tax    | Freight | Line Total | Item Number |
|------|----------------------------------|-----|------|-------------|-------------------------------|------------|-----------|--------|---------|------------|-------------|
|      | 0100.0000.000.0000-----000.000.0 | 1   | EA   | 1468086     | RUBBERBANDS 17IN 55 GALLON C2 | \$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'.

The screenshot shows the 'Edit Requisition' window. On the left, the 'Actions' menu is open, and 'Assign account to selected lines' is highlighted. The main area displays a table of requisition line items. The table has columns: Qty, Unit, Part Number, Description, Unit Price, Ext Price, Tax, Freight, Line Total, and Item Number. The items listed are:

| Qty  | Unit     | Part Number | Description | Unit Price  | Ext Price | Tax            | Freight       | Line Total    | Item Number    |
|------|----------|-------------|-------------|---|-----------|----------------|---------------|---------------|----------------|
| 00.0 | 1.000000 | EA          | 008979      | GLUE ELMER'S SCHOOL GALLON                                  | 8.6300    | \$8.63         | \$0.71        | \$0.00        | \$9.34         |
|      | 1.000000 | EA          | 008151      | PAINT TEMPERA BLACK CRAYOLA ARTISTA II PINT                 | 1.3600    | \$1.36         | \$0.00        | \$0.00        | \$1.36         |
|      | 1.000000 | EA          | 006186      | TISSUE SPECTRA 20X30 WHITE 24 SHEETS (QUIRE)                | 0.7600    | \$0.76         | \$0.00        | \$0.00        | \$0.76         |
| 4    | 1.000000 | EA          | 160-1456    | PENCIL CRAYOLA COLORED FULL SIZE PK/12                      | 1.0000    | \$1.00         | \$0.00        | \$0.00        | \$1.00         |
| 5    | 1.000000 | EA          | 017670      | PENCIL LADDIE W/ERASER NO.2 SOFT YELLOW DIX13304 PACK OF 12 | 2.1900    | \$2.19         | \$0.00        | \$0.00        | \$2.19         |
| 6    | 1.000000 | EA          | 027343      | PEN GREEN BALLPOINT WRITE BRICK STICK MEDIUM PACK OF 12     | 0.9700    | \$0.97         | \$0.00        | \$0.00        | \$0.97         |
|      |          |             |             | <b>8.000000</b>   |           | <b>\$20.93</b> | <b>\$0.71</b> | <b>\$0.00</b> | <b>\$21.64</b> |

At the bottom, there are checkboxes for 'Hold Account' and 'Submit for Approval', and a 'Mode: Edit (1 of 1)' button. The 'OK' and 'Cancel' buttons are at the bottom right.

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', hit 'OK'.

This close-up shows the bottom of the window. The 'Submit for Approval' checkbox is checked. A yellow arrow points to the 'OK' button. The 'Cancel' button is also visible.

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. Your order will be delivered approximately one week after Purchasing sends the order to the vendor. Please import the shopping lists and have them approved as soon as possible so your order can be expedited.

Print **or** save requisition for your records.

**Reminder: Our system is configured for single vendor requisitions, if your staff had carts with multiple suppliers, you will need to create another requisition for each remaining supplier.**

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

Questions? Contact Kellie Pilchen in the Purchasing Department at (619)588-3266, [lauhonpilchenk@cajonvalley.net](mailto:lauhonpilchenk@cajonvalley.net)