

Anonymous Requisition Form Instructions

Step 1. Go to the link provided by your district in order to get to the requisition form.

This will take you to the Requisition Creation Screen:

The screenshot shows a web form for creating a requisition. At the top left are buttons for 'Submit', 'Cancel', and 'Attach'. The form is divided into several sections:

- Requester Information:** 'Requester Email' (text box), 'Attention To' (text box), 'Requested PO Date' (dropdown menu showing '8/8/2016'), and 'Requisition No' (text box with '(Auto)' placeholder).
- Vendor Information:** 'Vendor No' (text box with a binoculars icon), 'Vendor' (large text area), and 'Fund to be used/Notes to Approver' (text box).
- Approval and Delivery:** 'Supervisor/Approver' (dropdown menu with a binoculars icon), 'Deliver To' (large text area), and 'Who will place the order' (dropdown menu).
- Table Management:** A row of buttons: 'Add Line', 'Copy Line', 'Edit Line', 'Delete Line', and 'Upload'.
- Table:** A table with columns: '#', 'Quantity', 'Unit', 'Description', 'Unit Price', and 'Total'. The table is currently empty, displaying 'No data to display'.
- Bottom:** 'Requisition Description' (text box) and 'Submit' and 'Cancel' buttons.

Step 2 (Left Side). Enter your E-mail address in the first box provided. Enter the Vendor No in the respective box. If you do not know the Vendor No, you can click the binoculars to search on your vendor. You can also begin typing the name of the vendor and the list of available vendors will populate automatically. Once this is completed the vendor's name and address will automatically appear in the next box. If you cannot find the vendor you are looking for please contact the board office. If necessary, add any notes for the approver in the box below. You should also define who will be placing the order.

Step 3 (Right Side). Select the Approval Path or Supervisor this requisition should go to for approval. The possible options will be presented with a drop-down menu. This selection will also define the location that the goods will be delivered to. If you need a different Deliver To address than what is presented (or if nothing is presented), you can manually enter an address. If you cannot find the correct Approval Path please contact the board office.

Step 4. Add a description to the Requisition Description Box identifying the general description of the requisition request.

Step 5. Add line item(s) to the requisition. Click on the button that says "Add Line." Then fill out the Quantity, Unit, Price per unit and Description. Once all of the lines are completed click on the "Update" button. If you have more items that need entered, continuing adding lines until finished. Here is what a line should look like:

*Don't forget to add a line for shipping charges if needed

Here is what your screen might look like after adding 3 line items:

#	Quantity	Unit	Description	Unit Price	Total
1	6.000	Chairs	Hon Task Chairs	\$155.00	\$930.00
2	6.000	Floor Mat	Classroom floor mats for chairs	\$45.00	\$270.00
3	1.000	Desk	Desk for science lab	\$235.00	\$235.00

Step 6. If you have supporting documents to go along with your requisition, go to the "Attach" button towards the top of your requisition form.

Once you click the button, you will be able to browse to a location on your computer for a file. You can upload a PDF with this button and your approvers will be able to view your supporting documents.

Step 8. Go to the top of the screen and select the "Submit" button.


Instructions on How to lookup a Vendor No.

Step 1. Next to the "Vendor No" box, click on the binoculars icon:

Vendor No 

Step 2. In the Vendor Name box type in the first few letters of the vendors name, the more letters you enter the fewer the results will be. Then select the "Find" button, a list of results will display in the lower grid. Once the vendor you are looking for is in the results grid, double click on that line and you will be taken back to the main form where the vendor number and address will be populated for you.

Select Vendor X

Vendor Name  Status

Starting Vendor No Ending Vendor No

No	Name	Phone	Address
79212	STANBURY UNIFORMS, INC	(660) 258-2246	PO BOX 100
78760	STANDARD CHAIR OF GARDNER		1 S MAIN ST
78770	STANDARD DISPLAYS	(216) 771-2449	1615 E 25TH STREET
79050	STANDARD STATIONERY CO	(312) 810-1335	2251 S FOSTER
79200	STANDARD WELDING CO	(800) 523-1898	1864 E 28TH STREET
79205	STAN HWYETT HALL	(330) 836-5533	714 N. PORTAGE PATH
625249	STANLEY HUGHES		37675 DOOVYS ST
628405	STANLEY J KIELAR		1005 SANTA FE COURT
8135	STANLEY SECURITY SOLUTIONS,INC	(800) 758-2378	2350 ELDO ROAD

