2018

# How to Enter a Requisition into iVisions

From any district website, under the “Staff Links” tab, click on **iVisions**.

Enter your username and password.

The first screen will be the Welcome page to the Employee Self Service web portal. Click on the **My Workflow** tab on the red line. Choose the appropriate Fiscal Year from the Connection Group drop-down list. Click **Login**.

1. Click on **Purchasing & Payables** on the left side of the screen.
2. Click on **Purchasing**.
3. Click on **Control Panel**.
4. Click on the **Green +** sign (in the middle/left side of the screen). This is the **Add** Button.
5. Enter the **Vendor**, **Requester** and **Order Via** Information. PO Notes are notes that are printed on the PO; Internal Notes are notes that are specific to the requisition and are not printed on the PO (ex: special ordering instructions). Notes are optional.
6. Once the above is completed, you are ready to build your requisition in the section below on the same screen page.
7. **IMPORTANT!** If you are building a large multi-line requisition click on the box next to **Hold Account** at the left-side bottom of the screen. This will save you time entering the account number for each line item.
8. Enter the **Account Code, Quantity, Unit, Part Number, Description** and **Unit Price**. The Ext. Price, Tax, Freight and Line Total will automatically fill in. You must change the default description to reflect what is actually being ordered (i.e, pens, markers, black two-pocket folders). Click on the gray diskette icon to save the line item.
9. You must click on the gray diskette icon after **every line item entry**.
10. When entering many line items on a requisition, it is a good idea to save your requisition often. This is done by clicking on the **OK** button. To add to a requisition that you have saved, choose the requisition, and either double-click on it or click on the edit button (**the notebook icon**) which is between the green plus sign & magnifying glass.
11. When you are completely finished entering items to your requisition, check the box next to **Submit for Approval** (in small print on the far left side, near bottom of screen), then click on **OK**. Now your requisition is in the approver’s queue.

Once the Purchase Order has been created at the district office, you will receive a copy of the PO via e-mail for your files.

# How to Enter a Requisition into iVisions
## Using eProcurement – new in 2018-19
## eProcurement vendors:
## School Specialty, Blick Art Supplies & Lakeshore Learning

Follow the above steps, #1 - #5.

6. Once the above is completed, you are ready to build your requisition via eProcurement option.
7. From the Actions tab, click on eProcurement.
8. Build your cart, either by entering item number or item description. When done choosing items, click on View Cart/Checkout option. **Try to complete within 10-15 minutes; otherwise the system may time out and you will lose all your work.**
9. Click on Proceed to Checkout.
10. Click Submit.
11. Click Transfer.
12. On next screen, you'll see a note that your item has been brought back into iVisions. Close this window.
13. To find the requisition just brought into iVisions, click **Apply**.
14. Choose the requisition you just created by double-clicking on it.
15. On this next screen, you need to double-click each line item and – from the drop-down list – choose the appropriate account code. For each line item, after choosing the account code, click on the far right column diskette.
16. When done doing step #15 for all line items, you can click on **Submit for Approval** and **OK**. Now your requisition is in the approver's queue.

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