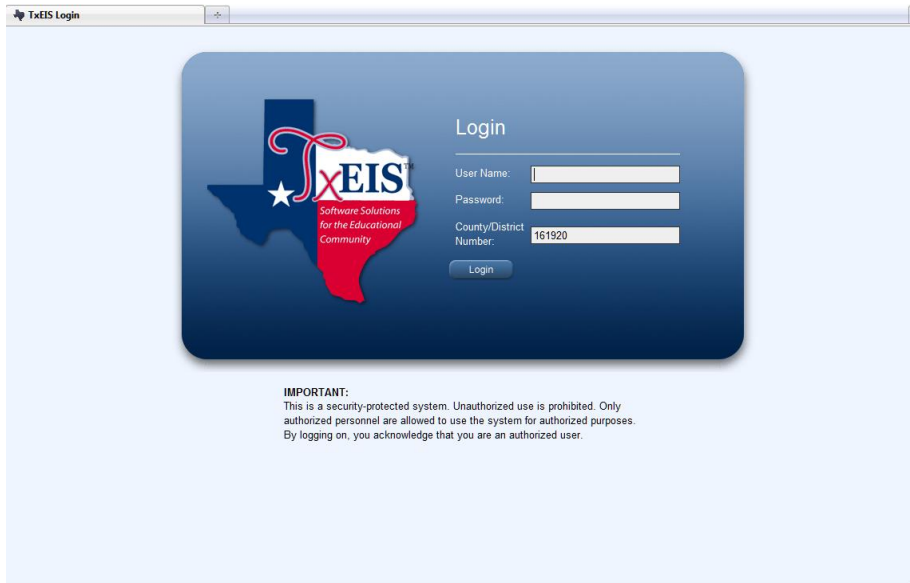




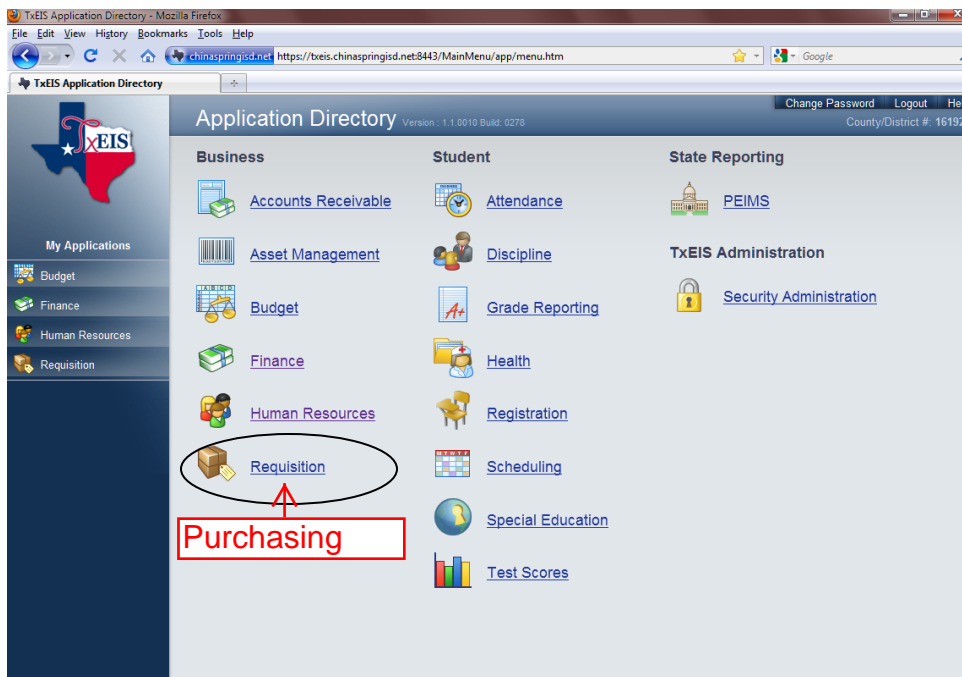
# Entering TxEIS Requisitions

# TxEIS Entering a Requisition

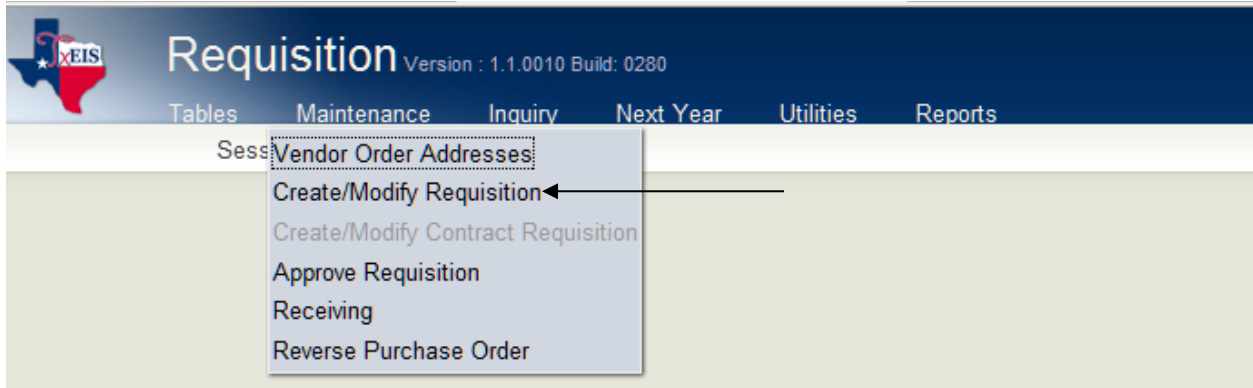
1. Login to TxEIS using your user name and password and county/district number 097902.



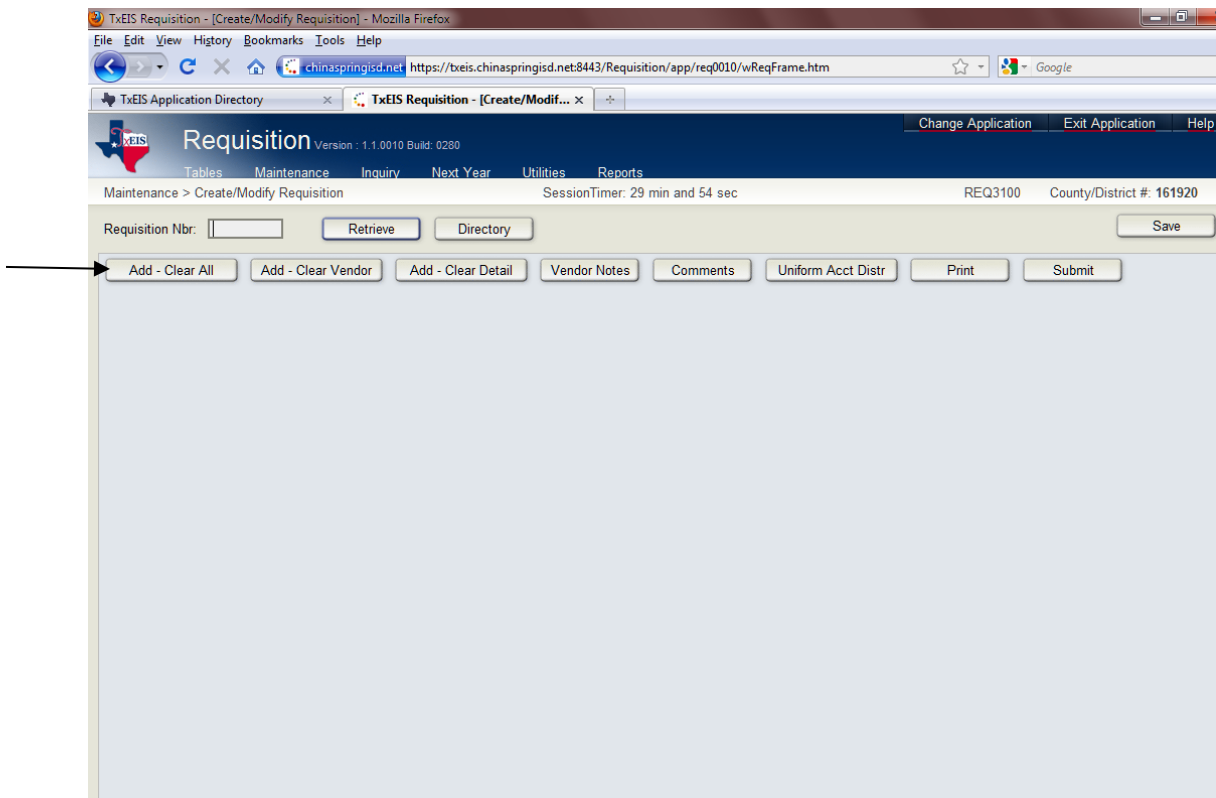
2. Left click on Purchasing



3. You are now ready to enter a Requisition which will eventually become a Purchase Order. At the Requisition window, click on the Maintenance menu and select Create / Modify Requisition



4. You are now at the window where you input a new requisition. Click on Add – Clear All



Enter the information in the relevant fields. You will find that there are many drop down buttons to assist you in making your selections. You may also type in the first few letters in a field and it will pull up the remaining information (ie; vendor name). You will need to email Accounts Payable (Meredith) to have a vendor added to the system. If you select the vendor by name then the number will automatically be filled in.

**\*\*Note:** Vendor Notes will print on the Purchase Order, but Item Notes and Comments do not.

The following fields must be complete: Order for, Shipping Addr, Vendor Name, Reason (ie; 1<sup>st</sup> grade supplies), Bid or quote number (if needed).

To begin adding a list of items you must first hit the +Add button.

The screenshot shows the 'Requisition' application interface. At the top, there are navigation links for 'Change Application', 'Exit Application', and 'Help'. Below this, the user 'Erica Bullock (EBULLOCK)' is logged in. The interface includes a header with 'SessionTimer: 07 min and 00 sec' and 'REQ3100 County/District #: 161920'. A toolbar contains buttons for 'Retrieve', 'Directory', 'Save', and 'Delete'. Below the toolbar, there are buttons for 'Add - Clear Vendor', 'Add - Clear Detail', 'Vendor Notes', 'Comments', 'Uniform Acct Distr', 'Print', and 'Submit'. The main form area contains fields for 'Requisition Per: 09', 'Reference Nbr:', 'Shipping Addr: Administration Office', 'Work Order:', 'Sort Key/Vendor Name: Flatt Stationers, Inc. / Flatt Sta', 'Confirm Only:', 'Vendor Nbr: 00346', 'Attachments:', 'Reason: SUPPLIES', 'Bid Nbr:', 'Priority: R Regular', and 'Freight Cost: 5.00'. Below the form is a table with columns: 'Accounts', 'Item', 'Catalog Nbr', 'Description', 'Unit of Issue', 'Unit Price', 'Quantity', 'SubTotal', 'Discount %', and 'Discount'. The table contains one row: 'Accounts 001 ABC123 PAPER EA Each Each 2.00000 10.00 0.00 0.00% 0.00'. At the bottom right, a red box highlights a '+ Add' button.

The catalog number, description (if you need more space tab over to Long Description and you can enter more information), unit of issue (always use EA each), unit price (total amount of order), quantity (use 1).

After all information for the items are entered hit the refresh totals button.

The screenshot shows the same requisition system interface. The 'Add - Clear All' button is now active. The form fields are populated with: 'Originator: Erica Bullock (EBULLOCK)', 'Requestor: Erica Bullock (EBULLOCK)', 'Requisition Nbr:', 'Date Request: 09-26-2011', 'Date Required: 09-26-2011', 'Order For:', 'Requisition Per: 09', 'Shipping Addr:', 'Sort Key/Vendor Name:', 'Vendor Nbr:', 'Reason:', 'Priority: R Regular', 'Reference Nbr:', 'Work Order:', 'Confirm Only:', 'Attachments:', 'Bid Nbr:', and 'Freight Cost: 0.00'. The table below has columns: 'Delete', 'Note', 'Accounts', 'Item', 'Catalog Nbr', 'Description', 'Unit of Issue', 'Unit Price', 'Quantity', 'SubTotal', and 'Discount'. The table contains one row: 'Delete Note Accounts Item Catalog Nbr Description Unit of Issue Unit Price Quantity SubTotal Discount 0.00 0.00 0.00 0.00% 0.00'. At the bottom left, a red box highlights a 'Refresh Totals' button.

6. After you have input the necessary information, click the save button

The screenshot shows the 'Requisition' software interface. At the top, there is a header with the MEIS logo and the text 'Requisition Version: 1.1.0010 Build: 0280'. Below this is a navigation bar with tabs for 'Tables', 'Maintenance', 'Inquiry', 'Next Year', 'Utilities', and 'Reports'. The main title bar reads 'Maintenance > Create/Modify Requisition' and includes a 'SessionTimer: 20 min and 24 sec' and 'REQ3100 County/District #: 161920'. The form contains several input fields and buttons. A 'Save' button is circled in red. Below the form is a table with columns: Delete, Note, Accounts, Item, Catalog Nbr, Description, Unit of Issue, Unit Price, Quantity, SubTotal, and Discount. The table contains one row with the following values: Note, Accounts, 001, [blank], [blank], [blank], 0.00000, 0.00, 0.00, 0.00. Below the table is a 'Refresh Totals' button and a section titled 'Accounts for item 001' with a table that has columns: Delete, Account Code, Description, Balance Amt, Pct, and Amount. This table is currently empty, showing 'No Rows'.

7. After saving you will then need to submit the requisition. This will forward it to your Principal / Supervisor to be approved. After approval it will be forwarded to the business office for final approval.

Requisition Version: 1.1.0010 Build: 0280

Maintenance > Create/Modify Requisition SessionTimer: 20 min and 24 sec REQ3100 County/District #: 161920

Requisition Nbr: [ ] Retrieve Directory [ Save ]

Add - Clear All Add - Clear Vendor Add - Clear Detail Vendor Notes Comments Uniform Acct Distr Print **Submit**

Originator: Erica Bullock (EBULLOCK) Requisition Per: 09 Reference Nbr: [ ]  
Requestor: Erica Bullock (EBULLOCK) Shipping Addr: [ ] Work Order: [ ]  
Requisition Nbr: [ ] Sort Key/Vendor Name: [ ] Confirm Only:   
Date Request: 09-26-2011 Vendor Nbr: [ ] Attachments:   
Date Required: 09-26-2011 Reason: [ ] Bid Nbr: [ ]  
Order For: [ ] Priority: R Regular Freight Cost: 0.00

Delete	Note	Accounts	Item	Catalog Nbr	Description	Unit of Issue	Unit Price	Quantity	SubTotal	Discount
		Note Accounts	001				0.00000	0.00	0.00	0.
									0.00	

Refresh Totals

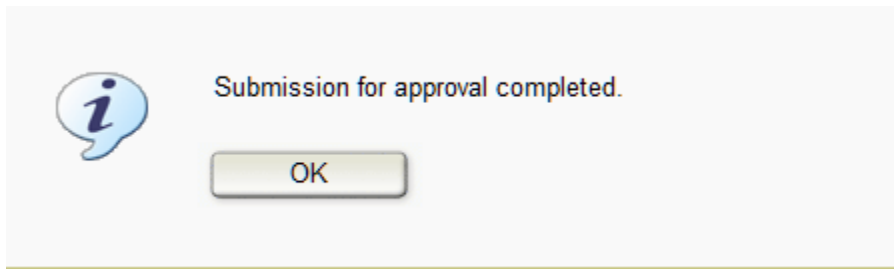
Accounts for item 001

Delete	Account Code	Description	Balance Amt	Pct	Amount
No Rows					

**\*\*NOTE:** You will be allowed to save requisitions if over budget, but not allowed to Submit. You will have to change the amount of your requisition to fall within your budget.

If you change / edit the quantity or amount in the middle section, it does not automatically update the bottom section. You may have to change the total amount in the bottom section manually and save. You will need to hit the Refresh Totals button in both sections.

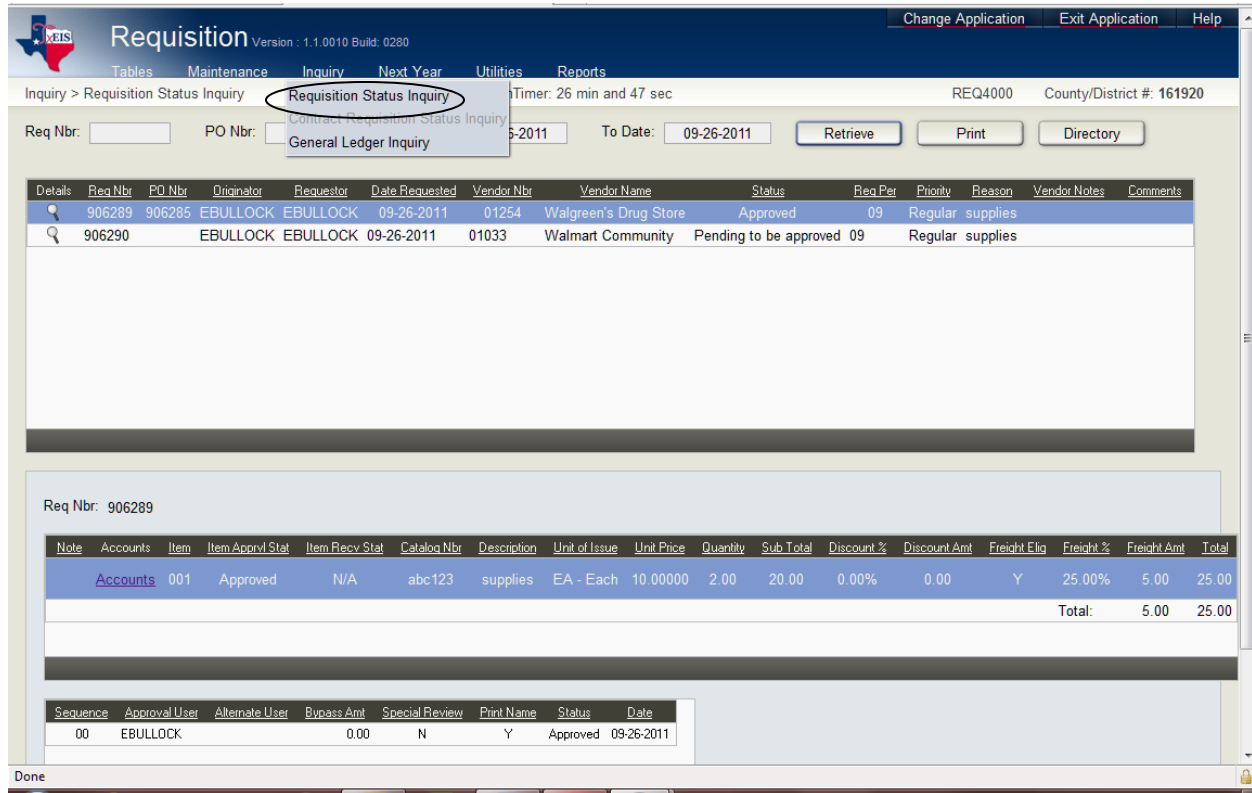
8. When the requisition has been submitted properly, a box saying "Submission for approval completed." Click on the OK button and you will revert back to the first screen. You will now be ready to submit another requisition if needed.



9. If it is not obvious what the purchase order is for, your supervisor may ask you to email them more details.
10. After a requisition is approved, a purchase order will be assigned and you will receive an email. At that time, you will log back into the system and print the purchase order and place the order.
11. After the order is complete attach the order documentation (receipts, packing slips, etc.) to the purchase order and send it to the business office.



# Requisition Status Inquiry



The Requisition Status Inquiry window is used to view the status of each item included on a specific requisition or purchase order.

The window consists of the following three grids:

- The top grid displays requisition or purchase orders.
- The middle grid displays items included on the requisition.
- The bottom grid displays a list of the approvers in the sequence of their approval.

Note: This Requisition Status Inquiry is filtered according to the accounts in the user's profile.