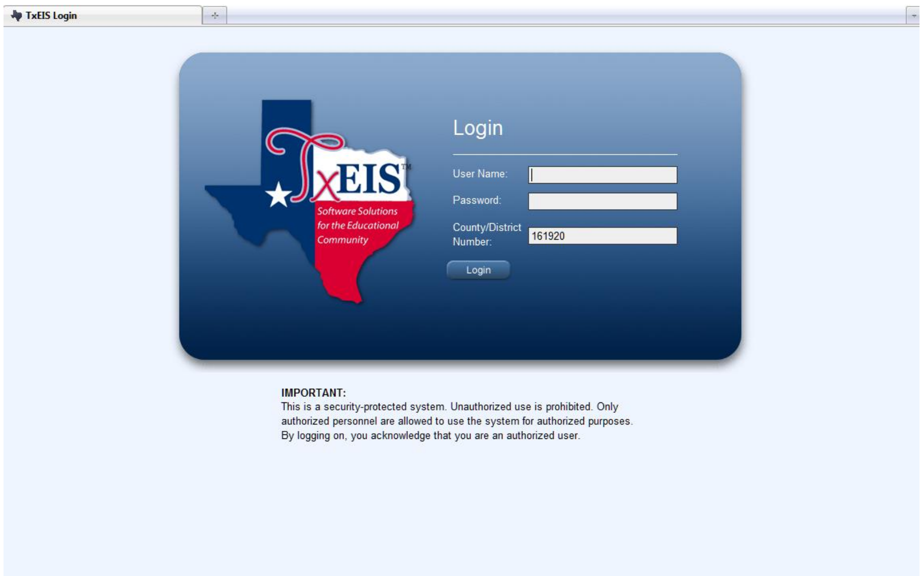
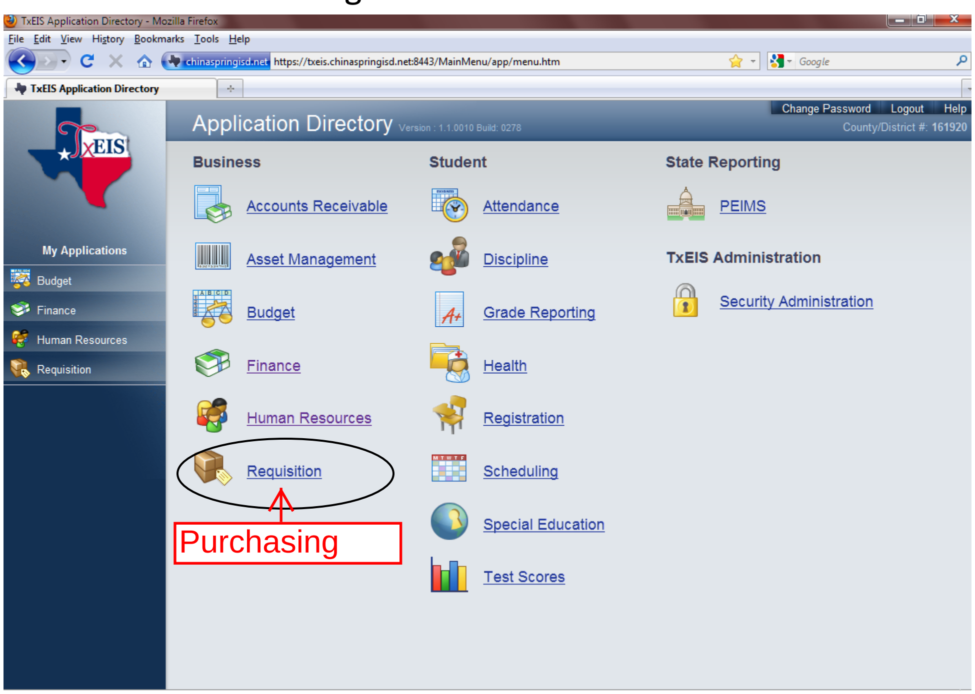
Entering TxEIS Requisitions

TxEIS Entering a Requisition

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

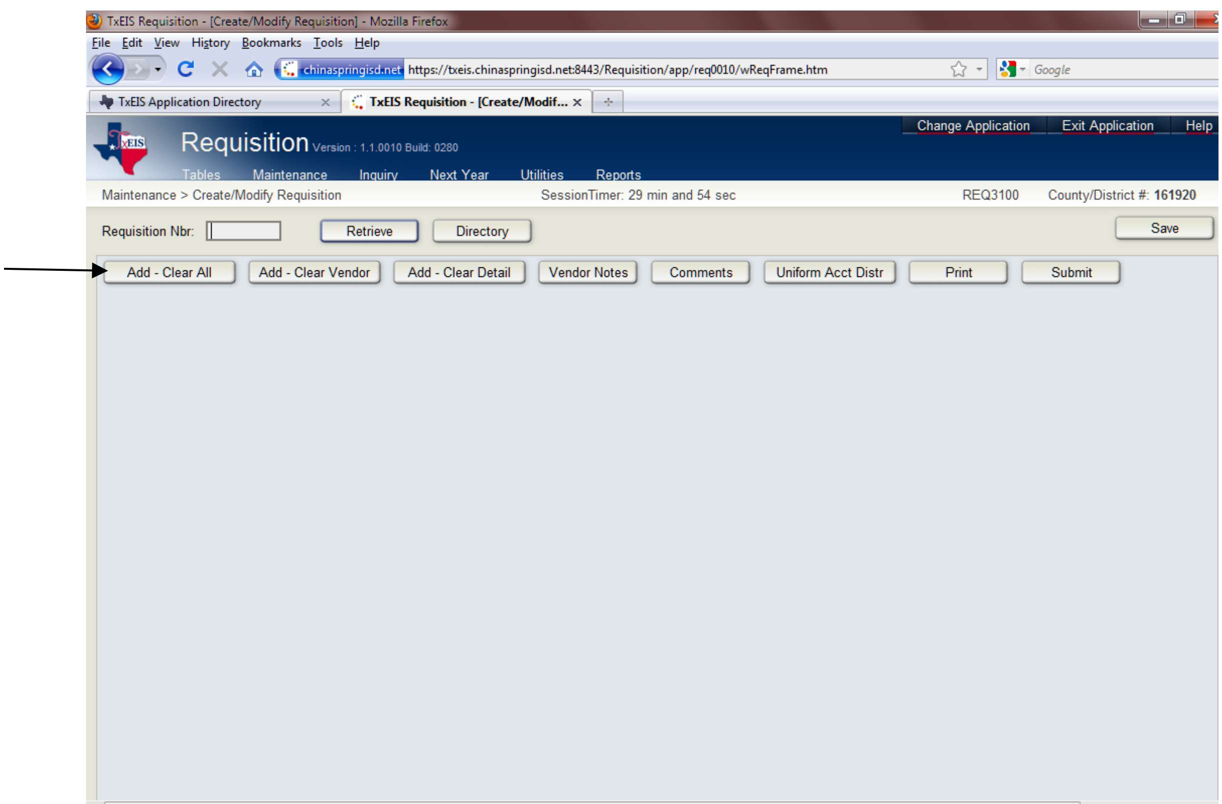


2. Left click on Purchasing



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*



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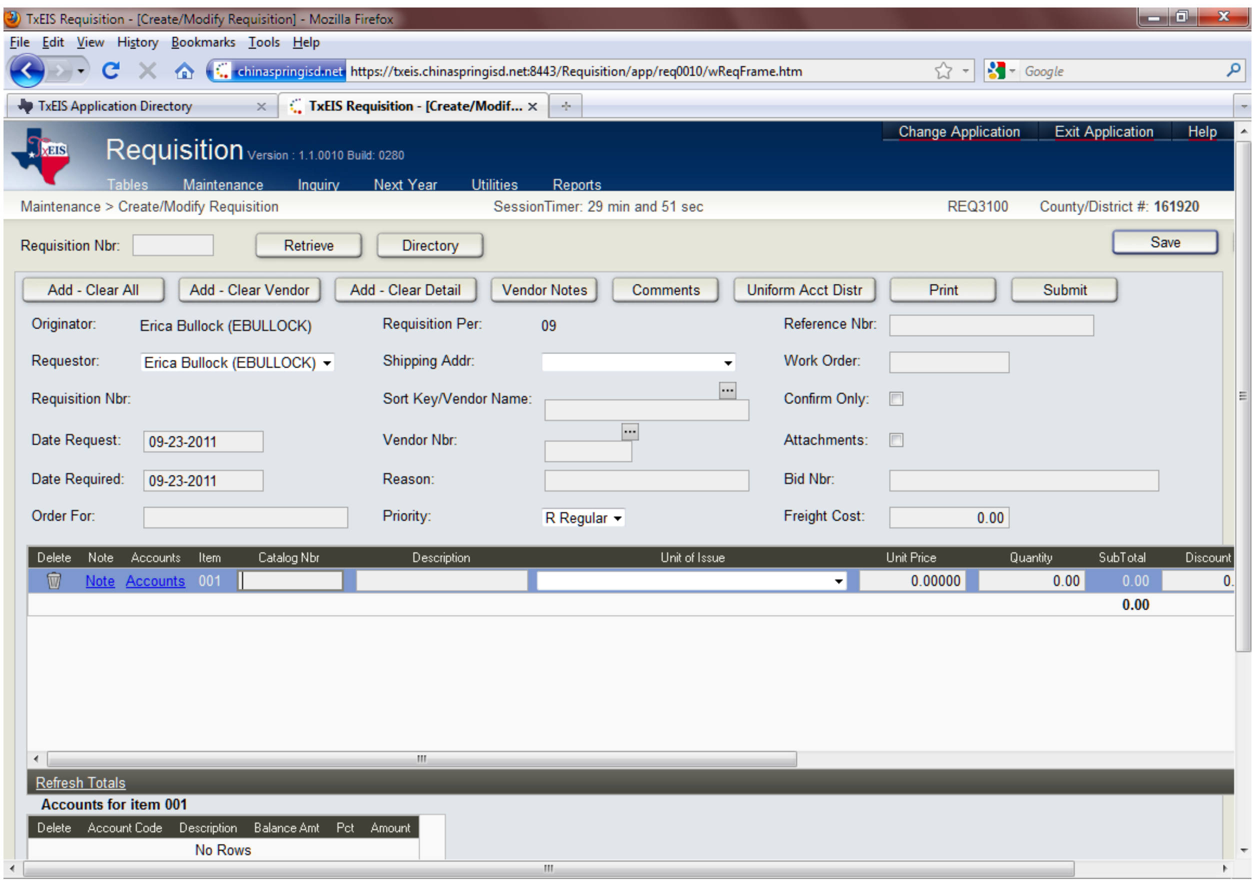
Enter the information in the relevant fields. You will find that there are many drop down buttons to assist you in making your selections. You may also type in the first few letters in a field and it will pull up the remaining information (ie; vendor name). You will need to email Accounts Payable (Meredith) 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; 1st grade supplies), Bid or quote number (if needed).

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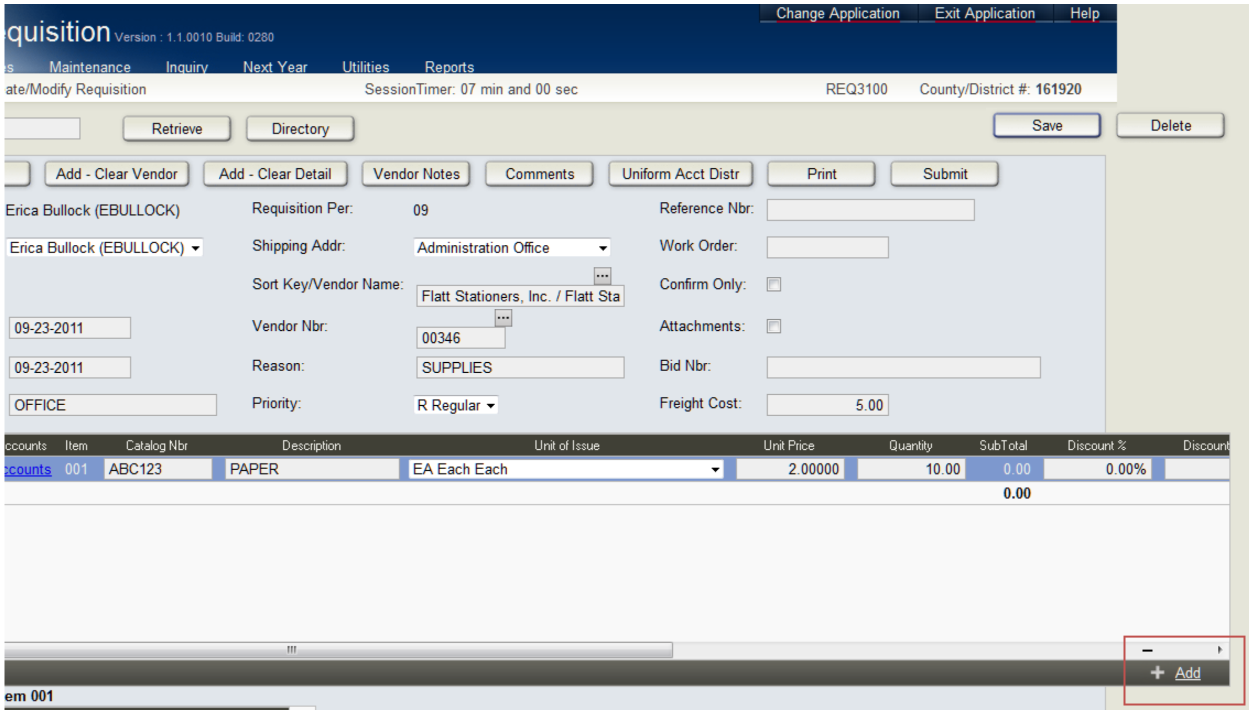
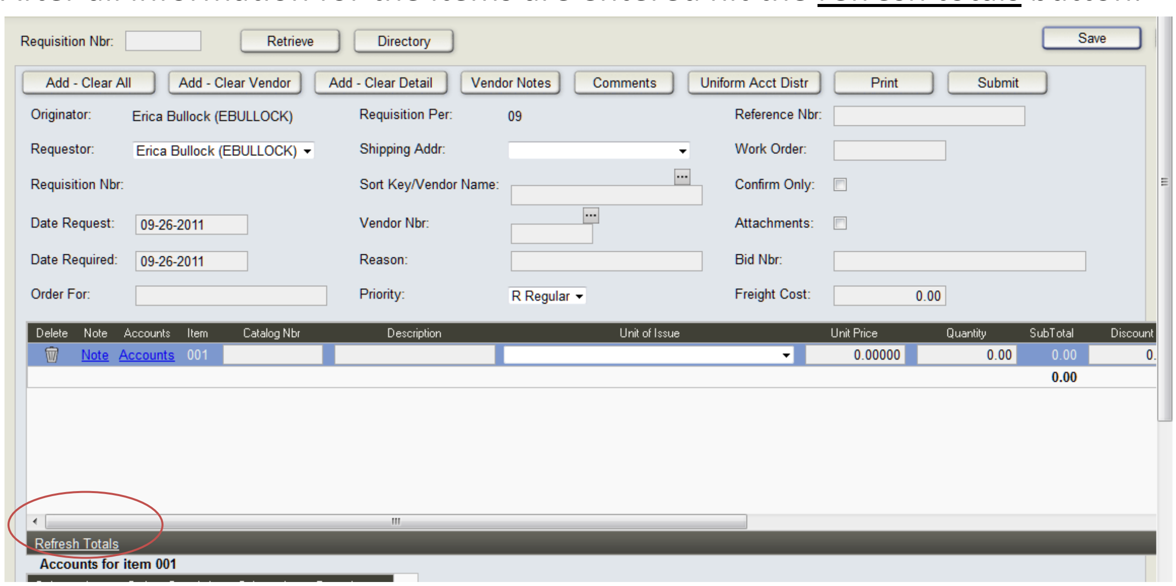
To begin adding a list of items you must first hit the *+Add* button.

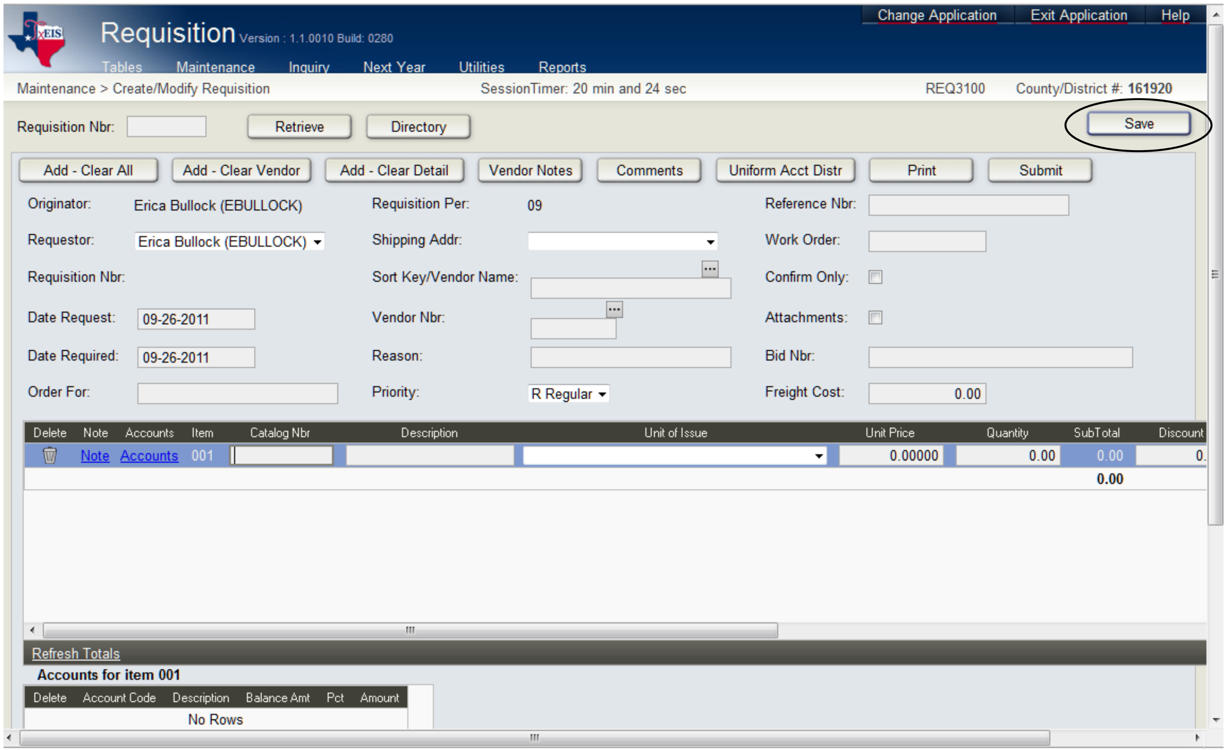


The catalog number, description (if you need more space tab over to Long Description and you can enter more information), unit of issue (always use EA each) , unit price (total amount of order), quantity (use 1).

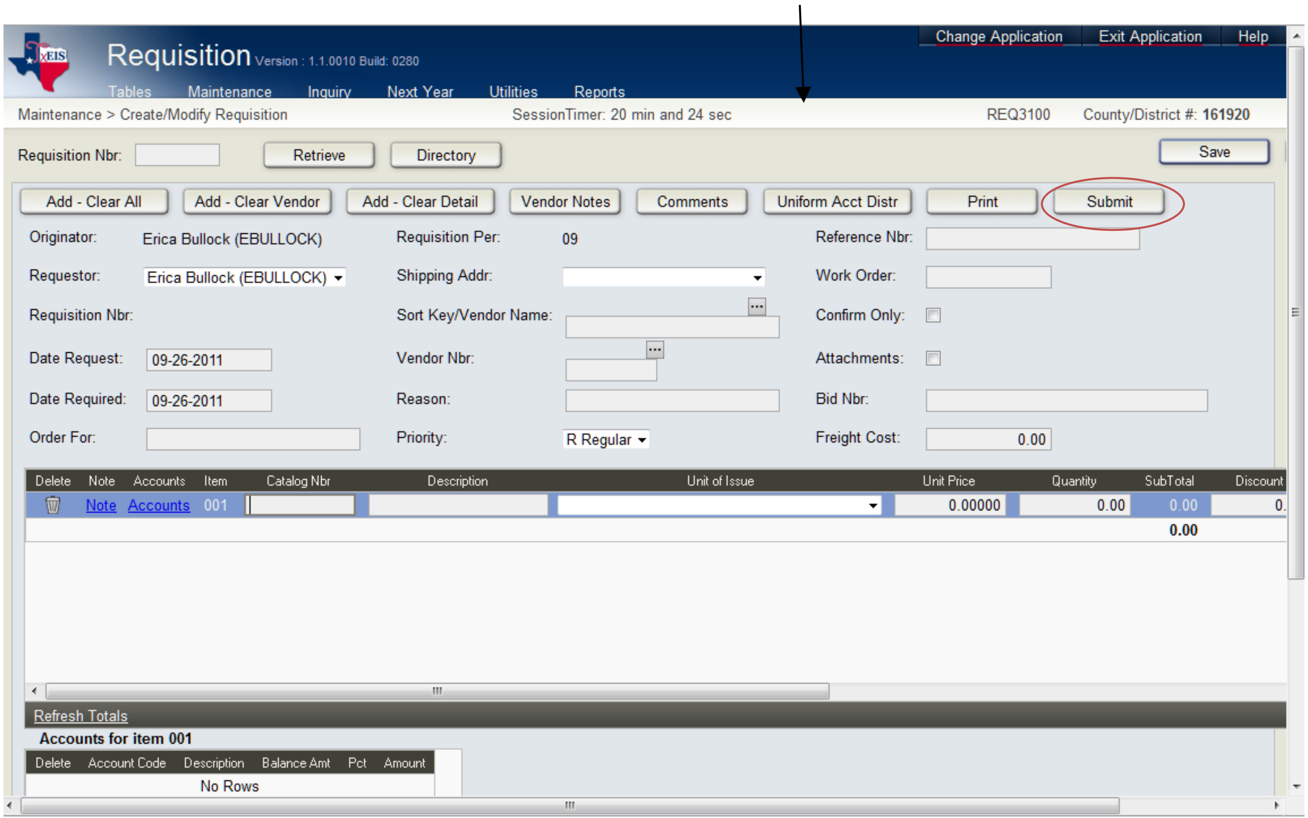
After all information for the items are entered hit the refresh totals button.



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



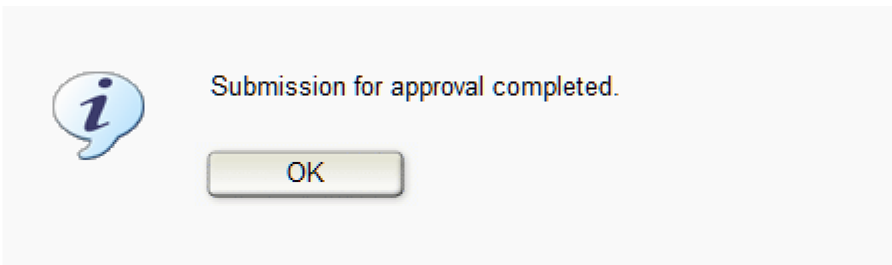
7. After saving you will then need to submit the requisition. This will forward it to your Principal / Supervisor to be approved. After approval it will be forwarded to the business office for final approval.



**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

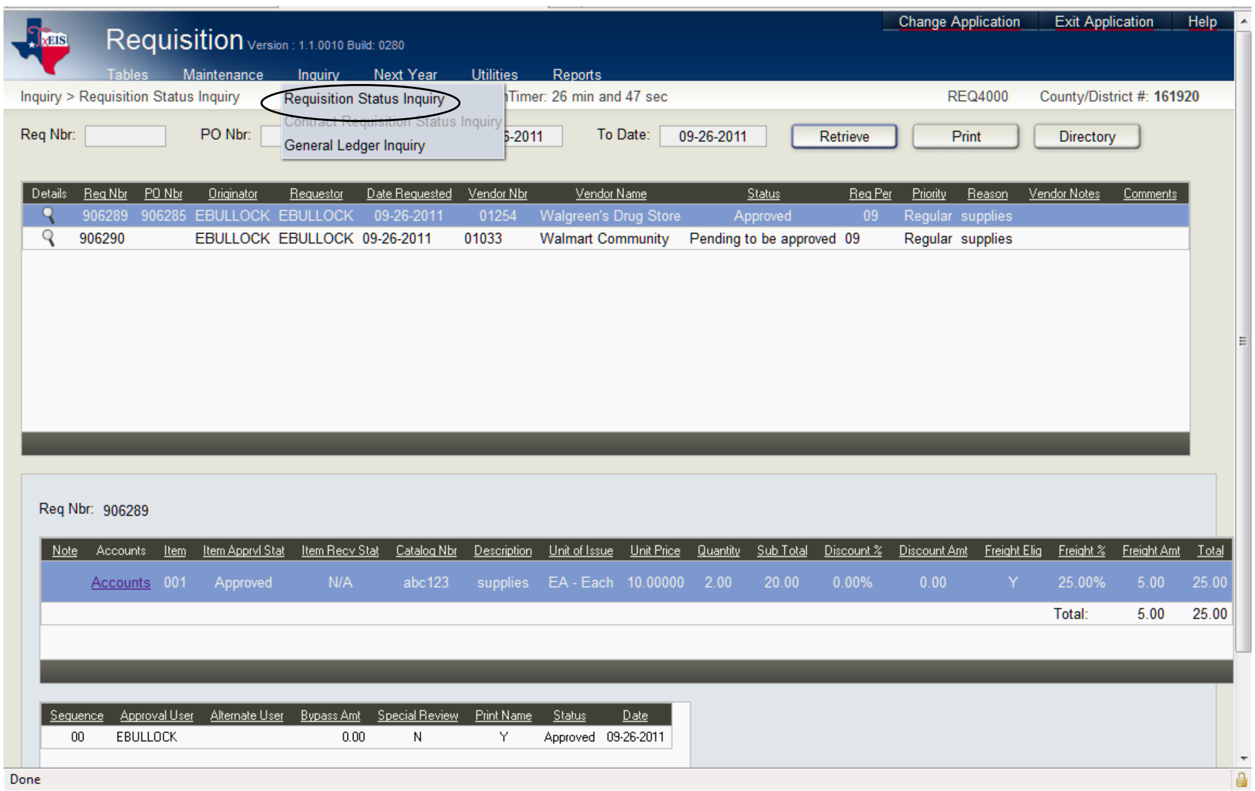


9. If it is not obvious what the purchase order is for, your supervisor may ask you to email them more details.

10. After a requistion 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.