

## Entering Purchase Requisitions in Infinite Visions

Click on the Infinite Visions Logo

Enter your User Name and Password

User: first initial & last name (all lower case) Password: password1

**UNDER CONNECTION GROUP NAME:** \_\_\_\_\_ **FY 15-16**  
Your School Name

Click on Purchasing and Payables

Click on Purchasing

Click on Control Panel

The screenshot shows the 'Add Requisition' dialog box in the Infinite Visions Enterprise Edition - Accounting - [Control Panel] window. The dialog box is divided into several sections:

- Filter Criteria:** Includes fields for Reg. No., PO. No., Vendor, and Account Filter (with a 'Show Paid Column' checkbox).
- Requisition Information:** Includes fields for Req. Number (0), Date (05/14/2015), Vendor, Ship To (Colebrook Elementary), DAC (Colebrook Elementary School), Requester, and Buyer.
- Order Information:** Includes fields for Order Via (Email), Project (Undesignated), Date Required (05/29/2015), Order Type (Purchase Order), Reference, and Award Number.
- PO Information:** Includes fields for PO Number, PO Date (None), Revision, Req. App., Closed Date, and Status.
- Line Items:** A table with columns: Description, Part No., Unit, Unit Price, Qty., Ext. Price, Tax, Freight, and Account.
- Summary:** Includes checkboxes for 'Submit for Approval' and 'Close this dialog after update?', and fields for Sub-Total (\$0.00), Tax (\$0.00), Freight (\$0.00), and Total (\$0.00).
- Buttons:** Includes 'OK', 'Cancel', and 'Help' buttons.

The status bar at the bottom of the window displays: Ready, Entity: Entity1, Group: ColebrookFY1415, FY: 2015, DAC: 002, UserID: cbrooks, Version: 2015.1.14, Programs, ENG, 10:12 AM.

Double Click on the Add New button located on the top toolbar. (It looks like a sideways triangle with a star)

Choose vendor from Drop Down **or** Begin Typing the Vendor name.

Check address for accuracy at the drop down or by choosing the vendor name and clicking Address tab at the top of the screen. Click Tab for Requisition Detail to go back to your main screen again.

(If you see any discrepancy with the address, please contact Patricia or Bridget at the SAU office via e-mail or telephone with the corrected one)

**Vendor not on the list**-Click 00-Add a New Vendor, Click Tab for Proposed Vendor, Type in as much information as you know. Click Tab for Requisition Detail to go back to main page.

**DATE OF PO: 7/1/15 OR LATER**

Choose Ship To: Your school name & address

DAC: Your school name

Requester: Your position/title

Order via: E-mail is the default (if you know for sure they only accept via fax, mail, etc.. choose that instead)

Project: Only choose if the project's listed pertains to your order, otherwise leave it as Undesignated

Date Required: defaults to 15 days out (if you need it sooner you can change this, however it doesn't guarantee that the order will arrive by this time since it varies on the approval process)

Reference: if for a grant enter the Grant Title, Fund #, Activity #/you can enter a description of your own choosing here as well

Click Add New (Triangle with Star)

Enter description of item (include personalization or special instructions, colors, etc.. here)

Part No: Item # or ISBN Number

Unit: EA (keep at default of EA)

Unit Price: Enter Price of each item

Qty: Enter # of that item you wish to order

Account: Open from Drop Down (You should see your accts listed only with a description of Supplies, Books, Video, Software, Computer Equip, Other Equip, Dues & Fees)

Choose the correct account for that item. If you choose Supplies, Books, Video, Computer Equip or Other Equipment it will automatically calculate freight at 15%-all other categories you will need to enter the freight)

Project Director's Only:

Grant Funds #'s are as follows (this will be the first 3 digits of your account number)

**Colebrook Grants-**

Title I Fund 1 (001) Title II Fund 3 (003) Healthy Schools Fund 20 (020)  
IDEA Fund 12 (012)

**Pittsburg Grants-**

Title I Fund 1 (001) REAP Fund 14 (014)

**Stewartstown Grants-**

Title I Fund 1 (001) Title II Fund 3 (003)

**SAU Grants-**

IDEA Fund 9 (009) Project Aware Title I Fund 1 (001)

Tab through until amounts are listed on the bottom of the screen under Quantity, Ext Price & Freight.

If you are done entering this item but need to enter additional items, Click OK and you will get another blank screen to continue.

If you are done with the order, click Close Dialog Box after Update, Click OK.

You should be back on the main screen you began the purchase requisition on.  
(Top says Edit Requisition)

Check the entire purchase req over. Make sure your total at the bottom is accurate for the entire order.

If your freight is not added or incorrect do the following-Actions,  
Recalculate Tax & Freight, Check the box for Freight, Change Percentage or make it 0 for no freight, OK.

Check the total at the bottom again for accuracy.

If okay, check the box that says Submit for Approval.

If the Submit for Approval button is grayed out and won't allow you to check it please do the following.

Click OK to close out the purchase requisition. Click Cancel to go to the main Control Panel screen where you will see the purchase requisition you just did. Highlight it and double click it. Now you can check the box Submit for Approval. Click OK. You should now see it in the Control Panel showing the next approver as your Principal or Special Services Coordinator.

Check Close Dialog after update.

Click OK

Infinite Visions Enterprise Edition - Accounting - [Control Panel]

File Edit Actions Records Window Help

Record 1 of 1

Filter Criteria

Req. No.:  DAC:

PO No.: 15030090 Project:

Vendor:  View:

☐ Show Paid Column ☐ Show Account Detail

Account Filter:

Apply Selection

Clear Selection

Req. No.	Req. Date	Req. App.	Vendor Name	PO No.	R	PO Date	Amount	Status	Next Approver	DAC	Requester	PO Printed	Internal No
1102	05/12/2015	Yes	AMAZON.COM	15030090	0	05/15/2015	\$383.58	Open	AP	Stewartstown Community	Gr 5-8 SS & Lang Arts	Yes	

Entity: Entity1 Group: StewartstownFY1415 FY: 2015 DAC: 001 UserID: bcross Version: 2015.1.14

Ready 9:21 AM 5/18/2015

Make sure the Next Approver for that Purchase Requisition is your Principal or Special Services Coordinator.

**If it is not**, open up the purchase requisition by highlighting it and double clicking. Check the box Submit for Approval. Click OK.

If you have another purchase requisition to do-follow the process from Add New (Triangle with Star)

If you are done, you can go to File, Close.

This will bring you back to your main screen.

File, Close to get out of Infinite Visions completely.

Your orders will be placed on Fridays. We will need your purchase requisition at the SAU office by Thursday. The approval process is as follows...

**You**-Originator, Principal or Special Serv Coord, Cheryl Covill, AP(ready to order)

You can always look up where your order is under Purchasing & Payables at Purchasing, Control Panel, Apply Selection. Find your Purchase Req, see what is listed under Next Approver. If it was made into a Purchase Order (it will have a Purchase Order Number listed- this means the order was placed on the date of the PO)

The secretaries will continue to check in the orders. If it's a subscription, please verify you are receiving it by letting the secretary know so she can check it in as received. Otherwise the SAU office will not know that it's okay to pay.