



School Administrative Assistant Instructions for eProcurement Requisitions

(Creating a requisition for yourself)

Before starting, please make sure your browser settings are set to allow pop-ups:

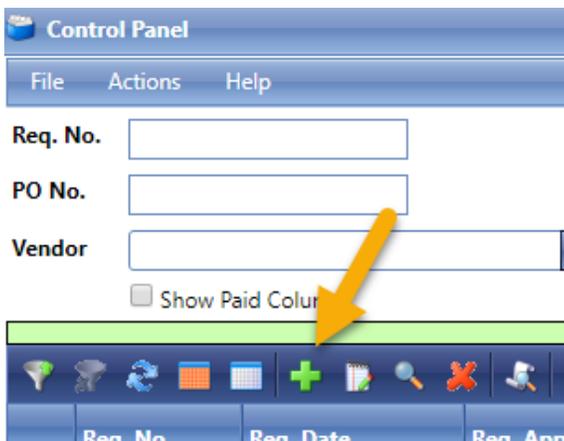
- Click the Chrome menu on the browser toolbar.
- Select Settings.
- Click Show advanced settings.
- In the "Privacy" section, click the Content settings button.
- In the "Pop-ups and redirects" section, click the toggle switch to change from blocked to allowed

You will access an online marketplace through a requisition in iVisions, using the eProcurement option.

Log into iVisions (***eProcurement is only available in the iVisions web portal***)

1. Go to My Workflow
2. Select Connection Group
3. Go to Purchasing and Payables
4. Purchasing
5. Control Panel

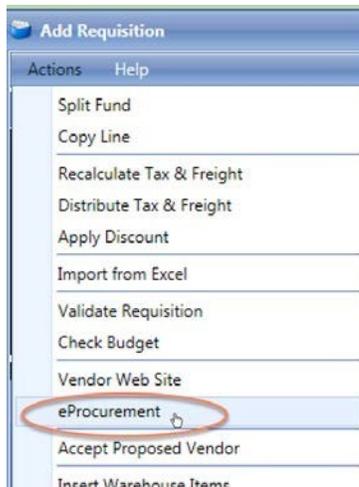
Click the green + sign to create a new requisition



In the Vendor field, use 'EqualLevel' as a placeholder. Later you will go back into the requisition and enter the specific supplier that you are purchasing your items from. Fill out the 'Ship-to' and 'Requester' fields. Enter "EPROCUREMENT" in the 'Order Via' **AND** 'Project' fields. See a sample of the Requisition information below:

Requisition Detail	Addresses	Notes	PO Board Report
Requisition Information			
Req. Number	<input type="text"/>	Date	7/31/2019 <input type="button" value="Calendar"/>
Vendor	EQUALLEVEL INC. <input type="button" value="Dropdown"/>		
Ship To	CVUSD WAREHOUSE - PUR <input type="button" value="Dropdown"/>		
DAC	PURCHASING <input type="button" value="Dropdown"/>		
Requester	CLAY, SHARON <input type="button" value="Dropdown"/>	<input type="checkbox"/>	W9 Rcvd
Buyer	<input type="button" value="Dropdown"/>		
Order Information			
Order Via	EPROCUREMENT <input type="button" value="Dropdown"/>		
Project	EPROCUREMENT <input type="button" value="Dropdown"/>		
Date Required	8/15/2019 <input type="button" value="Calendar"/>		
Order Type	Purchase Order <input type="button" value="Dropdown"/>		
Reference	<input type="text"/>		
Award Number	<input type="button" value="Dropdown"/>		

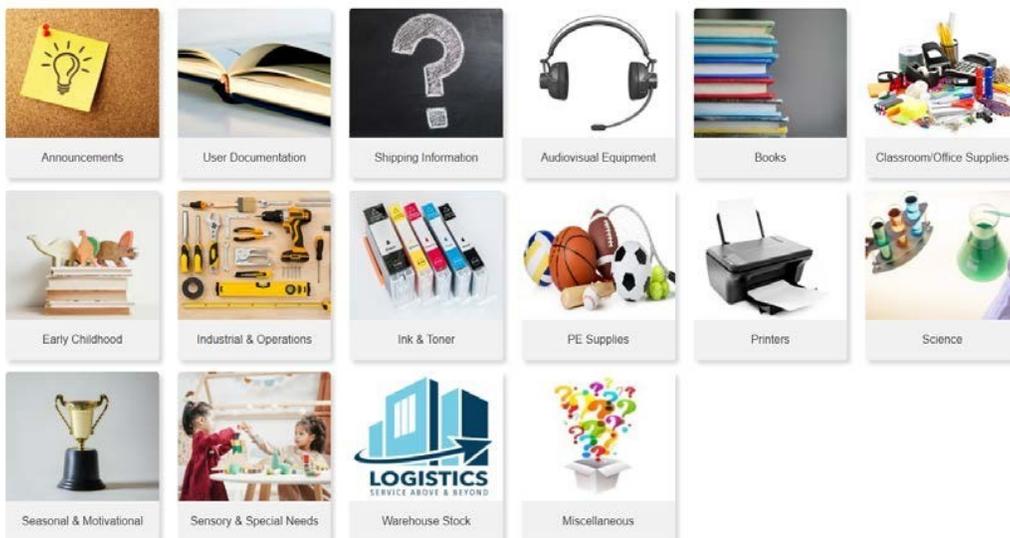
Click 'Actions' and select 'eProcurement'.



You will now start your shopping from our new Guided Buying Marketplace.



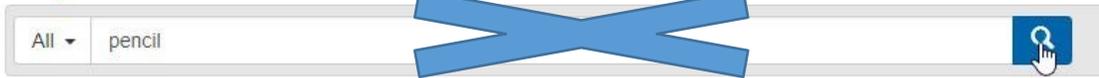
Welcome to the Cajon Valley Union School District Marketplace.



[View All Suppliers](#)

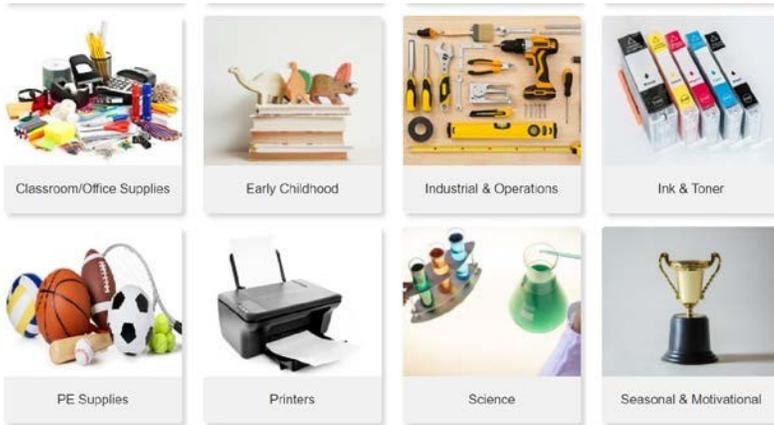
There will no longer be a search bar shown at the top of the screen.

EqualLevel



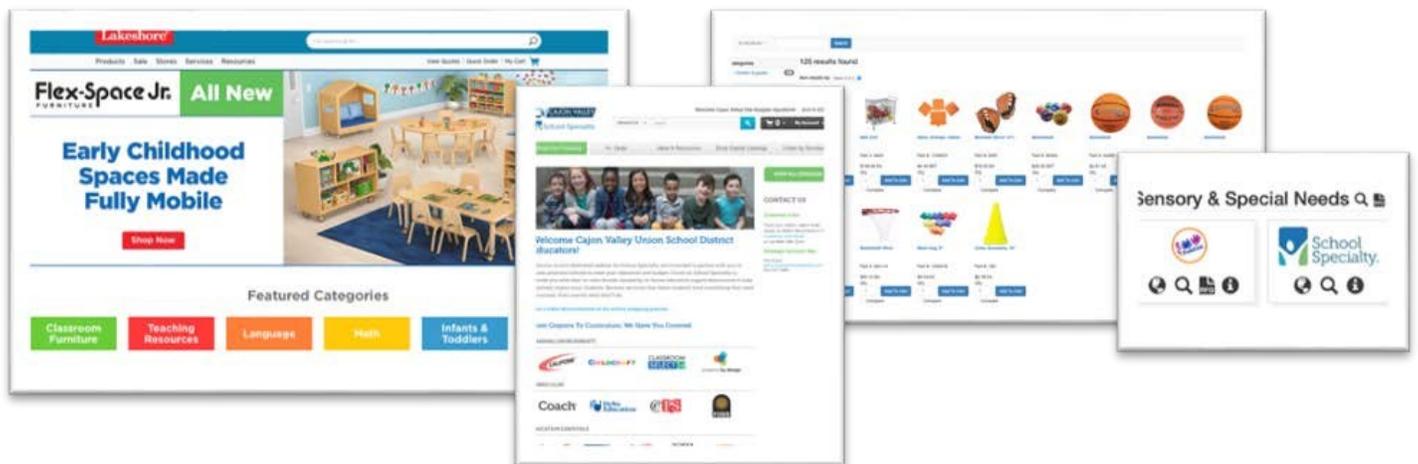
The new tiles will make it easy to shop by category. Within each category, you will find the contracted suppliers with the best value items.

To start shopping, just click on any of the category tiles.



Make sure to check out the Announcements tile for any news or updated information regarding the marketplace.

Once in a category tile, you will be provided with the approved supplier's informational homepage, catalog of items or if there are multiple approved suppliers, you will be directed to a page of approved suppliers for the category. From there, you can shop for your items, add them to your cart and check out.

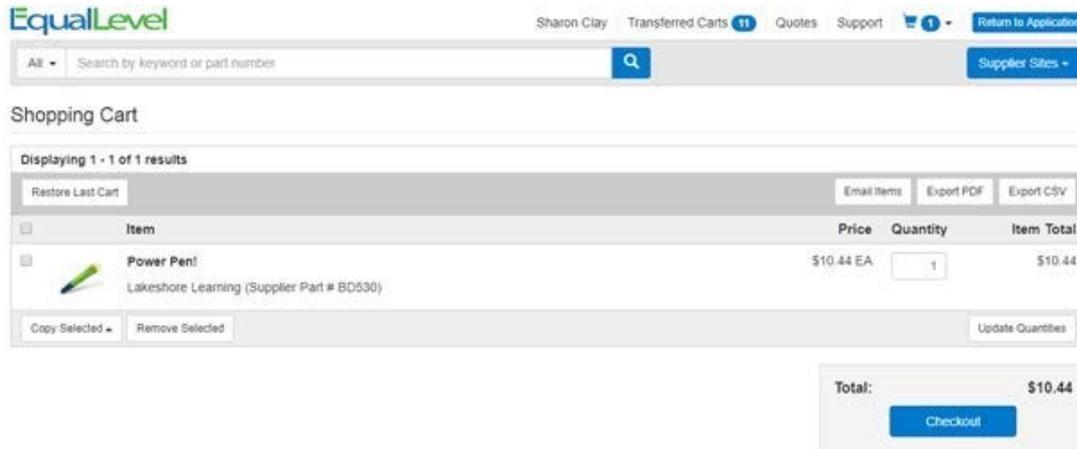


As always, Pay careful attention to the unit of issue; whether the item is sold as a package, by the dozen, each, etc. **Items from multiple suppliers may be added to the same cart, however, a separate requisition for each supplier will need to be created. Be sure to check the shipping policy for each supplier, which may include minimum order requirements to avoid shipping fees.**

Add items to your cart on that supplier's site as you would during a typical online shopping experience. **Please make sure quantities are correct as this is the last time changes will be able to be made.** If you are using Amazon, please select

free shipping to avoid being charged for shipping costs, ignore the shipping address and proceed through to checkout. *At checkout, you will transfer/submit the cart back to EqualLevel. Once transferred back to EqualLevel, complete the checkout process as specified below.*

Once you've finished adding all your items from various suppliers, click "View Cart". Review the list of items in your cart and verify the quantities. If you need to remove an item from your cart, click the checkbox on the left and click "Remove Selected". To adjust the quantities, enter the new quantity and click "Update Quantities". Then click "Checkout".



Choose the first supplier you want to import to iVisions.

Single Vendor Checkout

Your ERP system is configured for single vendor requisitions. Select below which supplier's items you would like to checkout back to your ERP system. The other items will remain in your cart and can be checked out on your next visit.

Suppliers

- BSN Sports / US Games
- Lakeshore Learning

Checkout

Click Checkout.



You will be notified that your items have been submitted to Infinite Visions.



Go back into your iVisions Control Panel.

Search for EqualLevel in the Vendor field and hit apply. You will see the requisition you just created at the top of your grid.



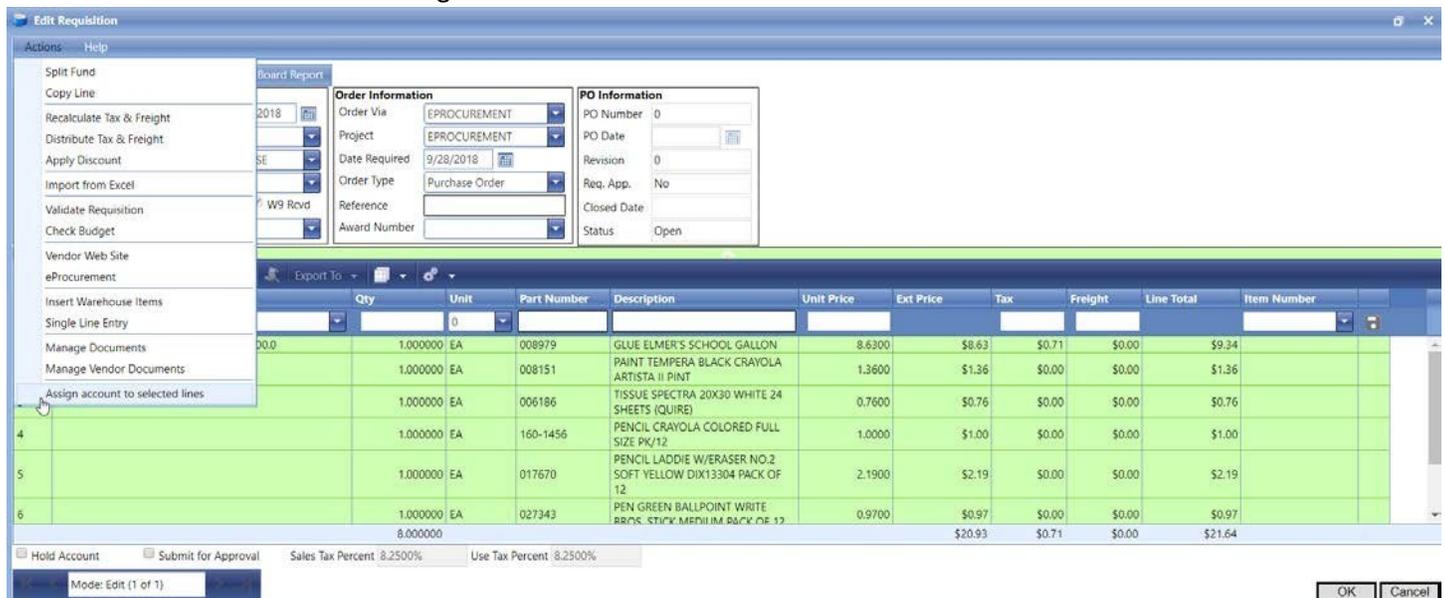
Double click to open the requisition.

Make sure to change the vendor name to the supplier you are checking out with at this time

Double-click on the first line item, add your budget code to the account field, tab through the other fields, zero out freight and save.



To add the same budget code to the rest of the line items, click once on line one, hold down shift and click on the last item. Go to 'Actions' and select 'Assign account to selected lines'.



You will need to recalculate tax. Go to 'Actions' select 'Recalculate tax & freight' and check the Tax box to calculate.

When finished click 'Submit for approval', then click 'OK'.

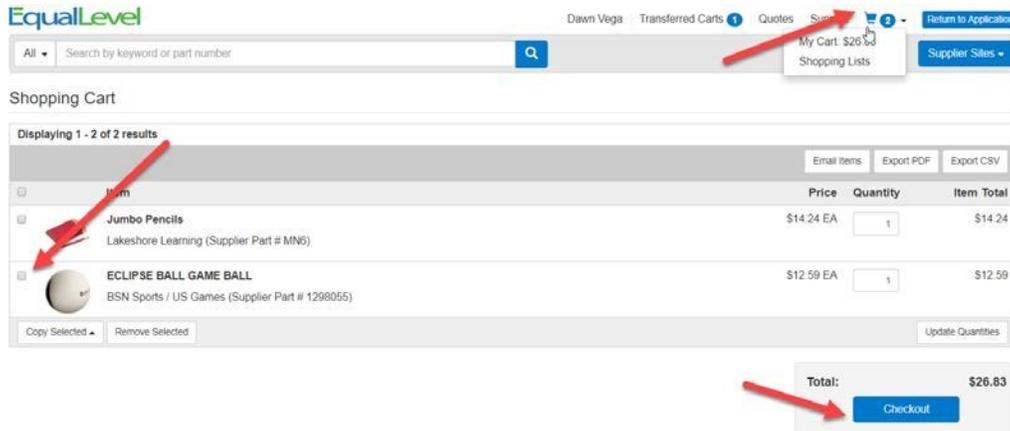


The requisition will now route through the typical approval process. Once approved, Purchasing will send the order electronically and the order will ship to your site. Please import the shopping lists and have them approved as soon as possible so your order can be expedited.

Print **or** save a copy of the requisition for your records.

Since a separate requisition is needed for each vendor, you will need to create another requisition for each remaining supplier you shopped with.

Once you have created your new requisition and are back in the Marketplace, you will click on my cart, check the box for one of the remaining suppliers, and proceed to check out.



You will be notified again that your items have been submitted to Infinite Visions. Go back in, find your newly created requisition, and complete the steps to submit it.

Notes:

- Amazon only holds pricing and availability of items for 7 calendar days after a shopping cart is created. The cart needs to be imported to a requisition and through the approval process within the 7 day window, otherwise pricing and availability will fluctuate.
- For a quick reference list of best value items comparable to those previously stocked in the Warehouse, please visit the School Specialty site in the 'Classroom/Office Supplies' Category and click on My List.



Once items are received, please post your receiving in iVisions so Purchasing can process the invoice for payment.

Electronic Receiving

Beginning with the 23/24 iVisions year, paper “Receiving Reports” will no longer be accepted. All receiving must be posted electronically in iVisions. For all orders delivered directly to your school site by a vendor (UPS, FedEx, Amazon courier, etc), orders must be checked for accuracy and posted to iVisions within one week of receipt. Items that are posted will indicate your approval to process payment. Orders delivered by CVUSD Warehouse/Logistics staff should not be posted by sites. Logistics staff will post orders delivered to the warehouse.

Instructions

- In iVisions, go to the ‘Purchasing & Payables’ menu, then:
 - o ‘Receiving’ Menu
 - ‘Purchase Order Receiving’ screen
- Press the Green ‘+’ button to add a new receiving transaction
 - o Enter the PO # in the “PO Number” field (choose PO from drop-down). Note: you will only be able to select open PO’s. PO’s that have been closed (already received and paid) cannot be selected for receiving.
- The PO details will be displayed as shown below.

Actions Help										
PO Number		Vendor								
12400737		AMAZON.COM								
		Ship To		CVUSD WAREHOUSE - FH						
		DAC		FLYING HILLS						
		Req		TROTRO, ARIELA						
Description	Part Number	GFA	Unit	YTD	Qty	Qty Ordered	Item Number	Case Pack	Item Cost	Notes
Educational Insights Alphabet Beanbags, Learn Letters, Toddler Learning Toy, Preschool Toys, Set of 26 Beanbags, Ages 3+	B0009J13S8	<input type="checkbox"/>	EA	0.00	0.00	1.00		1.00	\$20.34	
Gamenote Double Sided Magnetic Letter Board - 2 in 1 Alphabet Magnets Tracing Board for Toddlers ABC Letters Uppercase & Lowercase Practicing	B081GTG1ZW	<input type="checkbox"/>	EA	0.00	0.00	1.00		1.00	\$21.64	
Crazy Aaron's Hide Inside! Mixed Emotions Thinking Putty	B08XK3P5LZ	<input type="checkbox"/>	EA	0.00	0.00	1.00		1.00	\$15.86	
LoveInUSA Punch Craft Set, 6PCS Hole Punch Shapes Hole Puncher for Crafts Paper Punches Decorative Snowflake Star Circle Hole Puncher for Crafting Scrapbook Nail Designs	B096XSLQ39	<input type="checkbox"/>	EA	0.00	0.00	1.00		1.00	\$10.80	
Crazy Aarons Doodle Putty with Puppy Mold	B097NP7SHC	<input type="checkbox"/>	EA	0.00	0.00	1.00		1.00	\$16.18	

- Carefully compare each line item on the PO, compared to items you have physically received at your site.
 - o Did you receive the correct quantity of each item?
 - o Do the descriptions match?
 - o Are the items in good condition with no damage?
- If the answer to all these questions is yes, and your order has been received **COMPLETE with no missing or damaged items**:
 - o Go to the ‘Actions’ menu and click ‘Receive all Remaining Items’

- If the answer to any of these questions is no and you only received a **PARTIAL order**:
 - o You will enter the quantity of each line item received.
 - Check the 'YTD' column to verify any quantities that were already posted. Double-click the line item you need to receive.
 - Enter the quantity in the 'Qty' Field. You may add notes if needed. [Click the save \(disk\) icon to save that line.](#)
 - Repeat for each line that has quantities received, saving each line.
 - Review the quantities in the Qty column to make sure they are correct for each item.
 - Click "Save" at the bottom right of the screen.
- **OR** If you have received a partial order but it is mostly complete:
 - o You can use the "Receive all Remaining Items" feature, but then remove the items not received.
 - For example, if your PO has 10 line items and you received 9 out of 10 lines, to save time, choose receive all remaining items, then before hitting "save", double-click the one line item you did not receive and change the qty on that line to 0 (or whatever # you received) and [click the save \(disk\) icon to save that line.](#)
 - Then click "Save" at the bottom right of the screen. Even if you saved each line, you also need to hit 'Save' on the bottom of your screen when you're finished editing line items.



- **Pack slips / receiving paperwork may be attached in this screen using "Manage Documents". This is not a requirement, but remember, your posting must be accurate in order to ensure accurate payment processing.**
- **If you have damaged or wrong items:**
 - o Do not post receiving for those items in iVisions. For example, if you ordered 5 and you received 5 but 1 was damaged: only post the 4 items you received in good condition. Add a note 1 was damaged or wrong. Email receiving@cajonvalley.net to report details of the issue. Reference the PO # in the subject and add pictures/details so Purchasing can work with the vendor for a credit or replacement.
- **If you MAKE A MISTAKE on your receiving:**
 - o Try to avoid errors but don't worry, you can fix your mistakes!
 - o Example: You receive all then realize you are missing qty 1 of Line 1 of the PO.
 - Double click on that line item and enter "-1" in the quantity.
 - This will reduce the number received by 1 to reflect the accurate quantity.
 - o Example: You realized you have double posted (received an item twice).
 - Double click on that line item and enter "-1, -2, etc" in the quantity.
 - The Qty Ordered should match the YTD if done correctly.
- **Always double-check your entries.** Remember, we will be using this information to confirm what you have received in order to pay vendor invoices. Please make sure it's correct so we don't pay for items that were not received. All receiving must be posted electronically. No paper receiving reports are to be completed. **NO receiving needs to be when your items are delivered by district staff.**

- Special Scenarios

- **Field Trips** – After the field trip is complete, post the receiving with the number of students that actually attended the trip on the student line item. Post the number of chaperones on the chaperone line item. Depending on the policy of the venue, we may be required to pay for the total reservation, a flat fee, or only the number that actually attended. If you received an invoice from the vendor, please review it for accuracy then email it to invoices@cajonvalley.net with a message that it's approved for payment.
- **Software** – For digital software, the download information will be emailed to the end user that was specified on the P.O. (teacher, principal, etc.). Please follow up with the end user to confirm they received the software. Once they have access, the receiving should be posted as complete.
- **Services (assemblies, ICA's, contracts, subscriptions, etc)** – For one-time services that are fully complete such as one day assemblies, please post the receiving as complete as soon as the service is finished.
- For ongoing services (recurring, repeated services such as 549 Sports or magazines), do not post the receiving since it will not be complete after the first service. Instead, the invoices will need to be reviewed/approved and emailed to invoices@cajonvalley.net as the vendor invoices you. No services will be paid without an approved invoice.
- **Shopping PO's** – No need to post receiving electronically. Receipts must be emailed to invoices@cajonvalley.net as soon as the shopping has occurred. Please specify the PO# in the subject line.
- **Cancelled Items** – If Purchasing is aware that an item was cancelled by the vendor, the item will be removed from the PO and noted in the internal notes. Do not post items that you did not receive. If there is a cancelled item still showing on the PO, don't post that item.
- **Items delivered by Warehouse** – If your order is delivered by District Warehouse/Logistics/Purchasing staff you do not need to post the receiving. It has already been posted.
- Please contact the Purchasing Department with any questions. We are here to help!