

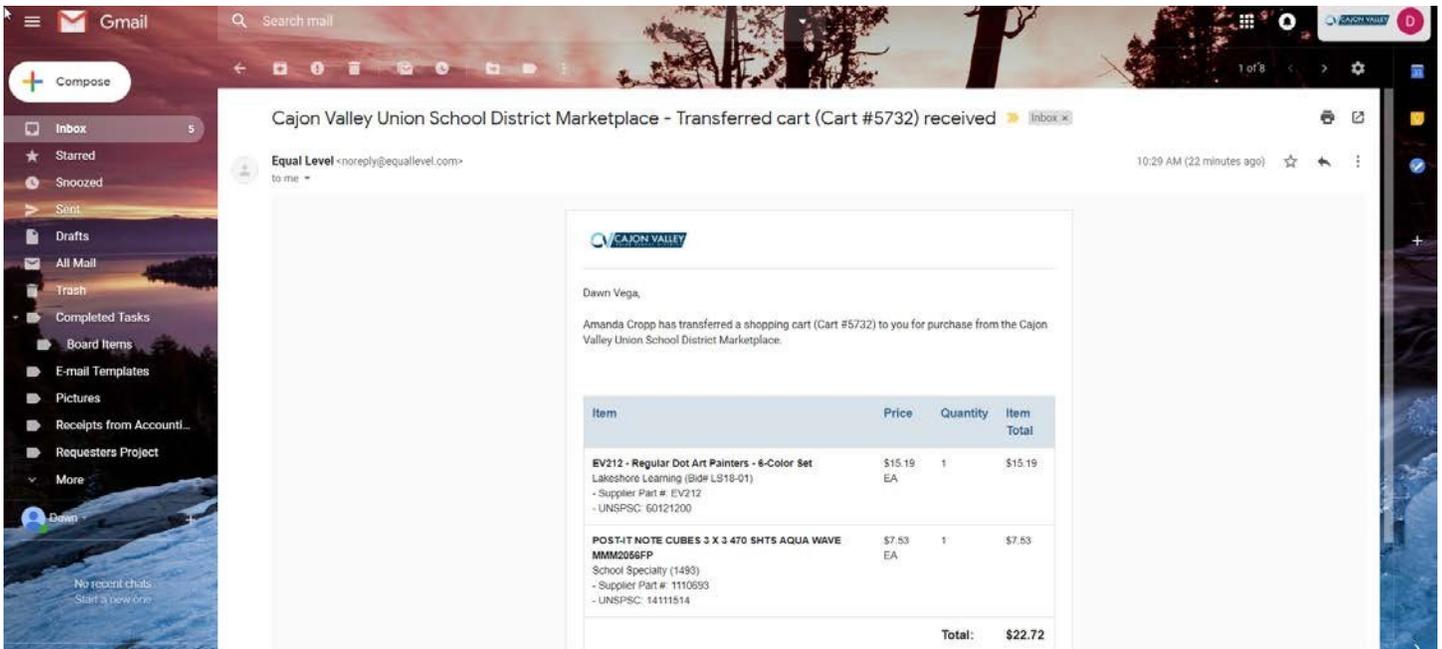


# EqualLevel

## School Administrative Assistant Instructions for eProcurement Requisitions

(Creating a requisition for a teacher or staff member)

When creating a requisition for a teacher or staff member, you will receive an email from EqualLevel stating that you have been transferred a shopping cart.



You will access the requesters shopping cart through a requisition in iVisions, using the eProcurement option.

(Note: If the shopping cart is compiled of items from different suppliers like the example above, you will need to create a separate requisition for each supplier, one at a time.)

### 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.

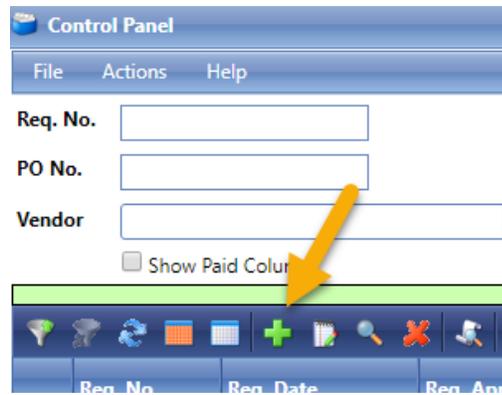
#### Suppliers

- BSN Sports / US Games (1 item)
- Lakeshore Learning (1 item)

Checkout

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

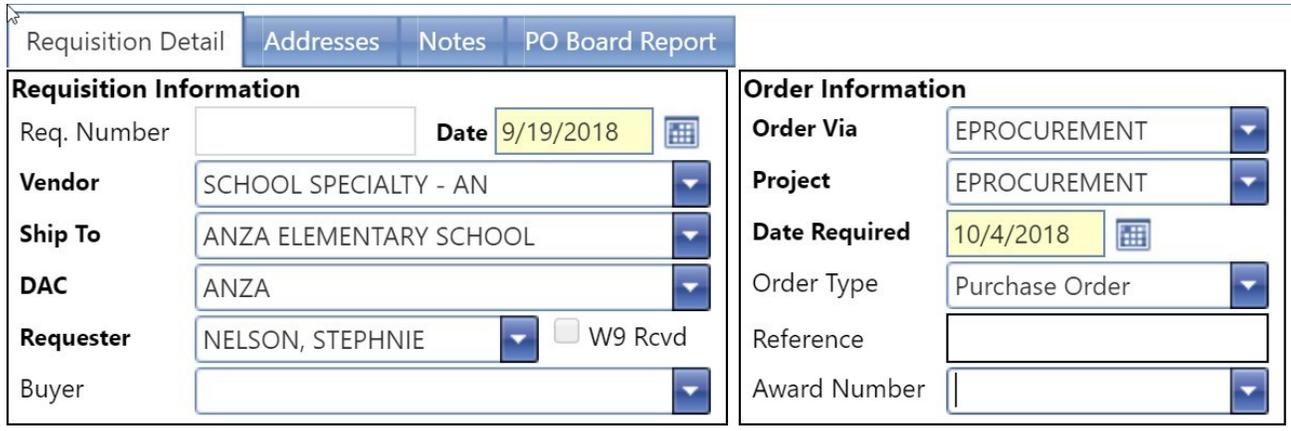
1. Go to My Workflow
2. Select Connection Group
3. Go to Purchasing and Payables
4. Purchasing
5. Control Panel



The screenshot shows the 'Control Panel' window with a menu bar containing 'File', 'Actions', and 'Help'. Below the menu are input fields for 'Req. No.', 'PO No.', and 'Vendor'. A checkbox labeled 'Show Paid Columns' is visible. At the bottom, a toolbar contains several icons, including a green plus sign which is highlighted by a yellow arrow.

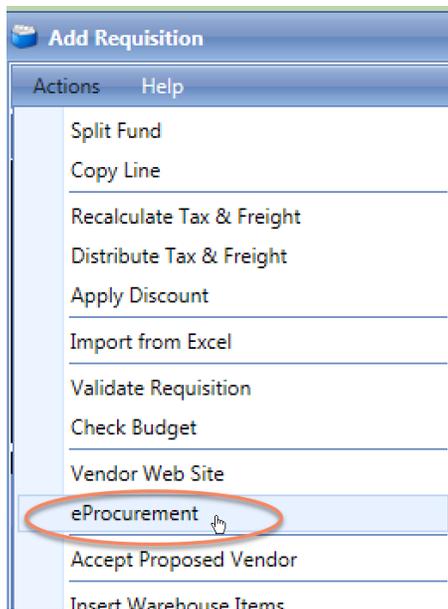
Click the green + sign to create a new requisition

In the Vendor field, enter a supplier that is specified in the requester's cart. 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:



The screenshot displays two side-by-side panels. The left panel, titled 'Requisition Information', includes fields for 'Req. Number', 'Date' (9/19/2018), 'Vendor' (SCHOOL SPECIALTY - AN), 'Ship To' (ANZA ELEMENTARY SCHOOL), 'DAC' (ANZA), 'Requester' (NELSON, STEPHNIE) with a 'W9 Rcvd' checkbox, and 'Buyer'. The right panel, titled 'Order Information', includes fields for 'Order Via' (EPROCUREMENT), 'Project' (EPROCUREMENT), 'Date Required' (10/4/2018), 'Order Type' (Purchase Order), 'Reference', and 'Award Number'. A navigation bar at the top shows 'Requisition Detail', 'Addresses', 'Notes', and 'PO Board Report'.

Click 'Actions' and select 'eProcurement'.



The screenshot shows the 'Add Requisition' dialog box with a menu bar containing 'Actions' and 'Help'. A list of actions is displayed, including 'Split Fund', 'Copy Line', 'Recalculate Tax & Freight', 'Distribute Tax & Freight', 'Apply Discount', 'Import from Excel', 'Validate Requisition', 'Check Budget', 'Vendor Web Site', 'eProcurement' (which is circled in red and has a mouse cursor over it), 'Accept Proposed Vendor', and 'Insert Warehouse Items'.

This will take you to EqualLevel where you will access the carts that have been transferred to you.

All Search by keyword or part number

Transferred Carts

You have received 2 transferred carts that require checkout

Displaying 1 - 2 of 2 results

All From: 02/04/2019 To: 02/04/2019 Search

	Name	Items	Total	Suppliers	Status	Created By	Created On	Purchased On	
<input type="checkbox"/>	Cart #5732 - 1	1	\$15.19	Lakeshore Learning (Bid# LS18-01)	Transferred	Amanda Cropp	02/04/2019 10:28 AM PST		<input type="button" value="Checkout"/> <input type="button" value="Decline"/>
<input type="checkbox"/>	Cart #5732 - 2	1	\$7.53	School Specialty (1493)	Transferred	Amanda Cropp	02/04/2019 10:28 AM PST		<input type="button" value="Checkout"/> <input type="button" value="Decline"/>

Choose the cart that corresponds to the supplier you selected for the 'vendor field' in your requisition and click check out.

Click  again.

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

eProcurement - Cart Received - Google Chrome

https://iv.cajonvalley.net/EIW/landing/eProReceived.aspx?EPRO=A2E56B48-F808-415A-B845-56A5C39FBF74



Your items have been submitted to Infinite Visions. Once in Infinite Visions, open the Purchasing & Payables Control Panel to continue with your Requisition. It is okay to close this page.

Go back into your iVisions Control Panel.

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

Control Panel

File Actions Help

Req. No.  DAC

PO No.  Project

Vendor: SCHOOL SPECIALTY View: All  Show Paid Column  Show Account Detail

Req. No.	Req. Date	Req. App.	Vendor Name	PO No.	R	PO Date	Amount	Status	Next Approver	Next Approver Name	DAC	Requester
1	2901976   09/12/2018	No	SCHOOL SPECIALTY		0	0	\$0.00	Open	Orig		PURCHASING	VEGA, DAWN

Double click to open the requisition.

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.

Line	Account	Qty	Unit	Part Number	Description	Unit Price	Ext Price	Tax	Freight	Line Total	Item Number
1	0100.0000.000.0000.-----000.000.0	1	EA	1468086	RUBBERBANDS 17IN 55 GALLON C	\$5.47		\$0.45	\$0		

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', hit '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. Your order will be delivered approximately one week after Purchasing sends the order to the vendor. Please import the shopping lists and have them approved as soon as possible so your order can be expedited.

Print *or* save requisition for your records.

**Reminder: Our system is configured for single vendor requisitions, if your staff had carts with multiple suppliers, you will need to create another requisition for each remaining supplier.**

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

Questions? Contact Kellie Pilchen in the Purchasing Department at (619)588-3266, [lauhonpilchen@cajonvalley.net](mailto:lauhonpilchen@cajonvalley.net)