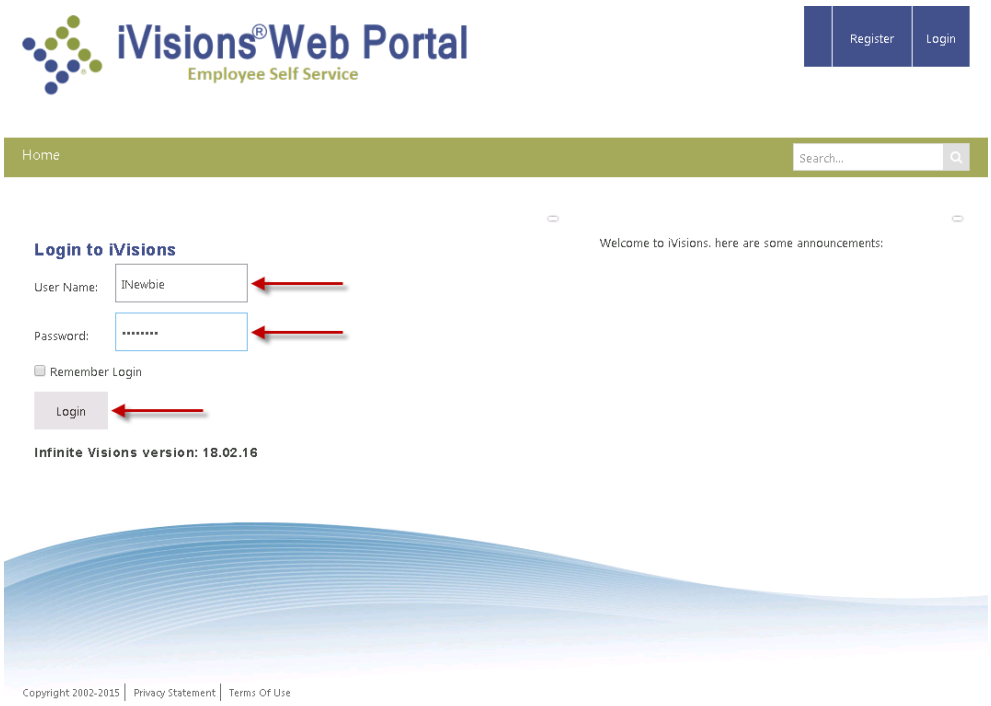
Entering a Purchase Requisition in iVisions:

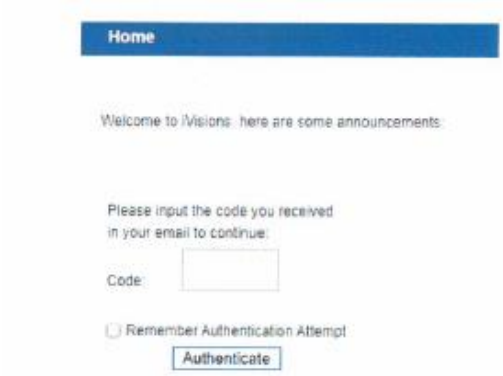
Your first step is to login to ESS (Employee Self Service). Go to the school district website and click on the iVisions Employee Self Service Web Portal in the Staff Links or under Employee Resources; or Copy and click the link: https://ivisionsess.tylerhost.net/manhattaness

1. When the portal opens, click on "Login" at the top right

2. At the login screen, enter your User Name and Password. Your user name is firstnameinitialfulllastname. If you forgot your password, click on Forgot My Login? and an email will be sent to you to reset it.



3. Two Factor Authentication: You will be prompted for a code that will be emailed to you.



2. You will receive an email with a code that looks similar to this.

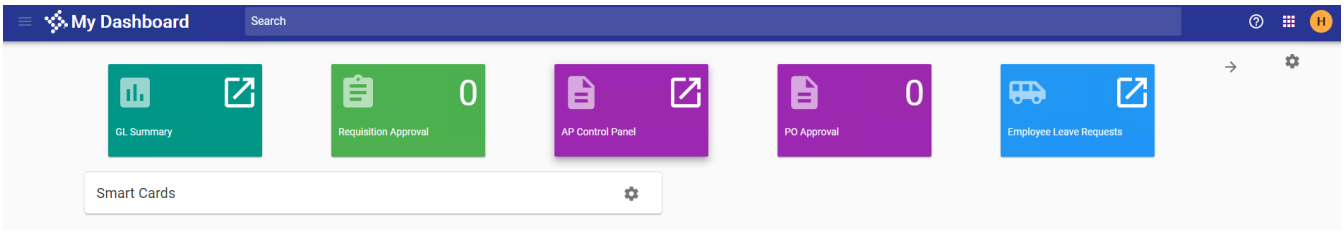
3. Input that 6-digit code in the box and then click Authenticate.
4. You may also select "Remember Authentication Attempt" which will remember your login on that computer and browser, preventing the authentication message from appearing again.

If you use the same computer, you can click the box Remember Authentication Attempt.

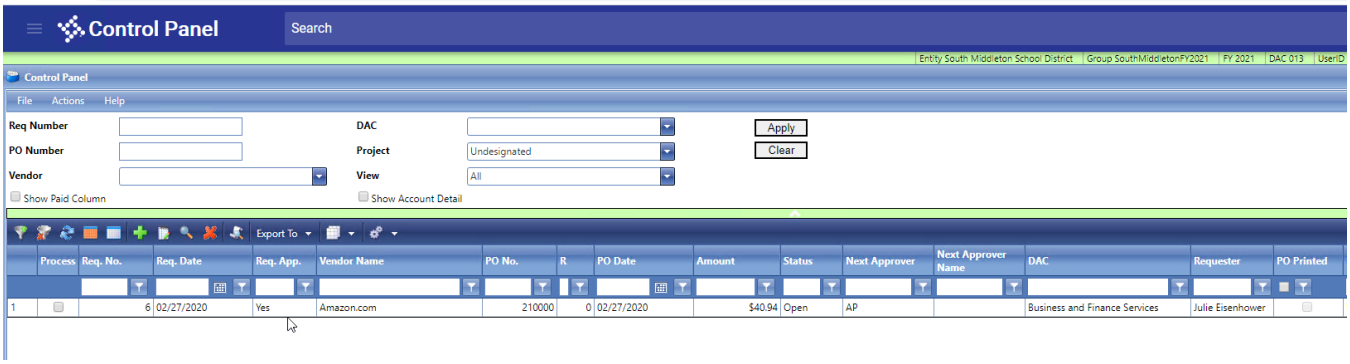
4. There will be a choice on your menu that says My Workflow. You will click on this option and it will take you to My Dashboard. Do NOT click again or attempt to login when the login screens pops up. This is temporary and you just need to wait…it will automatically log you in but may take a few seconds.

Entering a Requisition

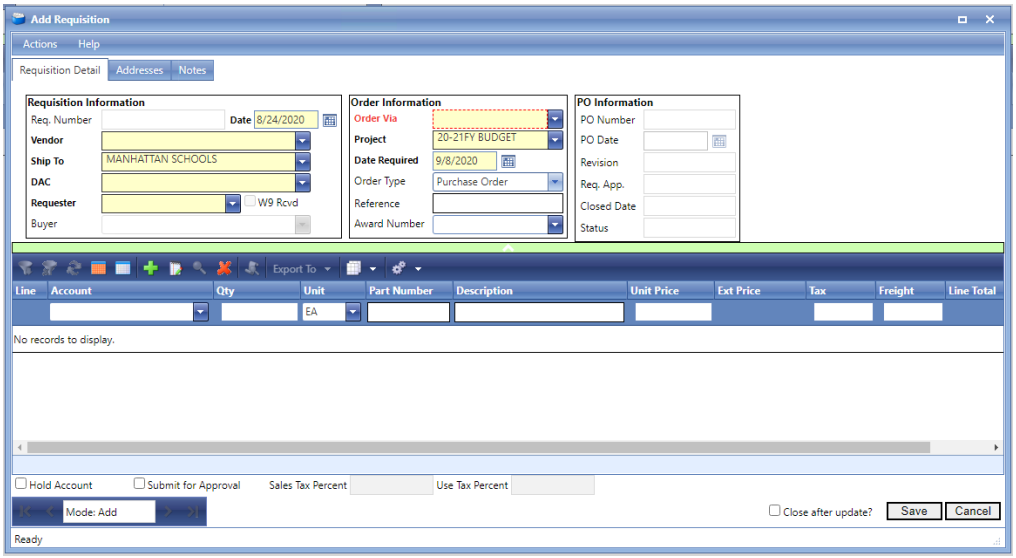
5. Once you are in the iVisions Dashboard and to get to the create requisition screen you will click on the AP Control Panel title at the top of your screen. If you step away for a bit, you may need to refresh your screen if you receive an error message.



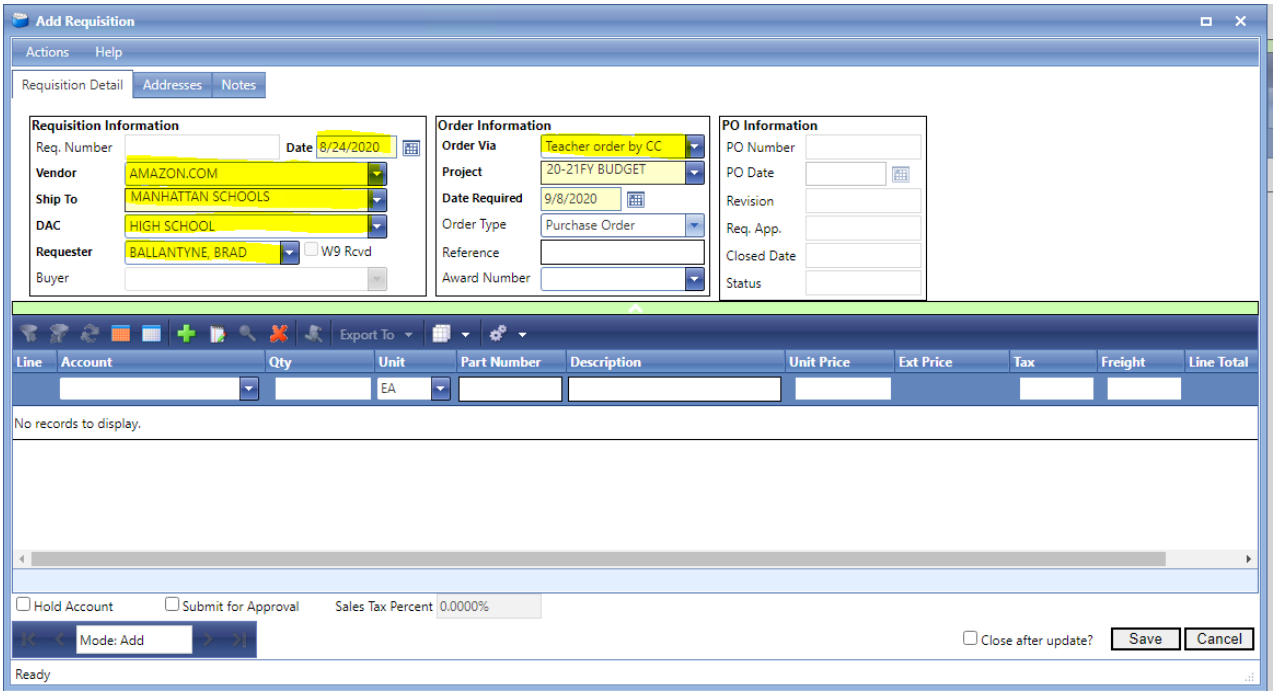
6. The AP Control Panel Title Short Cut takes you right into the create requisition screen. This is where you will create your requisitions.



7. Click the green Add (+) button. If the green Add (+) button is greyed out, make sure you are in the current FY connection group in the upper right corner. Click the down arrow and change if needed.

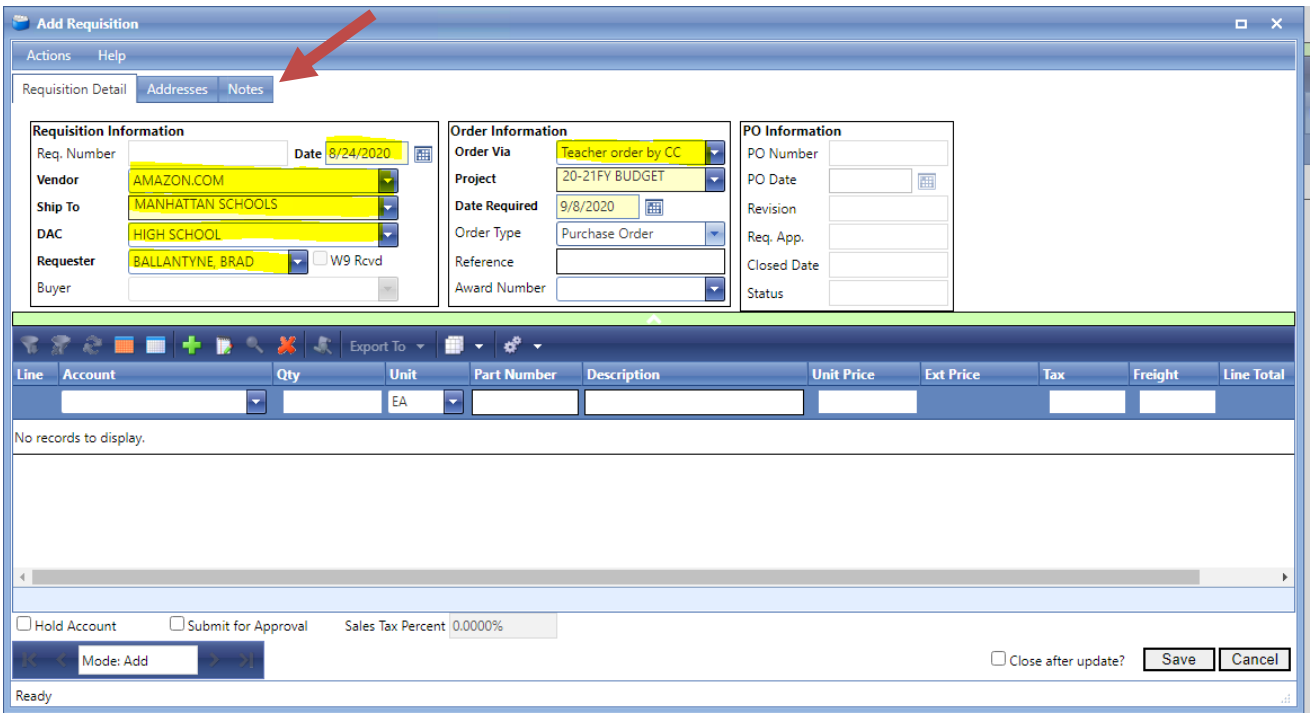


8. In the Requisition Information area, enter the Vendor and Requestor. Review the Ship To and Requisition Date fields and adjust if needed.

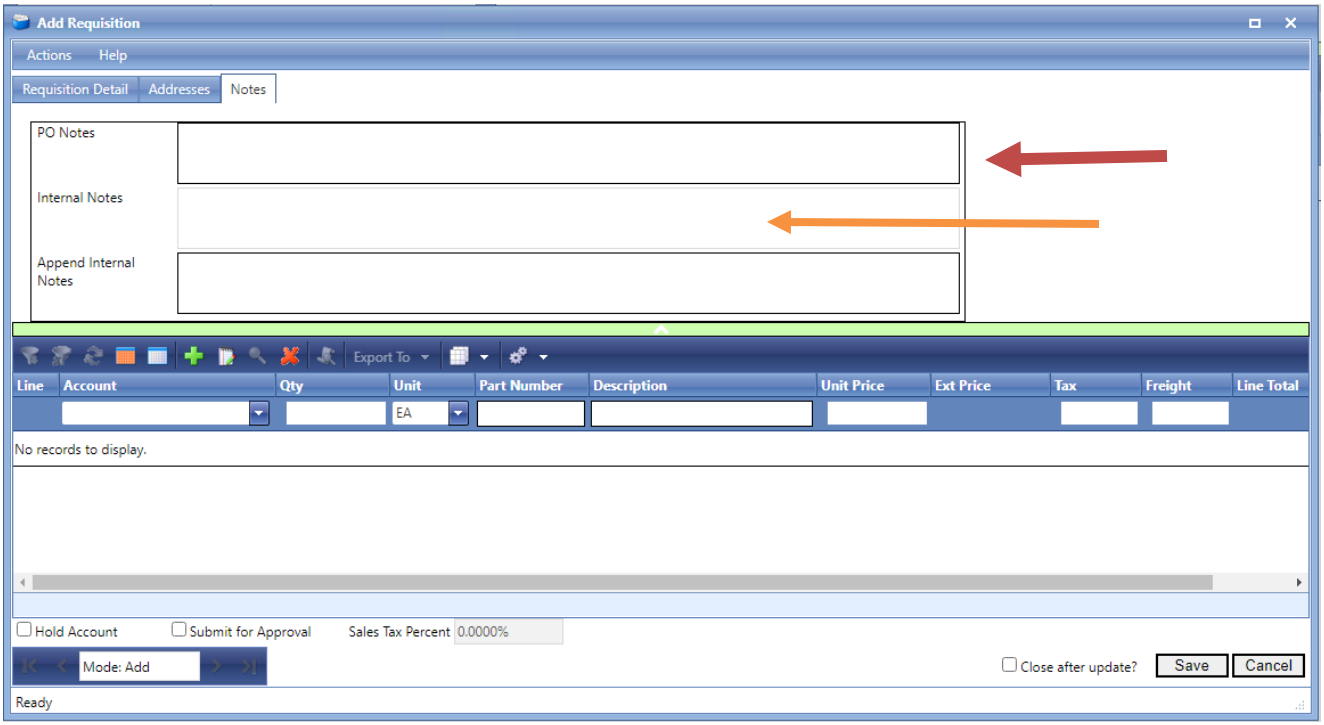


9. Review the Order Via and Project Information and adjust if needed. Under Project: Choose the <u>current FY Spring Order</u> only for those orders done in the spring for the following school year.

10. If you need to add notes to the requisition, go to the 'Notes' tab.



a. Anything entered in the PO Notes field will print on the PO
b. Use the 'Append Internal Notes' field to add notes that shouldn't be printed on the PO.
    i. Once saved, the internal notes cannot be changed.

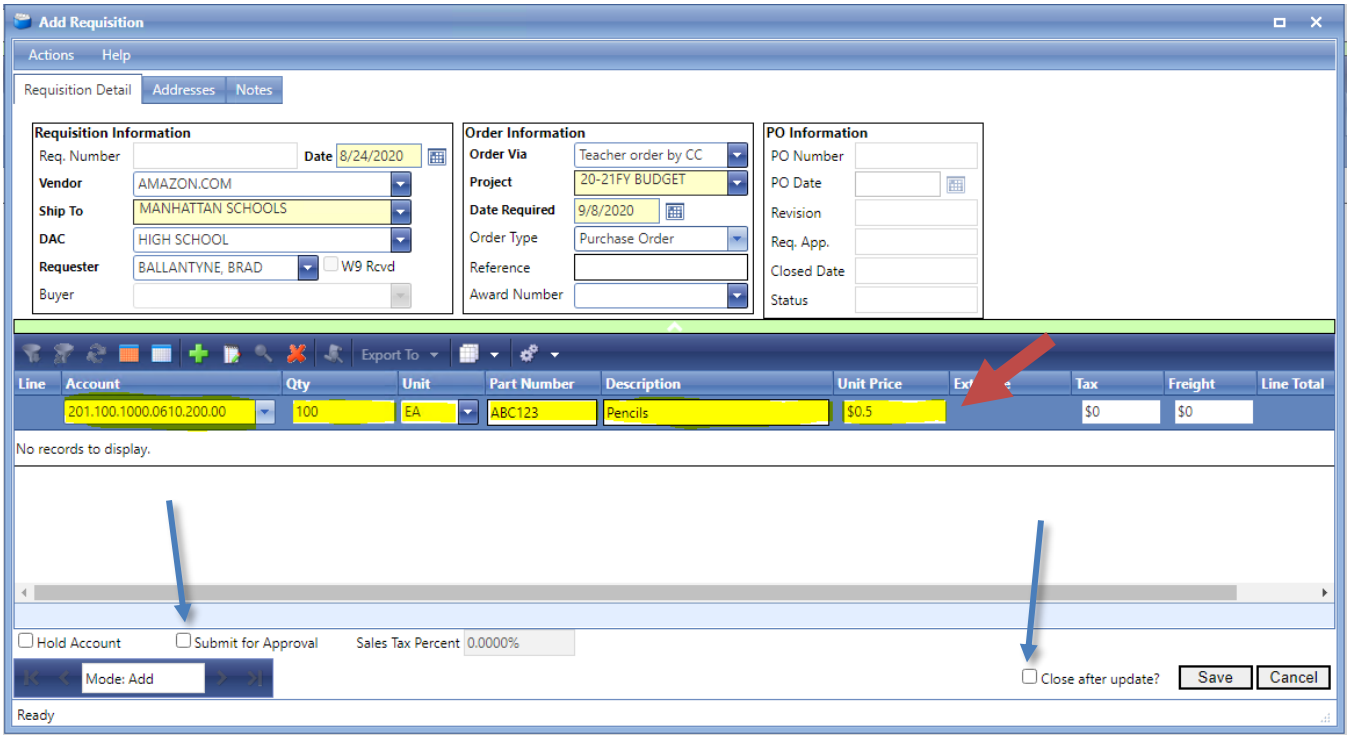


11. In the bottom half of the requisition form, enter your line detail (what you would like to order). Be specific on part number and description of each item you want to order.

Click the **grey floppy disk icon** to the right to save the line. You will need to click the floppy disk for **each** line entered. If you do not see the floppy disk, either scroll the bar to the right or maximize your screen.

a. Account, Quantity (Qty), Description and Unit Price are required. Complete the other fields as appropriate. Continue entering lines until requisition is complete.
b. To edit a saved line, double click it and it will appear in the edit bar. Update the fields and click the floppy disk icon to save the changes.
c. To delete a saved line, single click to highlight it and click the red X above.
d. If you are entering a lot of information or would like to save your work to continue at a later point, click the 'Close this dialog after update?' checkbox and click 'Save'. To reopen the req, just double-click it in the Control Panel grid.

12. To submit the req for approval, click the 'Submit for Approval' checkbox and click 'Save'.



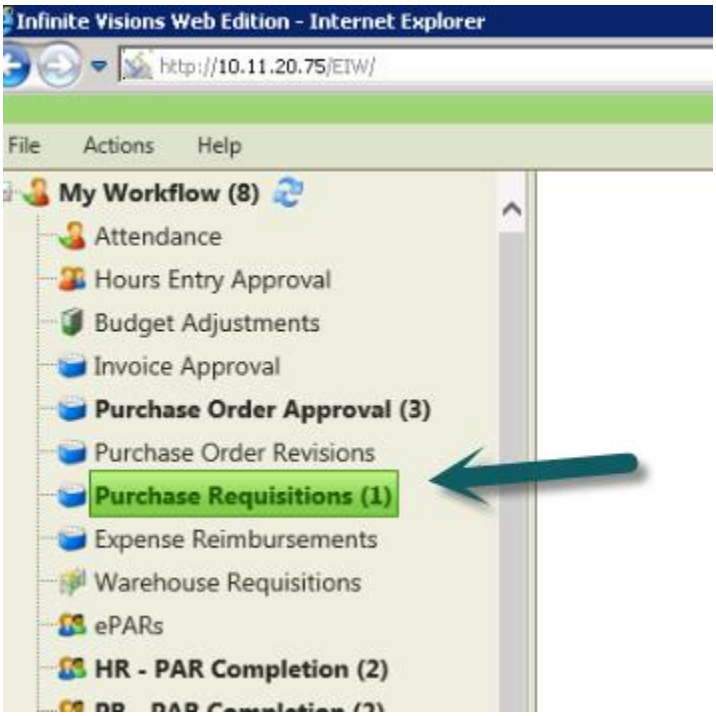
Tips & Tricks

- If using the same account for multiple lines, check the 'Hold Account' box before entering the account to be repeated

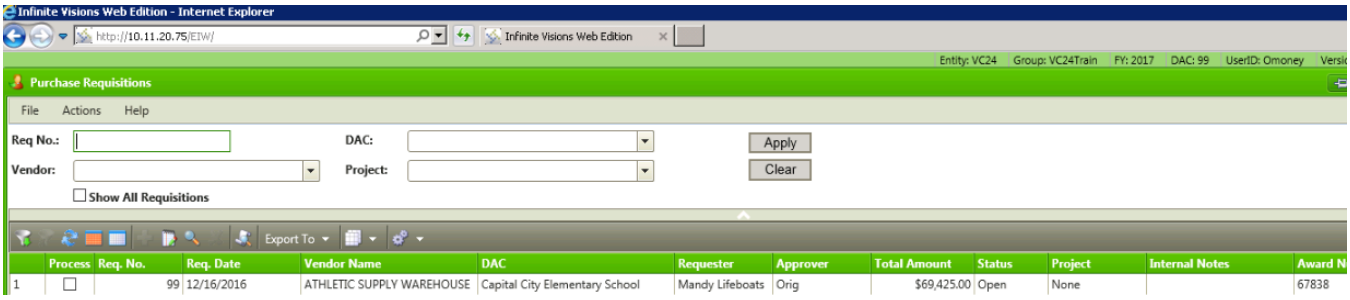
ADMINISTRATIVE STAFF ONLY

Approving a Requisition

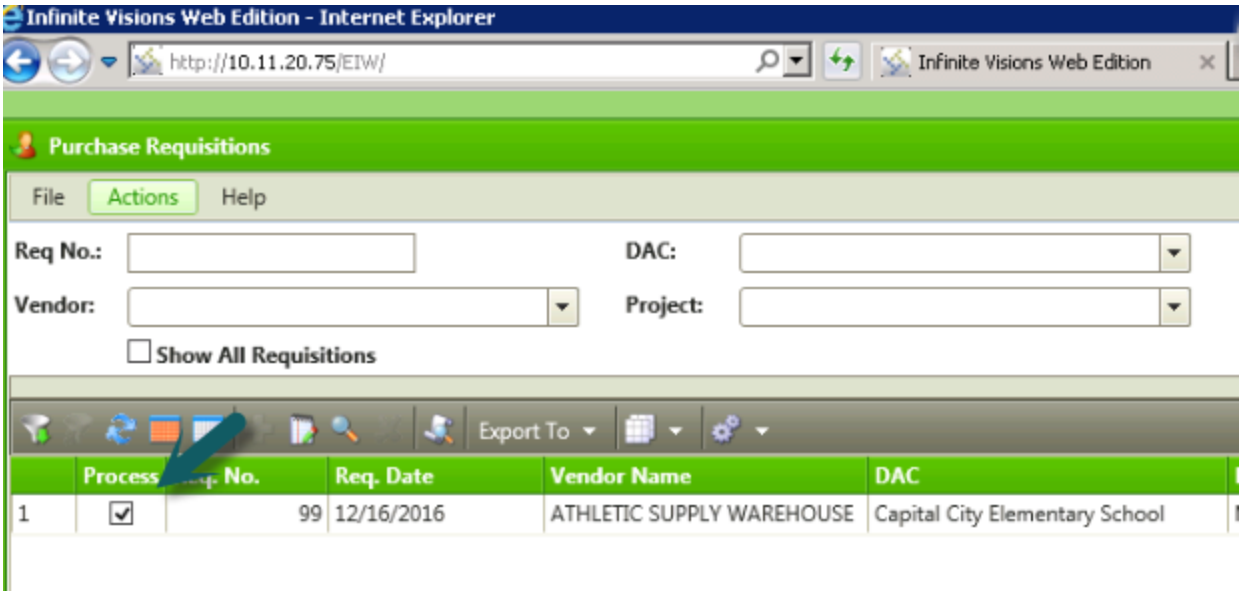
Login to **iVisions Employee Self Service Web Portal**, go to My Workflow > Purchase Requisitions

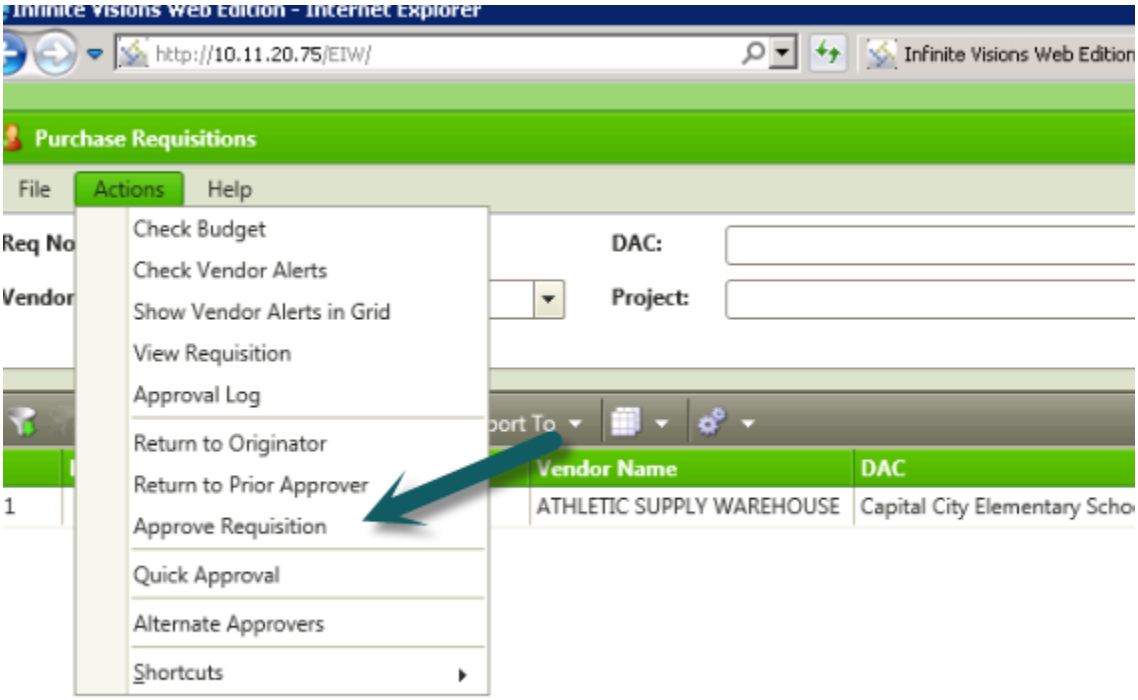


1. Any requisitions awaiting your approval will be displayed. Double click any of them to review in detail



2. To approve, click the 'Process' check on one or more and go to Actions > Approve Requisition, you can return to prior Approver or return to the original.





Tips & Tricks

- From the Actions menu, you can also quickly review budget, vendor alerts, approval log and/or return a requisition