Helpful Tips for entering Requisitions

How to correct mistakes to a Requisition after it has been submitted for approval

As you may know by now, once you save and submit a requisition it can not be changed, or can it? If you need to make a correction to a Requisition after it has been submitted, do the following:

1. Call the first person that must approve your Requisitions, and ask them to Deny the Requisition.
2. The Requisition will now be sent back to you for changes.
3. You can then open the Requisition by clicking on the “Resubmit Denied Requisitions” button on the Po/Requisition menu.
4. Select the correct approval rule.
5. The Requisition will now reappear and you may make any changes to it you would like.
6. When you are finished with the changes:
    a. Click on the Save button at the bottom of the screen
    b. Then click on the Submit button at the top right corner of the screen.
7. Your Requisition will now begin the approval process over again.

Need to cancel an entire Requisition but you already submitted it?

1. Call the first person that must approve your Requisitions, and ask them to Deny the Requisition.
2. The Requisition will now be sent back to you for changes.
3. You can then open the Requisition by clicking on the “Resubmit Denied Requisitions” button on the Po/Requisition menu.
4. Select the correct approval rule.
5. The Requisition will now reappear.
    a. On the right side of the screen click on the first line of the Requisition.
    b.
6. When you are finished with the changes:
    a. Click on the Save button at the bottom of the screen
    b. Then click on the Submit button at the top right corner of the screen.
7. Your Requisition will now begin the approval process over again.

Ever enter a Requisition only to find out you selected the wrong Approval Rule?

After entering an entire Requisition you realize you forgot to change the Approval Rule to the correct rule or you selected the wrong Approval Rule in error, when you attempt to Save the Requisition you may receive one of the following error messages stating that you are “not allowed submit a Requisition for this Approval Rule” or “the account numbers on the Requisition are not in the Range assigned to this rule”. To change the Approval Rule to the appropriate Approval Rule after you receive the error message do the following:

1. Click on the “Rules” button.
2. Select the correct Approval rule
3. Save and Submit the Requisition.
4. If you do not receive any error messages, then you are all set.

Have to enter the same account number over and over again?

The software requires an account number for each line you enter on a Requisition. If your order has several lines and they are all using the same account number, follow this procedure and it will save you the time of having to key in the account number for each line:

1. On the first line of the order, enter the account number.
2. With your mouse, highlight the entire account number
3. Then press and hold down the “Ctrl” key and tap the “C” key.
4. This will copy the account number into your clipboard.
5. Finish entering the remaining fields on the first line of the Requisition.
6. When you get to the account number field on the second line of the Requisition, press and hold down the “Shift” key and tap the “Insert” key.
7. Presto, this will copy the account number into the account number field.
8. You can repeat step 6 for each line on the Requisition as long as the account number on each new line is the same account number as on the first line.

Have to enter part of the same account number over and over again?

On Requisitions that need to be allocated over several schools, you use most of the same account number over and over again, except for the school location at the end of the account number. To save yourself the trouble of entering most of the account number over and over again, follow this procedure:

1. On the first line of the order, enter the entire account number.
2. With your mouse, highlight the entire account number except for the last two digits which are the school number.
3. Then press and hold down the “Ctrl” key and tap the “C” key.
4. This will copy the account number into your clipboard.
5. Finish entering the remaining fields on the first line of the Requisition.
6. When you get to the account number field on the second line of the Requisition, press and hold down the “Shift” key and tap the “Insert” key.
7. This will copy the part of the account number you highlighted above into the account number field, just add the school number to the end of the account number.
8. You can repeat step 6 for each line on the Requisition as long as the part of the account number you highlighted above is the same part of the account number to be used on as on the remaining lines.

You submitted a Requisition for approval and haven’t received your Purchase Order yet?

As you know once you submit a Requisition for approval, it must be approved by each approver that is set up for the Approval Rule you selected. If you would like to know where your Requisition is in the approval process or who is holding up your Requisition you can run the following report:

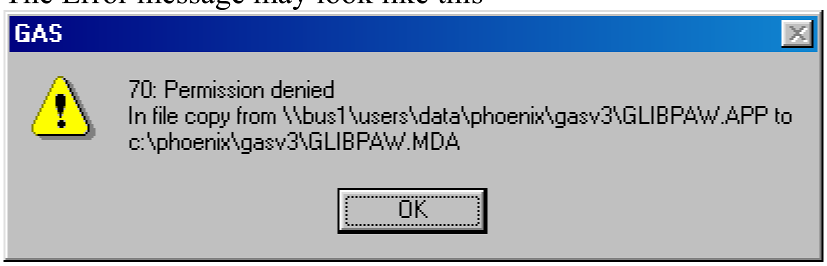
1. Go to the Report menu in Accounting
2. Select the Budget Building button or the Purchasing button
3. Select the “Open Req's Awaiting Approval by Approver” report
4. Enter the Fund or Fund Range you want to run the report for
5. The report will list by Approver, all the Requisitions that are awaiting approval for each Approver.

Do you need a printout of all the Requisitions you recently entered that you have not yet received a Purchase Order for?

1. Go to the Report menu in Accounting
2. Select the Budget Building button or the Purchasing button
3. Select the "Open Req's by User that Entered" report
4. The report will only print all the detail for your open Requisitions and will sort them by Requisition number.

You tried to log into the Accounting software, but it gives you a strange error message and won't let you log in

The Error message may look like this



Periodically I am making changes / modifications to the master copy of the Accounting software (i.e. a new report), when I am done with the modification, the next time you log into the Accounting software, it will automatically update the software on your computer with the newest version of the software. But if you should happen to log into Accounting at the same time I am working on the master copy of the software, your computer will try to perform this update an will not be able to, so you will receive the above error. To resolve this problem:

1. Click the OK button and exit out of the error messages
2. Wait about 5-10 minutes and try logging back into the Accounting software again.
3. If you still receive this error message, then call me at x345 and let me know you are trying to log into Accounting, I will close the master copy of Accounting and you will then be able to get into Accounting.