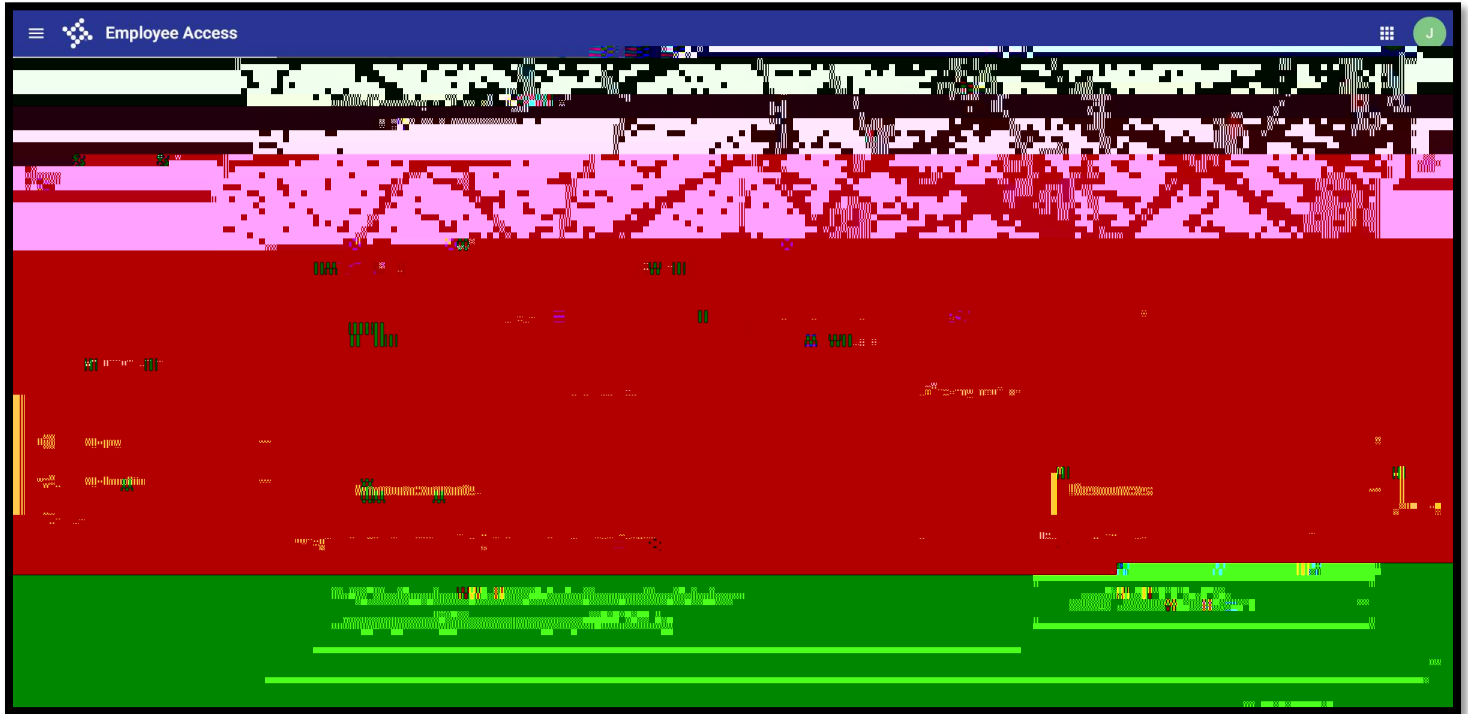


How-To Enter a Requisition

For assistance, please contact SchoolERPSupport@wesdschools.org

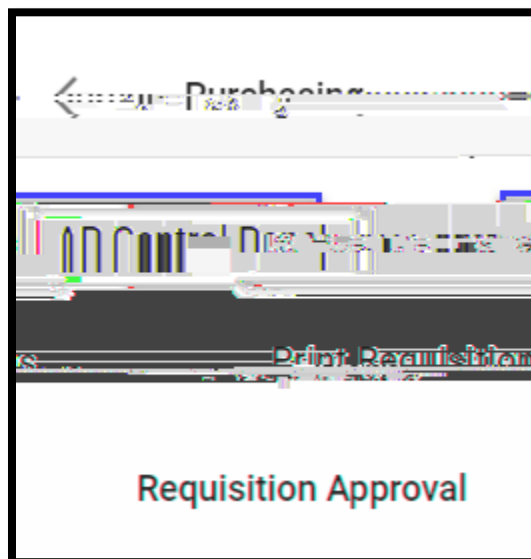
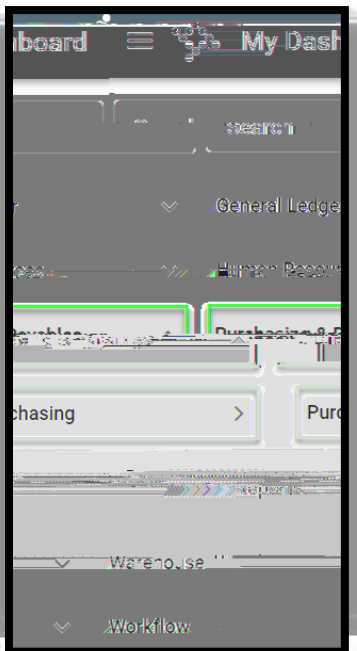
STEP 1: Login to School ERP Pro through Employee Access Portal (<https://tyler-waestdaz.okta.com/>)
*Employee Access Portal can also be access by WESD website > Staff > Employee Access – School ERP Pro



STEP 2: Click on “Hamburger” Menu next to My Dashboard



STEP 3: Click on Purchasing & Payables > Purchasing > AP Control Panel



STEP 4: Click +Add to start a new requisition

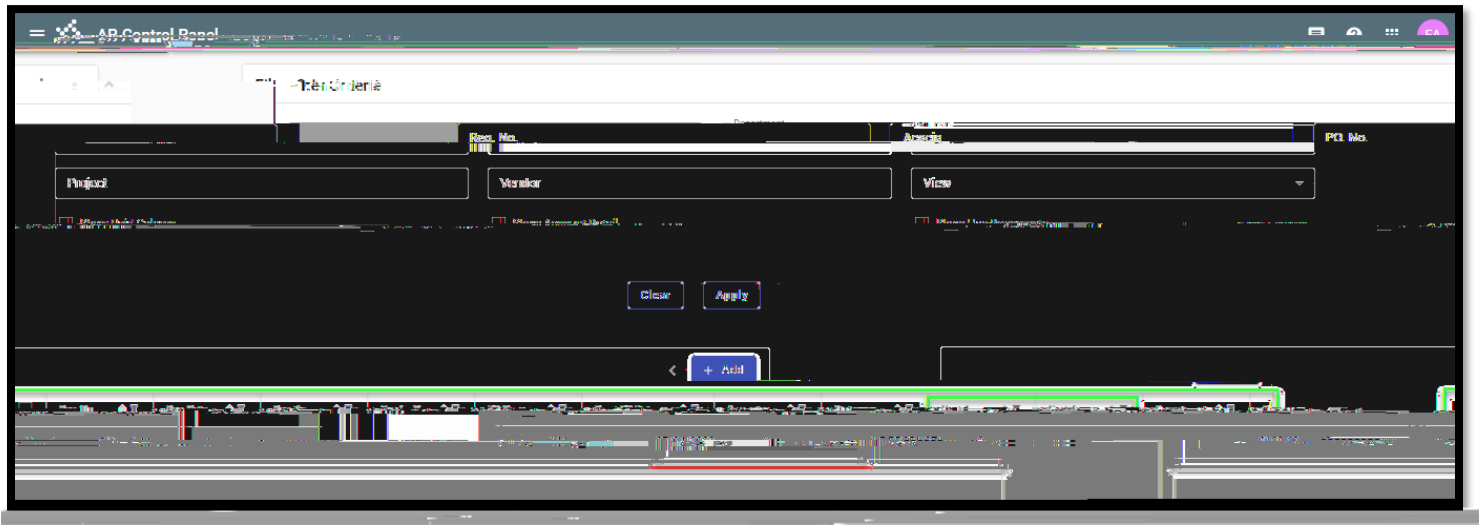
The screenshot shows the top portion of a requisition form. At the top, there's a 'Filter Criteria' section with a dropdown for 'Department'. Below this are input fields for 'Project', 'Vendor', and 'View'. At the bottom right of the form, there is a green button with a white plus sign and the text '+ Add'.

STEP 5: Fill in all sections below

1. *Date* defaults to current date
2. *Vendor* – select from drop down or start typing
3. *Ship to* – leave defaulted as Materials Management Center
4. *Department* – will default to the current DAC you are in
5. *Requester* – select site from drop down
6. *Buyer* leave blank
7. *Order Via* – will default to email (can change if you wish)
8. *Project* – will default to undesignated – do not need to change
9. *Date Required* – leave as is
10. *Order Type* – Purchase or Blanket
11. *Reference* – name of person whom is requesting the order so it can be identified easily (ie: Bob Smith)
12. *Award #* - leave as is

The screenshot shows the lower portion of the requisition form. It includes fields for 'Vendor', 'Date', 'Order Type', and 'Reference'. Green numbered callouts (1-12) are overlaid on the form fields, corresponding to the steps listed in the previous block. For example, callout 1 points to the 'Date' field, callout 2 points to the 'Vendor' dropdown, and callout 12 points to the 'Award #' field. The 'Purchase Order' section is highlighted in a light blue box.

STEP 10: After clicking Submit for Approval, screen will take you back to AP Control Panel. You should then see the requisition that was just released from the queue and is now with the next approver.



**If requisition stays 'Orig' in Next Approver column, this means it has not yet been released from the queue to start in the line of approval. In order to release from the queue, double click on requisition > scroll to bottom > check box for Submit for Approval > click Save.

Friendly Reminders:

- If an item is going to be split funded, follows Step 6 through Step 7
- Attach any quotes, club meeting minutes, field trip request, etc. to requisition