Requisitions

District personnel purchase items in the TEAMS system using the Requisitions module. Requisitions must be created, and then purchase order can then be created for the requisition, which is then received. An invoice must then be created for the requisition. This document describes this process.

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Introduction

Purchasing items in TEAMS is a six-step process.

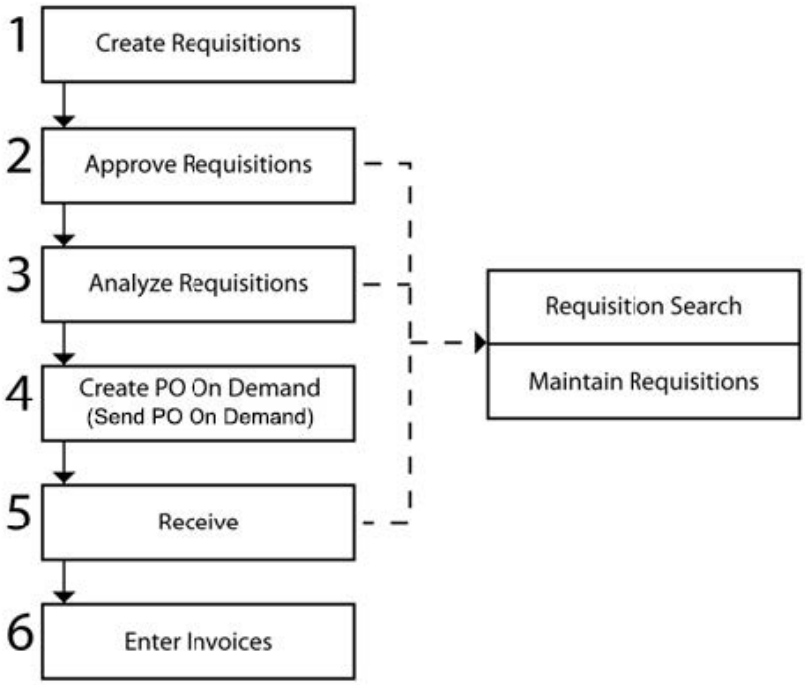

Figure 1: Requisitions workflow

Note: Use the Receive entry point to search for requisitions you want to receive. To modify a requisition you are about to receive, use the Maintain Requisitions entry point.

Overview

- In Create Requisitions, you can create traditional, not-to-exceed, project, and blanket requisitions.
- In Requisition Search, you can search for traditional, not-to-exceed, and blanket/project requisitions.
- In Maintain Requisitions, you can edit or view information about requisitions.
- In Receiving Requisitions, you can receive items bought through requisitions.
- The Appendix provides supplementary information for requisition-related functions.

Create Requisitions

To purchase items using TEAMS, you must create and submit requisitions. These requisitions are approved by approvers and analyzers so that they can be posted and invoiced. This document describes how to create and submit these requisitions:

- Traditional Requisitions (page 4)
- Not-To-Exceed Requisitions (page 17)
- Project Requisitions (page 20)
- Blanket Requisitions (page 24)

Note: The requisitions available depend upon your level of access and the configuration choices made by your district. The options available in the various requisition types are configurable by your district, via the Requisition Options entry point.

Creating Traditional Requisitions

1. Navigate to the TEAMS Home page and locate the **Requisition** menu.

   Note: The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Click the **Create Requisitions** link. The Select Requisition Type tab appears.

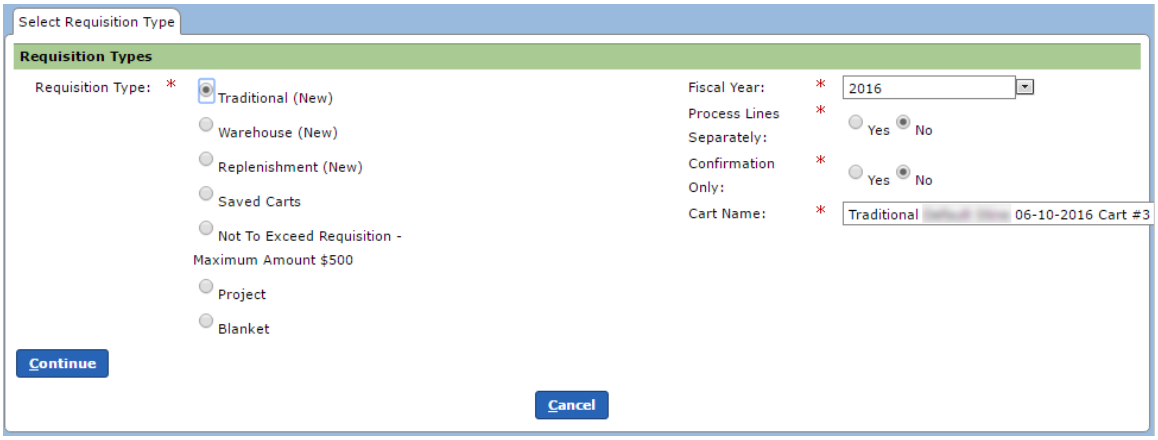

Figure 2: Select Requisition Type tab

3. In the **Requisition Type** field, *Traditional (New)* is the default selection. Leave Traditional (New) selected.

   Note: Select *Traditional (Saved)* if you have already created the requisition and saved it as incomplete in the Line Items tab, and select the saved requisition from the **Cart Name**

drop-down list.

4. The **Fiscal Year** defaults to the current year. You can change the year, if necessary.
5. The Cart Name field is populated with a name comprised of these elements:
   - The name of the employee currently logged in
   - Today's date
   - The next cart number

   You can change this information, if necessary.

   Note: Cart Names are stored in numbered increments. If you change the Cart Name, the next requisition will default in using the same number as the number you change. For instance, if you change the Cart Name from *Traditional Rita Velazquez 10-24-2013 Cart #1* to *Office Chairs*, the next requisition you create will default in the same Cart Number you changed: Traditional Rita Velazquez 10-24-2013 Cart #1.
6. Because the line items you add to the requisition can be approved individually, one item may be approved but not the other, or one item may be approved before the other. Use the **Process Lines Separately** field to indicate whether the items you add to the requisition must be purchased together. Select *Yes* if one item may be purchased without the other(s). Otherwise, select *No*; in that case, no purchase order is created until all lines are approved.

   Note: This option might not be available, based upon your district's configuration.
7. Use the **Confirmation Only** field to indicate whether you are creating this requisition only to confirm it. For instance, select *Yes* if you already have the merchandise and only need to confirm the order. (*No* is the system default.)

   Note: This option might not be available, based upon your district's configuration.
8. Click the **Continue** Button. The Create Requisition tab appears.

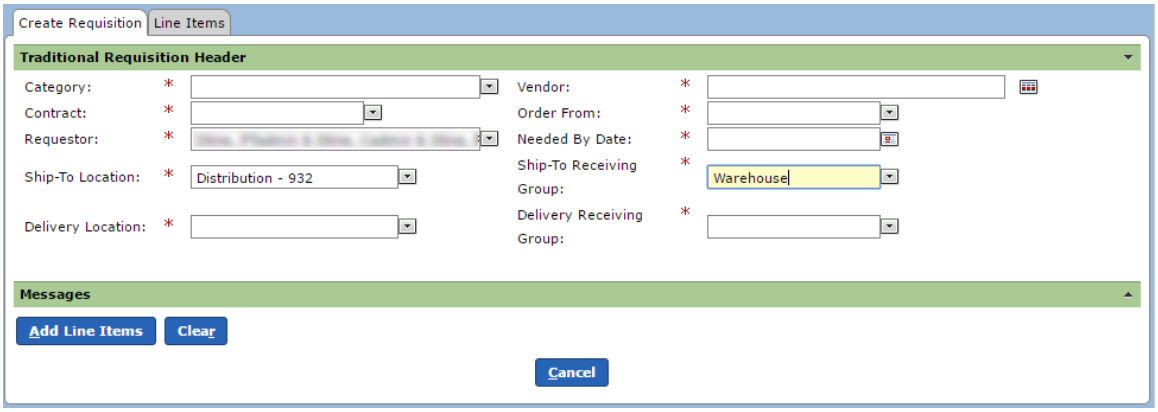

Figure 3: Create Requisition tab

9. The **Category** and **Vendor** fields are related.
   - If you select a procurement Category first, the vendor drop-down list is populated with those vendors that are assigned to the category you selected. Choose your categories consistently, as they are useful for budget analysis at the end of the year.
   - If you select a Vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.

   Note: The Contract and Requestor drop-down lists are populated with preferred contracts and requestors, respectively.

10. Select a **Contract** from the drop-down list. Some categories may have contracts tied to them. If this is the case, the Contract field will be populated with the contract name.
11. Select **Order From** from the drop-down list if it is not already populated. Order From with *(P)* prior to the address indicates a paper Purchase Order will be printed. Order From with *(E)* prior to the address indicates the Purchase Order will be emailed to the Vendor.
12. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

    Note: The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.

    Note: Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.

13. Select the **Ship-To Location** from the drop-down list.

    Note: If the Distribution Center of your warehouse is selected as your Ship-To Location then the **Delivery Location** and **Delivery Receiving Group** fields appear. Use these fields to inform the warehouse where to deliver the goods. If the Ship-To Location is not warehouse-related then the Delivery Location and Delivery Receiving Group field do not appear.

14. Enter the **Needed By Date**. This date can be no earlier than three calendar days after the current date. For example, if today is September 15, the earliest date you can enter is September 18.
15. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
16. Select the **Delivery Location** from the drop-down list.
17. Select the **Delivery Receiving Group** from the drop-down list.

18. Click the ▲ on the **Messages** panel to expand the Messages panel.

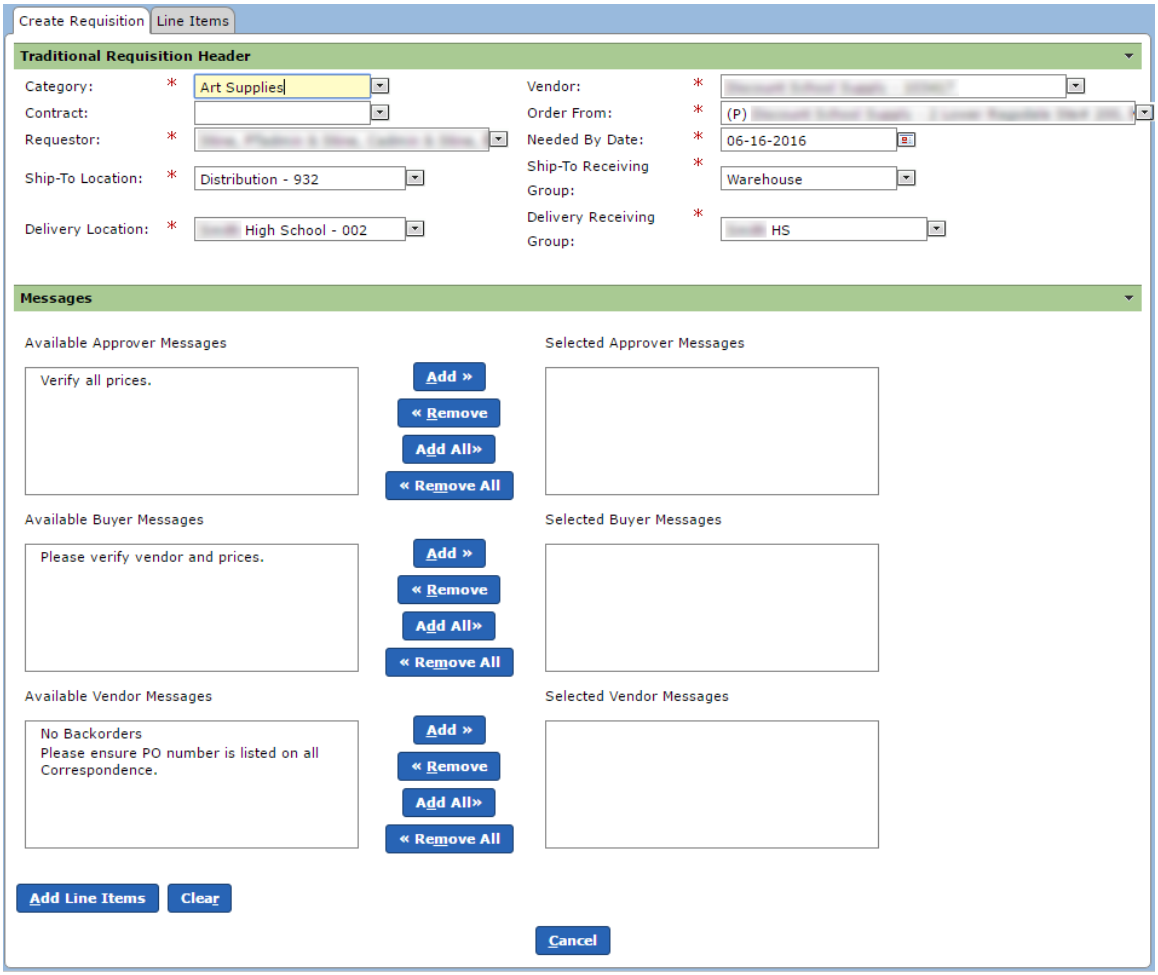

Figure 4: Create Requisition tab – Messages panel expanded

19. To include a message to Approvers, Buyers, or Vendors, highlight to select the appropriate message in the respective field and click the **Add** button.

> **Tip:** Use the **Add All** button to move all of the items in one of the Available fields to its corresponding Selected field.

> **Note:** Available messages are created in the Requisition Options function. For more information, see the TEAMS Requisition Setup Guide.

20. Click the **Add Line Items** button to view the Line Items tab.

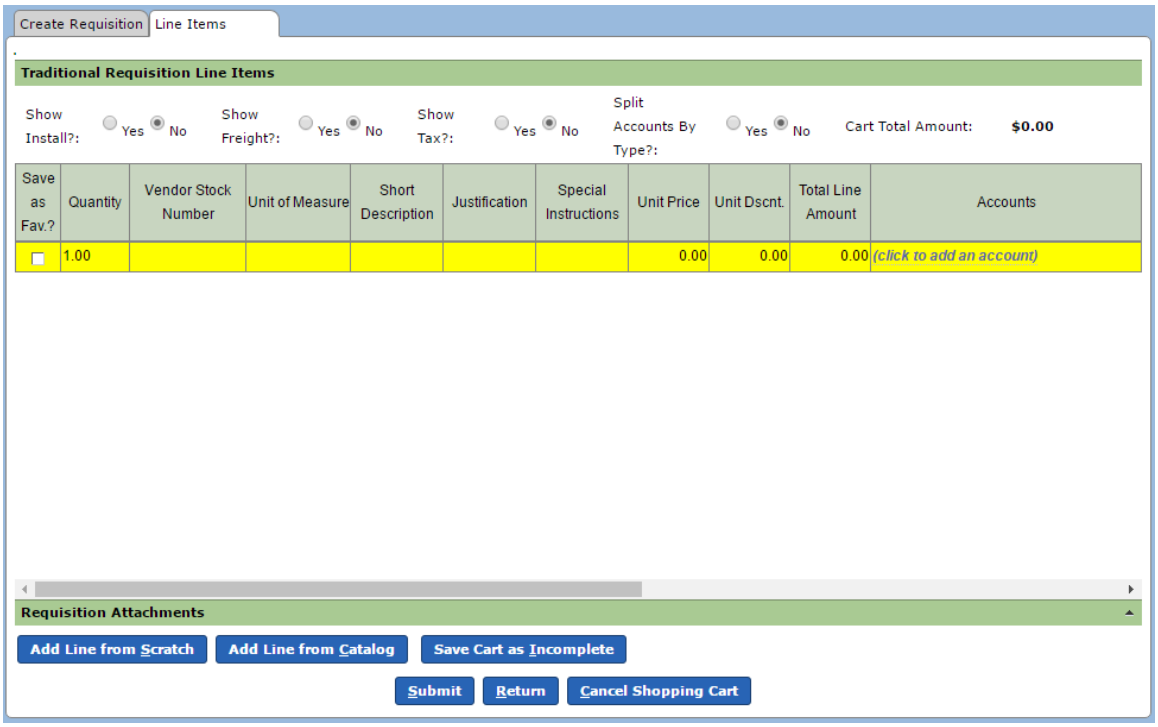

Figure 5: Line Items tab

> **Tip:** Tip: Use the **Add Line from Catalog** button to add a line item from the catalog, from a list of items you have saved as favorited items, or from a list of items you have added in the past. For more information about adding these items, see Adding a Line from the Catalog (page 12).

21. In the **Show Install?** field, indicate whether the item needs to be installed. If you select *Yes*, the Unit Install column is added to the table displaying the line items. Enter the amount the installation will cost in that cell of the appropriate line item.
22. In the **Show Freight?** field, indicate whether freight charges will be applied to the item. If you select *Yes*, the Freight column is added to the table displaying the line items. Enter the amount in that cell of the appropriate line item.

    Selecting Yes also adds the **Authorize Freight Charges** field. You must select this check box before you can modify the value in the Freight column.
23. In the **Show Tax?** field, indicate whether taxes will be applied to the item. If you select *Yes*, the Unit Tax column is added to the table displaying the line items. Enter the amount the tax amount in that cell of the appropriate line item.
24. In the **Split Accounts By Type?** field, indicate whether the unit price, discount, or tax amounts need to be taken out of another account. If you select *Yes*, the Expense Accounts, Discount Accounts, and Tax Accounts columns are added to the table displaying the line items. Enter the amounts for each and add the account out of which to draw the funds.

> **Note:** For more information about adding an account, see step 26.

25. Use the information in the following table to configure the table in the **Line Items** tab.

> **Note:** Click inside the cells under the relevant columns to enter information. The **Total Line Amount** cell cannot be edited, but is altered by what you enter in the **Unit Price** and **Unit Discount** fields, as well as the **Install**, **Freight**, and **Unit Tax** columns, if they are selected.

Column	Action
Save As Fav?	Select the check box in this column to save that line item as a favorite. The line item is added to the My Favorites tab when you click the Submit button. The values maintained in the My Favorites tab are the ones captured at the time they are added. Some of these values, such as Unit Price, may have changed after the item was added to favorites. When you need to add that item later, click the **Add Line From Catalog** button to access the Favorited Items tab. For more information about how to add favorited items, see Adding Items from the My Favorites tab (page 13).
Quantity	Enter the number of items you want to purchase.
Item Number	Enter the item's number. Entering an item number that matches the item number used in the catalog populates all of the information for the line item except for the account. For more information about adding an account, see step 26.
Unit of Measure	Select how the items are grouped from the drop-down list.
Short Description	Enter a short description, 250 characters maximum. This field may or may not appear on the tab, as your district can choose to show only the Short Description, only the Long Description, or both.
Long Description	Enter a long description, 1000 characters maximum. This field may or may not appear on the tab, as your district can choose to show only the Short Description, only the Long Description, or both.
Justification	Enter an explanation for the purchase. The approver sees this explanation during the approval process. Explanations do not appear on the purchase order.
Special Instructions	Special Instructions print on the Purchase Order beneath their corresponding line items.
Unit Price	Enter a price per unit.
Unit Dscnt.	Enter a unit discount. Unit discount can be entered with a percent sign (%) which will calculate the amount of discount based on the Unit Price, or you can add the dollar amount of the discount.

26. Click the **Click to add an account** link to include an account from which to draw funds to pay for the item. The Edit Accounts box is displayed, as shown in the following illustration.

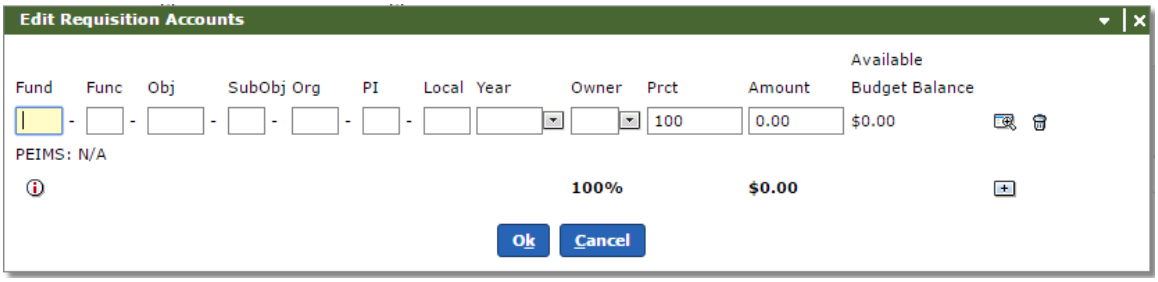

Figure 6: Edit Accounts box

27. Enter the account number, or click the icon to select one from the Account Numbers tab.

> **Tip:** Complete any of the boxes and click the icon to filter the search.

28. Select the **Year** from the drop-down list.
29. Select the **Owner** from the drop-down list.
30. The **Percent (Prct)** field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.

> **Note:** To delete an account, click the icon.

31. Optional. Click the **+** icon to add another account number for the requisition. Repeat steps 26 through 30, and ensure that the Percentage fields for all accounts adds up to 100 %.
32. Click the **OK** button. The account is added into the **Accounts** column in the Line Items tab.
33. Use the following information to add line items:
    - Use the **Add Line from Scratch** button to add a new, blank line item.
    - Use the **Add Line from Catalog** button to add a line with previously defined information.

> **Note:** Clicking the **Add Line from Catalog** button opens the Purchasing Catalog tabs, which you can use to select catalog items, items you have saved as a favorite, and items you have added before. For more information about selecting these items, see Adding a Line from the Catalog (page 12).

> **Note:** Click the **Save Cart as Incomplete** button to save the requisition and complete it at another time. When you want to continue creating the requisition, select *Traditional (Saved)* from the Select Requisition type tab, and choose the requisition you created and saved from the drop-down list. Saved Carts do encumber funds at the time they are saved. The district will determine how long a Saved Cart will remain in the system. If the Saved Cart exceeds the allotted time, then the requisition is deleted and the funds added back to the account number(s) that were in the cart.

34. To add attachments click the down arrow on **Requisition Attachments** and then click the **+** sign to browse for your saved attachment. You can add a description to the attachment.

    To delete a line item, click the icon.

35. Click the **Submit** button. A message appears, telling you that the requisition was successfully created, and asking if you would like to create another requisition.

> **Note:** If a selected account does not have sufficient budget for a line item, a message appears to inform you of the budget shortfall.

Adding a Line from the Catalog

If the item you want to add can be found in the catalog, instead of manually entering the line item, you can save time by adding line items from the catalog.

1. On the Line Items tab, click the **Add Line from Catalog** button. The **Purchasing Catalog** tab appears.

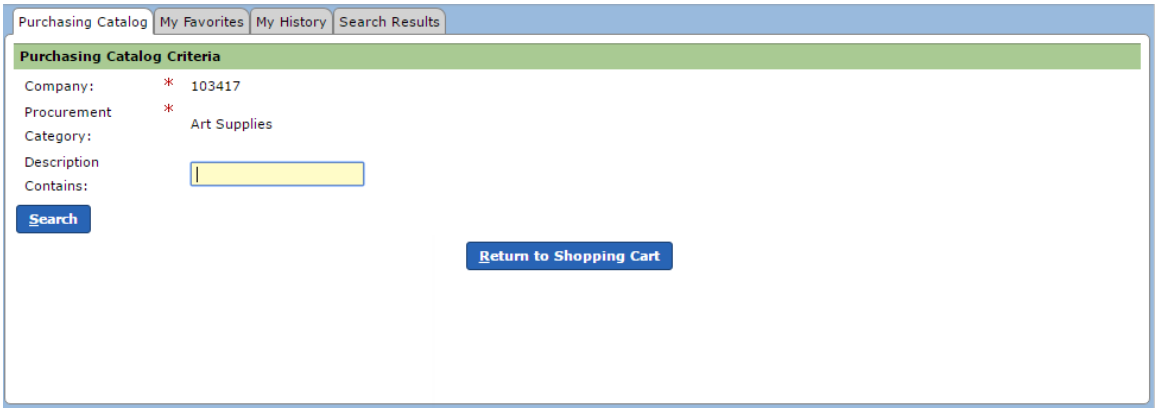

Figure 7: Purchasing Catalog tab

2. Enter information in the **Description Contains** field to search for items with a particular description.
3. Click the **Search** button. The **Search Results** tab appears.

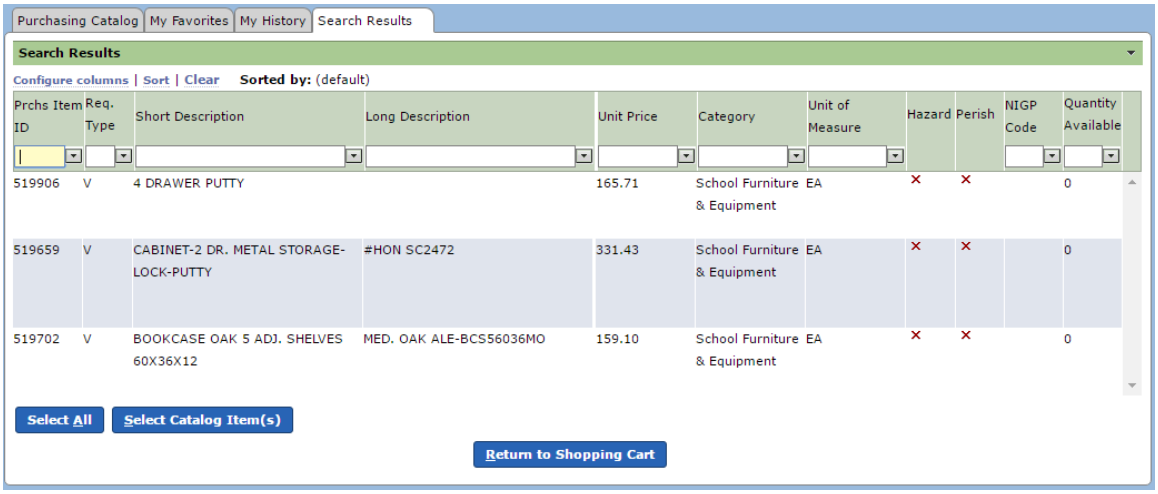

Figure 8: Search Results tab displaying results from a purchasing catalog search

If you leave the search fields empty when you click the Search button, your search returns the entire catalog.

4. Click the appropriate item to highlight it, then click the **Select Catalog Item(s)** button. The Line Items tab appears with the item you selected added to the list.

Adding Items from the My Favorites tab

When you enter line items, you have the option of saving them as favorites by selecting the **Save as Fav?** field. To select the items that have been saved as favorites:

1. Click the **My Favorites** tab to bring it forward.

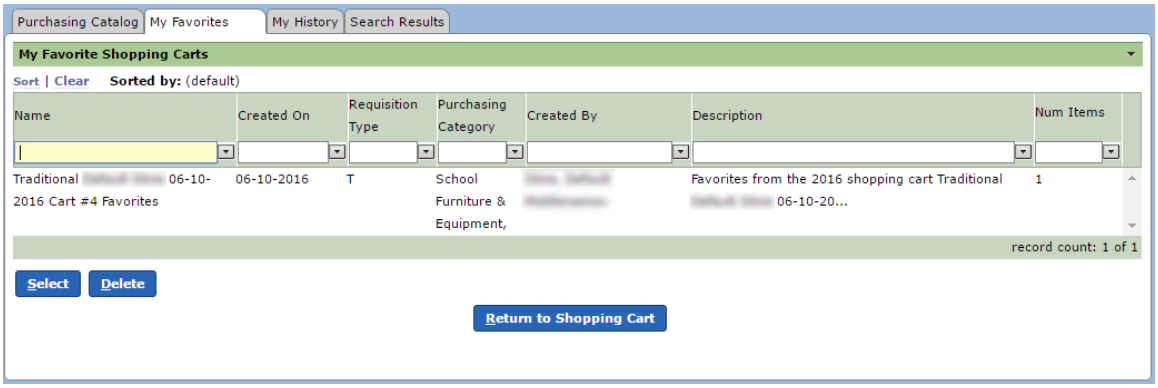

Figure 9: My Favorites tab

2. Highlight to select the item from the **My Favorite Shopping Carts** list, and click the **Select** button. The **Search Results** tab appears.

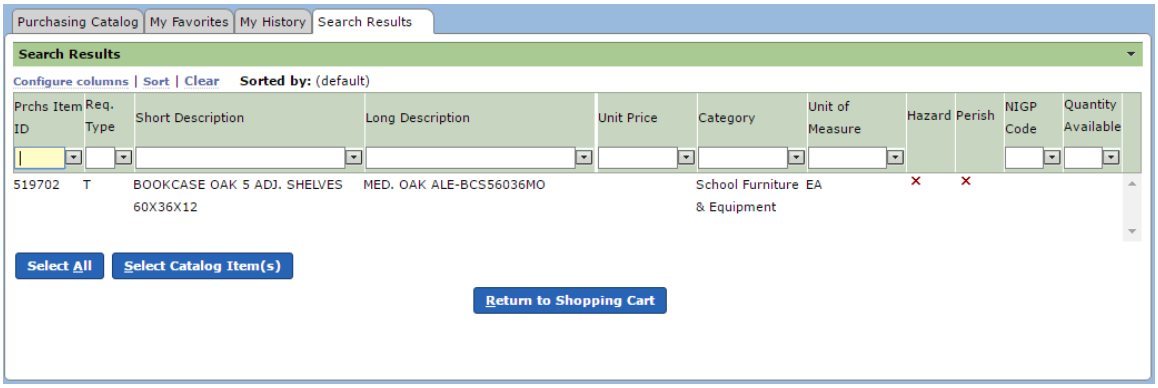

Figure 10: Search Results tab showing results for a favorited items search

3. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The **Line Items** tab appears with the item you selected added to the list.

Adding Items from the My History tab

Every requisition you have submitted in TEAMS is available via the My History tab. To search for and select items that have been added before:

1. Click the **My History** tab to bring it forward.

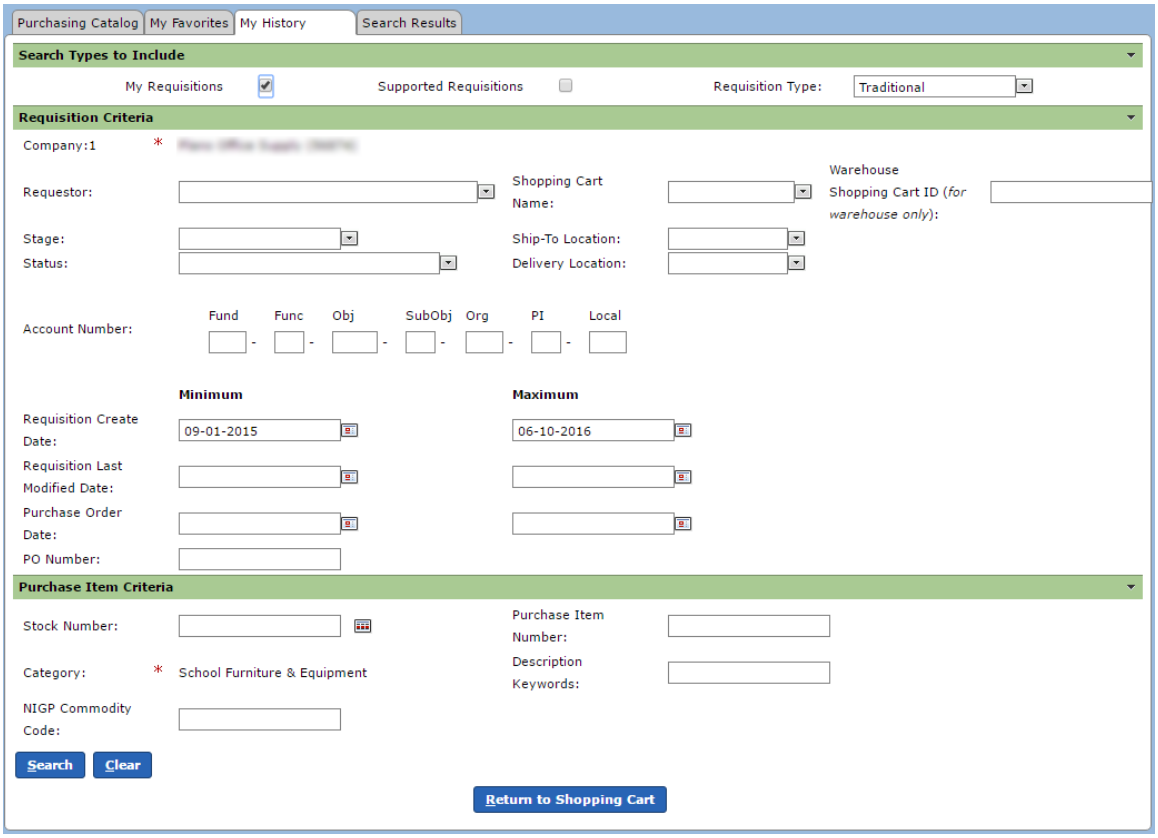

Figure 11: My History tab

2. In the **Search Types to Include** panel, select at least one of the following options:
   - **My Requisitions**. Select to search for requisitions that you created.
   - **Supported Requisitions**. Select to search for requisitions that were created for you by someone who supports you.
3. In the **Requisition Criteria** panel, enter information into at least one of these fields:

Field	Action
Requestor	Select an item from the drop-down list.
Requisition Create Date (Minimum column)	Under the Minimum column, enter a date on or after which the requisition(s) for which you are searching were created, or click the icon to select a date from the calendar. Enter a date in the Maximum column to search for requisitions that were created within a timeframe.

Field	Action
Stock Number	Click the icon to select a Stock Number from the Lookup Stock Number tab. In order to search for a stock number, you must first select a vendor. For more information about the Lookup Stock Number tab, see Using the Lookup Stock Number Tab (page 43).
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.

4. To narrow your search results, enter information into any of these fields:

Field	Action
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Enter the account number that was used to pay for the requisition for which you are searching.
Requisition Create Date (Maximum column)	Enter the date on or after which the requisition was created, or click the icon to select a date from the calendar. If you entered a date in the **Minimum** column, you can search for a requisition that was created within a timeframe by entering a date in this field.
Requisition Last Modified Date	Enter a date on or after which the requisition was last modified, or click the icon to select a date from the calendar. Enter a date in the **Maximum** column to search for a requisition that was last modified within a timeframe.
Purchase Order Date	Enter the purchase order date for the requisition for which you are searching, or click the icon to select a date from the calendar. Enter a date in the **Maximum** column to search for a requisition's purchase order date within a timeframe.
Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Description Keywords	Enter words that would match the description of the items on the requisition.
NIGP Commodity Code	Enter the NIGP Commodity code of the item of the requisition.

5. Click the **Search** button. The results of your search are displayed on the Search Results tab, as in the following illustration.

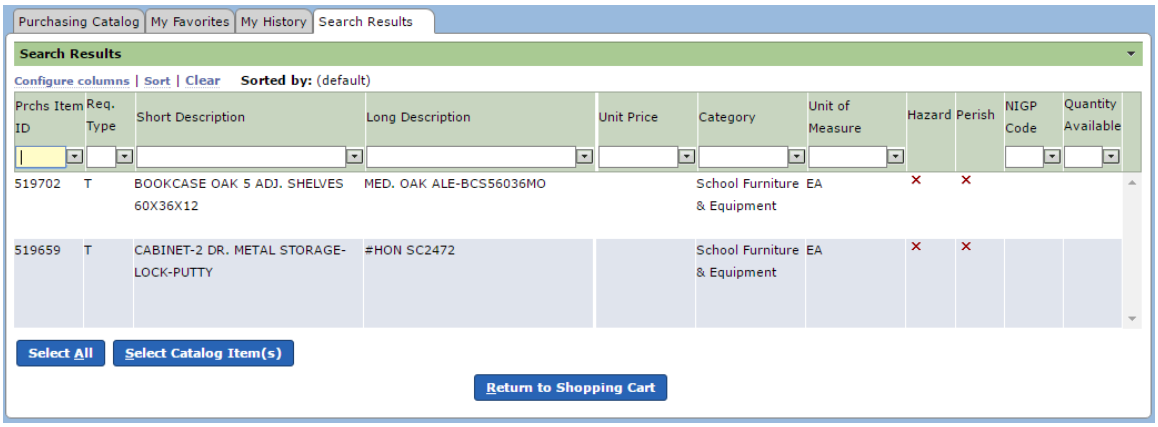

Figure 12: Search Results tab for items that have been ordered before

6. Highlight to select the appropriate item, and click the **Select Catalog Item(s)** button. The Line Items tab appears with the item you selected added to the list.

Creating a Not-To-Exceed Requisition

1. Navigate to the TEAMS Home page and locate the **Requisition** menu.

> **Note:** The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Select the **Create Requisitions** link. The Select Requisition Type tab appears.
3. In the **Requisition Type** field, select the *Not-To-Exceed Requisition* option. The options on the tab change, as shown below.

Figure 13: Select Requisition Type tab with Not To Exceed Requisition option selected

> **Note:** The maximum amount the requisition is not to exceed is determined by a business rule. Business rules are high-level maintenance functions that allow districts to control certain aspects of how TEAMS will operate.

4. Select a **Fiscal Year** from the drop-down list.

5. Click the **Continue** button. The **Not-To-Exceed Payment Authorization** tab appears.

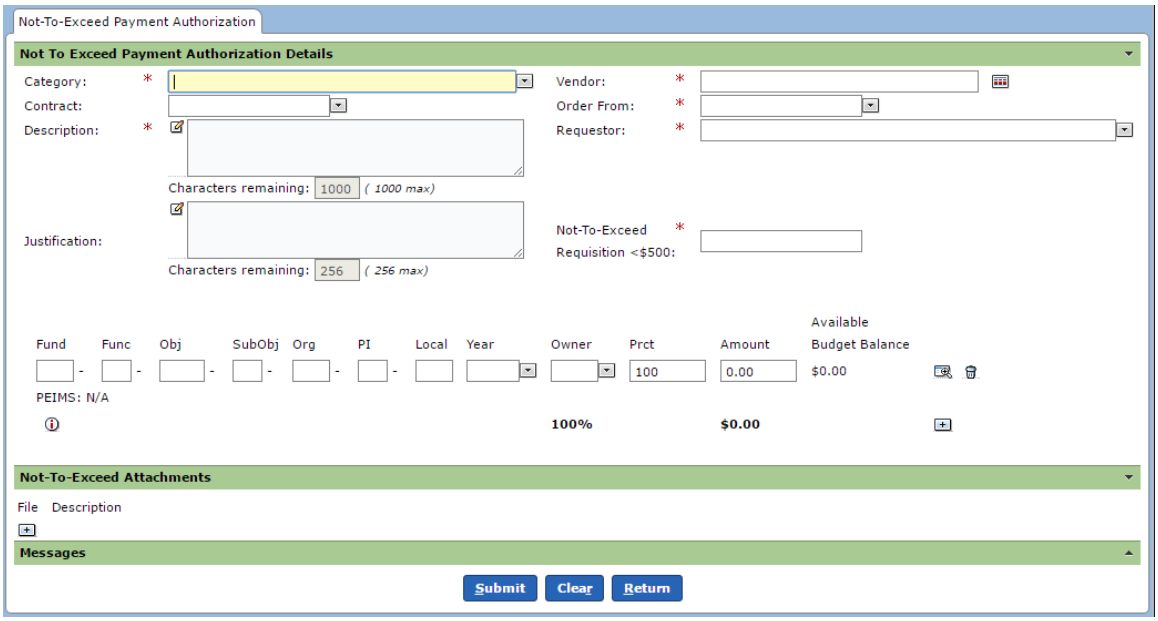

Figure 14: Not-To-Exceed Payment Authorization tab

6. The **Category** and **Vendor** fields are related.
   - If you select a procurement Category first, the vendor field is populated with those vendors that are assigned to the category you selected.
   - If you select a Vendor first, the category field is populated with those categories that are assigned to the vendor you selected.

> **Note:** The **Contract** and **Requestor** drop-down lists are populated with preferred contracts and requestors, respectively.

7. Select a **Contract** from the drop-down list. Some categories may have contracts tied to them. If this is the case, the Contract field will be populated with the contract name.
8. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

> **Note:** The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.

> **Note:** Requestors you support are defined in the Maintain Requisition Support Hierarchy entry point. You can also view who you support and who supports you using the View My Requisition Support entry point. For more information about these functions, see the TEAMS Requisition Setup Guide.

9. Enter a **Description**.

10. In the **Justification** field, enter an explanation for the purchase.

> **Note:** Whether the Justification field is displayed is controlled by business rule. Business rules are high-level maintenance functions that allow districts to control certain aspects of how TEAMS will operate.

11. Enter an amount in the **Not-To-Exceed Requisition** field. The amount must not be more than the amount displayed in the field name.
12. Enter or edit the account number, or click the **+** icon to select another one from the Account Numbers tab.

> **Tip:** Complete any of the boxes and click the icon to filter the search.

13. Select the **Year** from the drop-down list.
14. Select the **Owner** from the drop-down list.
15. The **Percent (Prct)** field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
16. Optional. To add another account to the requisition, repeat steps 12 through 15, and ensure that the Percentage fields for all accounts adds up to 100.
17. Click the **OK** button. The new account number is populated in the Account Number column.
18. In the **Not-To-Exceed Attachments** panel, click the **+** icon to add an attachment. The File and Description fields are displayed, as in the following illustration.

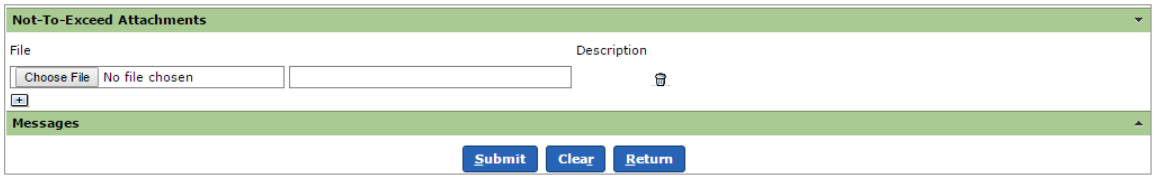

Figure 15: Not-To-Exceed Attachments panel with File and Description fields displayed

19. Click the **Choose File** button to open the search for attachments.
20. Enter a **Description**.

> **Note:** To add attachments, click the **+** icon again. To delete additional attachments, click the icon.

21. Click the **Submit** button. A message appears, telling you that the requisition was successfully created, and asking if you would like to create another requisition.

Creating a Project Requisition

1. Navigate to the TEAMS Home page and locate the **Requisition** menu.

   Note: The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Click the **Create Requisitions** link. The Select Requisition Type tab appears.
3. In the **Requisition Type** field, select the *Project* option.

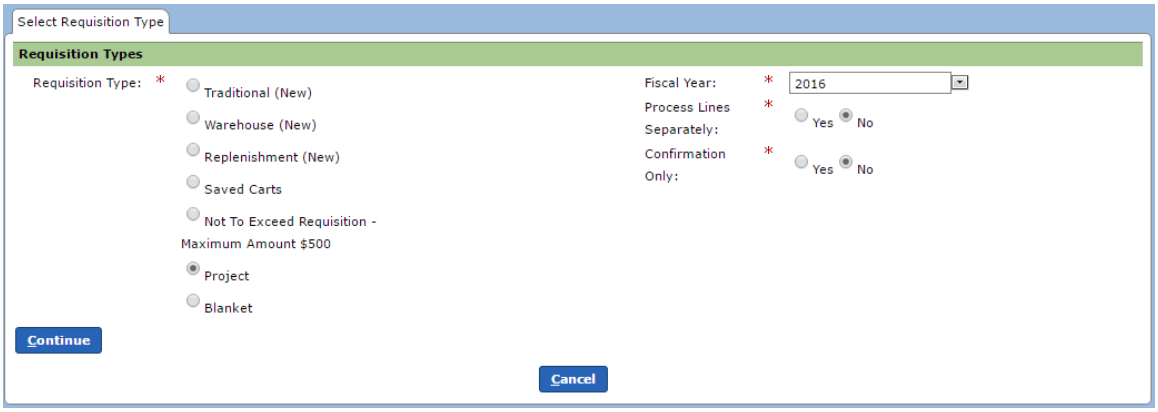

Figure 16: Select Requisition Type tab with Project option selected

4. Select a **Fiscal Year** from the drop-down list.

5. Click the **Continue** button. The Create Project Requisition tab appears.

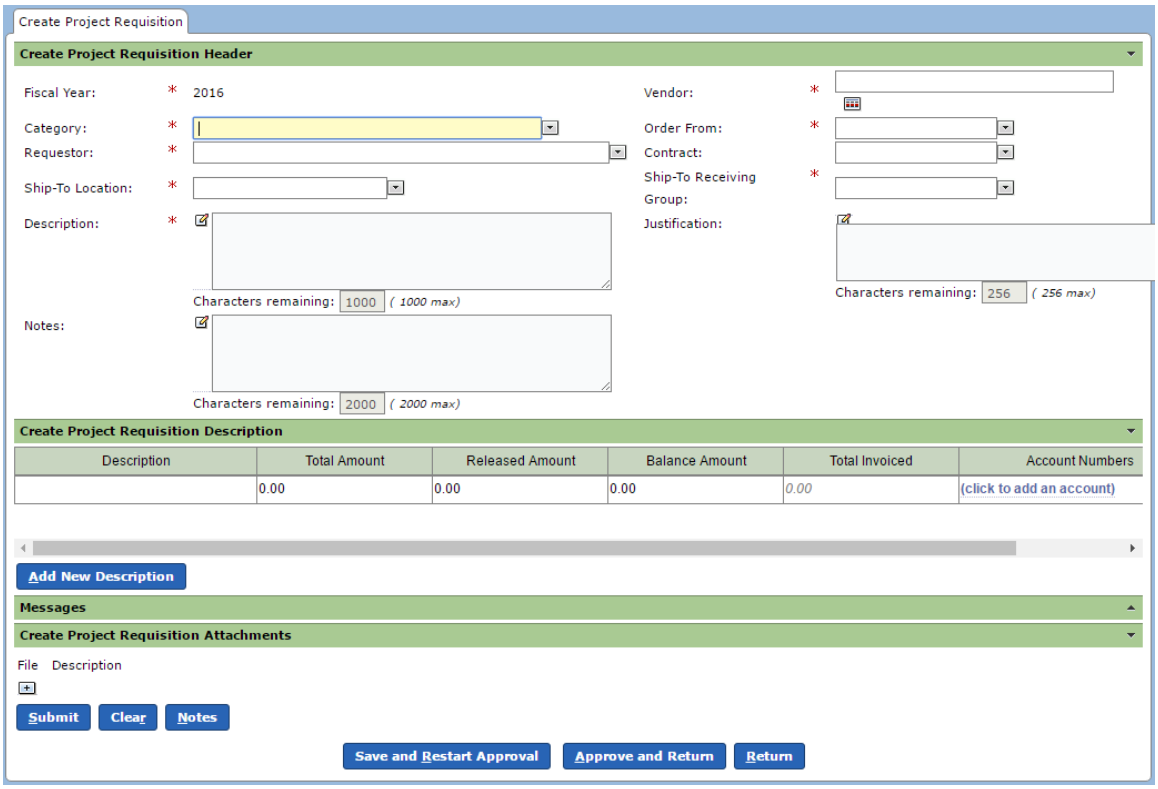

Figure 17: Create Project Requisition tab

6. The **Category** and **Vendor** fields are related.
   - If you select a Category first, the vendor field is populated with those vendors that are assigned to the category you selected.
   - If you select a Vendor first, the category field is populated with those categories that are assigned to the vendor you selected.

> **Note:** The Contract and Requestor drop-down lists are populated with preferred contracts and vendors, respectively.

7. Select a **Contract** from the drop-down list. The Category, Vendor, and Order From drop-down lists are populated with preferred Categories, Vendors, and Order From names, respectively.

> **Note:** Preferred Vendors and Categories are defined in the Maintain Procurement Contracts function.

8. The **Requestor** field defaults to your name, but you can select another one from the drop-down list, if necessary.

> **Note:** The names in this drop-down list reflect the requestors you support. To create a requisition for someone else, select his or her name from the Requestor drop-down list. Otherwise, leave your name selected.

> **Note:** Requestors you support are defined in the Maintain Requisition Support Hierarchy function. You can also view who you support and who supports you using the View My Requisition Support function. For more information about these functions, see the TEAMS Requisition Setup Guide.

9. Select the **Ship-To Location** from the drop-down list.

> **Note:** Depending on your selection, the Ship-To Receiving Group field is populated, and the Delivery Location and Delivery Receiving Group fields are displayed and populated on the tab.

10. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
11. Select a **Delivery Location** from the drop-down list.
12. Select the **Delivery Receiving Group** from the drop-down list.
13. Enter a **Description**.
14. In the **Justification** field, enter an explanation for the purchase.

> **Note:** Whether the Justification field is displayed is controlled by business rule. Business rules are high-level maintenance functions that allow districts to control certain aspects of how TEAMS will operate.

15. Click in the cell under the **Description** column to enter the name of the milestone.
16. Click in the cell under the **Total Amount** column to change the total amount.
17. Click the **(click to add account)** link to enter the account number. The Edit Accounts box appears.

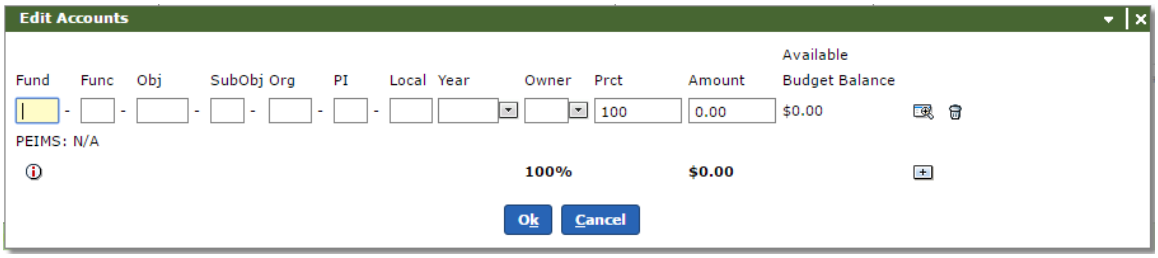

Figure 18: Edit Accounts box

18. Enter the account number, or click the **+** icon to select another one from the Account Numbers tab.

> **Tip:** Complete any of the boxes and click the icon to filter the search.

19. Select the **Year** from the drop-down list.

20. Select the **Owner** from the drop-down list.
21. The **Percent (Prct)** field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
22. Optional. Click the **+** icon to add another account number for the requisition. Repeat steps 17 through 21, and ensure that the Percentage fields for all accounts adds up to 100.
23. Use the **Action** column to delete a line item.
24. Click the **OK** button. The new account number is populated in the Account Number column.
25. In the **Create Project Requisition Attachments** panel, click the **+** icon to add an attachment. The File and Description fields are displayed, as in the following illustration.
26. Click the **Add New Description** button. An empty row appears.

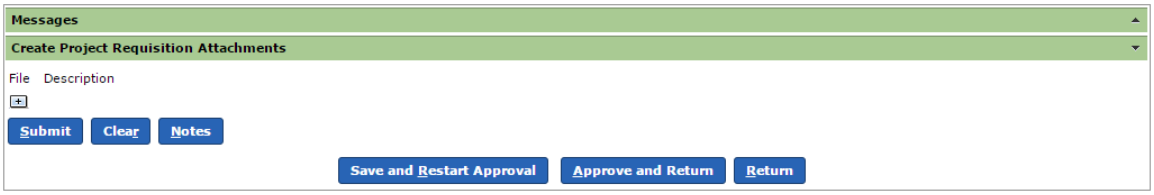

Figure 19: Create Project Requisition Attachments panel with Browse and Description fields displayed

27. Click the **Choose File** button to open the search for attachments.
28. Enter a **Description**.

> **Note:** To add attachments, click the **+** icon again. To delete additional attachments, click the icon.

29. Click the **Submit** button. The Select Requisition Type tab appears with a message that the project requisition was successfully saved.

Creating a Blanket Requisition

1. Navigate to the TEAMS Home page and locate the **Requisition** menu.

   Note: The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Click the **Create Requisitions** link. The Select Requisition Type tab appears.
3. In the **Requisition Type** field, select the *Blanket* option.

Figure 20: Select Requisition Type tab with Blanket option selected

4. Select a **Fiscal Year** from the drop-down list.

5. Click the **Continue** button. The Blanket Requisition tab appears.

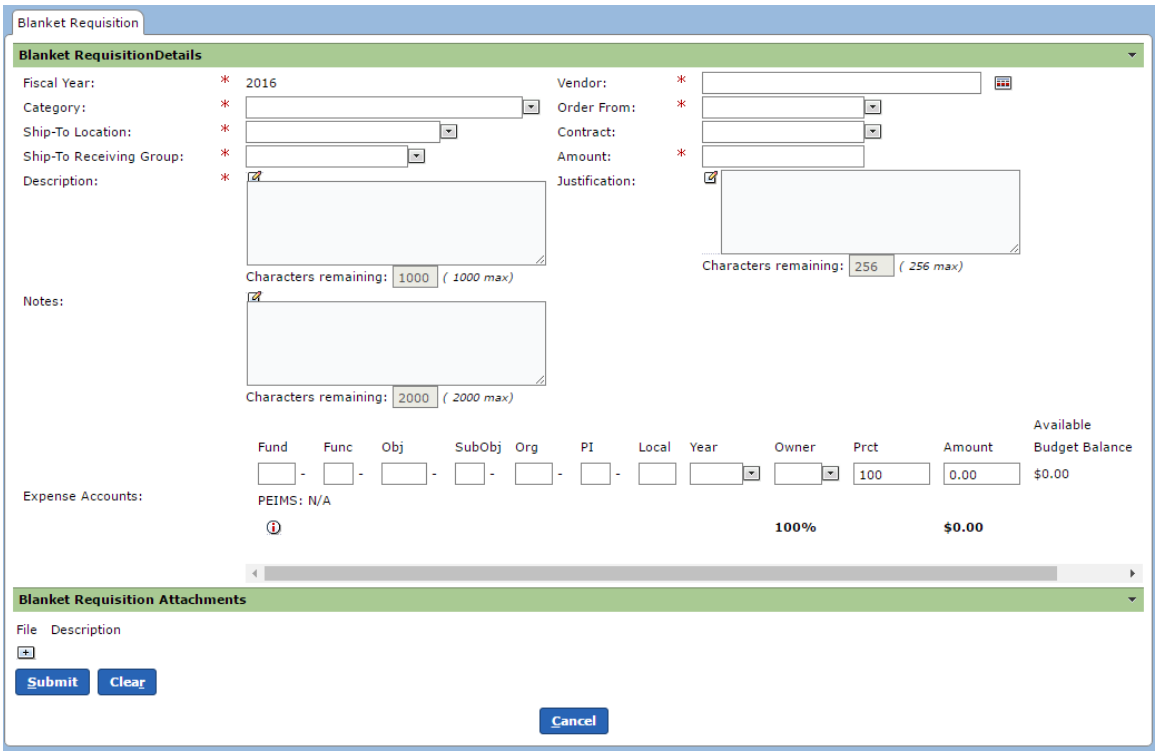

Figure 21: Blanket Requisition tab

6. The **Category** and **Vendor** fields are related.
   - If you select a Category first, the vendor drop-down list is populated with those vendors that are assigned to the category you selected.
   - If you select a Vendor first, the category drop-down list is populated with those categories that are assigned to the vendor you selected.

> **Note:** The Contract and Requestor drop-down lists are populated with preferred contracts and requestors, respectively.

7. Select the **Order From** from the drop-down list.
8. Select a **Contract** from the drop-down list.
9. Select the **Ship-To Location** from the drop-down list.

> **Note:** Depending on your selection, the Ship-To Receiving Group field is populated, and the Delivery Location and Delivery Receiving Group fields are displayed and populated on the tab.

10. Select the **Ship-To Receiving Group** from the drop-down list. Available selections in the drop-down list are based on your selection in the Ship-To location field.
11. Select a **Delivery Location** from the drop-down list.

12. Select a **Delivery Receiving Group** from the drop-down list.
13. Enter a **Description**.
14. Enter the **Amount**.
15. In the **Justification** field, enter an explanation for the purchase.

> **Note:** Whether the Justification field is displayed is controlled by business rule. Business rules are high-level maintenance functions that allow districts to control certain aspects of how TEAMS will operate.

16. Edit the **Expense Account**, or click the icon to select another one from the Account Numbers tab.

> **Tip:** Complete any of the boxes and click the icon to filter the search.

17. Select the **Year** from the drop-down list.
18. Select the **Owner** from the drop-down list.
19. The **Percent (Prct)** field is 100 by default. If you are adding one account number, leave 100 in the Prct field. Enter another percent if you are adding two or more accounts.
20. Optional. Click the **+** icon to add another account number for the requisition. Repeat steps 16 through 19, and ensure that the Percentage fields for all accounts adds up to 100.
21. Click the **OK** button. The new account number is populated in the Account Number column.
22. In the **Blanket Requisition Attachments** panel, click the **+** icon to add an attachment. The File and Description fields appears.

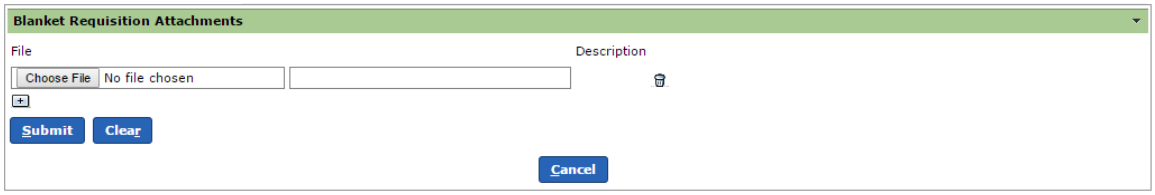

Figure 22: Blanket Requisition Attachments panel with Browse and Description fields displayed

23. Click the **Choose File** button to open the search for attachments.
24. Enter a **Description**.

> **Note:** To add attachments, click the + icon again. To delete additional attachments, click the icon.

25. Click the **Submit** button. A message appears, telling you that the requisition was successfully created and asking whether you would like to create another requisition.

Requisition Search

You can search for regular requisitions, not-to-exceed requisitions, and blanket/project requisitions.

Note: The requisitions available depend upon your level of access and the configuration choices made by your district.

Searching for Traditional Requisitions

1. Navigate to the TEAMS Home page and locate the **Requisition** menu.

   Note: The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Click the **Requisition Search** link. The Requisition Search tab appears.

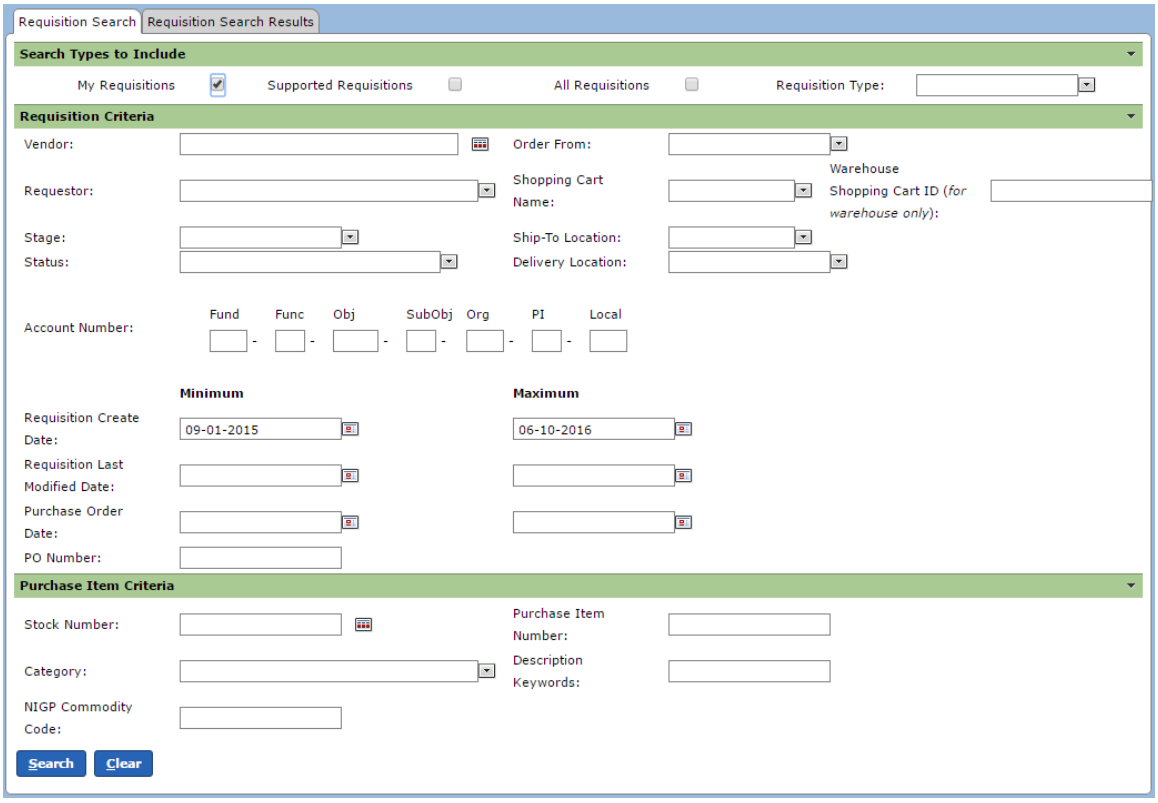

Figure 23: Requisition Search tab

3. In the **Search Types to Include** panel, select at least one of the following options:
   - **My Requisitions**. Select to search for requisitions that you created.
   - **Supported Requisitions**. Select to search for requisitions where you have selected a different person as the requestor.
   - **All Requisitions**. Select to search for both requisitions that you created and requisitions that you approved.
4. Enter information into at least one of these fields:

Field	Action
Vendor	Enter the name of a Vendor, or click the icon to select one from the Vendor Lookup tab. For more information about the Vendor Lookup tab, see Using the Vendor Lookup Tab (page 43).
Order From	Select the name of the person from whom the items on the requisition were ordered from the drop-down list.
Requestor	Select an item from the drop-down list.
Shopping Cart Name	Select the name of the shopping cart that was used for the requisition from the drop-down list.
Stage	Select the stage of the requisition for which you are searching from the drop-down list.
Status	Select the status of the requisition for which you are searching from the drop-down list.
Ship-To Location	Select the location where the items on the requisition were or are being shipped from the drop-down list.
Account Number	Enter the account number that was used to pay for the requisition for which you are searching.
Requisition Create Date	Under the **Minimum** column, enter a date on or after which the requisition(s) for which you are searching were created, or click the icon to select a date from the calendar. Enter a date in the **Maximum** column to search for requisitions that were created within a timeframe.
Requisition Last Modified Date	Enter a date on or after which the requisition for which you are searching was last modified, or click the icon to select a date from the calendar. Enter a date in the **Maximum** column to search for a requisition that was last modified within a timeframe.
Purchase Order Date	Enter the purchase order date for the requisition for which you are searching, or click the icon to select a date from the calendar. Enter a date in the **Maximum** column to search for a requisition's purchase order date within a timeframe.
Stock Number	Click the icon to select a Stock Number from the Lookup Stock Number tab.

Field	Action
	In order to search for a stock number, you must first select a vendor. For more information about the Lookup Stock Number tab, see Using the Lookup Stock Number Tab (page 43).
Purchase Item Number	Enter the number of the item that is or was being requisitioned.
Category	Select the requisition's category from the drop-down list.
Description Keywords	Enter words that would match the description of the items on the requisition.
NIGP Commodity Code	Enter the NIGP Commodity code of the item of the requisition.

5. Click the **Search** button. The results of your search appear on the Requisition Search Results tab.

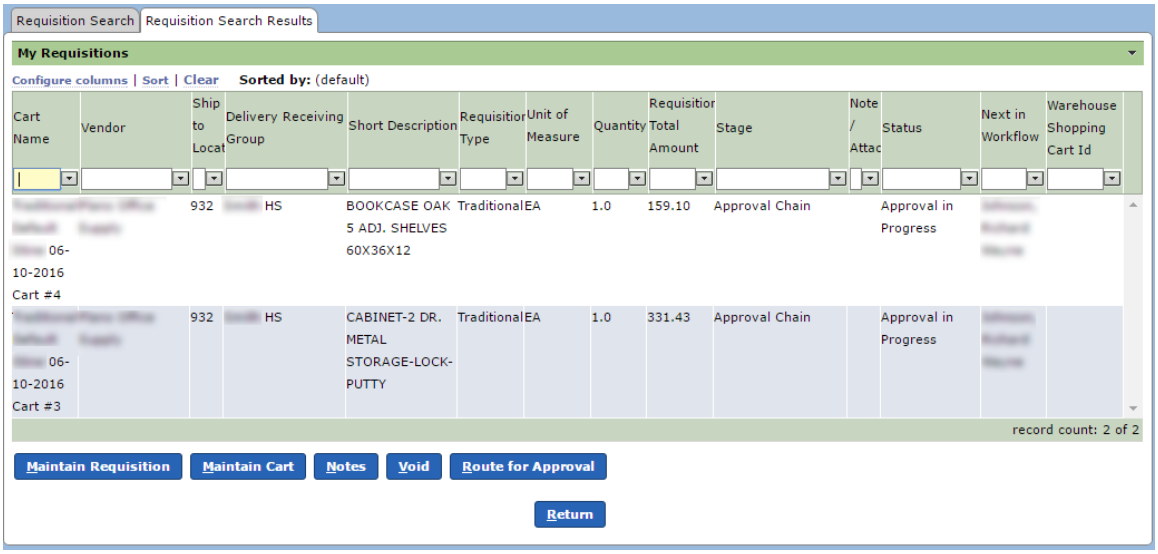

Figure 24: Requisition Search Results tab

Tip: Click the **Configure columns** link to open the Configure columns box and rearrange and/or hide the columns that are displayed in the matrix. In the Configure columns box, the columns listed in the **Selected columns** list will be displayed on the matrix in the order shown. To rearrange the order, drag a column to reposition it. To hide a column, drag it to the **Available columns** list. To add a column back to the display, drag it from the Available columns list to the Selected columns list. You can click the **Reset** button to return the columns to their original display. When you are finished arranging columns, click the **OK** button to close the box and return to the tab.

Maintaining Requisitions

Highlight to select the requisition you want to edit, and click the **Maintain Requisitions or Maintain Cart** button to edit the requisition or the cart, respectively. Both buttons open the Requisition Maintenance tab.

For more information, see Maintaining Requisitions (page 34).

Adding Notes to Requisitions

Highlight to select the requisition to which you want to add a note, and click the **Notes** button.

For more information, see Using the Notes Tab (page 42).

Cancelling Requisitions

Highlight to select the requisition you want to cancel, and click the **Cancel** button. A message is displayed which tells you that the requisition was successfully canceled. A cancelled requisition will have its funds returned to the account numbers within the requisition.

Routing Requisitions for Approval

Highlight the requisition you want to route for approval, and click the **Route for Approval** button. The requisition is routed for approval.

Searching for Not-To-Exceed and Blanket/Project Requisitions

Note: Because you use the same process to search for not-to-exceed requisitions as you use to search for blanket/project requisitions, the procedures in this section only cover how to search for not-to-exceed requisitions.

1. Navigate to the TEAMS Home page and locate the **Requisition** menu.

   Note: The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Select the **Not To Exceed Requisition Search** link. The Not-To-Exceed Requisition Search tab appears.

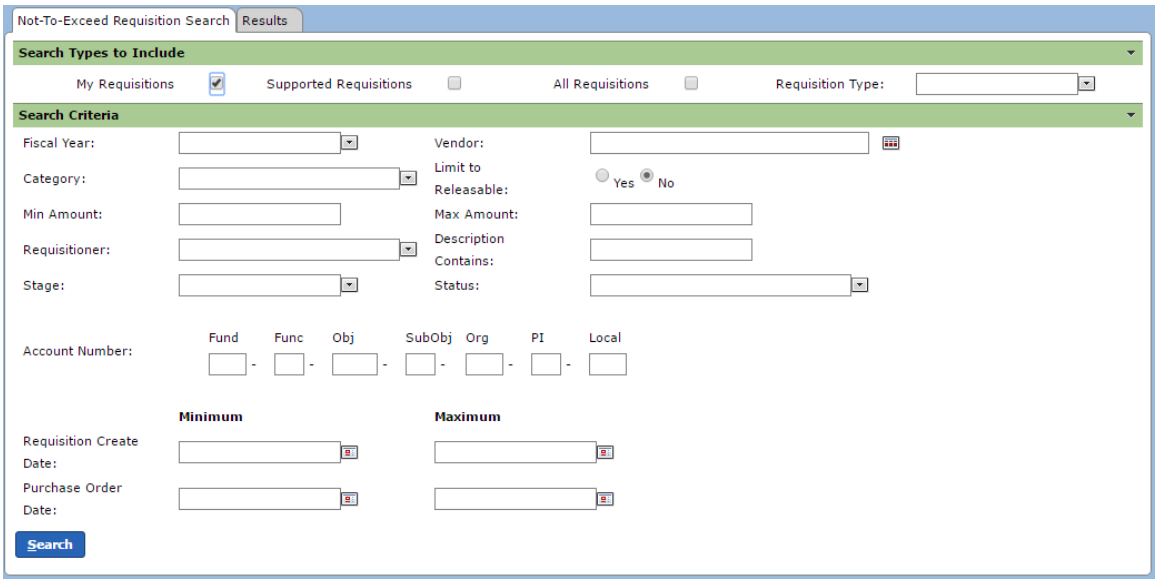

Figure 25: Not-To-Exceed Requisition Search tab

3. In the **Search Types to Include** panel, select at least one of these options:
   - **My Requisitions**. Select to search for requisitions that you created.
   - **Supported Requisitions**. Select to search for requisitions where you have selected a different person as the requestor.
   - **All Requisitions**. Select to search all requisitions.
4. Select a **Fiscal Year** from the drop-down list.
5. Enter information into any of these fields:

Field	Action
Vendor	Enter the name of a Vendor, or click the icon to select one from the

Field	Action
	Vendor Lookup tab. For more information about the Vendor Lookup tab, see Using the Vendor Lookup Tab (page 43).
Category	Select an item from the drop-down list.
Limit to Releasable	Select *Yes* to search for releasable not-to-exceed requisitions. Select *No* to search for both releasable and non-releasable requisitions.
Min Amount	Enter the minimum amount for the requisition.
Max Amount	Enter the maximum amount of the requisition.
Description Contains	Enter a part of the description.
Stage	Select an item from the drop-down list.
Status	Select an item from the drop-down list.
Account Number	Enter the account number.
Requisition Create Date Min/Max	Enter dates when the records were created to further filter the records returned.
Purchase Order Date Min/Max	Enter date when the Purchase Order was created to further filter the records returned.

6. Click the **Search** button. The Results tab appears.

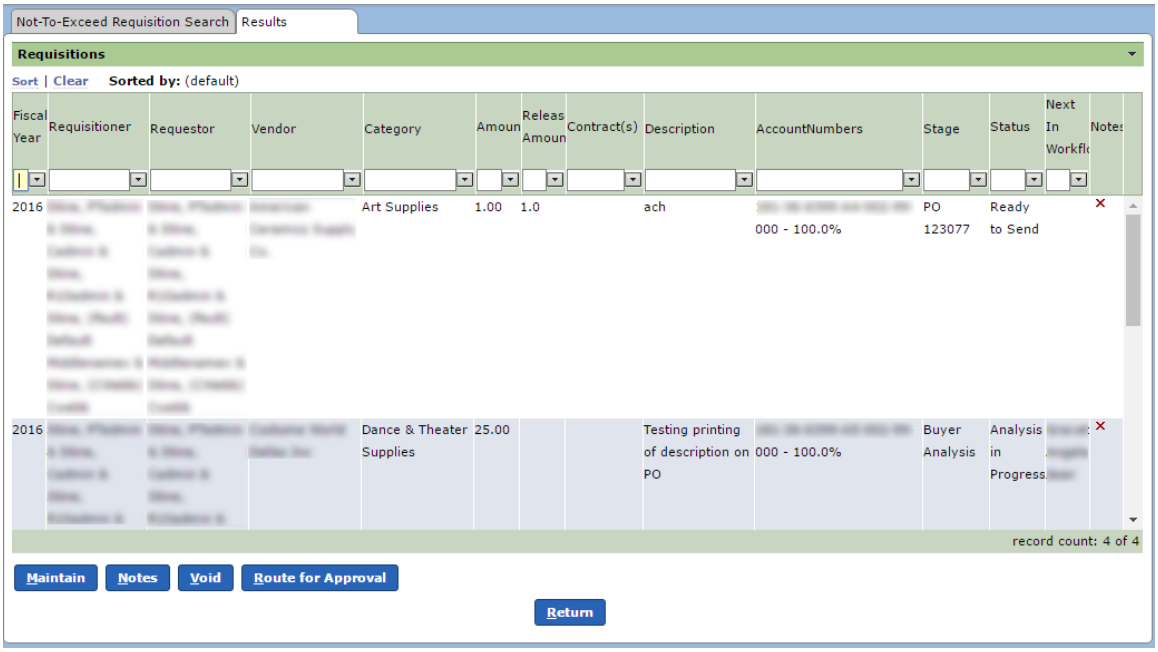

Figure 26: Results tab

Maintaining Not-To-Exceed Requisitions

Highlight to select the requisition you want to edit, and click the **Maintain** button to edit it. This button opens the Not-To-Exceed Requisition Maintenance tab. For more information, see Maintaining Requisitions (page 34).

Note: If you are working in the Blanket/Project Requisition Search function, clicking on the Maintain button opens the Blanket/Project Requisition Maintenance tab.

Adding Notes to Not-To-Exceed Requisitions

Highlight to select the requisition to which you want to add a note, and click the **Notes** button.

For more information, see Using the Notes Tab (page 42).

Voiding Not-To-Exceed Requisitions

Highlight to select the requisition you want to cancel, and click the **Void** button. A message tells you that the requisition was successfully cancelled. A Void Not-To-Exceed has the funds returned to the account number within the requisition.

Routing Not-To-Exceed Requisitions for Approval

Highlight the requisition you want to route for approval, and click the **Route for Approval** button. The requisition is routed for approval.

Maintaining Requisitions

After you create a requisition and it is submitted for approval, district personnel in the workflow have the option of editing it. Use the Requisition Maintenance tabs to review or edit traditional requisitions, use the Not-To-Exceed Requisition Maintenance tabs to review or edit not-to exceed requisitions, and use the Project Requisition tabs to review or edit Blanket or Project requisitions.

Maintaining Traditional Requisitions

You can maintain requisitions from various requisition-related functions. Use the following procedure to maintain requisitions.

Note: Illustrations in this procedure show the Requisition Search tabs accessed from the Approve Requisitions function. Button options will depend on the entry point from which you accessed the Requisition Search tabs.

1. If you are in the Requisition Search function, select a requisition and click the **Maintain** button. If you are using the Approve Requisitions or Analyze Requisitions functions, click the **Requisition Details** button. The Requisition Overview tab is displayed with the Requisition Maintenance navigation bar.

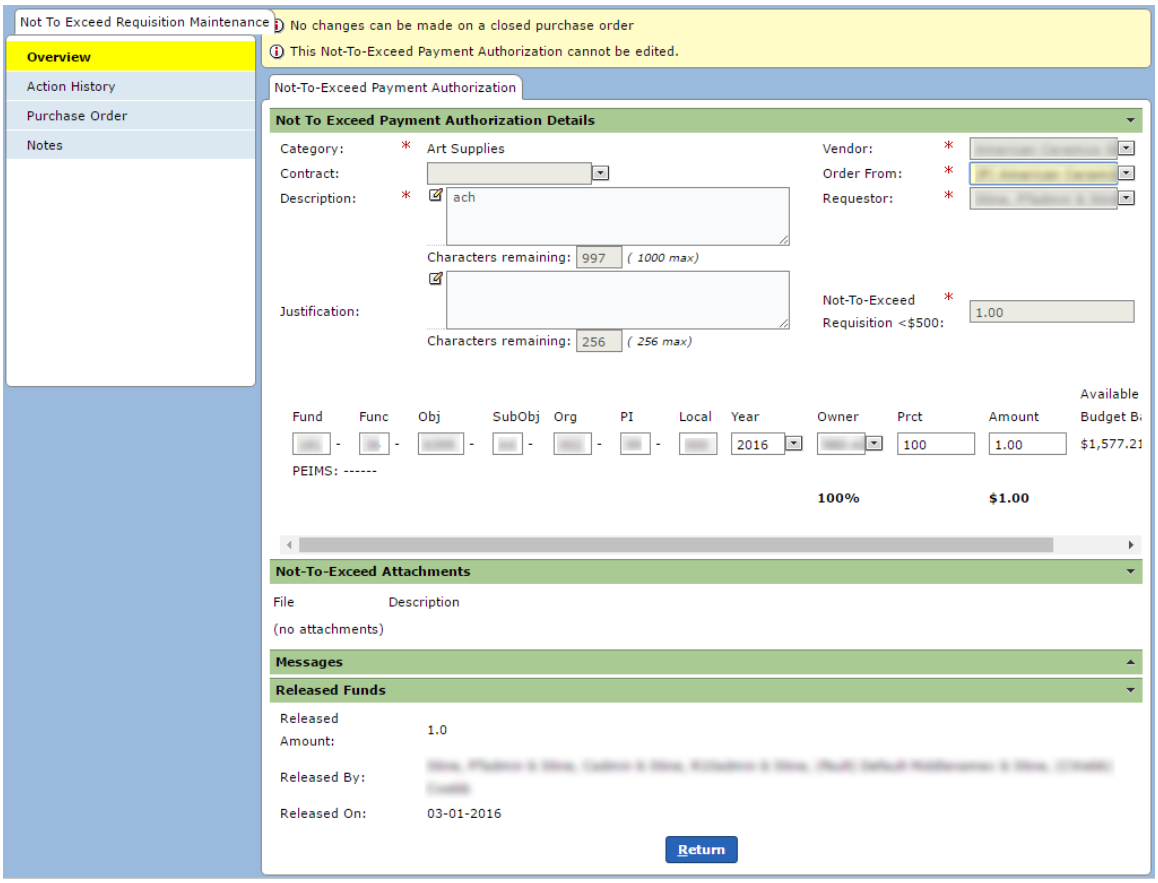

Figure 27: Requisition Overview tab with the Requisition Maintenance navigation bar

Note: The buttons on the bottom of this tab depend on how you accessed the Maintain Requisitions entry point.

2. Provided the first Approver has not approved the requisition, the Requisitioner is allowed to make changes and Save and Restart Approval. Approvers can make changes and approve the requisition. Use the following to edit information in the Purchase Item Details, Accounts, and Cost:

Field	Action
Vendor	Enter a vendor, or click the icon to select a vendor from the Vendor Lookup tab. For more information about working with the Lookup Vendor tab, see Using the Vendor Lookup Tab (page 43).
Category	Select a category from the drop-down list.
Order From	Select the entity from which the item(s) will be ordered from the drop-down list.

Field	Action
Contract	Select the contract from the drop-down list.
Stock Number	Enter the stock number, or click the icon to select one from the Lookup Stock Number tab. For more information about working with the Lookup Stock Number tab, see Using the Lookup Stock Number Tab (page 43).
Unit of Measure	Select a unit by which to measure the item(s).
NIGP Code	Enter the NIGP Commodity code of the item of the requisition.
Detailed Description	Enter a detailed description.
Special Instructions	Enter any special instructions.
Justification	Enter a reason for the requisition.
Accounts	Enter a different account number if necessary.
Cost	If needed change Quantity, Unit Price, Unit Discount Amount/Pct, Unit Tax Amount/Pct, Installation Amount/Pct, Freight Amount. Changes will be reflected in the Total Amount.

3. The **Save and Restart Approval**button saves any changes made and resends the requisition to the first approver. The **Notes** button allows you to add a note to the requisition. The **Return** button returns you to Requisition Search Results screen.

Receiving Requisitions

Use the Receive function to receive requisitions.

1. Navigate to the TEAMS Home page and locate the **Requisitions** menu.

   Note: The exact name of the menu you use to access this entry point depends on how your district has configured its TEAMS Home page. If you are unsure of the menu name, you can enter the entry point name in the Search Menu Items field to quickly locate it.

2. Click the **Receive** link. The Receiving Search tab appears.

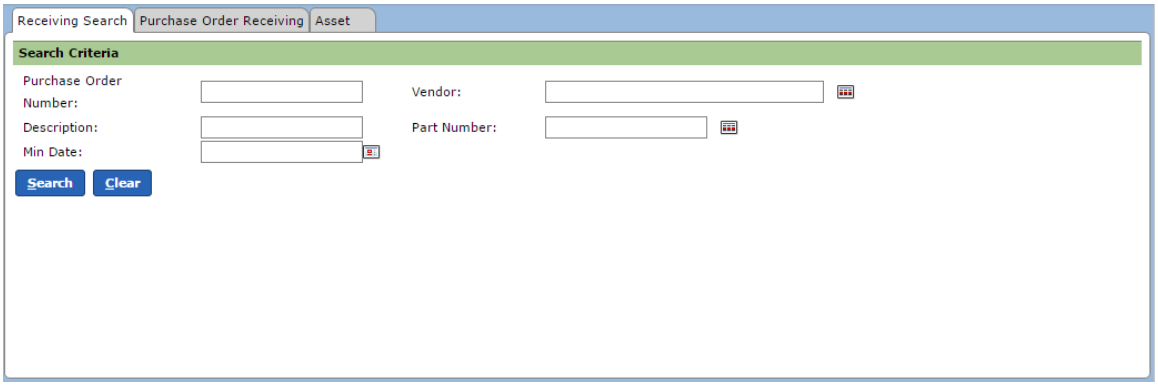

Figure 28: Receiving Search tab

3. Enter information into any of these fields:

Use this filter	To search by
Purchase Order Number	The purchase order number
Description	The description of the requisition. You must enter at least three characters.
Part Number	The part number of the order. Click the icon to select a part number from the Vendor Lookup tab. For more information about the Lookup Stock number tab, see Using the Lookup Stock Number Tab (page 43).

4. Use this information to refine your search results:

Use this filter	To search by
Vendor	The name of a Vendor. Click the icon to select a vendor from the Vendor Lookup tab. For more information about the Vendor Lookup tab, see Using the Vendor Lookup Tab (page 43).
Min Date	The date after which to search for requisitions. Click the icon to select a date from the calendar.

5. Click the **Search** button. The results of your search appear in the Purchase Orders panel.

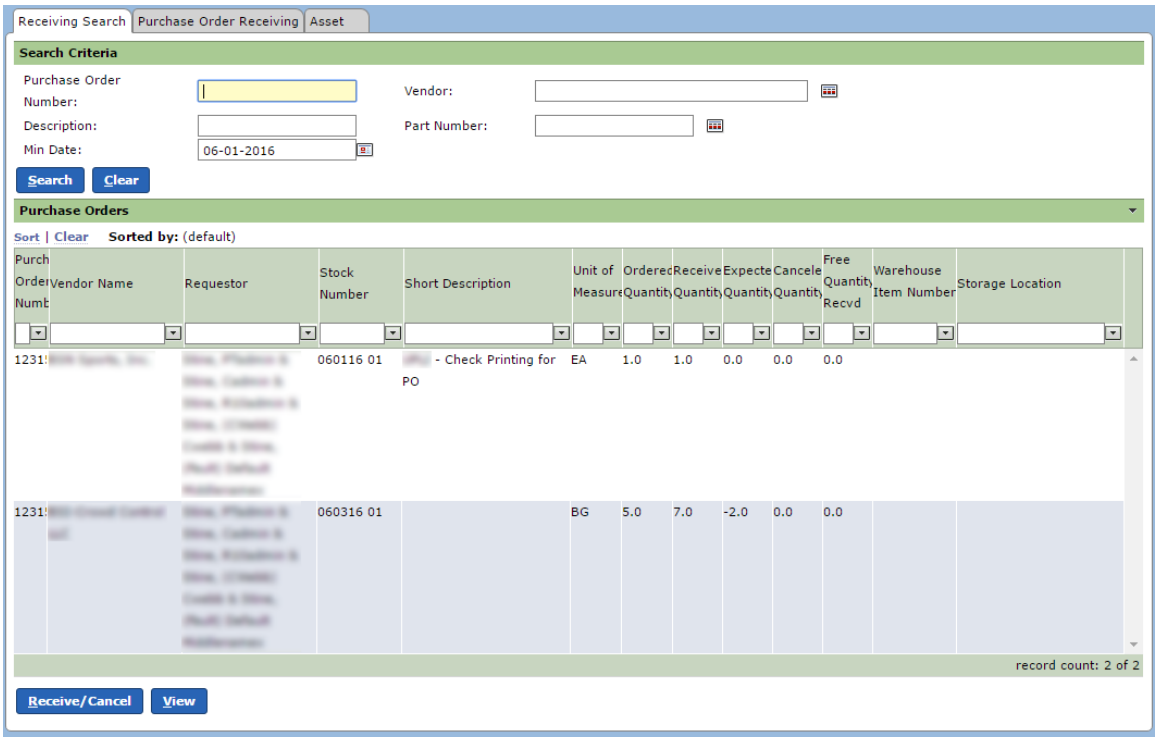

Figure 29: Receiving Search tab with results displayed

Note: The columns that are displayed in Figure 29 and Figure 30 depend on what is selected in the Requisition Options function. For more information about this function, see the *TEAMS Requisition Setup User Guide*.

6. To view the requisition that created a line in the Purchase Order, select the appropriate requisition and click the **View** button. A view-only screen will appear showing you the requisition details. Click **Return** to return to the Receiving screen.
7. Highlight to select the appropriate requisition, and click the **Receive/Cancel** button. The Purchase Order Receiving tab is displayed, as in the following illustration.

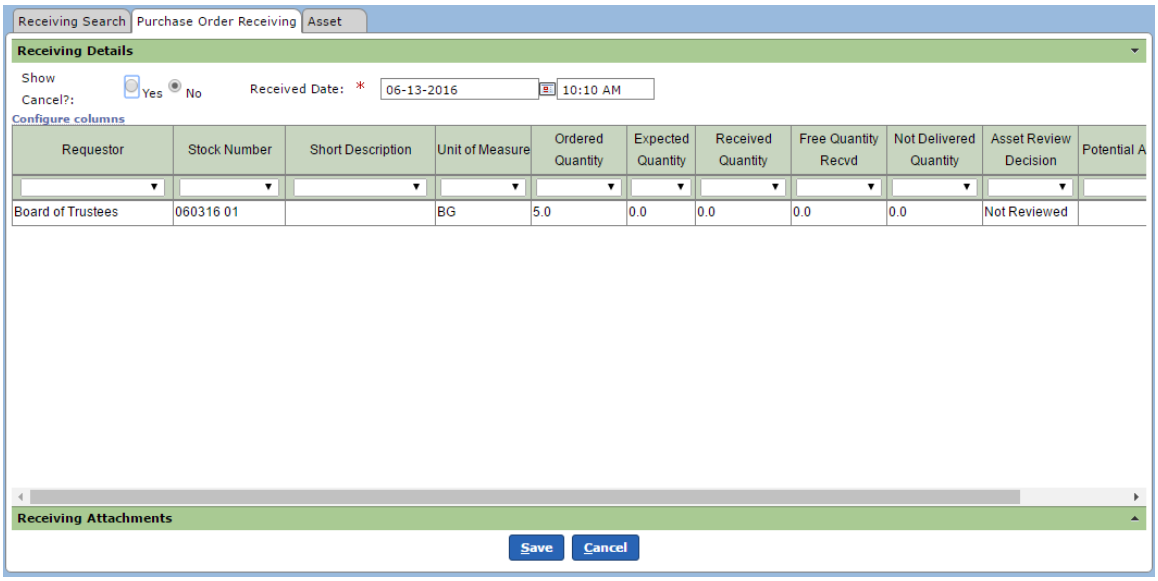

Figure 30: Purchase Order Receiving tab

8. As requisition lines are selected in the previous step, all requisition lines within the Purchase Order appear on the Purchase Order Receiving tab.
   - **Ordered Quantity** displays the amount of items ordered.
   - **Expected Quantity** shows the amount still to be received.
   - **Received Quantity** is the amount you are entering as Received.
   - **Free Quantity Received** is the amount of any items the vendor gave to the district at no cost. This amount does not impact what is displayed at Invoicing.
   - **Not Delivered Quantity** reflects the Ordered Quantity minus Received Quantity, therefore showing the amount yet to be delivered.

   Note: Asset Review Decision, Potential Asset and Existing Asset will be covered in Asset training.

9. Click in the **Received Quantity** column and enter the amount of goods delivered. Press the tab key, and the cursor will advance to the next line for quick entry into the next Qty. Received field.
10. Click the **Show Cancel** radio button to access the **Qty. Canceled** and **Cancel Reason** fields. Items cancelled are subtracted from the requisition creating the record and funds are returned to the account number within the Requisition.

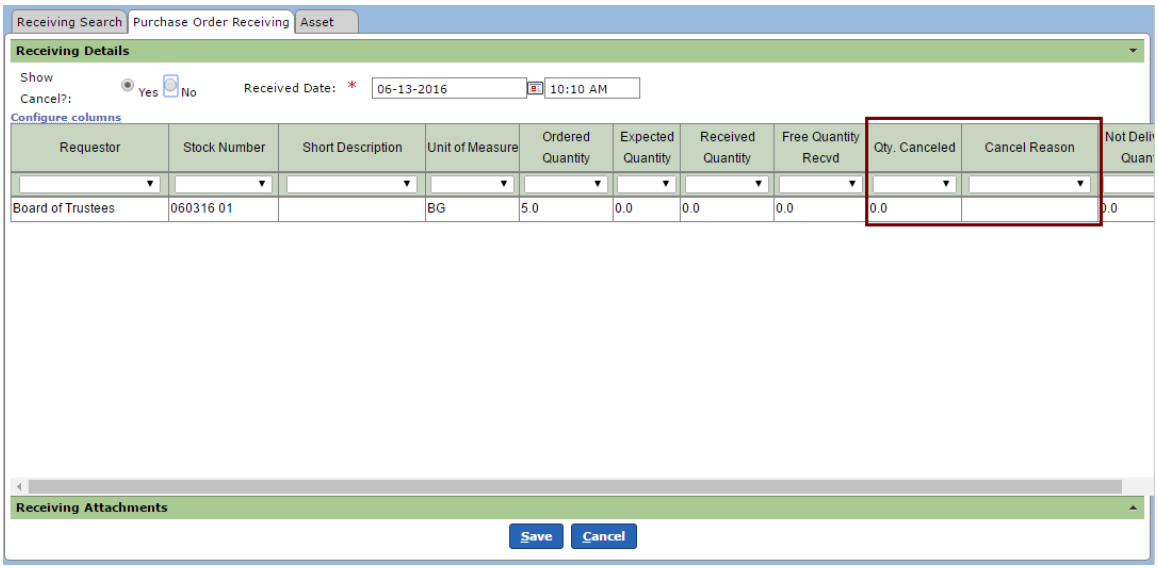

Figure 31: Purchase Order Receiving tab with cancel field displayed

11. When you complete entering the receiving amounts, click the **Save** button. The Packing Slip box appears.

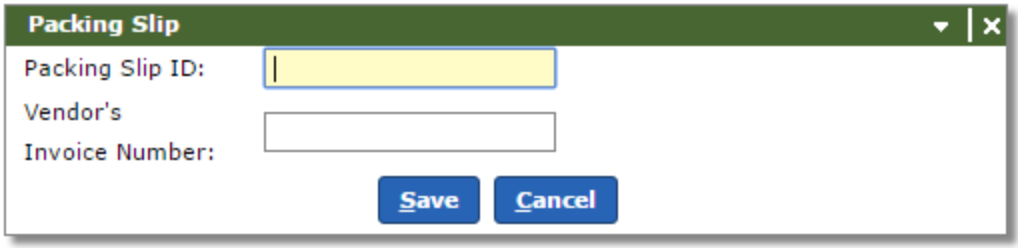

Figure 32: Packing Slip box

12. In the **Packing Slip ID** field, enter the number from the packing slip.
13. In the **Vendor's Invoice Number** field, enter the invoice number provided with the packing slip. This number will be used with the Invoicing process and will be matched to the number entered by Accounts Payable staff.

> **Note:** Packing Slip ID and Vendor's Invoice Number are not required fields.

14. Click the **Save** button.

Releasing Funds on Purchase Orders

Use these procedures to release funds on Purchase Orders for requisitions.

- **Not-To-Exceed**: To release Not-To-Exceed funds after you return from the vendor, go to the **Not-To-Exceed Requisition Search** entry point. Select the appropriate PO and at the bottom

of the screen, enter the amount listed on the receipt. You can also attach the receipt at this time. If there is a difference between the released amount and the PO amount, the remainder is liquidated from the account code(s). You cannot release Not-To-Exceed Requisition funds after the initial entry.

- **Blanket**: It is not necessary to release funds in order to issue invoices against Blanket PO. To do so, go to the **Blanket/Project Requisition Search** entry point, find the PO and click the Release field and enter the amount being released. Multiple entries can go against this type of PO.
- **Project**: Money must be released in order for accounts payable to pay invoices on Project requisitions. Go to the **Blanket/Project Requisition Search** entry point to find the appropriate PO and then click the Release link. Multiple entries can go against this type PO.

Appendix

This appendix explains how to use the Notes, Lookup Stock Number, and Vendor Lookup tabs for requisition-related functions.

Using the Notes Tab

In Requisition Search, click the **Notes** button to access the Notes tab.

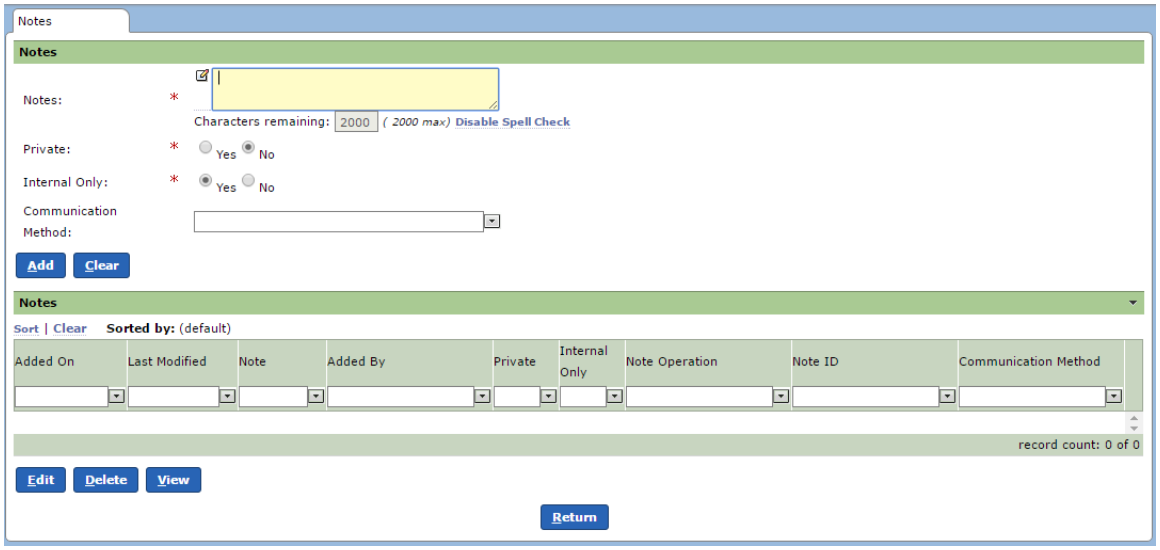

Figure 33: Notes tab

Adding Notes

1. In the **Notes** field, enter any free-text comments, up to 500 characters.
2. In the **Private** field, select *Yes* to indicate that this note is private; select *No* if the note is not private. No is the system default.

   Note: If a note is designated as Private, then only the person entering the note has access to it. No information about the note is displayed for other users.

3. In the **Internal Only** field, select *Yes* to indicate that this note is for internal use only; select *No* if the note is not only for internal use. Yes is the system default.

   Note: Selecting Yes in the Internal Only field indicates that only district employees have access to the note.

4. Select the **Communication Method** by which you received the information.
5. Click the **Add** button. The note is added to the Notes list.
6. Click the **Return** button to return to the tab on which you were working.

Editing an Existing Note

Highlight it in the Notes list and click the **Edit** button. Make any changes, and click the **Save** button.

Deleting a Note

Highlight it in the notes list and click the **Delete** button. The system displays a message asking you to confirm the deletion action. Click **Yes** to delete the note.

Using the Lookup Stock Number Tab

Click the icon next to the Stock Number field to access the **Lookup Stock Number** tab.

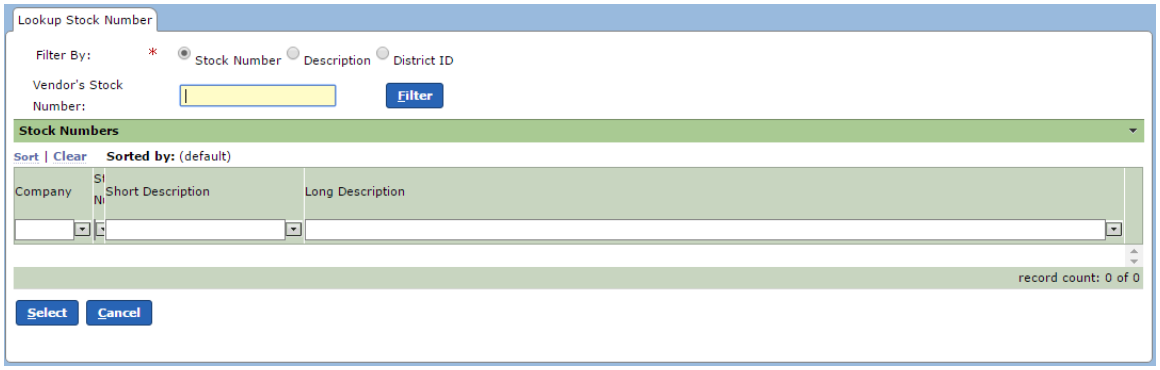

Figure 34: Lookup Stock Number tab

1. To filter the items in the Stock Numbers list, enter at least one character in the **Description Contains** field. The list is filtered by the Description of the item.
2. Highlight to select the appropriate item in the **Stock Numbers** list.
3. Click the **Select** button.
4. You are taken back to the appropriate tab, and the stock number you selected appears next to the **Stock Number** label.

Using the Vendor Lookup Tab

Click the icon next to the Vendor field to access the **Vendor Lookup** tab.

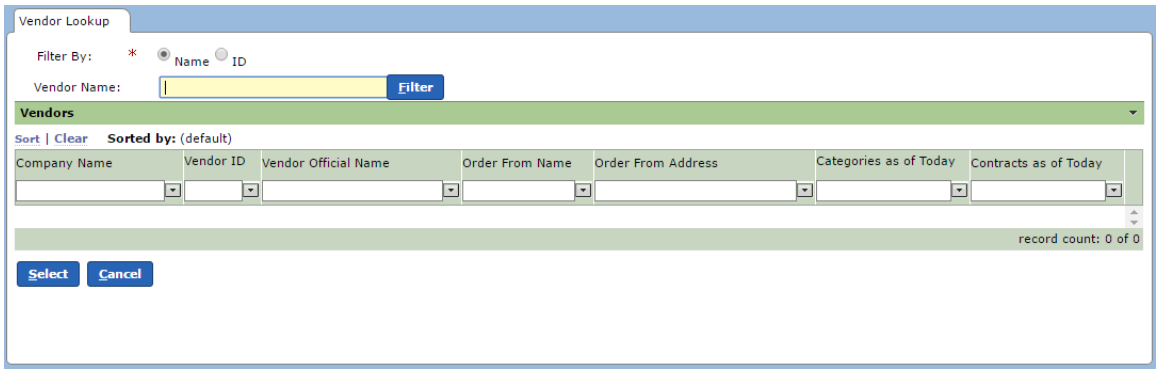

Figure 35: Vendor Lookup tab

1. In the **Filter By** field, select one of the following options:
   - **ID**: The Vendor ID field is displayed.
   - **Name**: The Vendor Name field is displayed.

   Tip: If you are unsure of the spelling of the company name, enter at least one letter, and click the **Filter** button. For example, if you enter Ed, your search results could return companies containing the word United, as well as those containing the word Red.
2. If you selected the ID button, enter the vendor's identification number in the **Vendor ID** field. If you selected the Name button, enter the vendor's name in the **Vendor Name** field.
3. Click the **Filter** button. The search results are displayed.
4. Select the appropriate **Company**.
5. Click the **Select** button. The tab in which you were previously working is displayed with the Vendor's information populated in the appropriate field.