

APPROVE REQUISITIONS

Escape Online 5 - ELAINE_LEGORRETA on Escape Online 5 Training

File Action Activity Help

Activities
020 - Pajaro Valley USD
Quick Start here

1 Finance
2 Requisitions
3 Approve Requisitions
Department Requisitions
Stores Requisitions
Vendor Requisitions
AR
Assets
Purchasing
Stores
Work Orders
Reports
My Reports
Report Favorites

HR / Payroll
Online Resources

Training
Training
Training

Finance - Requisitions - Approve Requisitions

Search
Go Clear Favorites

5

Search Criteria - Approve Requisitions Search

1 - Requisition Information
Pending Approvals 1 4
Requisition Number
Fiscal Year
Department
Academic Department
Order Location
Requisitioner
Vendor Id
Vendor Name
Requisition Type
Order Type
Goods and Services Category
On Hold Exclude

2 - Accounts
Fund
Resource
Year
Goal
Function
Object
School
Management

Requisition Number
Enter a requisition number to approve. (Leave blank to view all requisitions to approve.)

From Activities Menu, select:

- 1) Finance
- 2) Requisitions
- 3) Approve Requisitions

Search Criteria window will appear:

- 4) # of Requisitions in your approval que
- 5) Press GO to pull up list of items to be approved

QUICK APPROVAL

- 1) If you are okay to approve/deny without in depth review, open the Action drop down menu and select the desired action (Defer, leaves it in your que)

Finance - Requisitions - Approve Requisitions

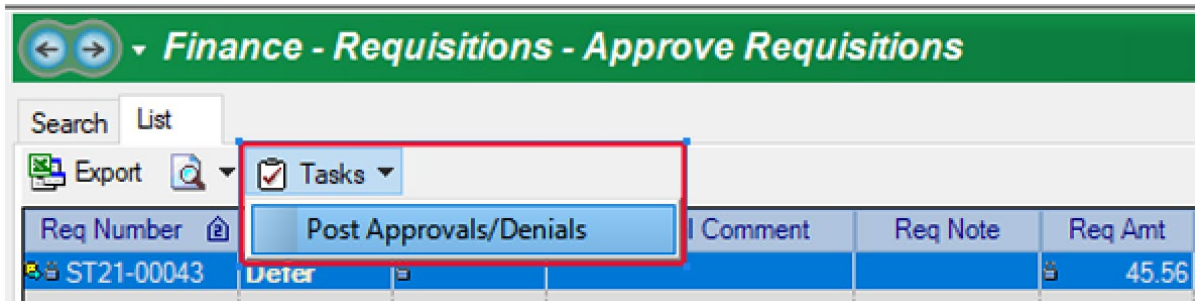
Search List
Export Tasks

Total \$ amount
Who submitted the requisition
Brief Description

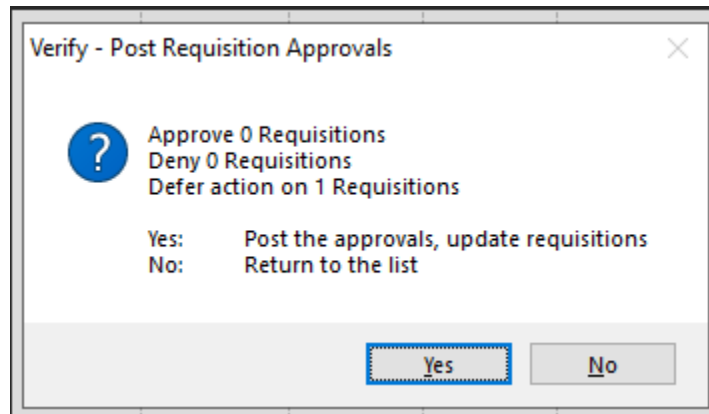
Req Number	Action	Result	Approval Comment	Req Note	Req Amt	Vendor Name	Loc	Curr Hold	New Hold	Curr Status Comment	New Status Comment	Buyer	Requisitioner	Fund	Res	Obj	Accts	Req Typ	Order Type	Req Com
ST21-00042	Defer				45.56		Watsonville	No					Marelin Ma	01	0000	4300	1	STORES		Hand Sanitizer

Dropdown menu

2) To Post Approvals/Denials, navigate to TASKS and select from dropdown



3) Review pop-up and select YES if okay

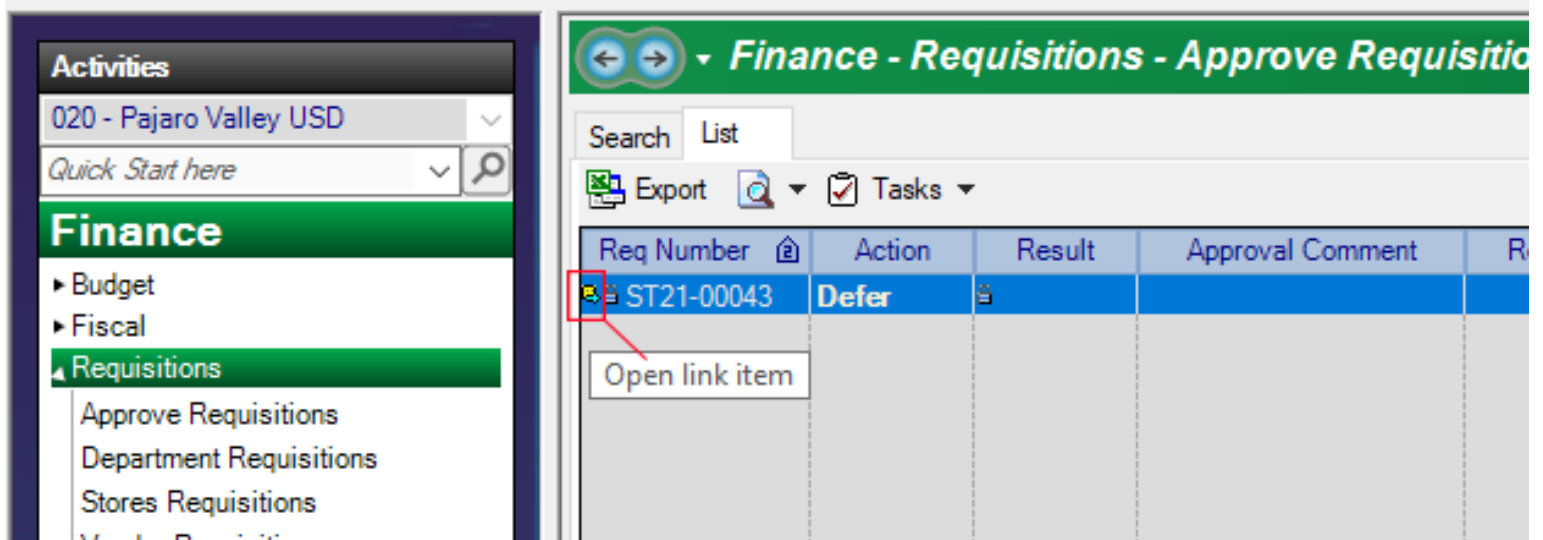


IN DEPTH APPROVAL

Select the LINK symbol on the REQUISITION to be approved:

Escape Online 5 - ELAINE_LEGORRETA on Escape Online 5 Training

File Action Activity Help



VENDOR REQUISITION

REQUISITION TAB – Comprehensive Overview

Finance - Requisitions - Vendor Requisitions

Search List Form

Delete Prev Next Close Cancel Tasks

Req# R21-00208, PO# , FY 2021 {2020/2021}, Status: Submitted

Requisition Items:1 Accounts:1 Payments Quotes Approvals:4 Assets Attachments Notes History:2

Requisition/Vendor Information		Order Information	
1 - Requisition Information Dept Id: BUSINESS (Business Department) Academic Department: Academic Department Requisitioner: Susan Rodriguez Who submitted Request Date: 7/1/2020 Order Location: WHS (Watsonville High School) Delivery Location: WHS (Watsonville High School) Room: Comment: Food for Health Academy events Brief Description Responsibility: Category: Goods and Services Category: FOOD/CAT (Food/Catering)		4 - Order Cost Information Non Taxable Amount: 750.00 Taxable Amount: 0.00 Sub Total: 750.00 Tax Rate: 9.250 Sales Tax: 0.00 Shipping Pct: 0.00 Shipping Amount: 0.00 Tax on Shipping: No Total Cost: 750.00 Adjustment Amount: 0.00 \$ amount + Taxes	
2 - Vendor Information Order Type: Blanket PO Online Order: No Online Order Contact: Vendor Category: Vendor Id: 004462 (TIMOTHY HAMMILL) Vendor Vendor Address Id: 1 Vendor Name: TIMOTHY HAMMILL DBA CASSIDYS PIZZA Street Address: PO BOX 1743 City State Zip: FREEDOM, CA 95019 Phone / Fax: (831) 724-2271 / Allows Emailing POs: No Quote Number: Credit Card Id:		5 - Summary/Status Information On Hold: No Status Comment: Date Approved: Board Date: PO Print Date: Line Item Cnt: 1 Line Items Fully Rcvd: 0 Total Qty Ordered: 1 Total Qty Rcvd: 0 Amount Received: 0.00 Date Completed: Days to Complete: 0 Fixed Asset Count: 0	
3 - PO Information PO Date: Buyer: Delivery Date: Change Notice Date: Change Notice Count: 0 Change/Cancel Msg: Ship Via: Terms: FOB:		6 - Accounting Information Account Distribution Option: 1 (Account Percentage) Acct Distributed Amt: 750.00 Acct Undistributed Amt: 0.00 Amount Encumbered: 750.00 Amount Expensed: 0.00 Amount Liability: 0.00	
		7 - Add/Update Information	

ITEMS TAB – Line by line, item review

Finance - Requisitions - Vendor Requisitions

Search List Form

Delete Prev Next Close Cancel Tasks

Req# R21-00208, PO# , FY 2021 {2020/2021}, Status: Submitted

Requisition Items:1 Accounts:1 Payments Quotes Approvals:4 Assets Attachments Notes History:2

Open Export

Line	Qty	Unit	Description	Unit Price	Extended Cost	Asset	Qty Rcvd	Date Rcvd	Qty To Rcv	Catalog #	Stores #
1	1	EACH	Open purchase order for pizza for Heal	\$750.0000	\$750.00	No	0		1		

Open purchase order for pizza for Health Academy events for 2020/2021 school year

If you hover over the line item, it will give you the full description

ACCOUNT – Distribution of funds to be used amongst account(s)

Finance - Requisitions - Vendor Requisitions

Search List Form

Delete Prev Next Close Cancel Tasks

Req# R21-00208, PO# , FY 2021 {2020/2021}, Status: Submitted

Requisition Items:1 Accounts:1 Payments Quotes Approvals:4 Assets Attachments Notes History:2

Export Cancel All

FF-RRRR-Y-GGGG-FFFF-O000-SSS-MMM	Amount	Percentage	Fiscal	Encumbered	Paid	Liability	Avail Bal
01-9010-0-3800-1000-5800-004-4494	\$750.00	100.0000	2021	\$750.00	\$0.00	\$0.00	(\$750.00)

If all looks good, select CLOSE at the top and follow steps 1-3 from QUICK APPROVALS

STORES REQUISITION

REQUISITION TAB – Comprehensive Overview

Finance - Requisitions - Stores Requisitions

Search List Form

Delete Prev Next Close Cancel Tasks

Requisition # ST21-00043 - FY 2021 - Status: Submitted

Requisition Item:1 Accounts:1 Approvals:3 Attachments Notes:1 History:1

1 - Order Information	
Dept Id	BUSINESS (Business Department)
Academic Department	
Requisitioner	Mairelin Martinez
Date Requested	6/30/2020
Order Location	WHS (Watsonville High School)
Delivery Location	WHS (Watsonville High School)
Room	
Comment	Hand Sanitizer
Responsibility	
Category	
2 - Account Information	
Total Cost	45.56
Acct Distributed Amt	45.56
Acct Undistributed Amt	0.00
Amount Encumbered	45.56
Amount Expensed	0.00

3 - Status Information	
On Hold	No
Status Comment	
Items Ordered	1
Amount Issued	0.00
Amount Not Issued	45.56
Date Approved	
Date Completed	
Days to Complete	0

4- Add/Update Information

ITEMS TAB – Line by line, item review

Finance - Requisitions - Stores Requisitions

Search List Form

Delete Prev Next Close Cancel Tasks

Requisition # ST21-00043 - FY 2021 - Status: Submitted

Requisition Item:1 Accounts:1 Approvals:3 Attachments Notes:1 History:1

Open Export

Line	Stores Item	Item Description	Ordered	Available Qt	Issued	To Issue	Unit Price	Unit	Cost
1	060141	Sanitizer, FOAMING Instant Hand Sanitizer, 6/case,	4	-10	0	4	\$11.3900	Each	\$45.56

ACCOUNT – Distribution of funds to be used amongst account(s)

Finance - Requisitions - Stores Requisitions

Search List Form

Delete Prev Next Close Cancel Tasks

Requisition # ST21-00043 - FY 2021 - Status: Submitted

Requisition Item:1 Accounts:1 Approvals:3 Attachments Notes:1 History:1

Export Cancel All

FF-RRRR-Y-GGGG-FFFF-O000-SSS-MMM	Amount	Percentage	FY	Encumbered	Expensed
01-0000-0-1110-1000-4300-004-1300	\$45.56	100.00	2021	\$45.56	\$0.00

If all looks good, select CLOSE at the top and follow steps 1-3 from QUICK APPROVALS