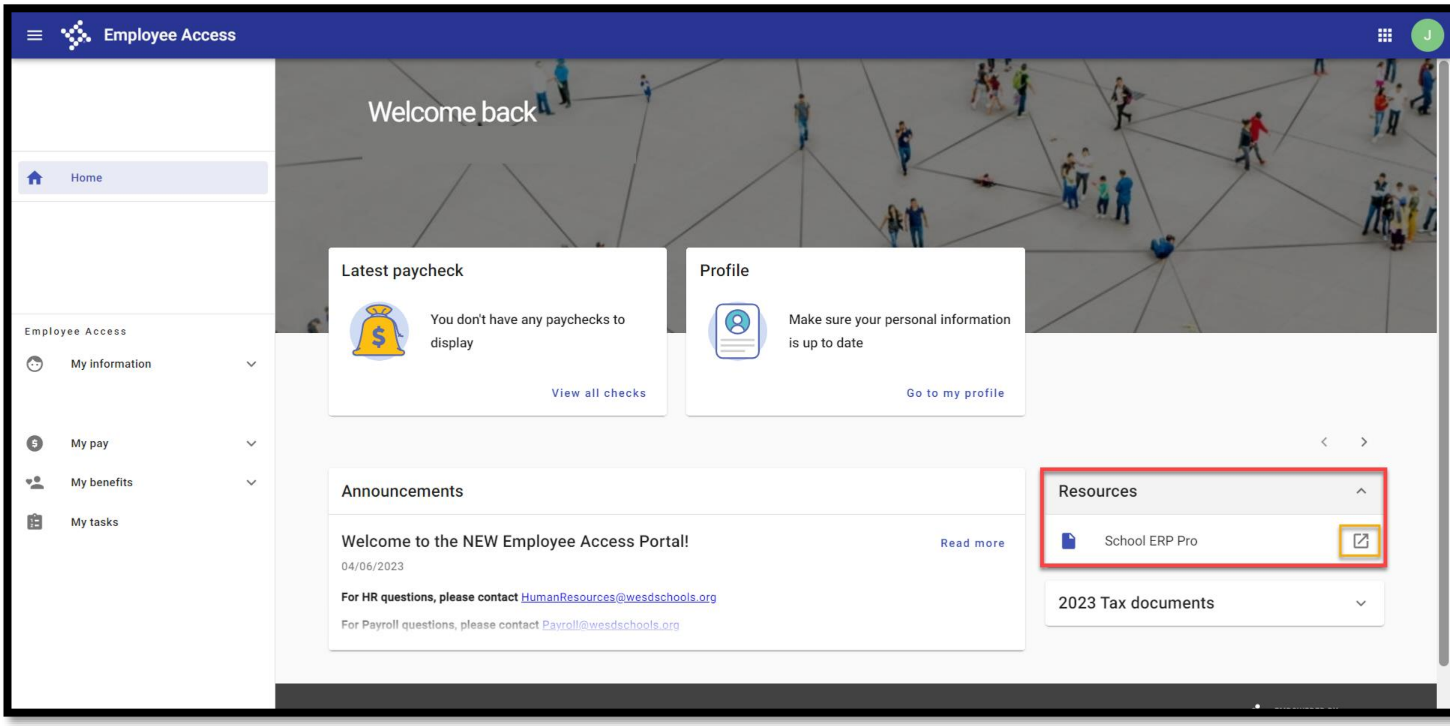
How-To Enter a Requisition

For assistance, please contact SchoolERPSupport@wesdschools.org

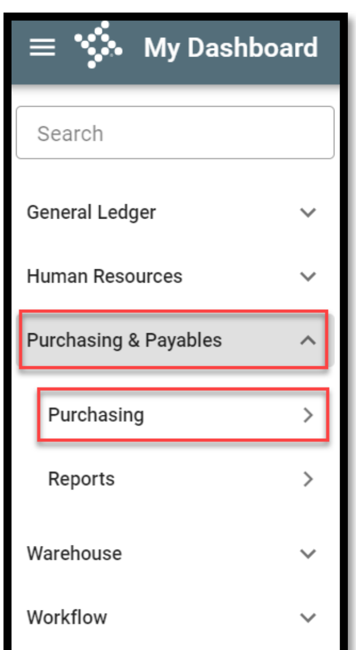
STEP 1: Login to School ERP Pro through Employee Access Portal (https://tyler-waesdtaz.okta.com/)

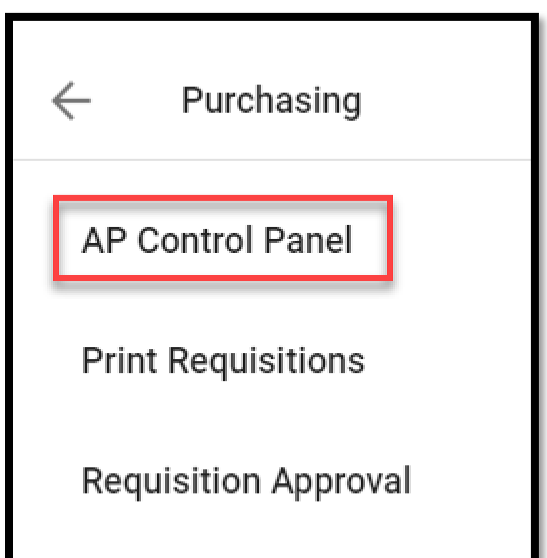
*Employee Access Portal can also be access by WESD website > Staff > Employee Access – School ERP Pro



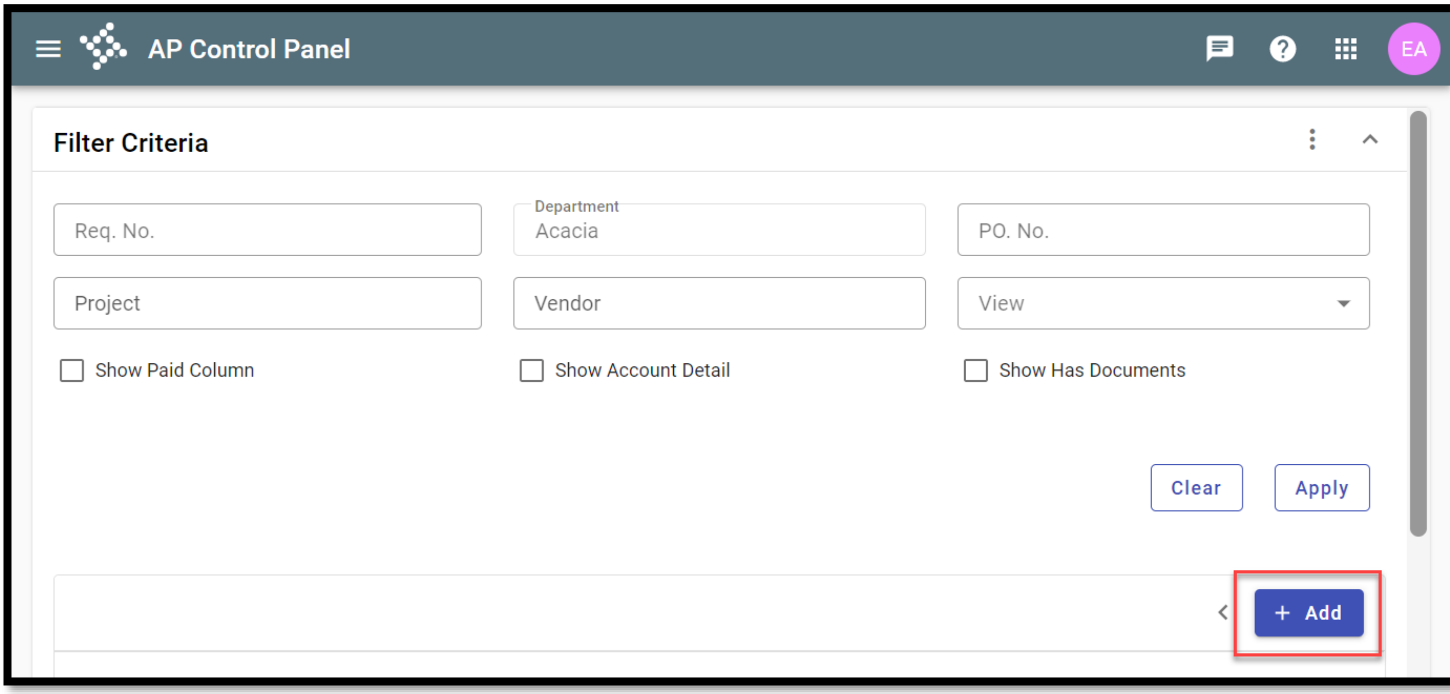
STEP 2: Click on "Hamburger" Menu next to My Dashboard

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



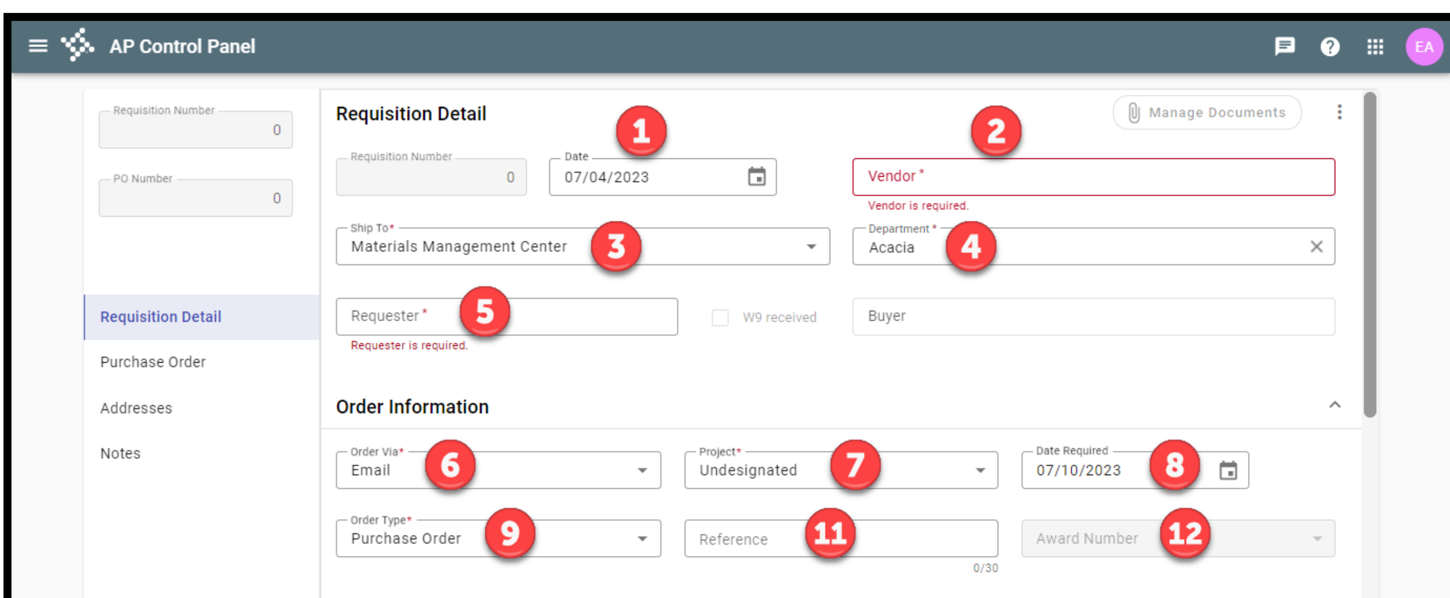


STEP 4: Click +Add to start a new requisition

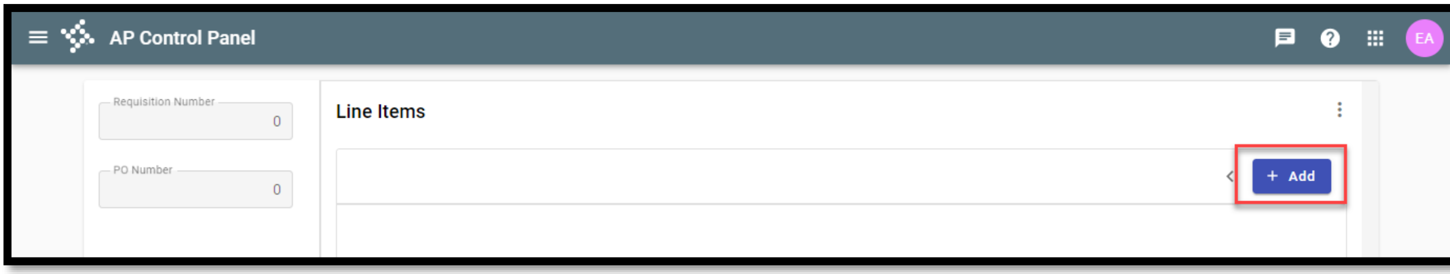


STEP 5: Fill in all sections below

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

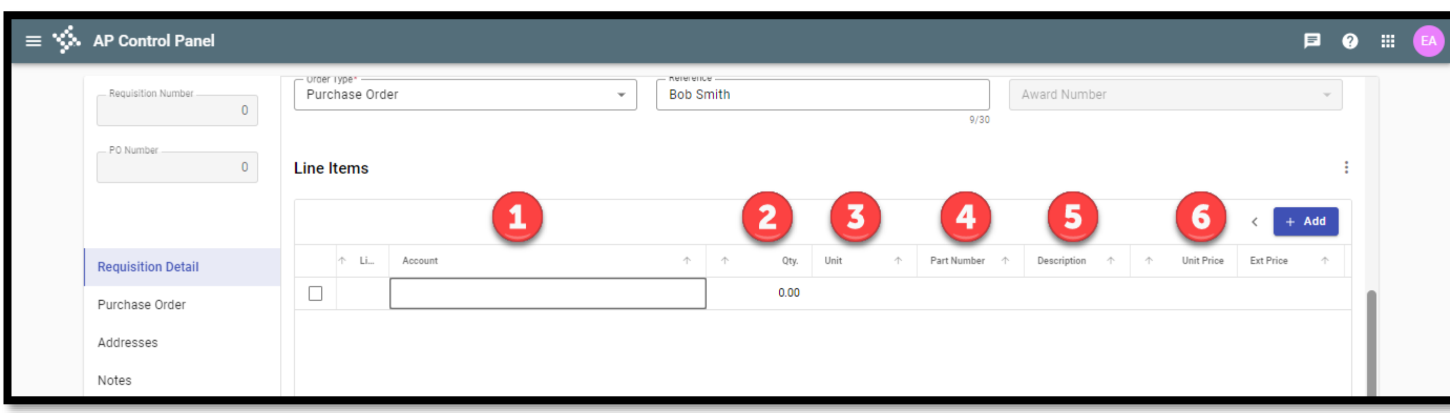


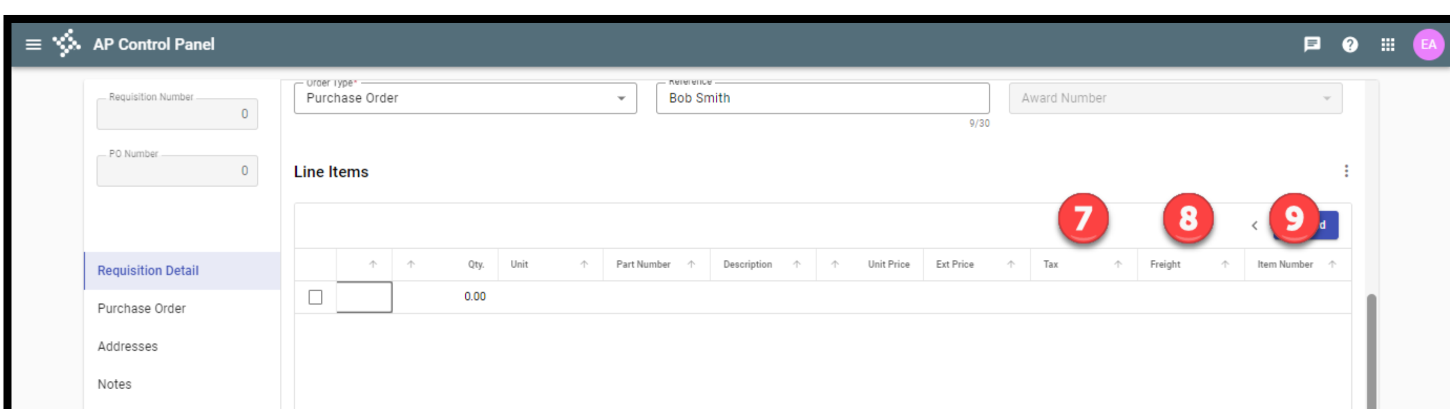
STEP 6: Click +Add to start entering line item



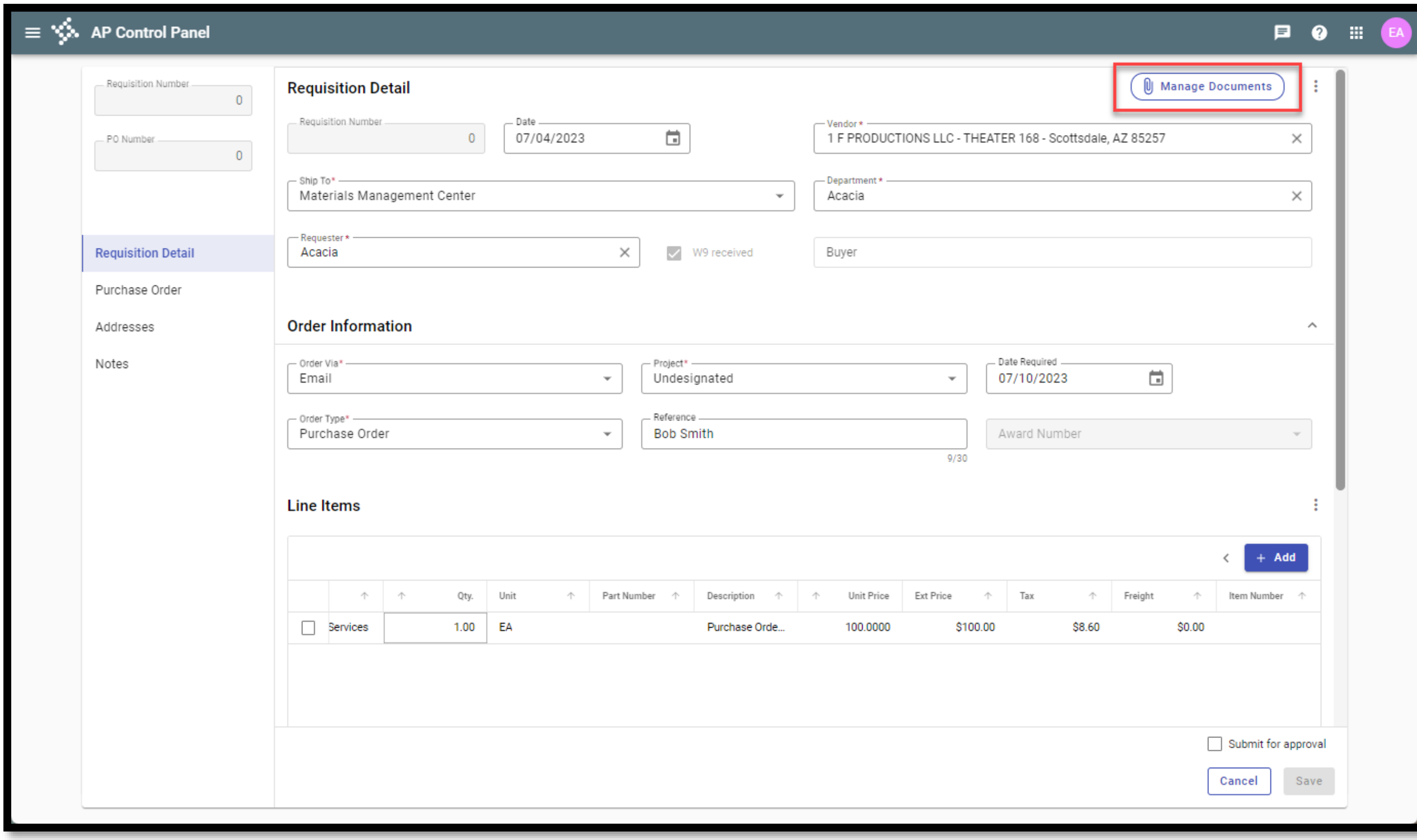
STEP 7: Fill in sections 1-9

1. *Account Code* – click in box and account codes will appear or start typing in account code
2. *Quantity* – enter quantity wishing to be ordered
3. *Unit* – enter if applicable
4. *Part Number* – enter if applicable
5. *Description* – change to reflect what is being ordered and who authorized user is
6. *Unit Price* – specify unit price of item wishing to be ordered
7. *Tax* – will default to 8.6% - call if tax is different on quote
8. *Freight* – enter freight charge based on quote
9. *Item Number* – leave blank

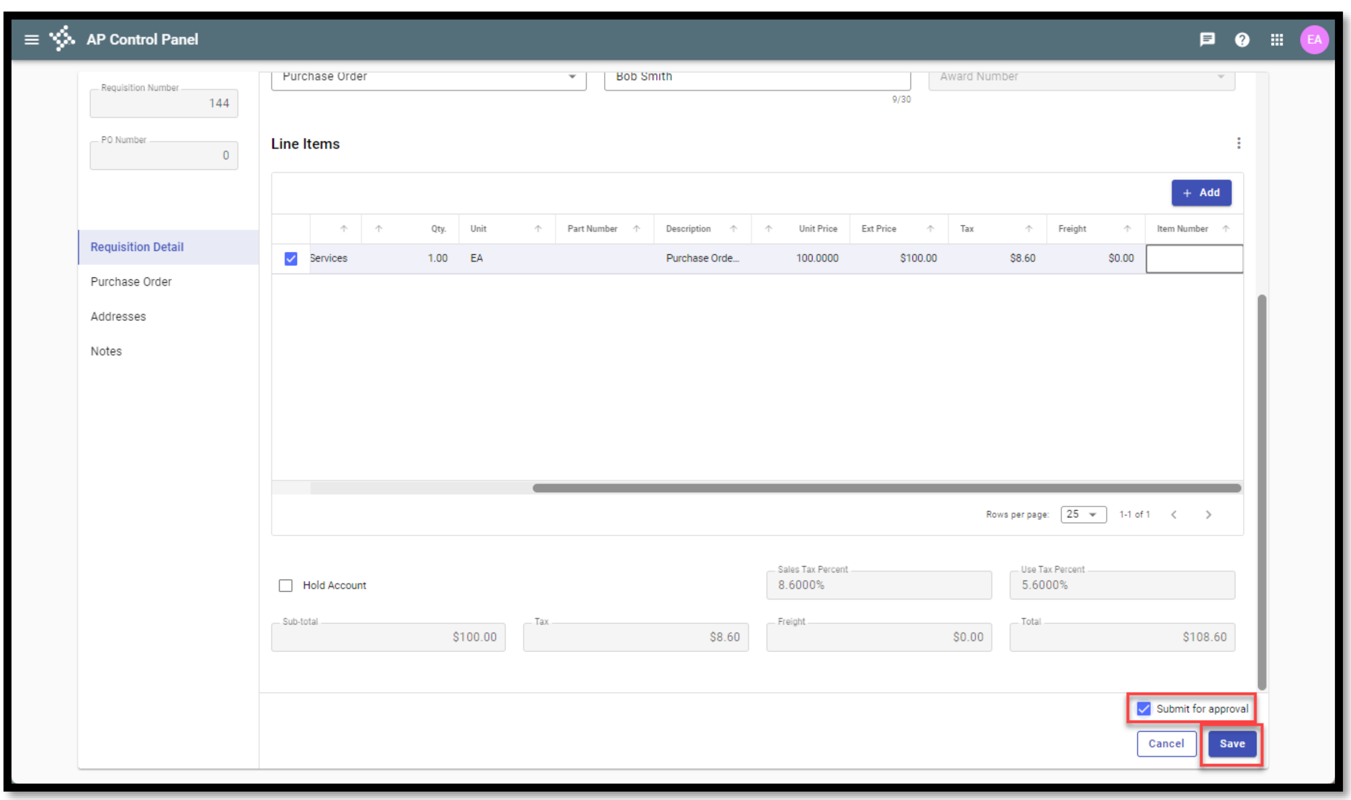




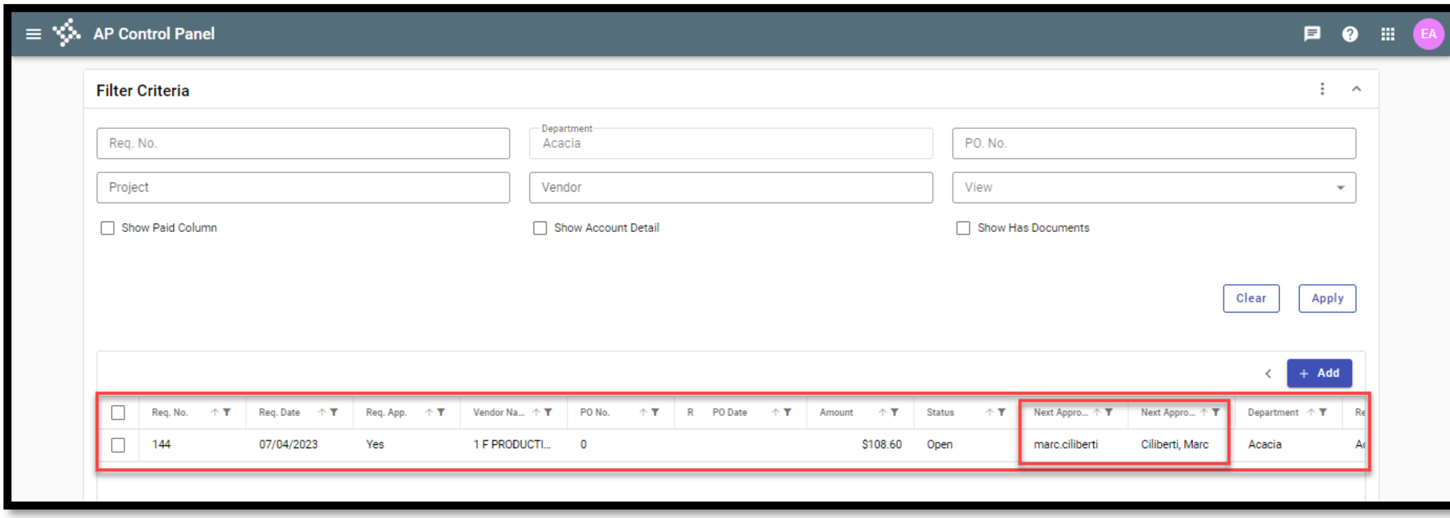
STEP 8: Click Manage Documents to add any supporting documents (see How-To Attach Documents in TCM for specific instructions)



STEP 9: After line detail has been added, check box for Submit for Approval
**If you wish to save the requisition in your queue and not release to next approver yet, do not select check box and just click Save*



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