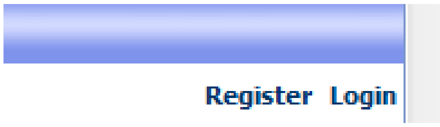
Using Infinite Visions Online Requisition Program

Logging In: Go to web page - https://ivisions.tylertech.com/cubaivisions/

Click on Login.



Enter your user name and password.

On the menu bar click on My Workflow.

Make sure the correct Connection Group Name is selected and click on OK.

Overview:

My Workflow: This will show you any items that need your approval. If you have items to approve, the My Workflow will be bold as will the menu item requiring completion, for example Purchase Requisition.

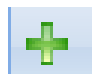
General Ledger | **Transaction Inquiry | Account Detail** will show you a budget summary for each account for which you have access. You may also look up a certain account or a group of accounts this way.

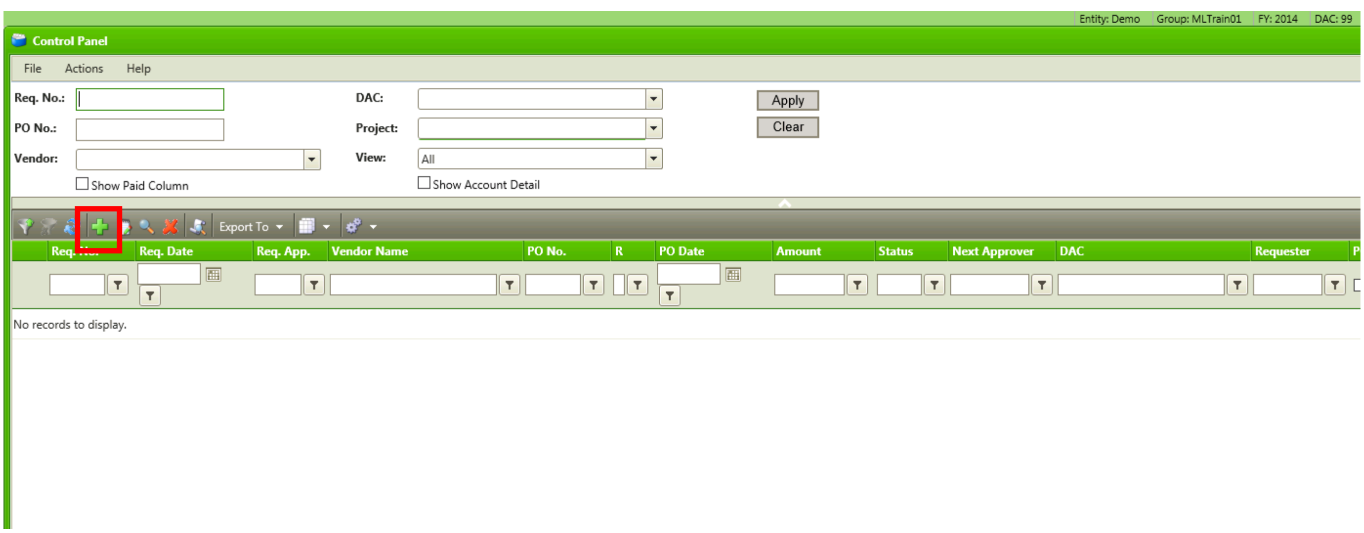
Reports | General Ledger Report Writer will run a summary report of each of your account codes. Additional reports may be available as well if requested by the Accounting Department.

Purchasing and Payables: Requisitions will be created and approved here. Any Requisition/PO that has been created in the current fiscal year for your location will be available for view.

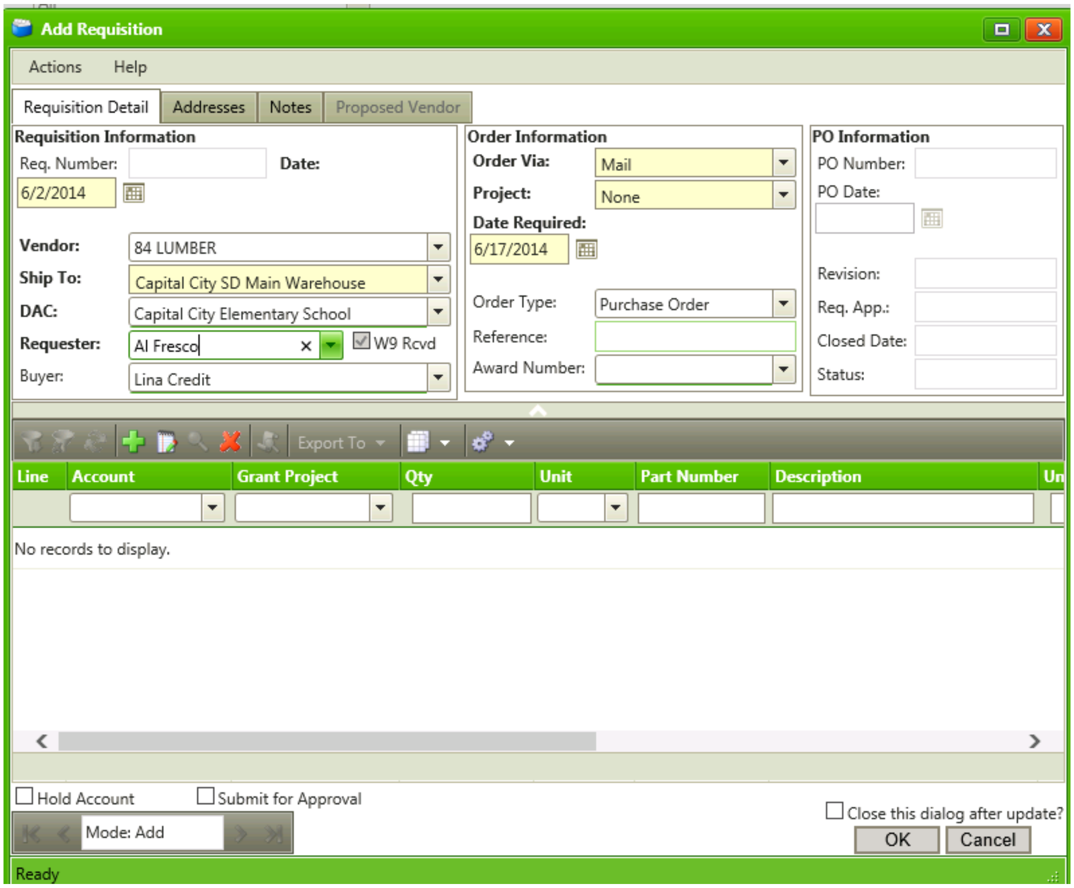
Entering a New Requisition:

Go to **Purchasing and Payables | Purchasing | Control Panel**.

Click the Green Plus Sign to add a new requisition: 



The system will display the following screen:



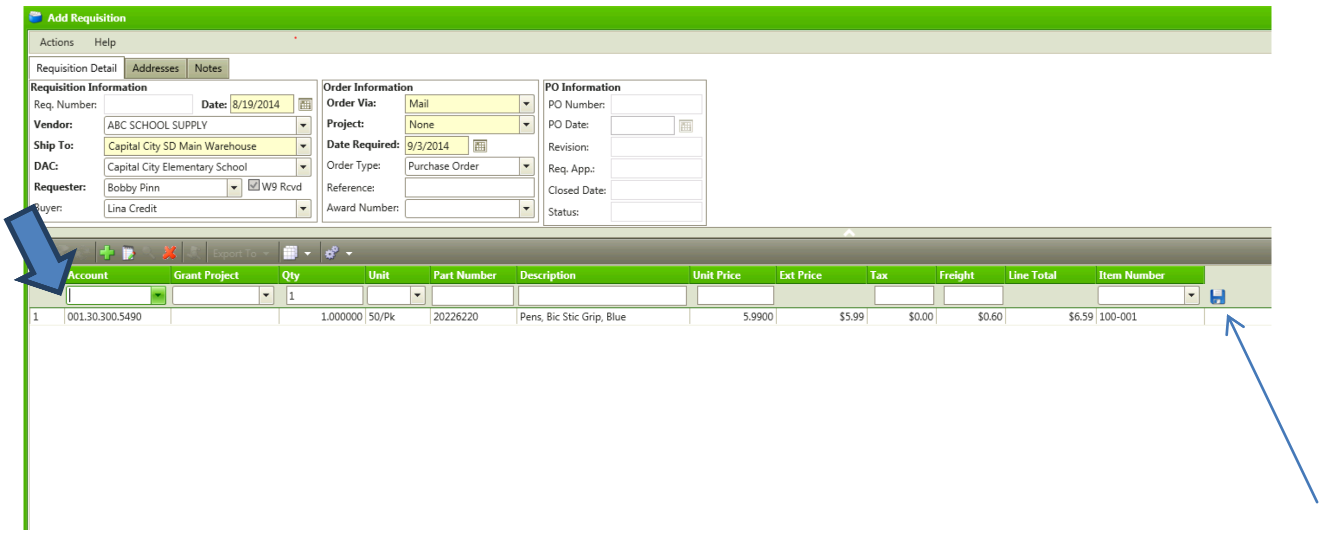
There are three tabs in the Add Requisition screen:

- The Requisition Detail tab includes the “Header” information for the requisition.
- The Addresses tab includes the address of the vendor and the ship to location.
- The Notes tab is where P.O. Notes that will print on the P.O. will be included. **Internal Notes** are for approvers and purchasing to view only and will not be printed on the P.O. **Please make sure to always include a brief explanation of purchase in the Internal Notes section.*

Add Requisition Information in the Requisition Detail tab:

- Select the Vendor from the drop down list. *If the vendor does not appear in the list, contact central office to add the vendor.*
- Select the appropriate Ship To address.
- Select the appropriate DAC (Distributed Accountability Center).

- Select the appropriate Requester. *If the requester does not appear in the list, contact central office to add the requester.*
- Select the Order method in the Order Via field.
- Select the appropriate Project, if one applies.
- The Date Required field will automatically default to two weeks from the current date, but may be edited if necessary.
- Select the appropriate order type.
- Detail can now be added in the following ways, which will be discussed in the following sections:
  - Entering line by line in the grid
  - Importing from Excel



Adding a Detail Line in the Grid:

Start typing the account number in the grid, once it auto fills click in the next column or hit tab. Enter the following additional items:

- Part Number (not required)
- Description – Enter the description of the item you are ordering – be specific as you will be able view this in reports
- Unit (not required) – Can be changed, click here to type in a new Unit – once a new unit has been entered it cannot be changed, all users in district will have this option
- Unit price – price per unit
- When you are finished, click the blue disk located on the upper right-hand side of the screen to save the line. If this is the last line that needs to be entered, click “Close this screen after save?” before hitting Save. If you have more to enter, you can click Save and then click New to initiate a new Requisition.

Submit Requisition for Approval

While in the requisition detail screen and after entering all information, select **Submit for Approval and Okay to Save and Submit.** The requisition will be saved in the Control Panel and will be routed for approval. **Please send quotes/backup documents to central office purchasing via email or interoffice mail and indicate requisition #.*

Actions Menu Items

Split Fund - Highlight the line you wish to split and go to **Actions | Split Fund**. You will then have two lines with the same row number. Enter the appropriate amount for each line.

Copy Line - Highlight the line you wish to copy. Go to **Actions | Copy Line**. You will now have two lines with the same information. They will have different row numbers.

Recalculate Tax & Freight – will allow you to enter a percentage for freight and it will distribute it equally among the accounts listed. Check Box Freight and enter the Freight amount. Click OK.

Apply Discount – Allows you to enter a discount percent and have that amount, per line, deducted from the requisition.

Distribute Tax and Freight - Allows you to enter a freight amount which will be distributed proportionately across the funding lines. Go to **Actions | Distribute Tax & Freight**. Check Box Freight and enter the Freight amount. Click OK.

Import from Excel - See next section for instructions.

Importing a Requisition from Excel:

Go to **Actions | Import from Excel** – browse to the file that was saved and click Import.

The Excel sheet must be in the following format:

Column A:	Line Number
Column B:	Description
Column C:	Part Number (not required)
Column D:	Unit (ea, per, etc)
Column E:	Quantity
Column F:	Unit Price
Column G:	Tax (enter $0 if there’s no tax)
Column H:	Freight (enter $0 if there’s no freight)
Column I:	Account

Column J: Warehouse – header required – leave blank
Column K: Grant – header required – leave blank

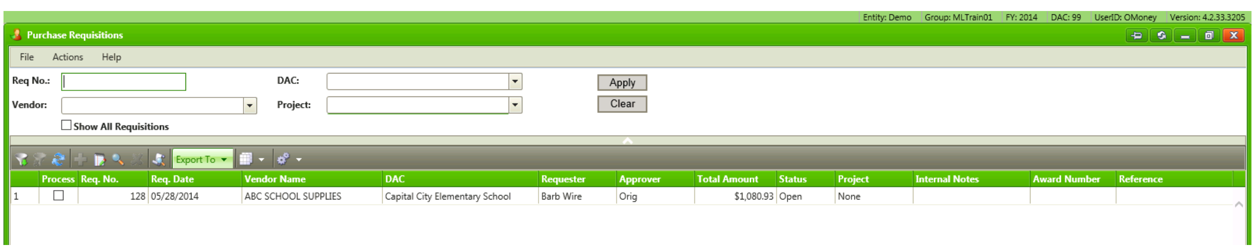
- All columns must be filled in with the exception of Part Number. If you have no freight or tax, enter $0.
- The worksheet must be named Sheet1.
- If an item is split funded enter the same Line Number multiple times. For example, if textbooks are split between two lines, both lines that contain the textbooks should have a line number 1.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Line Number	Item Description	Item Number	Unit	Qty	Unit Price	Tax	Freight	Account	Warehous	Grant		
2	1	gMachines T6588 Microtower	C3883-62	EA	8	399.95	0	0	400101006300				
3	2	Doorway DT5924 PC			12	679.99	0	0	400101006300				
4	3	Doorway DT5924 PC			6	679.99	0	0	400101006200				
5													
6													

Once imported, the lines will automatically populate the grid and the requisition can be submitted for approval (assuming all other pertinent information has been entered in the requisition tabs).

Approving a Requisition:

Go to **My Workflow | Purchase Requisitions.**



The requisition can be double clicked on to view/edit the information. If the requisition is acceptable, check mark the Process box and go to **Actions | Approve Requisition**.

If the requisition needs further information or will not be approved, go to
Actions | Return to Originator or **Actions | Return to Prior Approver.**