

DISTRICT CODE:

USER NUMBER:

Instructional Guide - Administrator Online Requisition System



If you have any questions please contact your Ed-Data customer service representative.

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I. Introduction

Categories & Awarded Vendors

(To select category and vendor online refer to instructions on page 2)

<u>Supply Category</u>	<u>Vendor List</u>
Athletic.....	Refer to Online System
Audio Visual.....	Camcor, Educational Equipment, Valiant, Troxell
Copy Paper.....	Refer to Online System
Custodial.....	Refer to Online System
Elementary Science.....	Carolina, Fischer, Frey, Nasco, Science Kit
Fine Art Supplies.....	Blick, Nasco, Sax Arts & Crafts, Sheffield Pottery, Triarco
General Classroom.....	Cascade or School Specialty
Health.....	Henry Shein
Family/Consumer Science.....	Nasco, S.A.N.E.
Library.....	Highsmith
Office/Computer.....	Corporate Express
Photography.....	Valley Litho
Physical Education.....	BSN, Nasco, Sportime, U.S. Games
Rocketry.....	Pitsco
Science.....	Carolina, Fischer, Frey, Nasco, Pitsco, Sargent Welch, Science Kit, Wards
Technology.....	Paxton Patterson

Requirements

H a r d w a r e :

- A PC or Mac
- Internet access

S o f t w a r e :

- PC Users - **Windows Explorer** 5.0 or higher
- Mac Users - **Safari**
- PC and Mac Users - **Adobe Reader** (Reader is not required, but will enable you to print a hard copy of your order)

* If you do not have Explorer, Safari or Adobe Reader they can be downloaded at no charge from the Microsoft, Apple and Adobe websites respectively. You can find a link from our login screen to download these free programs.

T i p s

- Do not create more than one requisition per supply category.
- Do not use the back and forward buttons in your browser. Instead use the buttons on the webpage to navigate through the screens.

Please follow the instructions below to create, modify and submit your requisition.

How can I login?

1. Proceed to www.ed-data.com
2. Click on the red login button on the bottom of the page.
3. Type in the following information:
 - a. DISTRICT CODE: This 2 character code is located on the cover of this packet.
 - b. USER NUMBER: This 5-digit code is located on the cover of this packet. Enter this code for the USER NAME & PASSWORD.
4. Click the login button.

How can I create or modify a requisition:

1. Click the "MY REQUISITIONS" button located on the main menu.

You are now viewing the "My Requisitions" screen. If you have a req(s). from last year it will be displayed here and it is available for modification. If you do **not** have a req from last year, you will need to create a **new requisition**. Based on your situation please follow the appropriate instructions below.

How can I modify my order from last year? (If you do not have an order from last year skip to "How do I create a New Requisition" below)

1. Click the red "MODIFY" button to open an existing requisition. Once the requisition loads you will see the detail of last year's order, with new bid pricing. You may now add, delete or modify quantities from the requisition (*see below for instructions*).

OR

How can I create a new requisition?

1. Click the "NEW REQUISITION" button located in the upper left-hand corner of the screen. A blank requisition will appear.
2. Select the category that you would like to order from by clicking on the drop down menu next to "CATEGORY".
3. Select the account code for your order by clicking on the drop down menu next to "ACCOUNT".

You are now ready to add items to your requisition. Simply follow the instructions below "How can I add an item to my requisition?"

How can I add an item to my requisition?

1. Select the vendor from the "Order Using" dropdown menu (The vendor may already be selected).
2. Place the vendor's item number in the cell marked "Item Number" (NOTE: Do not enter dashes)
3. Now enter the desired quantity, and then click "EASY ADD". The new item will be added to your requisition. Repeat to add additional items.

How can I change the quantity of an EXISTING item in my requisition?

1. Select the quantity to be changed and type in the new quantity.
2. Click "UPDATE" located at the bottom of the screen. This will process your change.

How can I delete an item from my requisition?

1. Type "0" as the quantity for the appropriate item.
2. Click "UPDATE" located at the bottom of the screen. This will process your change.

How can I save my requisition?

To hold (save) your req, click "HOLD REQUISITION" from the requisition screen. At this point your req is NOT submitted for approval. You can login at a later date to modify the requisition further. (Note: All reqs eventually need to be submitted for approval or a PO will not be created)

How can I submit my requisition?

Once your requisition is complete it needs to be submitted for approval. From the requisition screen, click "SUBMIT REQUISITION" (located in the middle of the page towards the right-hand side of the screen). Once your requisition has been approved you will not be able to modify it.

How can I approve/reject a requisition?

1. Log in to the system (see page 2 for instruction).
2. Click on the “**Approve Requisitions**” button.

Now you are in the administrations screen. This screen is only accessible by principals or business administrators. The upper portion of the screen allows you to filter the requisitions by the following options: Category, Schools (business office only), User Name or Number, Account Code, and Status.

3. Select the requisition(s) you would like to approve or reject by clicking on the box(es) on the left hand side of the screen.
4. In the “**Action Box**” located in the middle of the screen select the desired action (approve, reject).
5. Click “**Process Action**”

Once you approve a requisition, the teacher can no longer change that requisition.

Frequently asked questions

What does Approval status mean?

Approval status reflects the current status of a requisition. There are 3 status levels. They are:

- On Hold** - The staff member is still working on this requisition, and it is not ready for approval.
- Pending Approval** - These requisitions have been submitted for approval at the next level.
- Approved** - The requisition has been approved by your administrator.

How can I verify that my order has been submitted?

The status of each requisition is displayed on the “View Requisition” page. If your status reads “Pending Approval” you have submitted your requisition.

Can I put my requisition back “On Hold” after I’ve submitted it for approval?

Yes. If you inadvertently submitted the req, reopen it and then click “Hold Requisition”. You will see the status of the requisition change from “Pending Approval” to “On Hold”.

Can I change my order after it has been approved?

No. After your Principal has approved your order it cannot be modified.

Can I order from any vendor?

The online ordering system is based on a highly competitive cooperative bid. The online system allows you complete access to the awarded vendors’ entire catalog. The awarded vendor(s) will be displayed after you select a supply category within the requisition screen. All vendors carry national brand product, and will fulfill the vast majority of your supply needs.

Where can I find the vendor item number?

A number will appear next to the item description in the vendor’s catalog. Please contact the vendor if you do not have enough catalogs in your building.

Is it possible to print my requisition?

Yes. From the requisition screen click the “Print Requisition” button. After a brief pause you will see a window appear with your requisition in an Adobe file. Press “Ok” and your requisition will print. You will need the Adobe Reader software to print your requisition.

Why can’t I print my requisition?

Your computer may not have Adobe Reader or an old version of the program (Reader creates a printable report). You can download the correct version from the Adobe website. There is a direct link from our login screen that will take you to the Acrobat Reader download page. Simply follow the instructions on screen to download the free software.

Why is the program displayed awkwardly on my screen?

You are most likely using Netscape Navigator as your web browser. To properly run the requisition system you will need to use Microsoft Internet Explorer. If you do not have Explorer 5.0 or higher, there is a direct link from our login screen that will take you to the Microsoft Explorer download page. Simply follow the instructions on screen to download the free software.

Your screen resolution may not be optimized. The optimum screen resolution, depending on the size of your monitor, is usually 1024 x 768. To check your current resolution right-click on your desktop, do not click on an icon. A menu will appear. Click on "properties", and then click on settings. You will see your resolution displayed in the "screen area" box. If it is not set to 1024 x 768, slide the toggle until you reach 1024, then click ok. Another box will appear, click ok again, and then click "yes". Your resolution is now optimized at 1024 x 768.

Can I search for items in the system instead of using the vendor catalog?

Yes. While in a requisition find the "Order EZ" dropdown box. Click it and select "Browse Bid". A "Heading" box will appear which lists bid items in alphabetical order. Select a heading then click the "Browse" button. The system will then display any items associated with the selected heading. If you would like to add one of these items to your order place a quantity in the "Quantity" box, then click order items. You can now either do another search or go back to your order by clicking the "Return to Requisition" button.