

**Ed-Data Procurement Management System**  
**Supply Requisition Instructions - Business Office**

**Important Note:** For optimal viewing, please ensure that your screen resolution is set to 1024 x 640 or higher, and your browser zoom is set no higher than 100%.

**Login:**

1. Enter www.ed-data.com in the address bar of your web browser.
2. Click on the red "Order Entry System" button on the bottom of the page.
3. Type in the following information:
  - a. DISTRICT CODE: Enter the 2-character code located on the upper right-hand corner of this packet.
  - b. USER NUMBER & PASSWORD: This 5-digit code is located on the upper right-hand corner of this packet. Enter the 5-digit code for the USER NUMBER & PASSWORD.
  - c. Click "login". You are now logged in on the "Approve Requisitions" tab.

**Your Staff's Reqs – Review/Approve/Reject Orders "Approve Requisition" Screen**

1. Log in to the system (see instructions above).
2. Click on the "Approve Requisitions" tab. This screen lists all of your staff's requisitions by category.

**Open & Review a Requisition**

To view the itemized detail of any order click the "Modify" button on the left-hand side of the screen.

**Approve or Reject Requisitions**

1. 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.
2. Click the "Action" dropdown located on the bottom of the screen to select the desired action (approve/ reject).
3. Click "Apply" located next to the "Action" box.

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

**Sort & Filter Requisitions**

- **Sort** - The reqs can be sorted by clicking on headers at the top of each column.
- **Filter** - The system will allow you to filter requisitions by Budget Code, Category, Status, User Name, User Number, and in some cases by location. This can be useful while approving your requisitions or can be used to generate reports for budgeting or keeping a history. To filter and print (option) please follow the steps below.

1. View your staff's requisitions on the "Approve Requisitions" tab.
2. Click the filter box as desired in the "Filter List By" section.
3. After making a selection the system will display the requisitions to match your request.
4. You can clear your filter results by clicking "Clear Filter"

## **Requisition Creation & Modification “My Requisitions”:**

New requisitions can be created, and existing requisitions can be accessed and modified from the “My Requisitions” tab.

### **Create a New Requisition**

1. From the “My Requisitions” tab, click the “Show Category Menu” button to access a listing of all supply categories.
2. Click on the desired supply category. A new requisition will appear.
3. Select the account code for your order by clicking on the drop down menu next to “ACCT”.

You are now ready to add items to your requisition. Skip to “Adding Item To My Requisition” below.

### **Open and Modify an Existing Requisition**

From the “My Requisitions” tab click the gray “MODIFY” button to open an existing requisition. You may add, delete or modify quantities from the requisition.

- **Change Quantity:** Change the number in the “Current Qty” column, then hit enter on your keyboard.
- **Delete Items:** Click the “x” under the Delete column.

### **Add Items to Your Requisition from Order-EZ**

Order-EZ is quick and simple way to add items to your req if you have an awarded vendors’ item number. Item numbers can be found in the awarded vendor’s catalog, Ed-Data’s order booklet or in some cases the vendor’s website.

1. Select the vendor from the “Select Awarded Vendor” dropdown.
2. Type the vendor’s item number in the cell marked “Item #”.
3. Enter the desired quantity in the “Qty #:” cell.
4. Click the “Add” button. The item will be added to your requisition. Repeat to add additional items.

### **Add Items to Your Req with Search**

Our enhanced search tool allows you to browse our extensive database to add new items to your requisition. It’s simple and will help you stretch your budget. You can search using any combination of:

- **Vendor** – Narrow your search to a given vendor. (*For greater selection it’s recommended to leave this set to all vendors for most searches*)
- **Most Popular Item List** - Search an extensive listing of the most popular items purchased by thousands of teachers at the highest discounts.
- **Description** – This option can be used to narrow your results from “Most Popular Item” search or on its own to search all possible items.

1. Click the “Search” tab to enter the search screen.
2. Select any combination of Headings, Vendors or enter keywords then click Search.
3. Items will be listed below based on your search criteria. Enter the desired quantity and click “ADD”.
4. To return back to your order click on the grey “Requisition” tab (left of the Search tab).

### **SEARCH TIPS:**

- Use the Most Popular Item dropdown as your primary search tool to access an alphabetical listing of core items. If your search results are too extensive you can narrow them by entering a keyword in the “Description” box and searching again.
- First try searching by all vendors to provide the greatest item selection and lowest prices.

### **Exit Requisition**

- **Exit and Hold:** To close your requisition without submitting for approval, click the “Exit Requisition” or “Hold Requisition” button.
- **Exit and Submit:** To close and submit your requisition for approval, click the “Submit Requisition” button.

**If you need additional assistance your Ed-Data Customer Service Representative is Janice Iozia and can be reached at Phone: (973) 321-9392 or Email: [janicei@ed-data.com](mailto:janicei@ed-data.com)**