



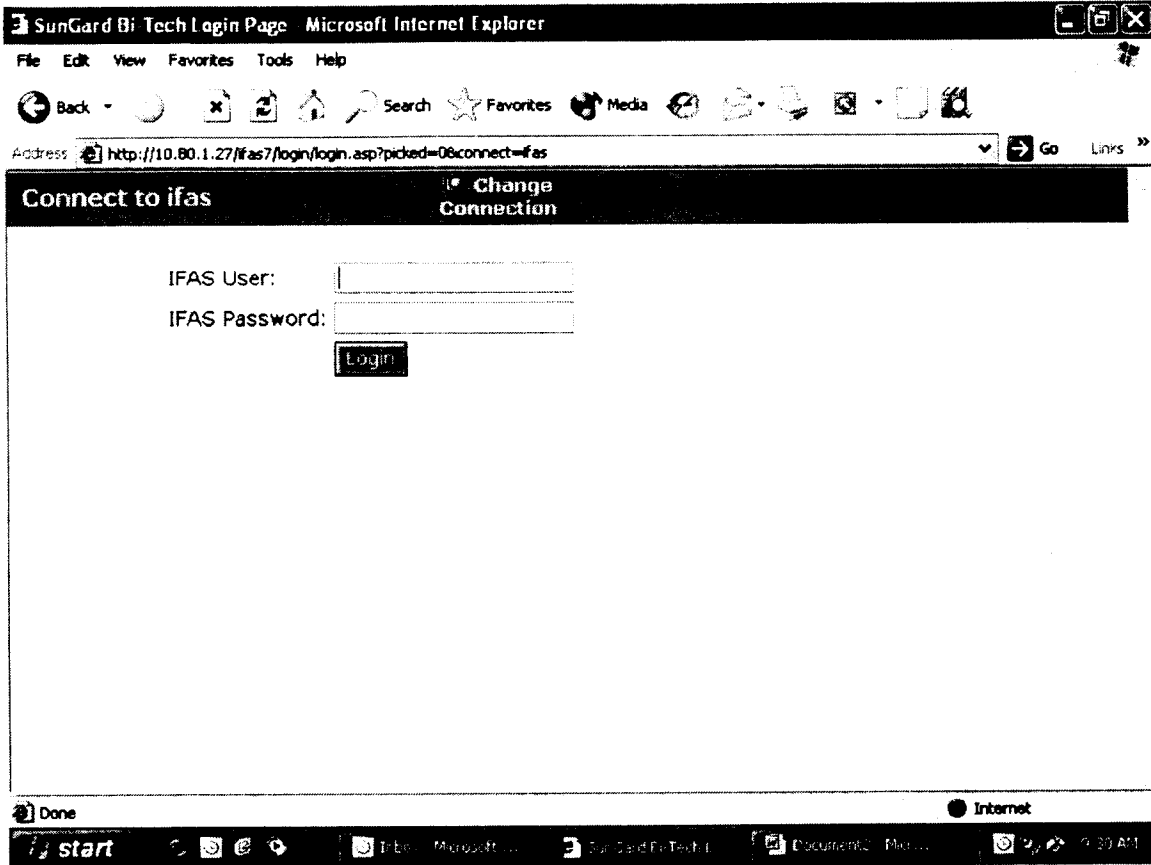
ACCESSING BI-TECH SOFTWARE

Step 1: Click on the Internet Explorer icon

Step 2: In the ADDRESS box enter the following IP Address:
<http://10.80.1.27/ifa7/>

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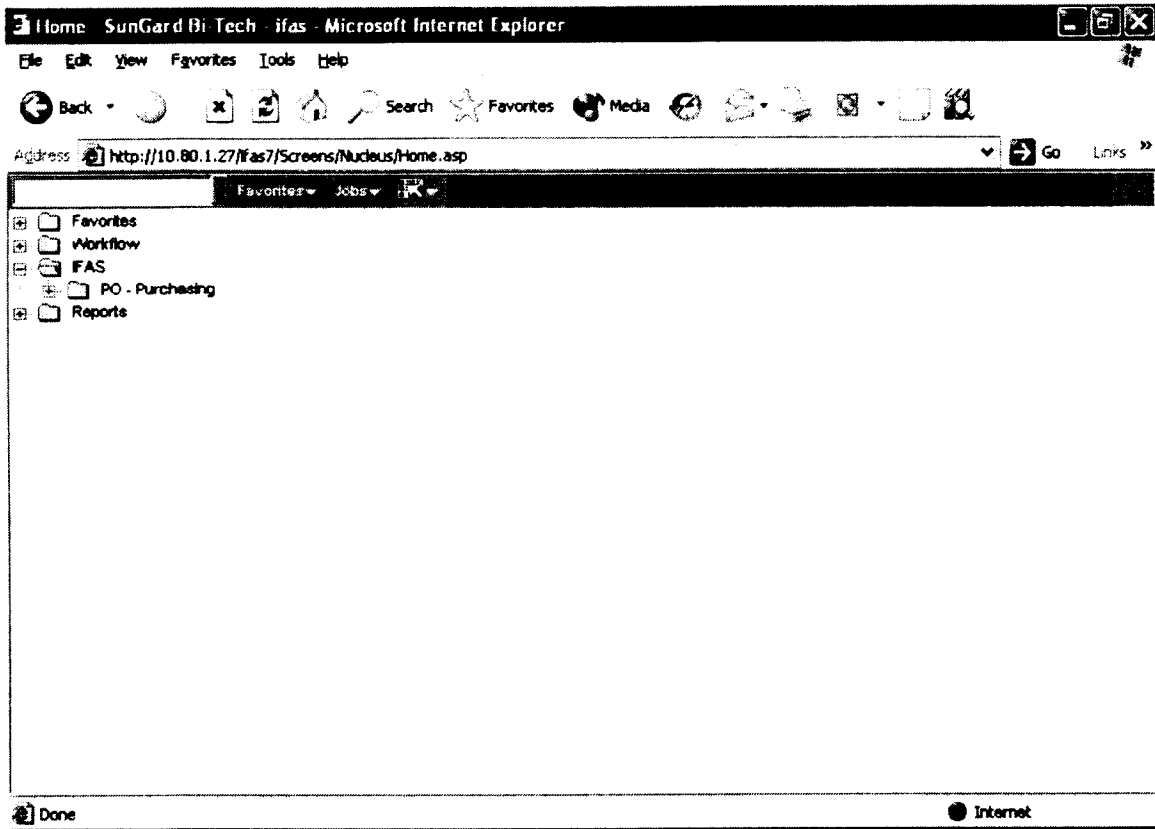


Step 3: This will open up the above log on screen.

Step 4: Enter your assigned IFAS User Code

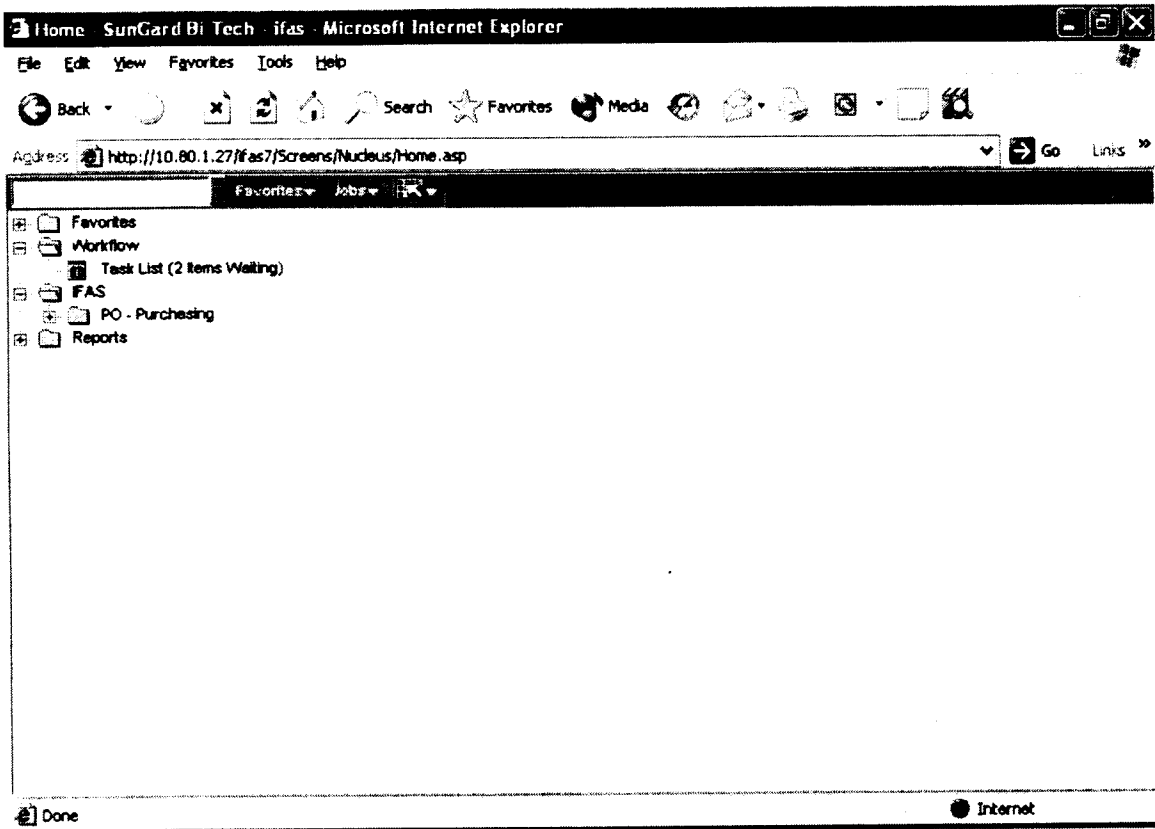
Step 5: Enter your assigned Password

Please note that the password may be changed by the user. Before going live with this system, we will forward instructions on how this password may be changed.



Step 5: Once you are logged in the above screen will appear.

Step 6: Click on the + sign next to the file folder titled Workflow



Step 7: Once this folder is opened, notice the Task List document. In parenthesis you will find the number of requisitions waiting for your approval.

Step 8: Click on the Task List document, the screen on the following page will appear.

SunGard Bi Tech Task List Microsoft Internet Explorer

Log Out

Records waiting

Choose Model: Purchase

Include tasks waiting on Ro... 0

PR	PO
PR000363	
PR000368	

History

USER	DATE	COMMENT	LINK
SE002LLL ✓	11/30/2004 3:52:43 PM		
SE002LLL ✓	11/30/2004 3:53:26 PM		
AD002ABJ ✓ ✗ ▾	11/30/2004 3:53:44 PM		

Summary

Purchase Request# = PR000368
 PR Total\$ = 10000.00
 Requested By = Lulu Lieck
 Request Date = 11/30/2004
 Entry Date = 11/30/2004
 Vendor = V000002-DELL MARKETING LP

Item#	Quantity	Price	Item Total	Description	Split Amount/ Percent
0001	5.000	1000.00	5000.00	Computers 1991200201 6639	
0002	5.000	1000.00	5000.00	Computers 1993300204 6639	

Done Internet

Step 9: Notice the Approval Screen is divided into two columns. The column on the left had side shows the Purchase Requisitions waiting for approval by requisition number. The column on the left gives you the details of the Purchase Requisition waiting for your approval. The top portion of this column, History, shows you the users that this requisition has been through, the first one being the originator. The last one on the list is the highest level of approval, usually you. The bottom part of this column, Summary, gives you detail of the purchase requisition.

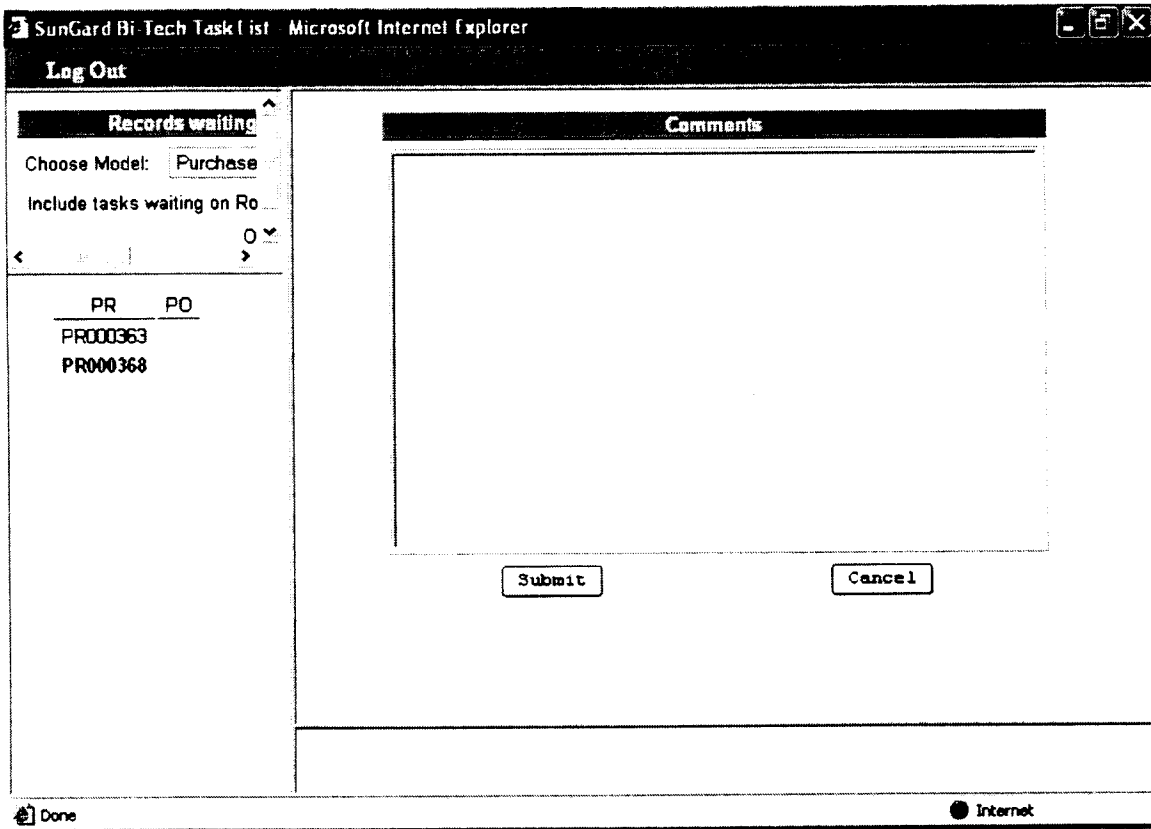
Step 10: In the History, notice the markings by your user ID. These marking will be colored prior to your approval.

The green check mark means approve

The red x mark means disapproved

The blue return check mark means you have made comments and have returned it to the originator for corrections/additions/deletions

Once you have reviewed the Purchase Request, click on the green check mark. The screen on the following page will appear.



Step 11: You may make comments in the Comment screen. Once you have completed your comments, if any, click on the Submit button.

Step 12: The screen on the following page will appear.

SunGard Bi Tech Task List Microsoft Internet Explorer

Log Out

Records waiting

Choose Model: Purchase

Include tasks waiting on Ro

PR PO

PR000363

✓ PR000368

History	
USER	DATE
SE002LLL ✓	11/30/2004 3:52:43 PM
SE002LLL ✓	11/30/2004 3:53:26 PM
AD002ABJ ✓	11/30/2004 4:17:36 PM

Summary	
Purchase Request#	= PR000368
PR Total\$	= 10000.00
Requested By	= Lulu Lieck
Request Date	= 11/30/2004
Entry Date	= 11/30/2004
Vendor	= V000002-DELL MARKETING LP

Item#	Quantity	Price	Item Total	Description	Split Amount/ Percent
0001	5.000	1000.00	5000.00	Computers 1991200201 6639	
0002	5.000	1000.00	5000.00	Computers 1993300204 6639	

Successfully processed the Approval request.

Done Internet

Step 12: Notice that the markings by your user ID have been removed and only a grey check mark appears. This is an indication that you have approved this request and it has now moved to the next level. Also notice the message that appears on the bottom of the second column: "Successfully processed the Approval request". This is also an indication that you have approved the request.

Step 13: Notice that in the first column the request that you have just approved has a green check mark. There is still one request to be approved. You need to click on the entire purchase requests that you have in this column until all have been approved, disapproved, or rejected back to originator with corrections.

NOTE: All originating campuses/departments have been given a timeline for entering purchase requests. They have until 4 p.m. to enter all that is needed. It is recommended that you log in every morning to see what is pending in your Workflow for approval.

GENERAL INFORMATION

User ID Definitions

The User ID is divided in the following manner:

1. First two alpha characters identify the title, or department of the user
2. Next three numeric characters identify the location of the user
3. The last three alpha characters identify the initials of the user. If user does not have a middle initial, then the initial of the last name is used twice.

EXAMPLE: PU729TR1 – Purchasing Department, location 729, trainer 1.

By knowing the make up of the user id number, you will be able to see, on your status screen of your purchase requisition, which level of approval is next for your purchase request.

The following list will identify the user titles:

1. AA Area Administrator
2. AD Principal/Assistant Principal
3. AH Athletics
4. AM Admissions and Attendance
5. AQ Aquatic Center
6. AT Attendance
7. BA Business Administration
8. BI Bilingual
9. BK Budget Clerk
10. BU Budget
11. CA Computer Aide
12. CE Certified Personnel
13. CK Clerical Assistant
14. CL Classified Personnel
15. CO St. Joseph's Academy
16. CS Computer Services
17. CT Career and Technology
18. CU Curriculum
19. DE Data Entry
20. DY Dyslexia Program
21. FA Music/Fine Arts
22. FC Facilities
23. FI Finance
24. FP Federal Programs
25. FS Food Service
26. GC Grants

User ID Definitions

User titles – continued

27. GR	21 st Century Program
28. GT	Advanced Academics
29. HS	Health Services
30. HV	Home Visitor
31. HY	Homeless Youth Project
32. IA	Internal Auditor
33. IN	Insurance and Safety
34. IT	Instructional Technology
35. LI	Librarian
36. MA	Maintenance
37. MC	Media Center
38. MI	Migrant Education
39. PD	Professional Development
40. PE	PEIMS
41. PI	Public Information
42. PL	Parent Liaison
43. PR	Parental Involvement
44. PU	Purchasing
45. PY	Payroll
46. RC	Records Clerk
47. RE	Research/Evaluation
48. RM	Records Management
49. SA	Student Accounting
50. SE	Secretary
51. SF	National Science Foundation
52. SP	Special Programs
53. SR	Security Department
54. SS	Special Services
55. SU	Superintendent
56. TE	Instructional Support Teacher
57. TR	Transportation Department
58. TV	ITV Studio
59. UI	UIL
60. WE	Wellness
61. WH	Warehouse

Notification of Final Approval of Purchase Request

The originator of the Purchase Request will be notified by email when their requisition has been given the final approval and is ready for print.

The email will give you a history of where, when, and how long your requisition has been.

After you have been notified, expect for your requisition to have a purchase order the following day.

The Purchasing Department has set a timeline. All purchase requests received for final approval will be approved by the Administrator of Purchasing between 4 p.m. – 5 p.m. These approved purchase requests will be printed between 10 a.m. – 11 a.m. the following day.

See next two pages for sample of email notification.

Rosario Pena

From: ifas@bisd.us
Sent: Monday, November 29, 2004 3:26 PM
To: Rosario Pena
Subject: WORKFLOW/Notify PR_APRV created by PU729MRP

WORKFLOW Information

Your PR has been approved and is ready to print.

Description:

Purchase Request# = PR000366
PR Total\$ = 10000.00
Requested By = Rosie Pena
Request Date = 11/29/2004
Entry Date = 11/29/2004
Vendor = V000002-DELL MARKETING LP

Item#	Quantity	Price	Item Total	Description Key(s)	Object(s)	Split Amount/ Percent
0001	10.000	1000.00	10000.00	computers 1013500201	6649	

History:

Who : Rosie Pena
Status : Yes
When : 11/29/2004 3:01:02 PM

Who : Alonso Barbosa
Status : Yes
When : 11/29/2004 3:06:03 PM

Who : Rachel Ayala
Status : Yes
When : 11/29/2004 3:16:06 PM

Who : Eliud Ornelas
Status : Yes
When : 11/29/2004 3:17:06 PM

Who : Margarita Ramirez
Status : Yes
When : 11/29/2004 3:18:08 PM

Who : Norma Lucio
Status : Yes
When : 11/29/2004 3:19:08 PM

Who : Eliud Ornelas
Status : Yes
When : 11/29/2004 3:22:09 PM
Comments: User already processed

Who : Michael Zolkoski
Status : Yes
When : 11/29/2004 3:22:09 PM

User=PU729MRP
Model=PR_APRV
Activity=A13
Key=82BA1FA7-4FE4-429A-A2D0-F5CDA7095D80
Version=6

General Recommendations

1. We strongly recommend that you closely review this manual prior to your scheduled training session.
2. We recommend that, at the beginning, please be very careful where you tab, click, or enter, on your purchase request screen. Any changes, however minor, will cause the purchase request to go back to the originator for re-approval.
3. We highly recommend, that once you complete your training session, you go back and PRACTICE, PRACTICE, PRACTICE.
4. We recommend that you ask as many questions as possible. The Purchasing Department has set up a Bi-Tech Hot Line dedicated solely to answering questions regarding the software. You can reach this service at (956) 982-3787. Someone will be ready to answer your questions. Also, you may email your questions by logging in to the Purchasing Department website. We will respond as soon as possible.
5. We recommend that you fax in to the Purchasing Department any attachments that will be needed for your purchase request. Please make a note on your attachments of the purchase request number that these attachments need to be placed with. We are working on a procedure for this, but at the moment, faxed in copies will suffice.

NOTES