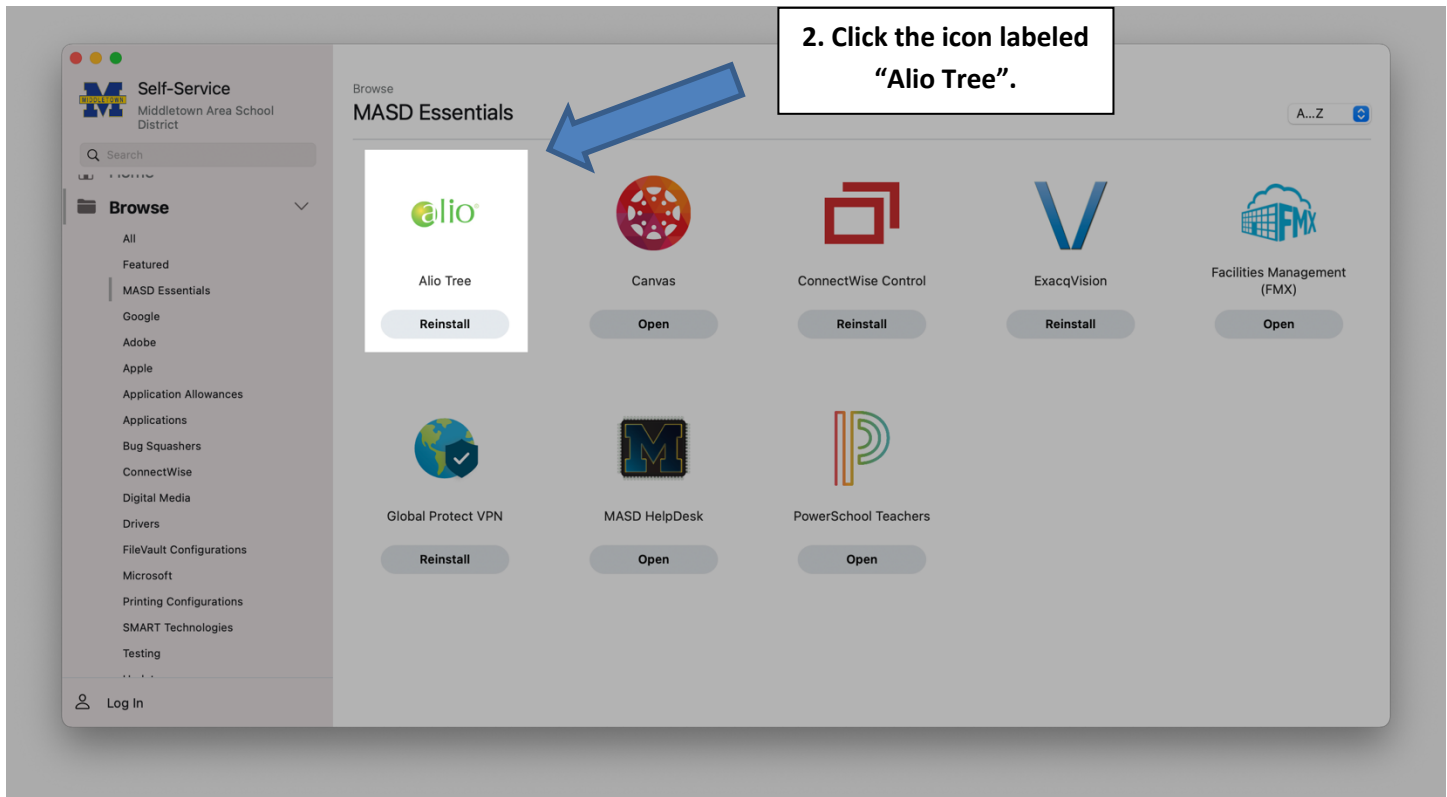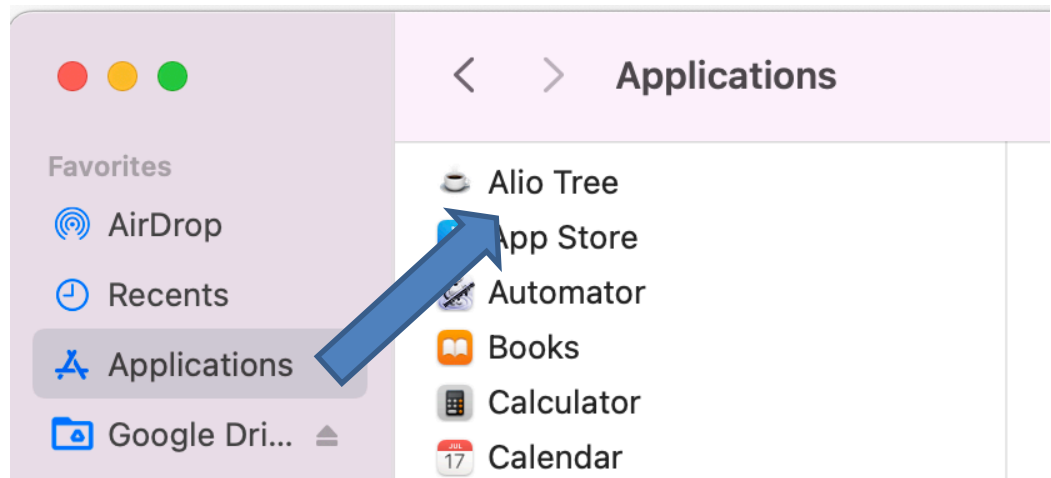# Entering Requisitions into alio

1. From Self-Service – **www.raiderweb.org** – go to the "MASD Essentials" Category.

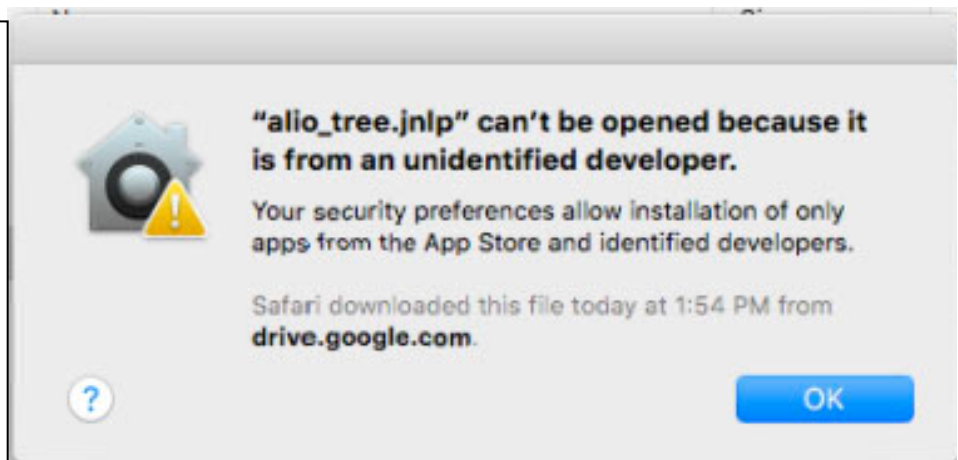**2. Click the icon labeled "Alio Tree".**



**3. Click the "Install" button.**

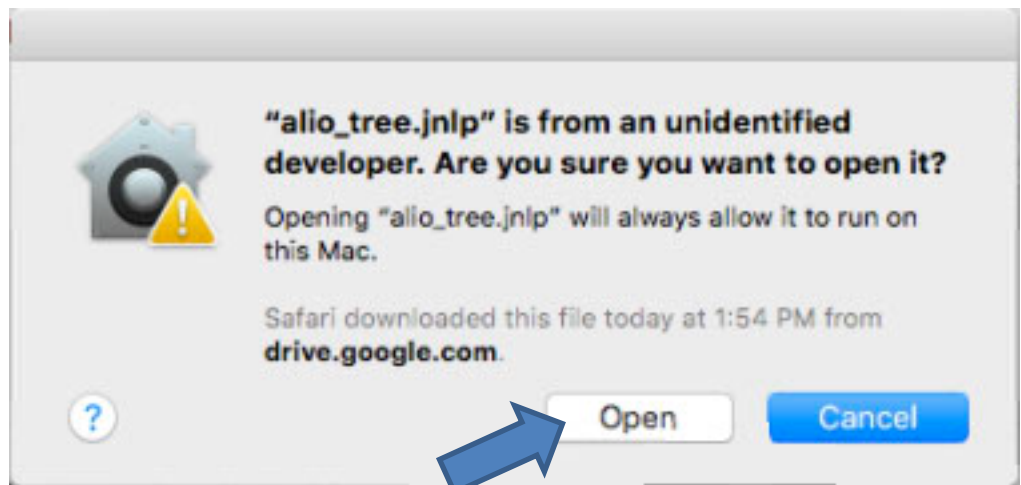**4. Go to your Applications folder and double click the "Alio Tree" file.**

**5.** If you receive the following message continue to step 6. If you receive a java message "Do you want to run this application". Click "run". If the login page appears go to step 8
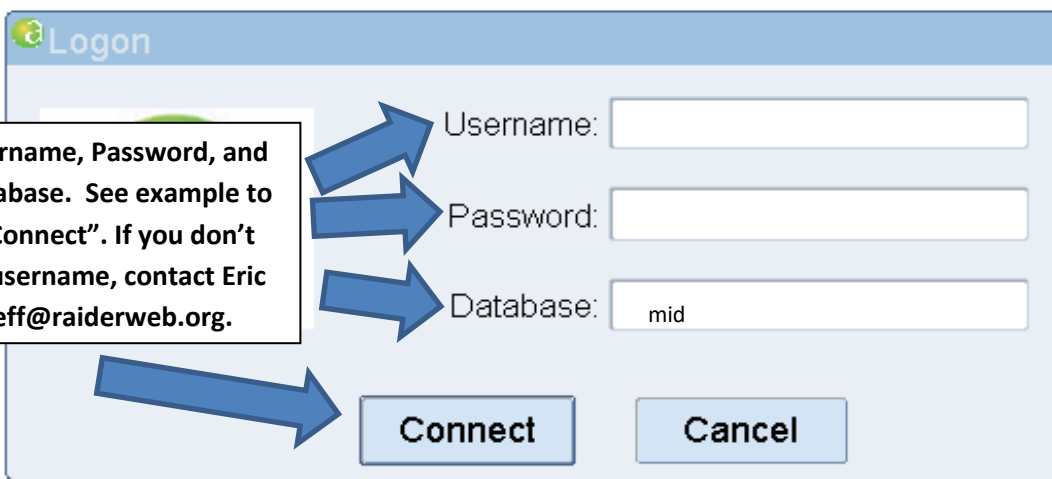
"alio_tree.jnlp" can't be opened because it is from an unidentified developer.

Your security preferences allow installation of only apps from the App Store and identified developers.

Safari downloaded this file today at 1:54 PM from **drive.google.com**.

OK

**6.** Go to the Apple menu and select "System Preferences". Then select "Security and Privacy". Then "General" tab. Click the "Open Anyway" option

Allow apps downloaded from:

◯ App Store

◉ App Store and identified developers

"alio_tree.jnlp" was blocked from opening because it is not from an identified developer.

Open Anyway

**7.** Then click "Open"

"alio_tree.jnlp" is from an unidentified developer. Are you sure you want to open it?

Opening "alio_tree.jnlp" will always allow it to run on this Mac.

Safari downloaded this file today at 1:54 PM from **drive.google.com**.

Open          Cancel
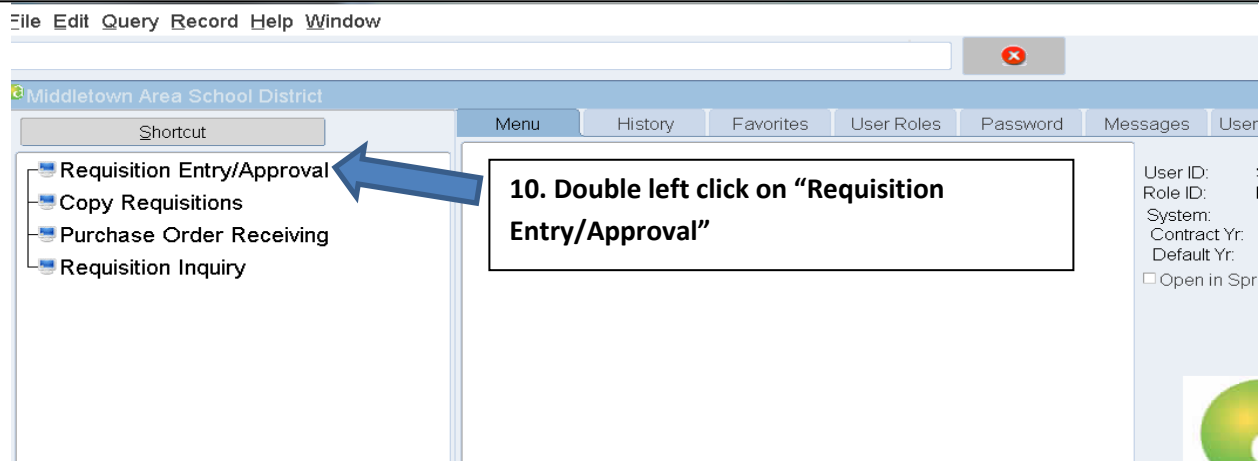
**Logon**

Username:

**8. Enter your Username, Password, and "mid" for the database. See example to right. Click on "Connect". If you don't remember your username, contact Eric Graeff at egraeff@raiderweb.org.**

Password:

Database: mid

Connect     Cancel

**9. If you get a message indicating that Release Notes are available to review, you may simply click "Dismiss".**

File Edit Query Record Help Window

Middletown Area School District

Shortcut

Menu | History | Favorites | User Roles | Password | Messages | User

- Requisition Entry/Approval
- Copy Requisitions
- Purchase Order Receiving
- Requisition Inquiry

**10. Double left click on "Requisition Entry/Approval"**

User ID:
Role ID:
System:
Contract Yr:
Default Yr:
☐ Open in Spr

**11. For each new requisition the following steps are needed on "Order Header" screen:**

a. Click on "Requisition #" and record the number provided for future reference.

b. "Date Entered" and "Account Year" will prefill with today's date and "20" for the year.

c. Click the drop down button next to "Vendor", start typing the vendor name until you find the vendor you need. If vendor is not in the system, email egraeff@raiderweb.org with the vendor name and address and vendor's website.

d. "Order Location" is your building. See cheat sheet to left. "Ship Location" is always "6" for Maintenance Facility.

e. Type your name in the "Requestor" field. Then, type your "Phone",- just enter the 10 digits and it will format automatically.

f. Click drop down for "Order Type". See left and Purchase Guidelines document to determine what to enter.

g. Type row number from your budget document for the item being requested in the "Internal" field.

h. Click on "Items" tab to take you to the next screen.

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alio Millennium Edition – Copyright Weidenhammer Systems Corp. 1997 - 2015

File  Edit  Query  Record  Help  Window

Mode: Entry

Requisition Entry/Approval - FOENT01B          03/06/15  10:40 am

Requisition #          Print Requisition   Date Entered 08-14-2015      Account Year 16      PO #          Item Total
○ Enter  ○ Req's Only  ○ Approve  ○ Approve By Year   Requisition Status          View   Acct Total

Order Header   Items   Accounts   Inquire   Approval

Estimates   Documents

Vendor                              ▼   Locations
                                        Order  ▼
Mailing Name:                           Ship   ▼
Address:
                                        Requestor          Phone
New/Other   City:                       Owner              Order Type
            State:          Zip:

Buyer Code   Freight Cost  Freight %  Discount %  Contract No        Date Cancel  Date Needed
        ▼        .00      .0000       .0000                     ▼
Default Product Class
        ▼                         Update

Special Instructions
Internal                                Header                        Hea
                              Edit                            Edit
PO                                      Footer                        Foot
                                                              Edit

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Order Locations:

1 – Administration Building
6 – Maintenance Facility
21 – Fink Elementary School
23 – Kunkel Elementary School
25 – Reid Elementary School
52 – Middletown Area Middle School
81 – High School

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Order Type:

ACCT – Non-physical items
BLNK – Blanket order (requisition for non-specific items being ordered all year long)
ITEM – physical items that will go through receiving

File   Edit   Query   Record   Help   Window

Mode: Entry

**Requisition Entry/Approval - FOENT01B**        3/06/15  10:40 am

Requisition #  00005879   Print Requisition   Date Entered 08-14-2015   Account Year 16   PO #                  Item Total         .0

◉ Enter   ○ Req's Only   ○ Approve   ○ Approve By Year   Requisition Status                    View   Acct Total

| Order Header | Items | Accounts | Inquire | Approval |

Item   Catalog         Description                                          Product Class    Extended Cost
1                      ▼                                              ▼  Edit              ▼

Quantity    Unit Cost      UOM           Freight: Cost   Percent   Discount: Amt   Percent   Asset Tag No -  Grouping   Final Cost
  1.0000                  ▼                  .00     .0000         .00    .0000                          ▼              .00

Item   Catalog         Description                                          Product Class    Extended Cost
                       ▼                                              ▼  Edit              ▼

Quantity    Unit Cost      UOM           Freight: Cost   Percent   Discount: Amt   Percent   Asset Tag No -  Grouping   Final Cost
                         ▼

Item   Catalog         Description                                          Product Class    Extended Cost
                       ▼                                              ▼  Edit              ▼

Quantity    Unit Cost      UOM           Freight: Cost   Percent   Discount: Amt   Percent   Asset Tag No -  Grouping   Final Cost
                         ▼

**12.  Enter the following information from your budget document on the "Items" screen:**

a. "Description" – column E of budget document.

b. "Quantity" – column P of budget document (should be the number of items being requested)

c. "Unit Cost" – column N of budget document; however, please verify with the vendor that the cost is still correct.

(NOTE: The "Extended Cost" will automatically calculate.)

d. Click the + button, if you have other items to purchase FROM THIS VENDOR. Then follow instructions "a – c" for each additional item.

e. Click on the "Accounts" Tab to go to the next screen.

**13. Enter the following from your budget document on the "Accounts" screen:**

a. "Account Number" – column C of budget document.

NOTE: If each item has a different account number, you must enter each line separately (i.e. From line 1 to line 1; From line 2 to line 2…) OR if each item has the same account number, you may enter the account number once with From line 1 to line 9999 as shown.

b. Tab past the "Amount" field and type 100 in the "Percent" field for each line used.

See next page for example.

NOTE: Account numbers are very important for the accurate recording of District expenditures. If a line item on your budget request document was not very specific, the account number listed on your budget document may not be detailed enough and should not be used. If the item being purchased will be used by multiple departments (regular education, special education, gifted education…) or different buildings, please check with Eric Graeff at **egraeff@raiderweb.org** to obtain the correct account numbers to use.

This screen shot is an EXAMPLE of account number entry for two items with *different* account numbers.

NOTE: "Total Distributed" at bottom should be for total of items ordered.

14. Click "Finish"



15. You may receive this message until the budget has been finalized in Alio. Click "OK".

**16. Alio will automatically take you back to the first screen – "Order Header".**

**NOTE: You should see the message: "Needs Approval by PUR" in the Requisition Status field.**

**17. Click save icon.**

**18. Enter additional requisitions, as needed following steps above.**