HOW TO CREATE A REQUISTION/PURCHASE ORDER - ON LINE PURCHASE ORDER

PLEASE NOTE – NOTHING IS TO BE PURCHASED WITHOUT A PURCHASE ORDER FIRST BEING SUBMITTED AND APPROVED – ALL ORDERS ARE TO BE PLACED BY THE DISTRICT OFFICE.

NOTE:

1. **If your requisition is for a conference or hotel, you can not register on-line for that conference until you have received the e-mail notification that your requisition has been approved. Likewise, you can't make reservations for hotels until the requisition for the hotel has been approved. In all cases – documentation regarding conference fees, hotel costs, etc must be sent to the District Office as soon as you submit the requisition. If prepayment for registration or hotel is needed – the PO must be received in the District Office at least 2 weeks PRIOR to deadline and must have proper documentation and must ok'd to pay.**

2. **Any one item costing between $1,000 and $5,000 needs two quotes, the requisition being one and another to be sent over to the Business Office. Any one item costing over $5,000 requires three quotes.**

PLEASE USE ALL CAPS

- Go to the internet on your computer
- Go to the District web page   www.waupaca.k12.wi.us
- Go to "Staff Resources"
- Click on "District Purchasing"

This will bring up your Skyward Login and Password. (If you save this page in your favorites, then you don't have to go through the above 4 steps each time you want to do something in Skyward) Enter your login and TAB to your password. Enter your password and hit enter – This will bring up the Skyward Program.

On the Skyward dashboard you can add items to your favorites, see where you have gone in the past. You can even create notes for yourself on how to do something.

Note: If the program is in a font too large to see on your screen – go to START on your computer, then control panel, Display, Settings and change pixels to 1024 x 768 pixels. Apply and close out.

Now that you are in the program – follow these steps:

1. Click on PUrchasing
2. Click on REquisitions –This will bring up a screen that will show any current requisitions – if there are no current requisitions – it will say "no records available".
3. Click on Add (far right side) – NOTE: Items in red or with * are required fields – Some fields will be pre-filled for you.
4. If you are authorized in more than one requisition group – choose the appropriate group by using the drop down box (ie: you are authorized in both high school and extra-curricular areas). If you are only authorized in one group – it will be pre-filled for you.
5. Choose a fiscal year – This is especially important in the spring when there may be 2 years available to you (the current year and the next year).
6. Description – Please give a general overview of what you are buying (ie: pencils, pens, paper or registration for John Smith, etc.) THIS IS NOT THE PLACE FOR DETAILS, LIKE ITEM NUMBERS, ETC.
7. Select a Vendor – You can do this in 2 ways. You can either click on "vendor" and it will bring up a laundry list of vendors or you can start typing the first few letters or words of the vendor name and it will

bring up various vendors and their addresses. Select the one you wish to use. NOTE: IT IS VERY IMPORTANT TO NOTE THE ADDRESS INFORMATION. SOMETIMES THERE MAY BE MORE THAN ONE VENDOR WITH THE SAME NAME BUT DIFFERENT ADDRESSES (Especially prevalent with Hotel or DPI etc.)

<u>If the vendor you select shows a red "Ecommerce Vendor" to the right of the vendor name, you can do an order directly from their catalog. If you choose to do so, please follow the Ecommerce instructions.</u>

8. The ship to address has been pre-filled for you unless you have more than one address authorized for you – in which case you must select the address you want the item shipped to.
9. ATTENTION – This item is pre-filled with your name. If you want it to be someone other than yourself – just type in the correct name.
10. Ship Date – This is the date you would like to have this item received by. **THIS DATE IS ESPECIALLY IMPORTANT WHEN DOING THE NEXT YEAR PO'S IN THE SPRING – YOU SHOULD BE SURE TO PUT A DATE AFTER JULY 1 WHEN YOU WANT THE ITEM DELEVERED – MAKE SURE IT IS A DATE LATE ENOUGH SO THE ITEM IS NOT SITTING WAITING TO BE CHECKED IN FOR WEEKS – WE CAN'T PAY THE INVOICE UNTIL IT IS CHECKED IN BUT COMPANIES EXPECT THEIR MONEY ONCE THE ITEM IS RECEIVED.**
11. Ship Via – This can be skipped but if you have specific shipping requests – fill it in here.
12. Once this page has been completed, click SAVE AND ADD DETAIL (if ordering just one item) or SAVE AND ADD MASS DETAIL (if ordering two or more) – Skyward will now bring up a screen for putting in your detail information
13. Line Number is pre-filled for you but you can override it if you wish. For example the first item will probably be on line 100 and the second on line 110. If you wish to put an item or narrative between those 2 items you can input another detail line by putting in line number 105 and the system will place that item between the first and second line items when the requisition is printed out.
14. Line Type: 99% of the time you will use merchandise as your type. You will only use narrative if you want to put in a statement after a detail line like "must be delivered to back door" or "please cancel any items that are back ordered", "Free Shipping" or "Quote #" or "Discount Authorized by John Doe" etc. – Remember this narrative will show on the PO
15. Catalog line is grayed out – this line is not available at this time.
16. Quantity – This is the number of these items you want (like 1 box or 1 dozen or 1 registration)
17. Unit of Measure – this is the description of how you are ordering the item (ie. Dozen, each, box, etc.) This space can be left blank.
18. Unit Cost – Cost of each unit (ie: $5.99 per box or $80 per registration. The Total Amount will be computed for you by multiplying the unit price by the quantity.
19. Description – This is where you put your detail information. Put the item number and any information you want printed on the PO in this box. (ie: Registration for John Smith to Teaching Conference in Madison on March 9, 2011 or item J610 Black Fine Tip Pilot Pens, etc.)
20. CLICK SAVE
21. If you have more items to list on the PO – Click Add – to add additional detail lines and repeat steps 13-20 as many times as necessary to complete your order or you can click on mass add which lets you do 5 items at a time.
22. Once you are done entering your items – Click Add Requisition Accounts.
23. A list of available account numbers will appear. **Put a check mark in the select box for the appropriate account numbers**. If in doubt regarding what account number to use – call and ask. NOTE: you have only been given access to specific account numbers for your position – If you feel you don't have access to a specific account number you must contact the District Office. If you are unsure of what each account number means – a description of each account appears on the right of the page when an account is highlighted. Additionally – the system only lists the first several of your account numbers - there are scroll arrows located below the list that will take you to your additional account numbers.

    If you want the requisition to be split between two or more account numbers – simply select all the account numbers you wish to use and then at the bottom of the screen you will see a percent box and an amount box. You can use either of these boxes to determine how much of the total goes into each account number.

25. Once you are satisfied that your accounting is correct – Click Save Account Distribution – if a screen comes up saying the account number you chose is over budget, just click OK.
26. If you have information or messages that you would like to relay regarding this requisition – you may attach a note at this time – this note will be seen internally only – it will not print on the PO. To add a note – click on "Notes" just to the left of the submit button. Click on "Add" - At "Note Category" click the black down arrow – Click "Add A Note". Type your note in the Note box – click "SAVE" – click "Back". This should bring you back to the place you were before entering your note – if the note was saved successfully there will be an "*" next to the word notes.
27. One last chance to modify, add, delete, - if you are satisfied – Click "Submit for Approval" and the requisition will be sent to the next person on the approval list for your requisition group – Generally your immediate supervisor or their assistant.
28. **You should print out a copy of this requisition at this time for your files. You will note when you see the printed requisition that it states right on it that it is not a valid PO and should not be honored by Vendors. This requisition does not become a valid PO until approved at the District Office and the District Office will be responsible for mailing or faxing in ALL PO's.**
29. When you are all done, click "Back", not the "X" in the top right corner.
    Then click "Exit", not the red "X". Then you are logged off of Skyward.

Congratulations you have just completed entering your requisition. There are a number of things that can be done from this point forward. It is possible for you to see where your requisition is – who has approved or denied your request – If you no longer see an item under your requisition list – and it was not denied – it should appear under your PO list.

Updated: 6/2020

MAKE REQUISITION – Simple Steps

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PLEASE PUT CAPS LOCK ON

1.) PUrchasing
2.) REquisitions
3.) ADD
    Choose requisition group. You may have more than one choice.
    Choose correct fiscal year. **In the spring of the year this is very important.**
    Enter simple description. (supplies, registration or hotel room, etc.)
    PC's - Start typing in vendor – Click on the vendor from the list. Or
    Mac's - Click on VENDOR then type in the first few letters of the vendor name in the box on the lower right. Hit TAB or ENTER to select vendor from list.
    SHIP TO: You may have more than one choice.
    ATTN TO: If you want this P.O. to be shipped to someone else, you can put their name here.
    DATE: **For next year requisitions be sure date is July 1 or later.**
    SAVE AND ADD DETAIL (if ordering just one item) or SAVE AND ADD MASS DETAIL (if ordering more than one item)
4.) Fill in all lines that have an "*". (Line # is filled in for you)
5.) Use TAB or ENTER to move down this page.
6.) SAVE:
7.) If done listing items, click on ADD REQUISITIONS ACCTS.
8.) Fill in account number, hit **ENTER,** or find account # in your list. For more accounts, click on black arrow.
9.) Click on the small box to the right of your chosen account #.
10.) SAVE ACCOUNT DISTRIBUTION
11.) SUBMIT FOR APPROVAL
12.) PRINT = print your requisition
13.) Display report - print requisition.
14.) "X" out
15.) BACK
16.) BACK again
17.) EXIT
18.) "X" will get you off the internet.

Updated: 6/2020

To: Administration/Teaching Staff
From: Linda Hoelzel

RE: **Amazon Orders**

Below you will find steps as to how you can order from Amazon. These steps must be followed or you will not be allowed to order. Since Amazon orders require more steps it should be the last resort and local vendors should be considered.

Please let me know if you have any questions in regards to this. You may contact me at the Business Office, 715-258-4121.

AMAZON ORDERS

1. A requisition **MUST** be done before an order can be placed with Amazon.

    - When making out the Requisition, you will use for the **Company/Vendor: SYNCB/AMAZON**

    - On one line of the requisition, preferable either the 1st line or last line it must say in the description area "**Amazon Order**"

2. The Requisition **MUST** be approved by **all** Administration before the order is placed with Amazon.

3. Once the Requisition is approved you must email to your school secretary: **ALL** links of each item being ordered from Amazon. She will then place the order.

4. Once the order has been placed you will receive a confirmation as to when you can expect your shipment.

5. **ALL** orders will be shipped to the school that you are located at and checked in.

HOW TO NAVIGATE AND LOOK UP INFORMATION REGARDING REQUISITIONS AND PURCHASE ORDERS

Remember – basically the difference between a requisition and a purchase order is that a requisition is a request to order something, it does not become a purchase order until all approving parties have approved it and it gets updated at the district office.

To review or check on any of your requisitions or purchase orders – first login to Skyward in the same manner you did to create your requisition.

- Click on PUrchasing
- Click on REquisitions

It will bring up a list of requisitions still in requisition status. If there are no requisitions listed – that means that your requisition has moved far enough through the process to now be considered a Purchase Order. In which case, click on BACK. Then you can click on the "View My Purchase Orders" button and a list of **your** purchase orders will be displayed.

The following navigational tools work the same for requisitions and purchase orders – you can look up the same information in the same manner whether your item is listed as a requisition or listed as a purchase order.

When you first bring up this window – above the list of requisitions/purchase orders – you will see a row of column headings. You can gain a lot of information just from this part of the screen. Working from left to right, you will see the following column headings:

P.O. # - This is the purchase order number.
Req. # - This is the requisition number on your requisition until it becomes a purchase order.
P.O. Sta – This is the status of the requisition or purchase order. If you hover over this spot a window appears telling you what the various codes mean.
Description – This will be the short description that you used when creating the requisition
Vendor Name – This will be the name of the vendor you selected when you created the order
Vendor St – This is the state in which the vendor is located
Amount – This is the total amount for the requisition or purchase order
Entered By – This tells who initiated this order

To find out more detail information on purchase orders or requisitions see the following:

Next to the individual line items, you will see a > to the far left. Click on the >.
You will see several items – if you click on "Expand All" it opens up all categories and shows you all detail information in each category.

Or

You can click on the + next to any sub-category for the detail information for that category only.

Master: Gives you vendor information (ie. vendor name, address, date entered, budget year, and ship to information, etc.)

Line Items: Gives you exactly what was ordered, unit costs, quantity, etc.

Accounts: Gives the accounting breakdown for the order by amount and percentage.

Approvals: Gives the date, time and name for each level of the approval process and whether it was approved or denied.

Receiving Records: Shows date, time, quantity received and who marked it received

P.O. Invoices: Shows invoice number, date and amount, the fiscal year, check number, check amount and the month/year that the check cleared the bank

Notes: If any notes or attachments were created for this order, they would show up in this area. Notes or attachments can be used for several purposes. You can use a note for example to let the district office know that you are sending necessary documentation over for this order via interoffice mail or give an explanation to your supervisor as to why you need this item, or provide a special phone or fax number, etc.) These notes **don't** show up on the P.O.

ADDITIONAL BUTTONS

Account Management - Account Master - Chart of Accounts: This will bring up the financial information regarding your various account numbers. Find your account number or type it in the bottom right box. Scroll down to see all the important information.
Purchasing – My Req. Approval History: This will have no information for you unless you are an actual approver of purchase orders.
Purchasing – View Purchasing Activity: This will show you all purchase order activity created by you or all purchase orders for your requisition group.
Purchasing – View My Purchase Orders: This will show all your purchase orders.

FILTERS – Generally speaking there is a filter on every screen. Most often the default filter will work for you, but if you want to change the filter, you may do so. Usually the filters will also default to showing just the first 10 items. You will need to either change the filter to a higher number or remember to use your scroll **arrows** to see the items beyond the initial list given. It is recommended you don't use anything higher than 25 or 50 or it can take the system longer to load up and you can't see that many lines on one page anyway.

If you have questions or problems using the requisition/purchase order system – please contact Carol Beyer-Makuski at the District Office, she will be happy to help you with the process.