

# Requisitions/Purchase Order Help Document


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The district requires that requisitions/purchase orders be approved before district funds may be obligated to procure goods and/or services. The Weblink module is the program employees must use to create a requisition/purchase order. The Weblink module can only be accessed while on campus. You cannot access the module when working outside the school district. You can access the Weblink module from the district's website at <https://www.andescentral.k12.sd.us>, then click on Menu > Staff > Weblink. I recommend that you add the Weblink address to your browser's Favorites.


A username and password is needed to log into the system. Each user ID is set up as follows: the first **four letters of your last name**, followed by the **first three letters of your first name**, example: **JOHNSUS**. The user password is the last four digits of your social security number.

Typically requisitions/purchase orders, for the next or upcoming school year, are entered and submitted during the month of March. Your supervisor or building principal will notify you as to when purchase orders are due.






## Entering Purchase Orders

1. Select the **Data Entry** menu and then **Purchase Orders**.
2. Steps to Complete Batch Options for Purchase Orders
  - To enter a new batch, click the Add New button  and then complete the batch options. If a batch does not exist, the batch options screen will appear immediately to create a new batch.
  - At the Batch Options screen, enter a unique description for the new batch in the Batch Description field. The description can be alphanumeric and up to **50** characters long. Leave the field blank to use a default description assigned by the system.

**Note:** If a unique description is not entered, the system will add a dash and four numbers starting with **0001** at the end (for example, **Batch Description-0001**) to make it distinctive.

- In the Processing Month field, enter the current month/year period for which to post the entries within the batch to the applicable modules; Use the **mm/yyyy** format or click the Calendar  Search button to select the desired date.

**Note:** If your requisitions are for the upcoming or “next” school year then the Processing Month should be 07/20XX or any month in the “next” school year. For example, let’s say that today is March 1, 2023, and you plan to enter your requisitions for next school year which begins in August 2023, then I recommend that you enter the Processing month of 07/2023.

- Enter the ID of the ship to address to use **ACHS**. The default ship to ID may be prepopulated.
  - Leave the Batch Beginning PO Number field blank to have the system automatically assign the next available purchase order number.
  - Click the Save button. 
3. If you previously created a purchase order batch and it has not been posted by the Business Manager, the Purchase Order Batch Search screen will appear listing your previously created batch or batches.
- To continue adding purchase orders to an existing batch, select the desired batch by double-clicking on the batch description or clicking on the batch once then clicking the Select button, 
  - Otherwise, to enter a new batch, click the Add New button  and then complete the batch options. If a batch does not exist, the batch options screen will appear immediately to create a new batch.
4. The Purchase Orders screen will appear for the selected purchase order batch.
5. Complete the Header Information of the purchase order.
- Leave the PO Number field blank to have the system automatically assign the next available purchase order number once the purchase order is saved.
  - In the Vendor ID field, enter the ID of the vendor from whom the goods or services will be ordered or purchased. If the ID is not known, click the Search button\_  to select the correct one.
  - Enter the total amount of the purchase order in the PO Amount field. If desired, leave this field blank until all the detail lines have been entered; then click the Calculate  button to have the system automatically add up all the detail line items and display the total in this field.

- Enter the current date of the purchase order in the PO Date field. Use the **mm/dd/yyyy** format or click the Calendar Search button to select the desired date. The current computer date of the web server will appear as the default.
- Enter the date the goods or services are expected to be received in the Expected Date field. Use the **mm/dd/yyyy** format or click the Calendar Search button to select the desired date.
- Enter a summary description for what is included on the purchase order in the PO Description field. The description can be alphanumeric and up to **40** characters long. Example: Supplies or Equipment, or Books, or Fees)
- The ship to address will appear by default and cannot be changed.
- The employee ID tied to the user will appear as the default and cannot be changed.

6. Complete the Detail Information of the purchase order.


**Tip:** By default, ten detail lines will appear in the Detail Information section; if needed, click the **Add Rows** button located at the top of the Detail Information List to add ten more lines. Any blank lines will automatically be removed (deleted) when the purchase order is saved.

- Select the Print field to print the line item on the purchase order.
- Click in the Post field to "De-select" or remove the check mark.

**Tip:** A checkmark will appear in the box if the field is selected. When entering a new detail line item, this field is selected by default.

- Enter a description for the line item in the Detail Description field. The description can be alphanumeric and up to **1,000** characters long.
- Enter the item number in the Item Number field, if desired. The number can be alphanumeric and up to **30** characters long. This is typically a catalog number or ISBN.
- Leave Cost Center ID field blank.
- Enter the quantity of the item to order in the Quantity field.
- Enter the cost of one unit of the item in the Unit Price field.
- If desired, enter the unit of the item to order, such as *EA* for *Each* or *DOZ* for *Dozen*, in the Unit Description field. The unit can be alphanumeric and up to **10** characters long.


- If the Quantity and Unit Price fields were completed, the system automatically calculates the total cost of the line item and displays it in the Amount field (can be changed, if needed); otherwise, enter the amount to be distributed to the specified account number for this line item in the Amount field.
- If desired, enter the website address for the item in the URL field. The URL can be up to **2,000** characters long.

**Note:** If your computer is connected to the Internet, click the Go To button  located to the right of this field to launch the Internet browser and display the specified website.

7. Repeat Step 6 until all the detail line items have been entered for the purchase order.

**Note:** **The last detail line should include a short statement as to the reason or justification for the need to purchase the item(s) listed on your purchase order.**

**Note:** The Distributed amount for the purchase order must equal the PO Amount specified in the Header Information. These totals along with the batch total are displayed at the bottom of the screen.


8. If the PO Amount field was left blank, click the Calculate button  for the PO Amount field at this time to have the system automatically add up the total of all the detail line items and display the total amount.


9. Click the Save button. 

10. A message will appear stating the purchase order was saved; click **OK**.

11. If desired, click the **Print Purchase Order** button to print the purchase order form for the current purchase order number displayed.

**Note:** In order to print the report, a purchase order must be displayed on the screen and have the Purchase Order Number field completed.

12. To enter another purchase order, click the Add New button , click **OK** when prompted to continue, and then repeat Steps 6-11.


**Tip:** If desired, the Save and Clear button  could have been utilized in Step 9 (instead of the Save button) to save the purchase order and add another one, and then this step could have been skipped.

13. Once all the purchase orders have been entered and printed, attach any supporting documents, such as a quotation, Amazon shopping cart printout, etc. and delivery to your building principal or supervisor.

## **Print a Purchase Order Listing-Detail or Purchase Order Listing-Summary Report**

Throughout the year printing a report, such as the **Purchase Order Listing-Detail** or **Purchase Order Listing-Summary**, can be useful to view a listing of all purchase orders saved and submitted in the past. The ability to copy a previously entered purchase order may save you time rather than entering the information again.

### **Printing a Purchase Order Listing-Detail or Purchase Order Listing-Summary Report**

1. Select the **Reports** menu.
2. At the Report Search screen, select the report to print by: 1) double-clicking on the desired report, or by 2) clicking on the report once and then clicking the Select button, or by 3) clicking on the report once and then pressing the **Enter** key.
3. Complete the required report printing options in the Report Parameters section, if applicable.
  - Leave the Report Selection Description as “Posted”.
  - Click on the search button  next to the Batch Description. Click in the check box to the left of the batch description to select one or more batches. Click on the page number to display the next page of batches to find a particular batch of purchase orders.

Hint: It may be helpful to avoid generic batch descriptions when creating a purchase order batch. Consider using a batch name that describes or summarizes the types of purchase orders saved within a batch. For example, a science teacher who is also a coach may name one batch of purchase orders “**SY2023-24 High School Science**” in which all the purchase orders will be for supplies, equipment, etc. for the high school science classes. A second purchase order batch for coaching may be named “**SY2023-24 Football**” in which all the purchase orders will pertain to supplies, equipment, fees, etc. for football.

4. Click the appropriate button for the desired output:
  - To preview the report on the screen in a PDF file format, click the **Generate to PDF** button.

**Tip:** Once the report displays on the screen, complete the print function as normal from within your Internet browser (for example, select the **File** menu and then **Print**) to print a hard copy of the report, or to save the report as a file, select the **File** menu and then **Save As** (when prompted, specify the name and location of the report file, and then click the **Save** button).

5. The report can be used find a purchase order from a previous school year. The purchase order number listed on the report can be used in copying a purchase order in the next set of instructions.

## Copying a Purchase Order

- Select the **Data Entry** menu and then **Purchase Orders**.
- Create a new purchase order batch or if existing Unposted purchase orders batches exist the Search screen will appear. Select the desired batch of purchase orders into which to copy the purchase order by double-clicking on the batch description or clicking on the batch once and then clicking the Select button.
- On the Purchase Orders screen, click the **Copy Purchase Order** button. If the Copy Purchase Order button is not visible, scroll down.
- If prompted to save the purchase order, click **OK** to continue.
- At the Copy Purchase Order screen, enter the number of the purchase order to copy in the Old Purchase Order Number field. If the purchase order number is not known, click the Find button to select the correct one.
- Leave the purchase order number field blank to have the system automatically assign the purchase order number.
- Click the Save button.
- The newly created (copied) purchase order will appear on the screen; if needed, **make changes**, and then click the Save button.