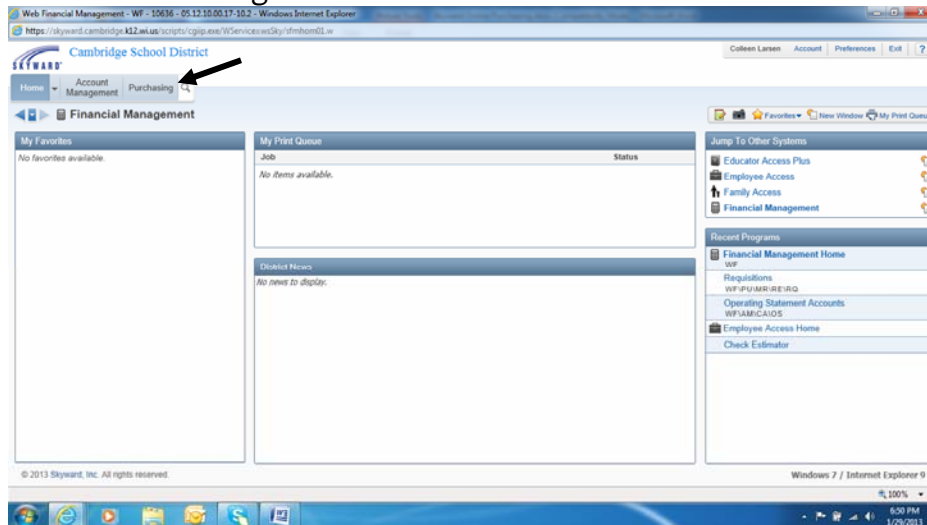


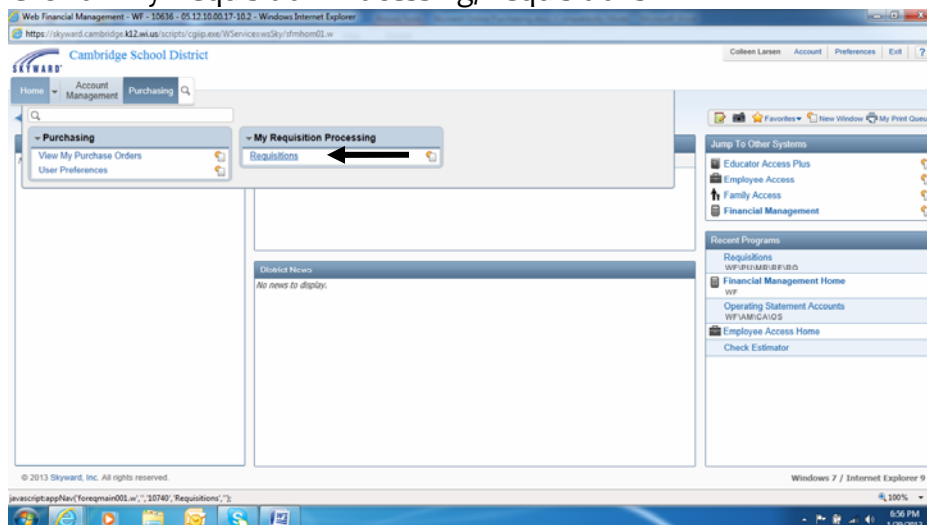
Create a Requisition

Please refer to the vendor specific instructions available for our online catalog retailers:
NASCO, School Specialty, and Staples.

WEB - Financial Management System
Click on Purchasing



Click on My Requisition Processing/Requisitions



Click on Add

The screenshot displays the 'Requisitions' page in the Cambridge School District's Skyward system. The browser window title is 'Requisitions - WFPUMRREQ - 10740 - 05.13.06.00.11-10.2 - FrontMotion Firefox'. The URL is 'https://skyward.cambridge.k12.wi.us/scripts/wvisa.dll/WService=wsSkyffreqmain001.w'. The user is logged in as 'Colleen Larsen'. The page features a navigation menu with 'Home', 'Account Management', and 'Purchasing'. The main content area shows a message: 'There are no records to display; check your filter settings.' A tooltip 'Add a new regular requisition.' is positioned over the 'Add' button in the 'Filter Options' sidebar. An arrow points to the 'Add' button. The sidebar also includes buttons for Print, View, Edit, Delete, Clone, Notes, Attach, Submit, Approve, Deny, Remove Approval, Add from Online Catalog, and Mass Approve Requisitions. At the bottom, there is a dropdown for '50' records displayed and a 'Requisition Number' search field.

Confirm/Select Requisition Group

This determines who the requisition goes to for approval so choose accurately!

Confirm/Select Fiscal Year

Enter a (short) Description

Do **NOT** include special instructions in this location because it does not display on the final printed Purchase Order. If necessary, please use **Notes** as defined below.

Select Vendor

- If the desired Vendor does not exist, please email the vendor name, order from address, telephone number and fax number to champton@cambridge.k12.wi.us to have it added. You can complete and submit your requisition
- The District Office handles online ordering for vendors “Amazon.com” and “Walmart.com” only
- Select vendor “Credit Card Checkout” for registrations, orders, and/or purchases that you would like to handle independently with a school credit card.

Confirm/Select Ship To

Confirm/Enter (Ship To) Attention

Click on Save and Mass Add Detail

Requisition Master Information - WFPUPWVRVREQ - 10740 - 05.13.06.00.11.10.2 - FrontMotion Firefox

https://skysward.cambridge.k12.wi.us/scripts/wsisa.dll/WService=wsSky/foreqmast001.w?isPopup=true

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 200 - MIDDLE SCHOOL

Fiscal Year: 2013 - 2014 July 1, 2013 - June 30, 2014

Account allocation by total requisition amount (YMA).

Account allocation by each requisition detail line (YDA).

This is a Blanket Requisition/Purchase Order

Requisition Information

* Batch Number: 23

* Description: DEMO Requisition

* Vendor: A TO Z RENTALL AND SALES 2209 S STOUGHTON ROAD MADISON WI 53716-2894

* Ship To: NIKOLAY MIDDLE SCHOOL 211 SOUTH STREET CAMBRIDGE WI 53523

Attention: CHRIS HAMPTON

* Due Date: 10/23/2013 Wednesday

Ship Date: 10/23/2013 Wednesday

Ship Via:

Contract:

Asterisk (*) denotes a required field

Save and Add Detail

Save and Mass Add Detail

Back

5 Requisition Detail Line items will Display:

For each item you would like to order, Enter a separate Requisition Detail Line with:

- Quantity
- Unit Cost
- Description (this should be detailed; include item number & description)

If you have a quote, you can enter one Requisition Detail Line for the items/order. Enter “1” in the Quantity, enter “x.xx” in the Unit Cost (where x.xx = quote total without shipping expense), and enter “See attached Quote” in the Description. Then make sure you include Notes or Attach(ment) as defined below!

If this requisition is for Credit Card Checkout, you can enter one Requisition Detail Line for the items/order. Enter “1” in the Quantity, enter “x.xx” in the Unit Cost (where x.xx = the absolute MAXIMUM you will charge to the credit card), and enter ~ where you plan to make the purchase, ~ a brief description of what you plan to purchase, and ~ a brief explanation of the reason for your purchase in the Description.

If you enter 5 Requisition Detail Lines and need additional line items, Click Save, then click Mass Add Detail to display another 5 Requisition Detail Line items

Add an additional Requisition Detail Line item indicating Shipping Expense

MANDATORY – Requisitions will be denied if this is not included

- If you are expecting shipping to be free, enter “1” in the Quantity, enter “0.00” in the Unit Cost, and enter “Free Shipping” in the Description.
- If you don’t know the shipping expense, enter “1” in the Quantity, enter “x.xx” in the Unit Cost (where x.xx = 10% of the order total {example: if your order total is 53.25, x.xx = 5.32}), and enter “Estimated Shipping” in the Description.
- If you know the actual shipping expense, enter “1” in the Quantity, enter “x.xx” in the Unit Cost (where x.xx = actual shipping cost), and enter “Confirmed Shipping” in the Description.

Click on Save

The screenshot displays the 'Requisition Detail Lines/Accounting' web application. The top section shows 'Requisition Master Information' including Batch Number 23, Requisition Number 0000014863, Group (200) MIDDLE SCHOOL, Fiscal Year 2013 - 2014, Vendor A TO Z RENTALL AND SALES, and Accounting: Account allocation by total requisition amount. Below this, the 'Requisition Detail Lines' section is visible, showing two lines. Line 100 has a quantity of 2 and a unit cost of 5.12000, with a description of '123-ABC Item Description'. Line 110 has a quantity of 1 and a unit cost of 3.50000, with a description of 'Confirmed Shipping'. A 'Save' button is highlighted with a black arrow on the right side of the interface.

Click on Add Requisition Accounts

Requisition Detail Lines/Accounting
WFPUMRREQ - 10740 - 05.13.06.00.11.10.2 - FrontMotion Firefox

Requestion Master Information
Batch Number: 23
Requestion Number: 0000014863
Group: (200) MIDDLE SCHOOL
Fiscal Year: 2013 - 2014
Vendor: A TO Z RENTAL AND SALES
2209 S STOUGHTON ROAD
MADISON WI 53716-2894

Accounting: Account allocation by total requisition amount.
Amount: 13.74
Ship To: NIKOLAY MIDDLE SCHOOL
Blanket PO: This is not a blanket PO
Description: DEMO Requisition

Buttons: Edit Master, Notes, Attachments, Submit For Approval, Save and Finish Later, Back

Requisition Detail Line Items
Views: General Filters: Skyward Default Clone

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost
100		123-ABC Item Description	2		5.12000	10.24
110		Confirmed Shipping	1		3.50000	3.50

Buttons: Add, Edit, Delete, Mass Add Detail, Add Requisition Accounts

50 2 records displayed Line:

Select the Account(s) that should be used to pay for the purchase.

- Multiple Account(s) can be selected if expense should be split
- Selected Account(s) must have funds available in order for the requisition to be submitted.
- Activity Account balances display in reverse sign so can and should be used when displaying as a “negative”.
- If you don't have access to the account that should be charged, please contact the District Office.

Click on Save Account Distrib(ution)

Account Distribution

Available Accounts (Accounts are displayed based on Account Clearance access)

Find	T	Loc	Obj	Func	Proj	Funds Available	Selected
10	E	200	411	143000	000	\$999.37	<input type="checkbox"/>
10	E	200	411	161328	000	\$0.00	<input type="checkbox"/>
10	E	200	411	161390	000	\$600.00	<input type="checkbox"/>
10	E	200	411	213000	000	\$1,000.00	<input checked="" type="checkbox"/>
10	E	200	411	214000	000	\$0.00	<input type="checkbox"/>
10	E	200	411	222000	000	\$172.00	<input type="checkbox"/>
10	E	200	411	240000	000	\$2,215.25	<input type="checkbox"/>
10	E	200	412	110000	000	\$-830.00	<input type="checkbox"/>
10	E	200	412	124000	000	\$7.42	<input type="checkbox"/>
10	E	200	415	135000	000	\$500.00	<input type="checkbox"/>
10	E	200	431	222000	000	\$200.00	<input type="checkbox"/>
10	E	200	432	222000	000	\$1,794.07	<input type="checkbox"/>
10	E	200	433	222000	000	\$9.00	<input type="checkbox"/>

Total Amount to Distribute: \$13,74 100.00%
 Total Distributed: \$13,74 100.00%
 Amount Remaining: \$0.00 0.00%

Account Number	Amount	Percent
10 E 200 411 161390 000	2.75	20.00%
10 E 200 411 213000 000	10.99	80.00%

Buttons: Save Account Distrib, Back

Click on Submit for Approval
(or Save and Finish Later)

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 23
 Requestion Number: 0000014063
 Group: (200) MIDDLE SCHOOL
 Fiscal Year: 2013 - 2014
 Vendor: A TO Z RENTAL AND SALES
 2209 S STOURGHTON ROAD
 MADISON WI 53716-2094

Accounting: Account allocation by total requisition amount.
 Amount: 13.74
 Ship To: NIKOLAY MIDDLE SCHOOL
 Blanket PO: This is not a blanket PO
 Description: DEMO Requisition

Buttons: Submit For Approval, Save and Finish Later, Back

Account Number	Account Amount	Account Percent	Over Budget
10 E 200 411 161390 000	2.75	20.01%	
10 E 200 411 213000 000	10.99	79.99%	

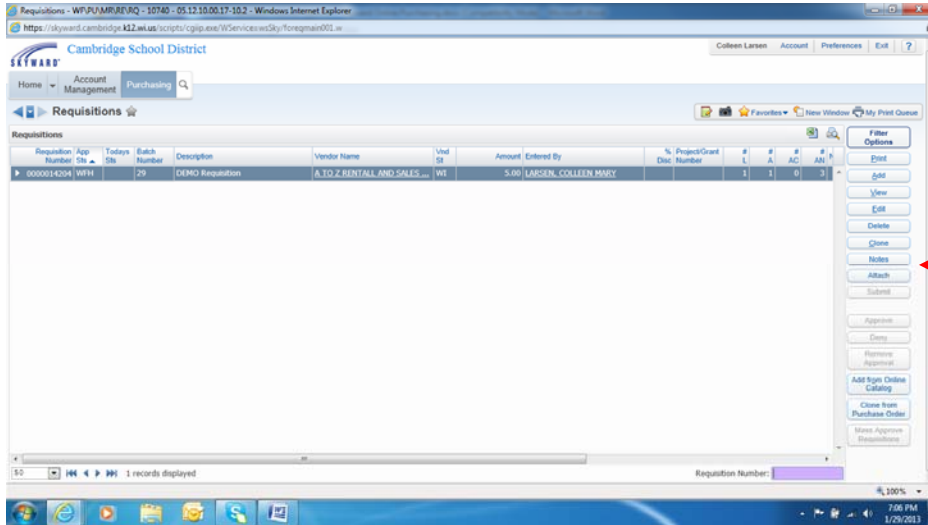
Buttons: Update Account Distrib, View Requisition Detail Lines

The Requisition will be in the list

If Status is WFH – The requisition has been submitted and is Waiting For Higher (approval)

If Status is WIP – The requisition was saved only – you will need to submit when ready

If there is any special information, documents, and/or instructions needed to process your requisition, please include Notes and/or Attach(ment). **DO NOT SEND EMAILS OR PAPERS RELATING TO A REQUISITION WITHOUT REFERENCING IT IN THE REQUISITION NOTES!**



Example: You create a requisition with a line item referencing an “Attached Quote”. If you are sending an email with that quote or sending a physical copy of the quote, you must indicate within the Requisition Note to look for the email or paper.

Example: You want to place the order yourself after your requisition is approved. Please specify that in a Requisition Note so a duplicate order is not processed.

IF NO ORDER INSTRUCTIONS (NOTES) ARE INCLUDED, THE REQUISITION/PURCHASE ORDER WILL BE PRINTED AND PHYSICALLY MAILED OR FAXED!