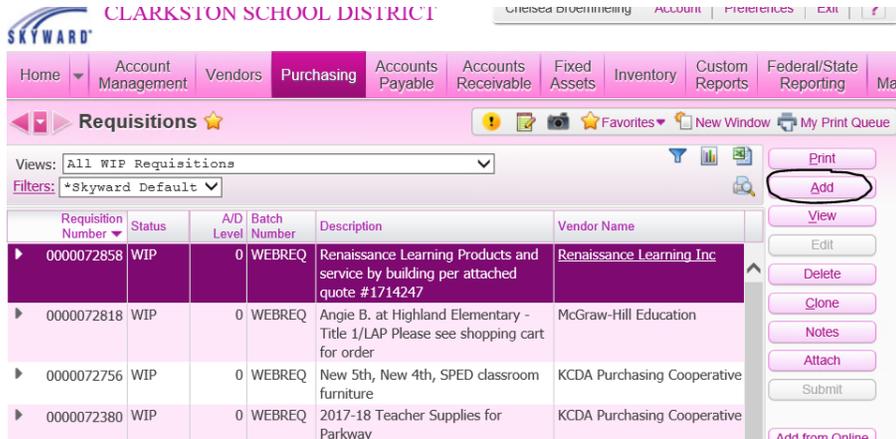


# Requisition Entry

**Menu Path:** Financial Management/Purchasing/Requisitions

## A. Add a new Requisition

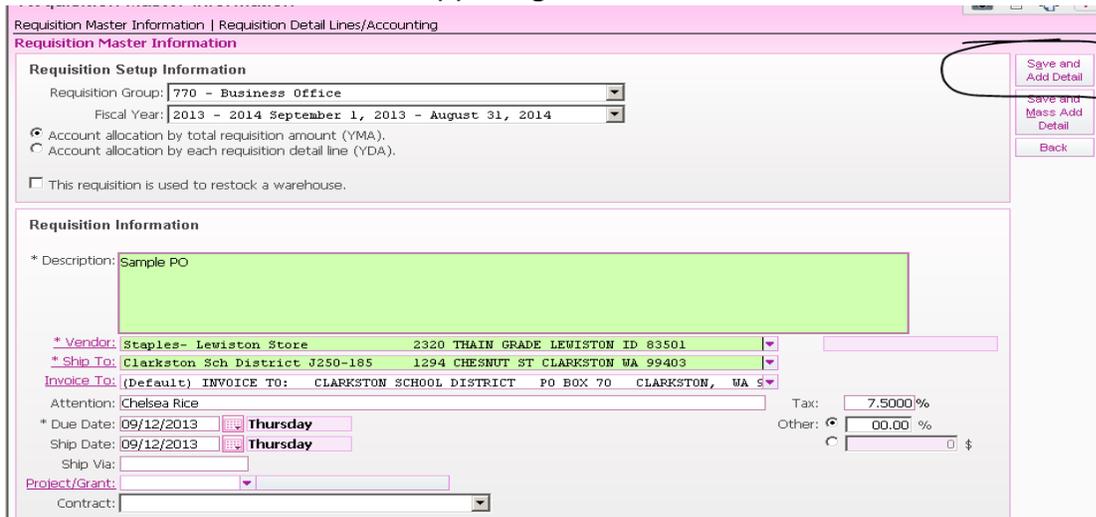
- Click **Add** on the right-hand side.



## B. Choose the appropriate Requisition Group

- Choose the appropriate Fiscal Year.
- Enter the Requisition Information for the requisition.
- The **Description** that you enter in the first screen will appear on the requisitions' approval screen. Use a general description for the requisition.
- Select a **Vendor**; start typing in the Vendor box and the list narrows automatically as entry begins. (If it is a New Vendor, type “\*New Vendor”. You will add the new vendor information later in the notes.)
- Enter and verify the **Ship To** destination.
- Change the **Attention** field as needed.
- Do not change the Due Date field or the Ship Date and the Ship Via. These fields are filled in automatically.

## C. Click **Save and Add Detail** in the upper right-hand corner to move to the next screen.



## D. Enter the Requisition Detail Lines.

- The **Line Number** will automatically populate.
- Enter a detailed description of the purchase. This needs to include **Item Number, Catalog Number, Quantity, Unit of Measure, Unit Cost, and Description.**
- If it is registration or lodging, it must include **location, who is attending, dates, confirmation numbers, etc.**
- **Save** when complete.

Batch Number: **WEBREQ**  
 Requisition Number: **0000041012**  
 Group: **(770) Business Office**

Accounting: **Account allocation by total requisition amount.**  
 Subtotal: **9.95** Tax: **0.75**  
 Total: **10.70** Other: **0.00**  
 Ship To: **Clarkston Sch District J250-185**

Fiscal Year: **2013 - 2014**  
 Vendor: **Staples - Lewiston Store**  
**2320 THAIN GRADE**  
**LEWISTON ID 83501**

Invoice To: **(Default) INVOICE TO: CLARKSTON SCHOOL DISTRICT**  
**PO BOX 70 CLARKSTON, WA 99403 PHONE**  
**509.758.2531 FAX 509.758.3326**

Description: **Sample PO**

**Requisition Detail Lines**

Line Number:  Taxable:  [View Tax](#)

Line Type:  Merchandise  Narrative

Catalog:

\* Quantity:

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description:

(\*) denotes a required field

## E. Shipping Charges

### SHIPPING MUST BE INCLUDED ON ALL APPLICABLE REQUISITIONS

The shipping amount needs to be listed as a dollar amount, otherwise it will not be encumbered. If you don't know what the amount is, you can state "shipping estimate" and use an amount between 10-15% of your total on the requisition. If it is free shipping, please do the same but state "free shipping" or "no shipping" and enter \$0 for the dollar amount.

- Add a new line
- Line type will be merchandise
- Enter one for the quantity and list the shipping amount as the unit amount
- Save when complete

Below are examples for normal shipping and free/no shipping.

### Normal Shipping Charges

Requisition Detail Line Items

Views:  Filters:

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
100		The Giver by Lois Lowry	23	Books	9.29000	213.67	
110		Classroom Inspirational Posters	4		6.99000	27.96	

**Requisition Master Information**

Batch Number: **WEBREQ**  
 Requisition Number: **0000031219**  
 Group: **(190) Clarkston High School**

Fiscal Year: **2011 - 2012**  
 Vendor: **Adams Book Company Inc.**  
**537 SACKETT ST**  
**BROOKLYN NY 11217**  
 Invoice To: **(Default) INVOICE TO: CLARKSTON SCHOOL DISTRICT**  
**PO BOX 70 CLARKSTON, WA 99403 PHONE**  
**509.758.2531 FAX 509.758.3326**

Accounting: **Account allocation by total requisition amount.**  
 Subtotal: **214.97** Tax: **16.12**  
 Total: **231.09** Other: **0.00**  
 Ship To: **Clarkston High School**  
 Description: **30 Copies of Night by Elie Wiesel**

**Requisition Detail Lines**

Line Number:  Taxable:  [View Tax](#)

Line Type:  Merchandise  
 Narrative

Catalog:

\* Quantity:

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description:

sterisk (\*) denotes a required field

## SHIPPING ESTIMATE

Invoice To: **(Default) INVOICE TO: CLARKSTON SCHOOL DISTRICT**  
**PO BOX 70 CLARKSTON, WA 99403 PHONE**  
**509.758.2531 FAX 509.758.3326**

**Requisition Detail Lines**

Line Number:  Taxable:  [View Tax](#)

Line Type:  Merchandise  
 Narrative

Catalog:

\* Quantity:

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description:

sterisk (\*) denotes a required field

## FREE SHIPPING EXAMPLE

**CHICAGO IL 60693** **booklets**

Invoice To: **(Default) INVOICE TO: CLARKSTON SCHOOL DISTRICT**  
**PO BOX 70 CLARKSTON, WA 99403 PHONE**  
**509.758.2531 FAX 509.758.3326**

**Requisition Detail Lines**

Line Number:  Taxable:  [View Tax](#)

Line Type:  Merchandise  
 Narrative

Catalog:

\* Quantity:

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description:

sterisk (\*) denotes a required field

## F. FAXING

If you would like your PO faxed:

- Add a new line
- Change the line type to **NARRATIVE**
- In the narrative blank, enter FAX PO TO VENDOR
- Save when complete

**Requisition Master Information**

Batch Number: **WEBREQ**  
Requisition Number: **0000041008**  
Group: **(770) Business Office**

Accounting: **Account allocation by total requisition amount.**  
Subtotal: **0.00** Tax: **0.00**  
Total: **0.00** Other: **0.00**  
Ship To: **Clarkston Sch District J250-185**

Fiscal Year: **2013 - 2014**  
Vendor: **Staples- Lewiston Store**  
**2320 THAIN GRADE**  
**LEWISTON ID 83501**

Description: **Sample Requisition**

Invoice To: **(Default) INVOICE TO: CLARKSTON SCHOOL DISTRICT**  
**PO BOX 70 CLARKSTON, WA 99403 PHONE**  
**509.758.2531 FAX 509.758.3326**

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**Requisition Detail Lines**

\* Line Number:   
Line Type:  Merchandise  **Narrative**  
Narrative:    
Quantity:   
Unit of Measure:   
Unit Cost:   
Total Amount:   
Description:

## G. AMAZON ORDERS

Some schools have one or two people order as a user on our School District's Amazon account and other schools have Julie Reitz place their order on Amazon with a copy of the white PO and the shopping cart. Either way is fine.

For those who would like Julie to place the order, please follow the below steps:

- Add a new line
- Change the line type to **NARRATIVE**
- In the narrative blank, enter **AMAZON**
- Save

The text will automatically fill in to read "Give a white copy of the PO to Julie Reitz to be ordered". This is the same concept as adding a narrative note to "Fax PO to Vendor" or "Direct Bill" on hotels.

The overall process will not change, but when the PO prints, there will be a note on all copies of the PO indicating that Julie will order and to be given a copy of the cart.

**Requisition Detail Line Items**

Views: **General** Filters: **\*Skyward Default**

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Com Code
100	1515	Example Order	1	EA	15.00000	15.00	
110	5576315	Misc Supply	10	EA	3.55000	35.50	

Requisition Detail Lines

\* Line Number: 140

Line Type:  Merchandise  Narrative

Narrative: Ama

Quantity: AMAZON

Unit of Measure:

Unit Cost: 0.00000

Total Amount: 0.00

Description:

Save Back

Requisition Detail Lines

\* Line Number: 140

Line Type:  Merchandise  Narrative

Narrative: AMAZON

Quantity: 0

Unit of Measure:

Unit Cost: 0.00000

Total Amount: 0.00

Description: Give a white copy of the PO to Julie Reitz to be ordered.

Save Back

Requisition Detail Line Items

Views: General Filters: \*Skyward Default

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comet Code
100	1515	Example Order	1	EA	15.0000	15.00	
110	5576315	Misc Supply	10	EA	3.55000	35.50	
120	AMAZON	Give a white copy of the PO to Julie Reitz to be ordered.	0		0.00000	0.00	

Add Edit Delete Mass Add Detail Add Requisition Accounts

## H. Choose the Account(s) to which this item is to be charged.

- Select the box or double click on the specific line to choose one or multiple accounts.
- As accounts are selected, they are placed at the bottom of the screen.
- Account descriptions are displayed at the top right side of the screen in the Account Number Information section.
- When finished, click **Save Account Distribution** to continue.

Available Accounts

Available Accounts for Clearance Group #100 ALL CODES

Fnd	T	Of	Ppss	Aa	Obbb	Li	4444	5555	Funds Available	Selected
10	E	530	0100	27	4350	102	0000	0000	\$185.35	<input type="checkbox"/>
10	E	530	0100	27	4350	401	0000	0000	\$834.33	<input type="checkbox"/>
10	E	530	0100	27	5000	000	0000	0000	\$26,963.43	<input type="checkbox"/>
10	E	530	0100	27	5000	102	0000	0000	\$-21,973.93	<input type="checkbox"/>
10	E	530	0100	27	5000	201	0000	0000	\$-276.82	<input type="checkbox"/>
10	E	530	0100	27	5300	401	0000	0000	\$-1,988.23	<input checked="" type="checkbox"/>
10	E	530	0100	27	5300	000	0000	0000	\$5,000.00	<input type="checkbox"/>
10	E	530	0100	27	5300	102	0000	0000	\$-13,988.23	<input type="checkbox"/>
10	E	530	0100	27	5300	401	0000	0000	\$11,816.25	<input type="checkbox"/>
10	E	530	0100	27	5350	000	0000	0000	\$20,000.00	<input type="checkbox"/>
10	E	530	0100	27	5350	401	0000	0000	\$-16,299.04	<input type="checkbox"/>
10	E	530	0100	27	5470	401	0000	0000	\$-175.72	<input type="checkbox"/>
10	E	530	0100	27	5680	102	0000	0000	\$-191.12	<input type="checkbox"/>

Account Number: Quick Key:

Total Amount to Distribute: \$5500.00 100.00%  
Total Distributed: \$5500.00 100.00%  
Amount Remaining: \$0.00 0.00%

Selected Accounts

Account Number	Amount	Percent
10 E 530 0100 27 5000 401 0000 0000	\$5500.00	100.00

Remove Remove All

Account Level Description

Account Number Information

Code	Description
10	General Fund
530	EXPENDITURES
0100	BASIC EDUCATION
27	TEACHING
5000	SUPPLIES & MATERIALS
401	HIGH SCHOOL
0000	Unassigned
0000	Unassigned

2011-2012 Available Funds By Individual Account

Save Account Distrib Back

- The Requisition Detail Lines/Accounting screen will appear.
- Edit Master to go back to the master information on the requisition.
- Add Notes as necessary (enter new vendor information here-Name, address, phone, fax).

- h. Save and Finish Later to save the requisition but not submit it for approval.
- i. If the requisition is ready to be submitted, click Submit for Approval. This will automatically move the requisition to the next approval level.

**Requisition Master Information**

Batch Number: **WEBREQ**  
 Requisition Number: **0000041012**  
 Group: **(770) Business Office**  
 Fiscal Year: **2013 - 2014**  
 Vendor: **Staples- Lewiston Store**  
 2320 THAIN GRADE  
 LEWISTON ID 83501  
 Invoice To: **(Default) INVOICE TO: CLARKSTON SCHOOL DISTRICT PO BOX 70 CLARKSTON, WA 99403 PHONE 509.758.2531 FAX 509.758.3326**

Accounting: **Account allocation by total requisition amount.**  
 Subtotal: **29.99** Tax: **2.25**  
 Total: **32.24** Other: **0.00**  
 Ship To: **Clarkston Sch District J250-185**  
 Description: **Sample PO**

Buttons: **Submit For Approval** (circled), **Save and Finish Later**, **Back**, **Edit Master**, **Notes**, **Attachments**

---

**Requisition Detail Line Items**

Views: **General** Filters: **\*Skyward Default**

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
100		Electric Pencil Sharpener Item# 15283	1	EA	29.99000	29.99	
110		No shipping charges	0	EA	0.00000	0.00	

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

## I. New Vendors

To order from a vendor that is not currently in the Vendor Master:

- a. At the blank for vendor (Step B), enter the \* symbol then the words new vendor

Requisition Group: **770 - Business Office**  
 Fiscal Year: **2013 - 2014 September 1, 2013 - August 31, 2014** Current Fiscal year not available  
 Accounting: **Account allocation by total requisition amount.**

---

**Requisition Information**

Description: **Sample PO**

Vendor: **\* |**

To: **\*New Vendor** Order From/Remit to: **[\*NEW VEN000]**  
 Address: **CLARKSTON WA 99403**

Date: **09/12/2013** Day: **Thursday** Other:

- b. Add the New Vendor information in the Notes (Name, address, phone, fax).
- c. If the New Vendor is a 1099 Vendor (provides a service, artists, presenters, speakers, repairs, staff training, etc) a W9 must be completed by the vendor and forwarded to the Business Office before the vendor can be set up in the system.

Accounting: **Account allocation by total requisition amount.** [Edit Master](#)

Subtotal: **29.99** Tax: **2.25** [Notes](#)

Total: **32.24** Other: **0.00** [Attachments](#)

Ship To: **Clarkston Sch District J250-185**

Requisition: **Sample PO**

[Submit For Approval](#)  
[Save and Finish Later](#)  
[Back](#)

[Add](#)

**Notes**

Requisition Notes

Views: **General** Filters: **\*Skyward Default** [Add](#)

Enter Date	Enter Time	Category	Note	Entered By	P
There are no records to display; check your filter settings.					

[Back](#)

**Notes**

**Add/Edit Note for Requisition# 0000041012** [Save](#)

\* Note Category: **\*New Vendor** [Back](#)

Entered Date: **09/12/2013**

Entered Time: **12:03 PM**

Entered By: **Rice, Chelsea Ann**

\* Note: **Valley Office Supplies, 838 N Main St, Lewiston, ID 83501**

Protected (Read only to all users except the user that entered it.)

Asterisk (\*) denotes a required field

## J. Cloning

There are two different ways to clone and it will depend on whether you are cloning a requisition or an existing PO.

### Existing POs- Current Year, Previous Year, etc.

If you enter the same PO each year or submit your requisition in the wrong fiscal year it can be very helpful to **clone** a previous PO.

- At the main requisition screen, click the "Clone from Purchase Order"
- Change the filter to the year of the PO that you wish to clone

Requisition Number	Item	Quantity	Description	Vendor	State	Amount	Entered By	Actions
0000059169	WFM	2	WEBREQ Registration for Liane Hill and Karen Pell to attend Literacy Dojo SBA workshop in Pasco on 11/17	ESD_123.Pasco	WA	220.00	Reitz, Julie Bet	<a href="#">Add</a> <a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a> <a href="#">Notes</a> <a href="#">Attach</a> <a href="#">Submit</a>
0000059230	WFM	1	WEBREQ Siemens Industry Inc.	Siemens Industry Inc.	ID	12,024.71	Sperry, Tina De	<a href="#">Approve</a> <a href="#">Deny</a> <a href="#">Remove Approval</a> <a href="#">Add from Online Catalog</a> <a href="#">Clone from Purchase Order</a>
0000059231	WFM	2	WEBREQ Lodging for Don Dotson and Carson Kachelmier to attend AP Summer Institute 7/27-30. 3 nights 7/27, 7/28 & 2/29. Confirmation #82462213.	Davenport Hotel Inc.	WA	338.64	Reitz, Julie Bet	
0000059249	WFL	1	WEBREQ Winter sports budget: additions for Boys basketball, Girls basketball, and Wrestling Allocation	Clarkston High School	WA	14,252.30	Wilson, Sharric	
0000059255	WFL	0	WEBREQ WA - ACTE - State, National & WAFACSE dues Debbie Romesburg	WA Assoc For Career & Tec...	WA	183.09	Romesburg, De	
0000059261	WFL	1	WEBREQ Hardware and paint	Early Bird Supply Inc- WO...	WA	153.92	Frazier, Brian C	
0000059288	WFL	1	WEBREQ Logitech Speaker System for Christ Simons Classroom	CDW Government Inc	IL	31.09	Gabeel, Cheryl	
0000059290	WFL	0	WEBREQ Incentives	Oriental Trading Company ...	NE	10.76	Monroe, Karen	
0000058491	WFH	3	WEBREQ 8 - 17" Dell LCD Monitors with 3 year warranty for James York	Insight Systems Exchange	CA	584.81	McCarter, Inga	
0000059017	WFH	3	WEBREQ 1 Logitech PC Speaker System for S. Pappas	CDW Government Inc	IL	31.09	McCarter, Inga	
0000059232	WFH	3	WEBREQ CSP 820549 Guardian Series Laptop	Staples- Lewiston Store	ID	23.36	Reitz, Julie Bet	

PO Number	Req Number	Status	Batch Number	Description	Vendor Name	Vnd St	Amount	Er
7701305075	0000048661	HIS	31	Copy Paper for DC Curriculum to repl done by Temp Jeri.	Stables- Lewiston Store	ID	1,464.72	Br
7701305073	0000047645	HIS	24	NWEA license renewal for EOC effective July 1, 2014. Partner ID #2056. Invoice in 2014.15	NW Evaluation Assoc- NWEA	OR	1,914.37	Br

- Select the correct requisition from the list it provides and hit "select".
- From there, go through each screen (the same as when you enter a new requisition) and make sure to select the correct PO group and fiscal year
- Double check that the description and coding is correct
- When you are finished, be sure to submit the requisition or save for future use.
- Remember to change dates in both descriptions when cloning a prior year PO if needed.

### Cloning a Requisition that has not yet become a PO.

If a requisition was sent back for any reason, you can edit into the requisition to make the needed changes or you can clone the requisition to avoid starting over if the wrong fiscal year was selected.

- Find the requisition you wish to clone and highlight it

**Clone Requisition**

**Clone FROM**

Requisition Number: 0000059669      Status: WIP

Fiscal Year: 2015-2016      Liquidation: Liquidation Pending

Description: Supplies for District Office

**Clone TO**

Requisition Group and fiscal year will be determined on the next screen.

Batch #: WEBREQ      Batch number set by district configuration.

Clone Notes

Clone Attachments

**Date Option**

Clone Original Dates      Entered Date: 10/30/2015      Friday

Use Current Date      Due Date: 10/30/2015      Friday

Input Dates      Ship Date: 10/30/2015      Friday

- From there, go through each screen (the same as when you enter a new requisition) and make sure to select the correct PO group and fiscal year
- Double check that the description, dates, and coding is correct
- When you are finished, be sure to submit the requisition or save for future use
- Remember to change dates in both descriptions when cloning a prior year PO if needed

## Key Points to Remember

### HOTELS:

- The description on hotel requisitions needs to begin with the number of rooms for the number of nights. For example: “Three rooms for one night- October 30, 2015 for ...” or “Two rooms for three nights- November 4, 5, and 6, 2015 for...”.
- The date listed should be the actual night of the stay, not including the date of the checkout.
- The descriptions must include the name of the person that will be staying at the hotel, the event which they are attending, and the location if applicable.
- The following description is a great example:  
“One room for two nights-October 29 and 30, 2015 for Yogi Bear to attend the WWCA Conference in Pasco, Wa”

### REGISTRATION:

- The descriptions must include the name of the person, event or training that they are attending, the dates, and the location.
- For example: “Registration costs for Yogi Bear to attend the WWCA Conference in Pasco, Wa on October 29-31<sup>st</sup>.”

### Yearly or Semester Based BLANKET POs:

- Blanket POs (previously called Open POs) that provide a date range to make purchases at a specific vendor must begin with the fiscal year, followed by Blanket PO, then a brief description of what the PO is for.
- For example: “2016-17 BLANKET PO for laundry services for the Food Service Department” OR for seasonal Blanket POs “Summer 2017 BLANKET PO for laundry services for the Food Service Department”

### TECHNOLOGY

- All computer supplies including computers, monitors, keyboards/mouse & accessories must be ordered from one of the contracted Purchasing Co-Ops (see attached purchasing and Bid Laws Sheet).
- When entering POs for computer equipment you **must** change the “**Ship To**” address to the Tech Department and list the **contract number** in the line item area. *Tech will provide you with the contract number when you contact them for possible purchases or quotes.*
- **Apple products**- Apple will not allow the sale of Apple products to school districts through any other vendor. We are required to purchase through a competitive bid process and the State Auditor’s Office does not consider Apple to be a sole source, therefore a written justification is required when purchasing any Apple product. The Tech Department can help you determine the best product for the desired use and help with the justification if needed. Please send the justification when submitting the requisition.
- Some toners for copiers and printers are covered in our Xerox contract. Please call Zach prior to entering your requisition and ask him if that printer is covered. Please have the serial number ready.
- Coding differentiation- use 5002 for technology including computers, monitors, tvs, projectors, etc. 5001 can be used for parts of those items, including batteries, replacement parts, hard drives, projector bulbs, etc.