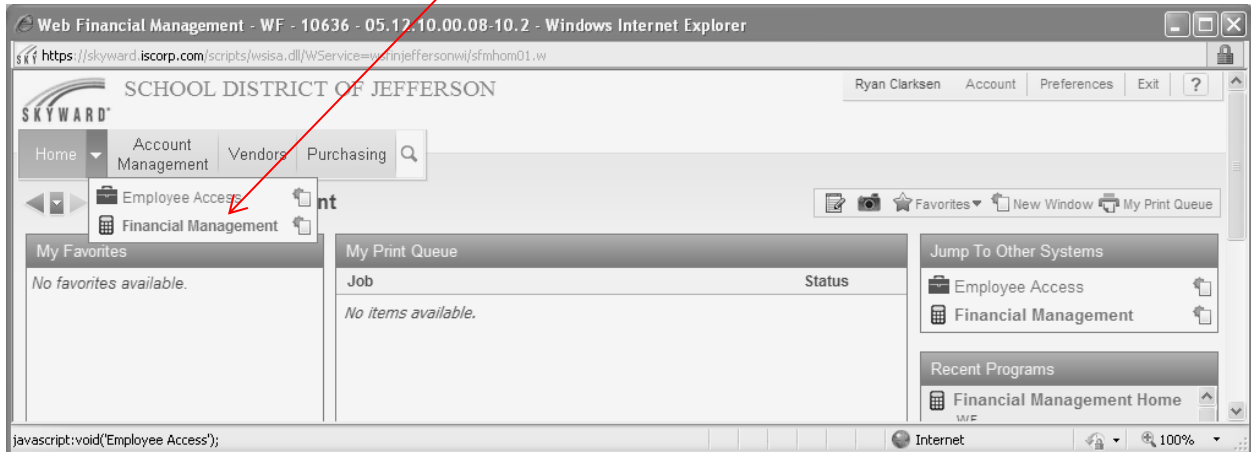


# Electronic Purchase Requisition Instructions

Log in to School District of Jefferson Web Site – [www.sdoj.org](http://www.sdoj.org), **District, Staff and Skyward Staff Access.**

Enter **Login ID** and **Password.**

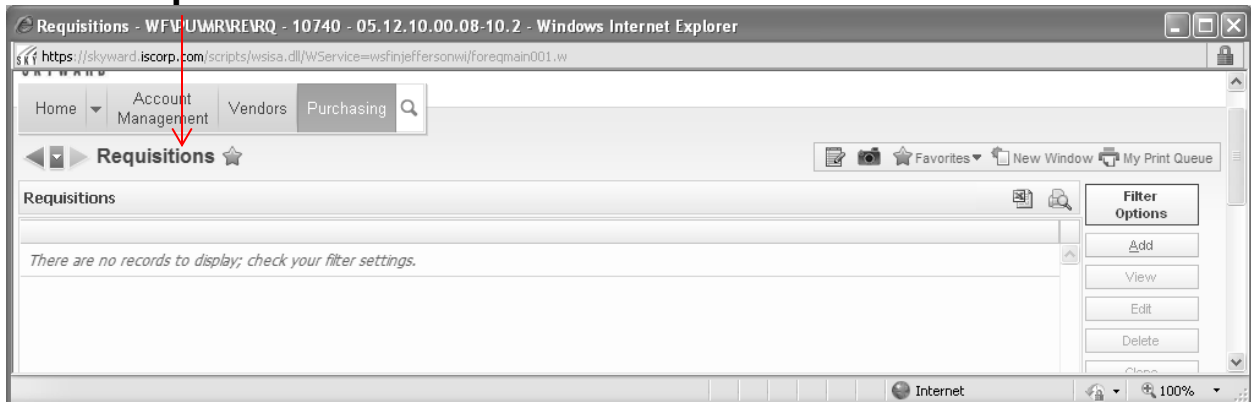
Under HOME Choose **Financial Management.**

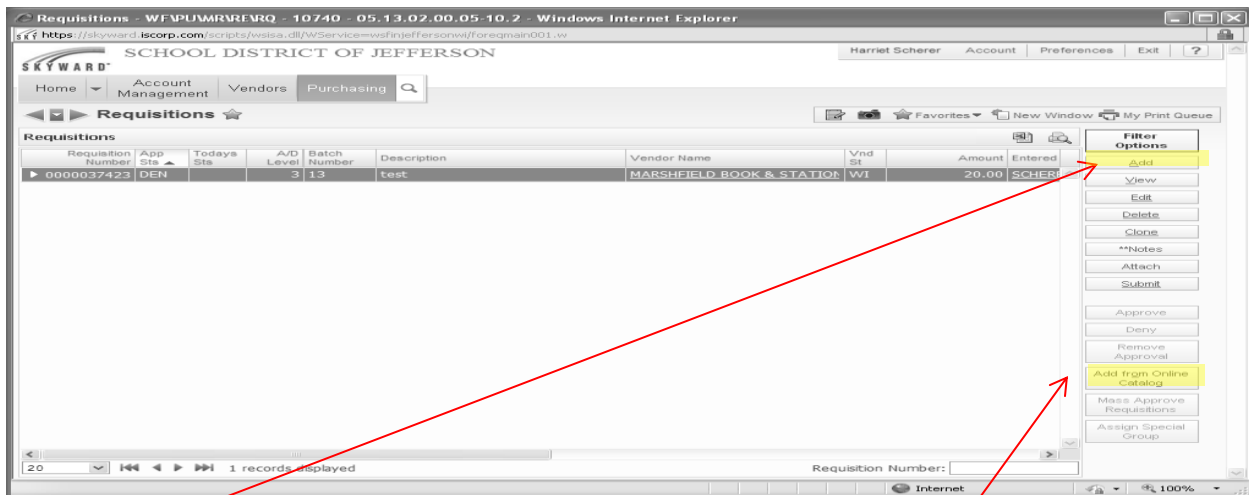


Choose **Purchasing.**

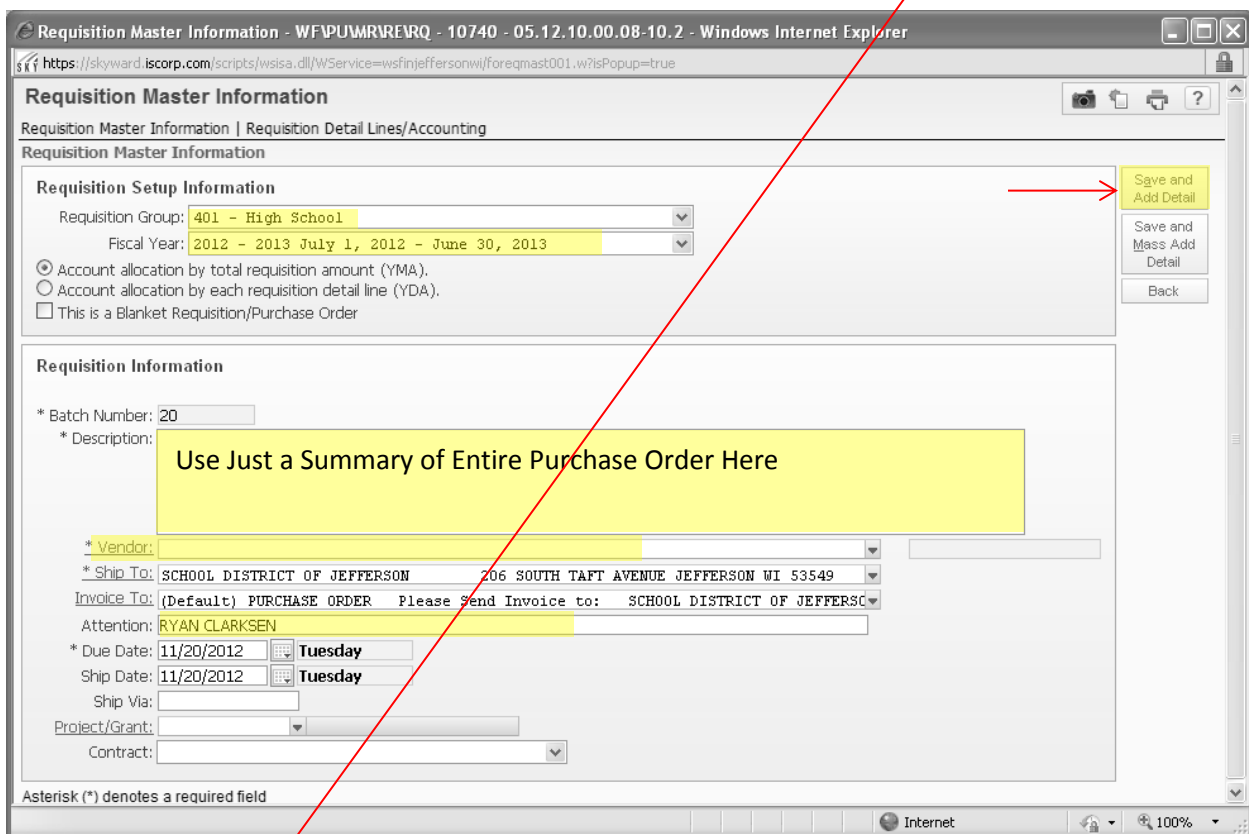


Choose **Requisitions.**



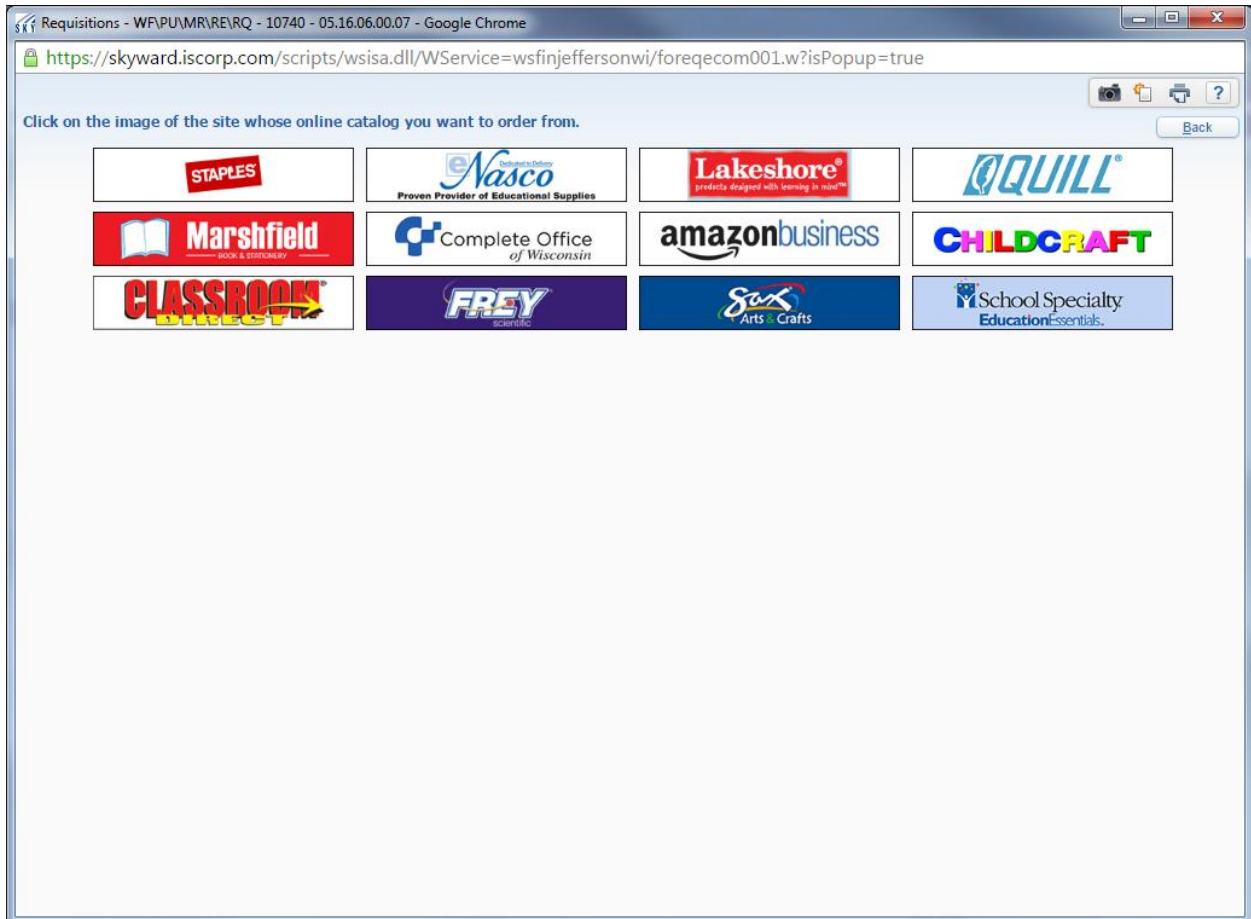


Choose **Add** and you'll see this screen.



**Or** Choose **ADD FROM ONLINE CATALOG** and you'll see the following screen. This is the area of the program that will allow direct access to on-line catalogs of vendors listed. As new vendors are added, an all-staff e-mail will be sent to notify everyone that a new vendor exists in this area. By clicking on the vendor icon, you will be able to enter items directly into their website. However, before you are taken to the vendor's website, you will get the above Requisition Master Information screen. After completing this screen, click on **SAVE AND ADD DETAIL** and you will be taken to their website. You then build your shopping cart as you normally would for any on-line order. At the time you are ready to place the order, the website will take you back to

the Skyward program to add account numbers, etc., and will follow our normal entering of requisitions. The order will not be placed until all approvals are complete and the order is submitted by the district office. These vendors can ONLY be accessed with the **ADD FROM ONLINE CATALOG** option. The discounts negotiated with these companies will be reflected in their online catalog through this process.



Choose the appropriate **Requisition Group**.

Choose the appropriate **fiscal year**.

Enter the **Description** – this is a SUMMARY of the entire Purchase Order – Not the detail lines of the PO. This description will show on reports that are run and will be helpful in identifying the purpose of the order.

Choose the **Vendor** – if you can't find the vendor you are looking for – or if you are uncertain for any reason – use the bogus vendor we have set up by just entering a "?" and choose that.

The **Ship to** address is generally the default of School District of Jefferson – leave that as is. The District Office will change it if needed (for example for subscriptions).

The **Attention** line will default to your name – please add your school before your name as well as your department (for example – HS – Clarksen – Lang Arts).

The rest of this screen does not need any changes - then choose **Save and Add Detail** – and you will see the following screen:

Requisition Detail Lines/Accounting - WFPUMRREQ - 10740 - 05.12.10.00.08-10.2 - Windows Internet Explorer

https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinjeffersonwi/foreqdet001.w

### Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

#### Requisition Detail Lines/Accounting

**Requisition Master Information**

Batch Number: 20  
Requisition Number: 000037005  
Group: (401) High School  
Fiscal Year: 2012 - 2013  
Vendor: ?CHOOSE THIS VENDOR IF NO VENDOR AVAILABLE

Accounting: Account allocation by total requisition amount.  
Amount: 0.00  
Ship To: SCHOOL DISTRICT OF JEFFERSON  
Blanket PO: This is not a Blanket PO  
Description: test

Invoice To: (Default) PURCHASE ORDER Please Send Invoice to:  
SCHOOL DISTRICT OF JEFFERSON 206 S Taft Ave,  
Jefferson WI 53549 Phone - (920) 675-1000 Fax -  
(920) 675-1020 or e-mail invoices to:  
accountspayable@jefferson.k12.wi.us

#### Requisition Detail Lines

\* Line Number: 100  
Line Type:  Merchandise  
 Narrative  
Catalog:   
\* Quantity: 0  
Unit of Measure:   
\* Unit Cost: 0.00000  
Total Amount: 0.00  
\* Description: Please Be Complete Here

Asterisk (\*) denotes a required field

Save  
Back

The **line number** is automatically generated.

**Line Type** – choose merchandise if you want to use the quantity field, use Narrative if you have only description or instructions to enter on the request. If you are ordering based on a quotation, please add a requisition line that references the quote number.

Enter **Catalog Number** if needed.

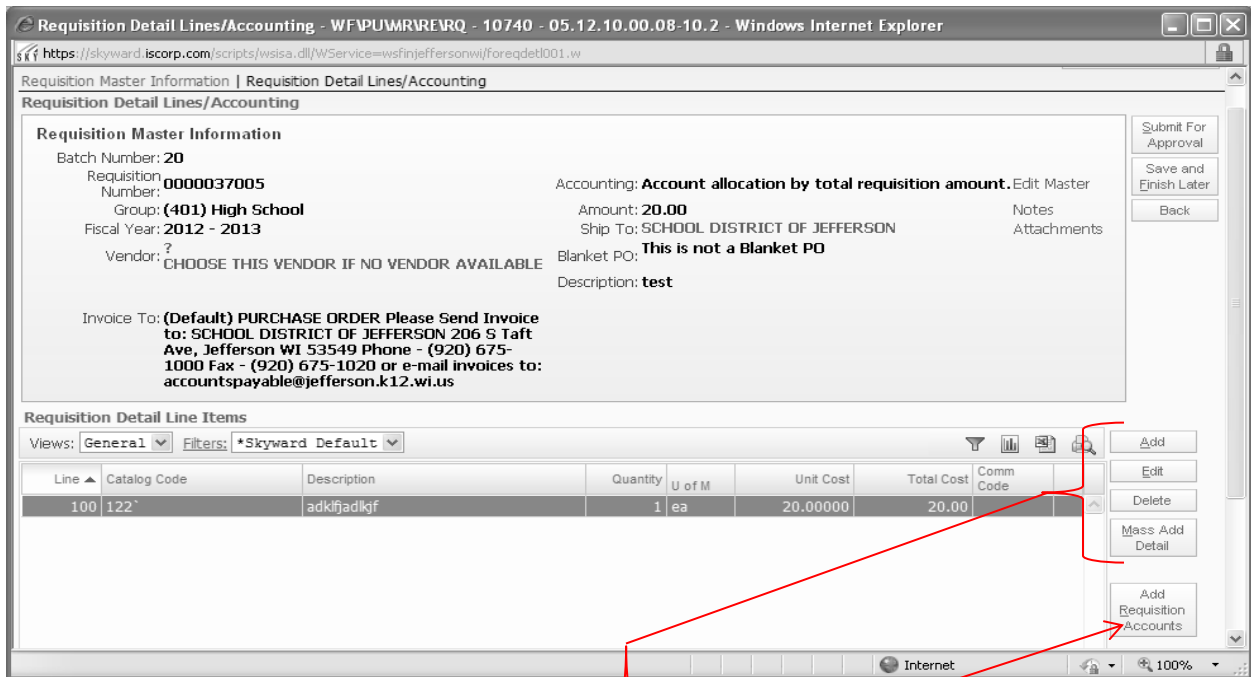
Enter **Quantity**.

Enter **Unit of Measure** (each, pkg, etc.).

Enter **Unit Cost** – the system will calculate the Total Amount.

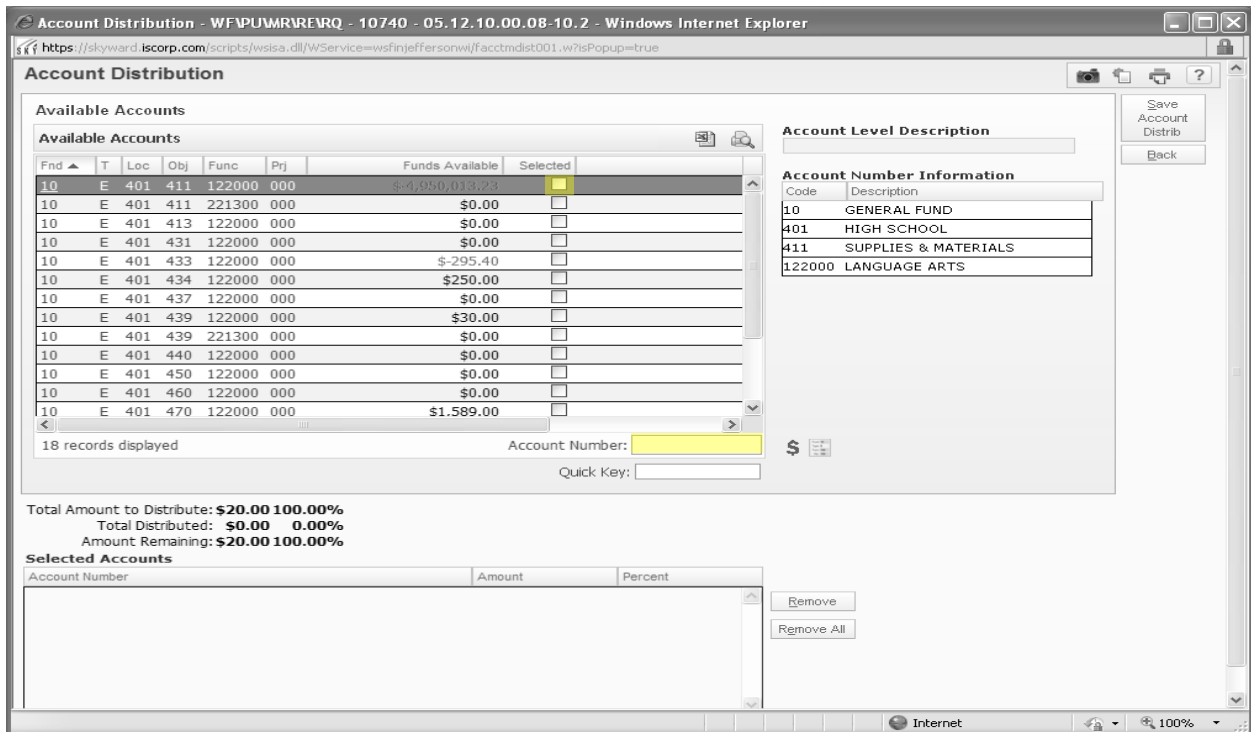
Enter the **Description** – Please be complete here – **who, what, when, where** – this is what the company will see on the purchase order, as well as what district office will see for receiving purposes. For example, hotel rooms and conferences, "Jane Smith, 2/25/18 & 2/26/18 for the Annual Teacher Conf. in Wisconsin Dells."

Choose **Save** and you will see the following screen:

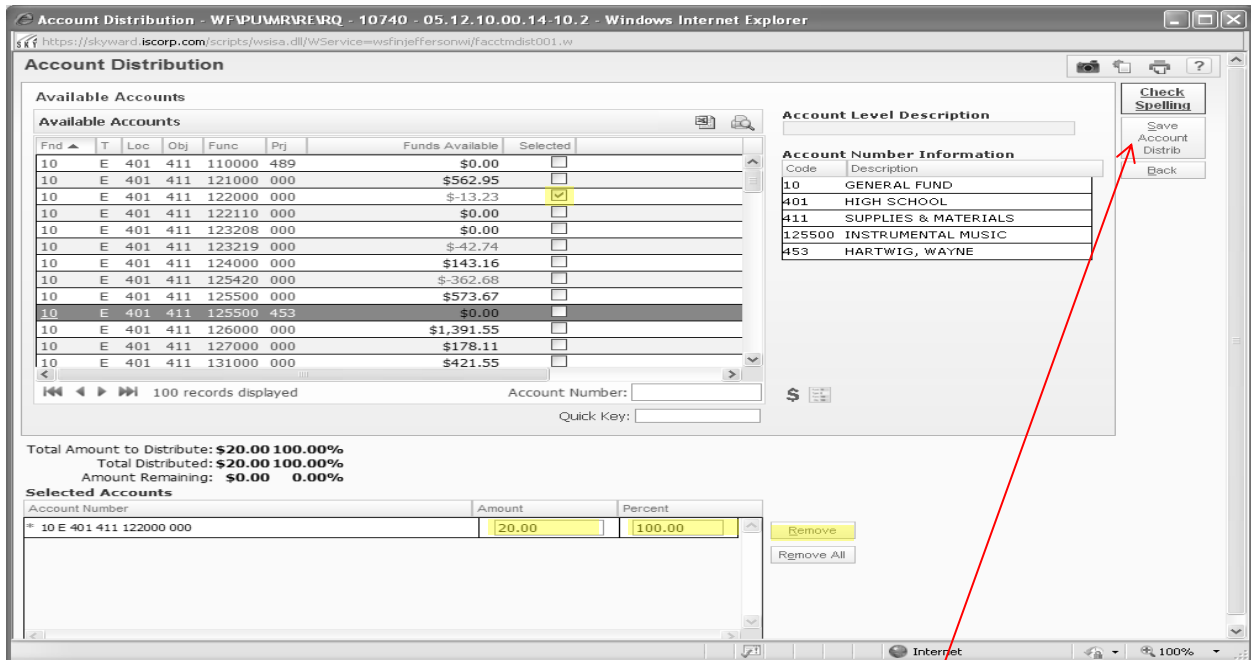


You can continue to add more requisition lines by choosing the **ADD** button, change a line by highlighting the line and choosing the **EDIT** button, Delete a line by highlighting the line and choosing **DELETE**. If you have a lot of lines to add – choose **MASS ADD DETAIL**, this will give you multiple description lines.

Choose **Add Requisition Accounts** in order to assign the account number to be charged. You will then see the following screen:



In order to choose an account you can either scroll through the list and select the account number you want to charge – or enter the account number in the account number field. If you choose to enter the number – you will need to type it all together and use an **E** to identify an expense account – like this – “**10E401940221300000.**” Selecting the account number you want to use by putting a check mark in the box, the account number will then populate the lower section of the screen under Selected Accounts – see screen below. If you need to charge more than one account – continue to add account numbers per previous instructions. You can enter the amount, or a percent. **Changes** can be made by simply clicking in the amount or percent field and make the change. **Remove** an account by highlighting the account, and choose “Remove.”



When you have all the accounting complete, choose the “**Save Account Distrib**” button.

## **NOTES AND ATTACHMENTS**

These are found in the Requisition Master Information Screen

**Requisition Master Information**

Batch Number: 20  
Requisition Number: 0000037005  
Group: (401) High School  
Fiscal Year: 2012 - 2013  
Vendor: ?  
CHOOSE THIS VENDOR IF NO VENDOR AVAILABLE

Accounting: Account allocation by total requisition amount. Edit Master  
Amount: 20.00  
Ship To: SCHOOL DISTRICT OF JEFFERSON  
Blanket PO: This is not a Blanket PO  
Description: test

Invoice To: (Default) PURCHASE ORDER Please Send Invoice to: SCHOOL DISTRICT OF JEFFERSON 206 S Taft Ave, Jefferson WI 53549 Phone - (920) 675-1000 Fax - (920) 675-1020 or e-mail invoices to: accountspayable@jefferson.k12.wi.us

**Requisition Accounts**

Account Number	Account Amount	Account Percent
10 E 401 940 221300 000	\$20.00	100.00%

### **NOTES:**

In order to communicate any information that is not to be actually written on the purchase order, you will use the **Notes** feature. Choose **Notes** and you will see the following screen:

**Notes**

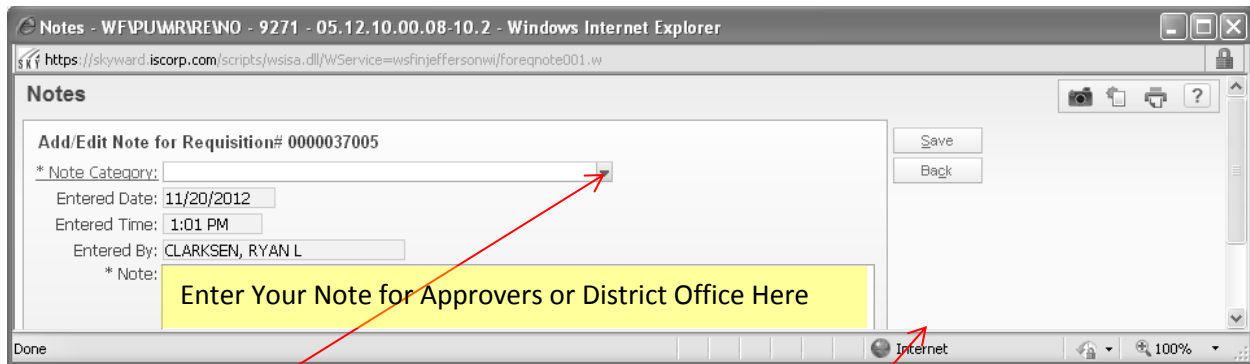
Requisition Notes

Views: General Filters: \*Skyward Default

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

Buttons: Add, Edit, Delete, Back

Choose **Add** to add a Note.



Choose the **NOTES** category from the drop down menu by Note Category, and then enter your note in the Note field. Below are some examples of reasons you would use as note:

-If you had to choose the ? for the vendor – you would need to let approvers know what vendor you need added to the system. Please include all information related to the vendor so they can be added completely; name, address, phone, fax, contact person, etc.

-If you have a question to ask one of the approvers as they are reviewing this request, enter your question in here.

-If the completed PO needs to be returned to you so you can pick it up, indicate that in this area.

-Any special handling the purchase order may need should go in the notes area. These notes do NOT appear on the purchase order, they are intended to be a means of communication in the approval and ordering process. Any information for the vendor needs to go in as a requisition line item.

Choose **Save** to save your note and continue.

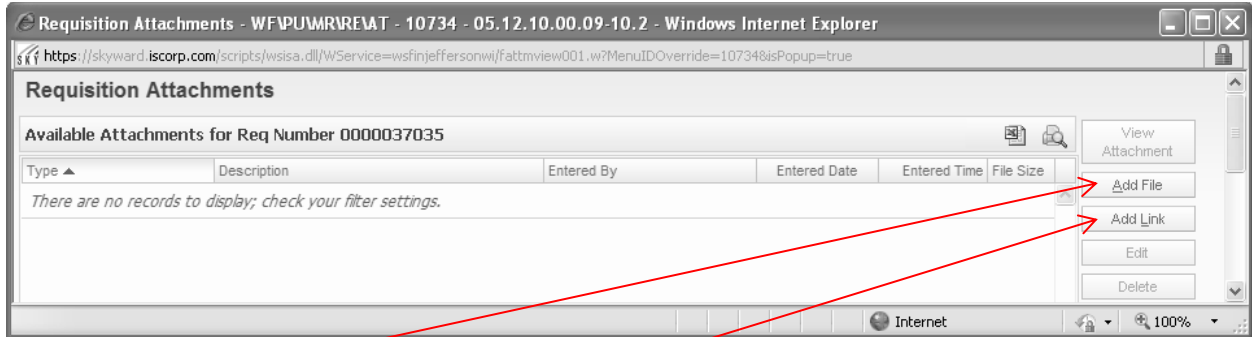
Again – please remember – this notes section will **not** appear on the purchase order that gets sent to the vendor – it is for the use of approvers and district office staff. Any information that the vendor needs in order to fill the order needs to be entered as a requisition line.



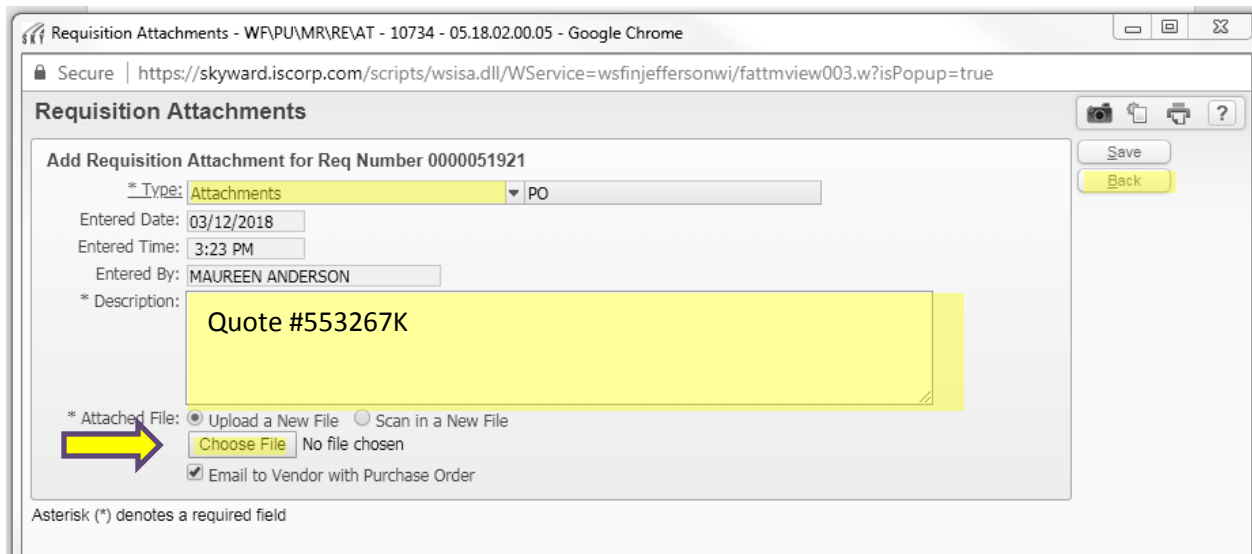
## ATTACHMENTS:

Anything that needs to be sent in with the purchase order, has to be attached electronically to the requisition; for example quotes, forms, invoices, attachments.

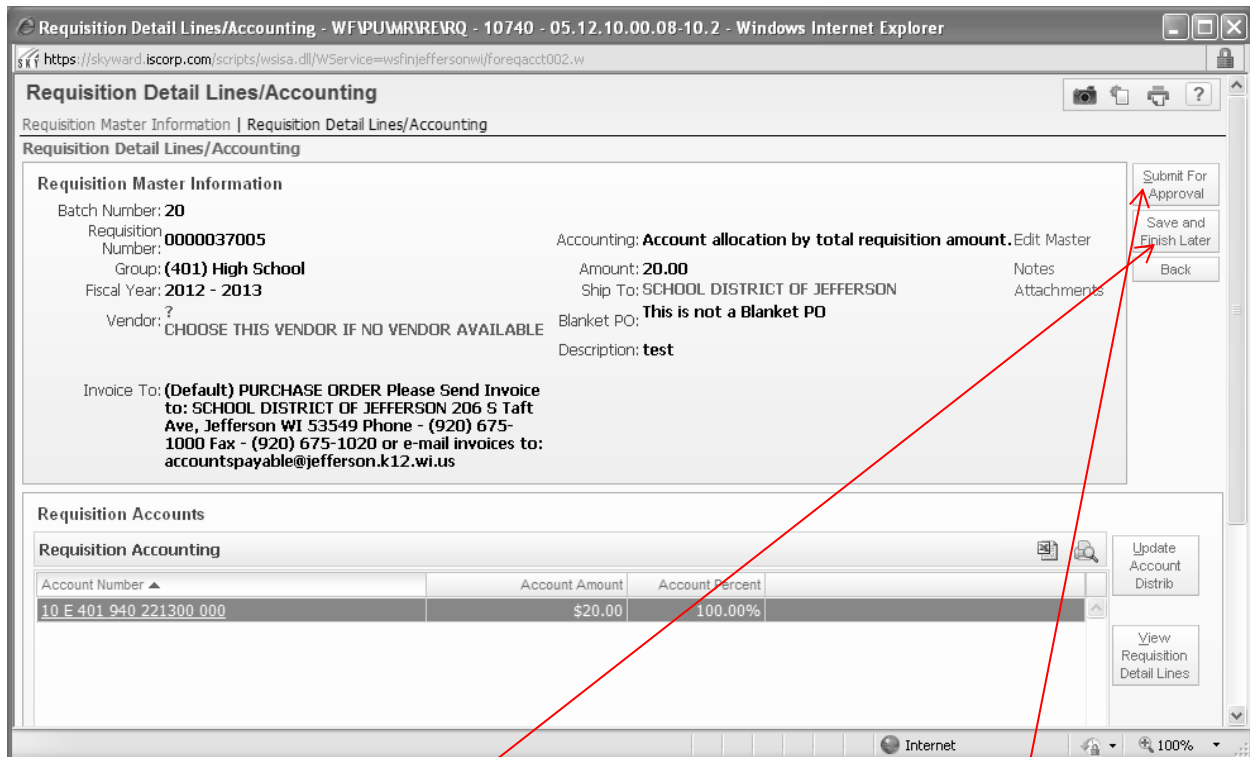
Choose **Attachments** to attach information to the electronic requisition.



Choose **Add File** to add an electronic copy of the information that needs to be attached to a requisition. Choose **Add Link** if you need to share a web site link that needs to be used. When you choose Add File you will see the screen below:



Choose **Attachments** as the type – this is just a generic category. Enter a **description** of the attached document; for example, quotation, registration, etc. You can attach a spreadsheet if there are a number of items you are ordering and it makes more sense to use “as per attached” instead of re-entering all the items into the requisition form. Choose **Browse** to locate the file you want to attach. When adding an attachment, please be sure to check the box that says “**Email to Vendor with Purchase Order.**” That way if the PO is being emailed, the attachment will be sent. Choose **Save** to continue adding the requisition.



When you are finished adding the detail, requisition accounts, any note and/or attachments, you are ready to **Submit for Approval**. Choose **Submit for Approval** to send the requisition on to your supervisor for approval.

Choose **Save and Finish Later** if you are not ready to submit the requisition for any reason. You are always able to go back in and edit the requisition at a later date. However, please remember, it will sit in your area until you submit it for approval. Please don't let requisitions sit there for long periods of time as it will cause some processes to be hung up.

**ANY QUESTIONS OR PROBLEMS PLEASE CALL:**

**YOUR BUILDING ADMINISTRATIVE ASSISTANT**

**-OR-**

**THE DISTRICT OFFICE –  
Mary Ellen Taylor – ext. 1041  
Maureen Anderson – ext. 1001  
Laura Peachey – ext. 1044**

## WORTH REPEATING!

Requisition Master Information - WFPUMRREQ - 10740 - 05.13.10.00.09-10.2 - Windows Internet Explorer

https://skyward.iscorp.com/scripts/wvisa.dll/WService=wsfinjeffersonwiforeqmast001.w?isPopup=true

### Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

#### Requisition Master Information

##### Requisition Setup Information

Requisition Group: 000 - DISTRICT OFFICE

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: 17

\* Description:

\* Vendor:

\* Ship To: SCHOOL DISTRICT OF JEFFERSON

Invoice To: (Default) PURCHASE ORDER Invoice To: SCHC

Attention:

\* Due Date: 01/17/2014 Friday

Ship Date: 01/17/2014 Friday

Ship Via:

Project/Grant:

Contract:

Asterisk (\*) denotes a required field

**Requisition Group:** Be sure to choose the Correct Req. Group – the approval process is dictated by the req. group.

**Fiscal Year:** **Extremely** important to choose the correct year. During the spring/summer there are two school years available – the current year and the next school year.

**Description:** This is only a SUMMARY of the entire requisition. Please do not include detail or notes in this area. For example enter “books,” “misc supplies,” “wrench set,” etc. Detail lines are entered on the next screen.

**Attention:** The system will auto fill your name in here. Please add your school in front of your name to ensure that you get your order to the correct school and to avoid any confusion.

When adding the Requisition Detail Lines, please be complete. This is the part of the order that the vendor will receive with all the items and ordering instructions.

If you have a quotation attached, please reference the quote number or date of the quote in the detail lines.

**Cloning Purchase Requisitions:** Go to “Purchasing” “Requisitions” “Clone From Purchase Order”. All the requisitions entered in your purchase order group will now be displayed. You can highlight the one you want to clone and click on “Select” and continue adding. Be sure to make appropriate changes in the requisition lines such as dates covered by the PO, etc.