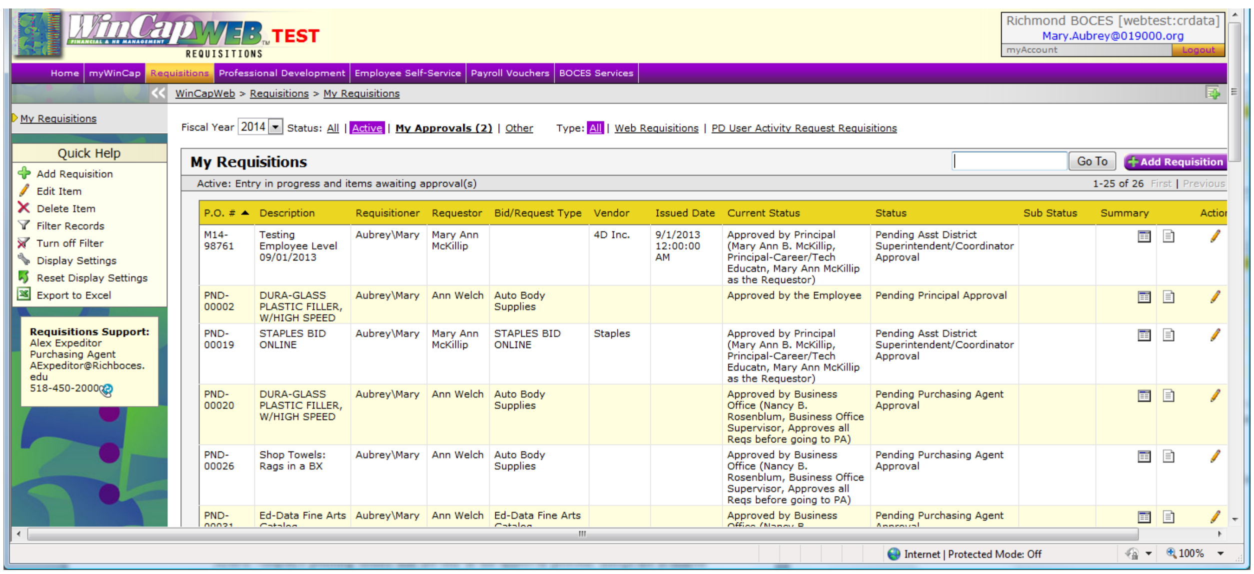
*WinCap*WEB Requisitions
(updated 12/13/2013)

To enter a Requisition, on the tool bar, click on "Requisitions"/"My Requisitions"

"My Requisitions" will be the main screen when viewing web requisitions – these are YOUR requisitions ONLY.

On the My Requisitions tab, the logged in Requisitioner is able to view their existing requisitions by fiscal year. Requisitions are displayed according to the Display Settings found under the wrench icon discussed later. The list is sorted by the PO# column. The list can be resorted by clicking on any column header.

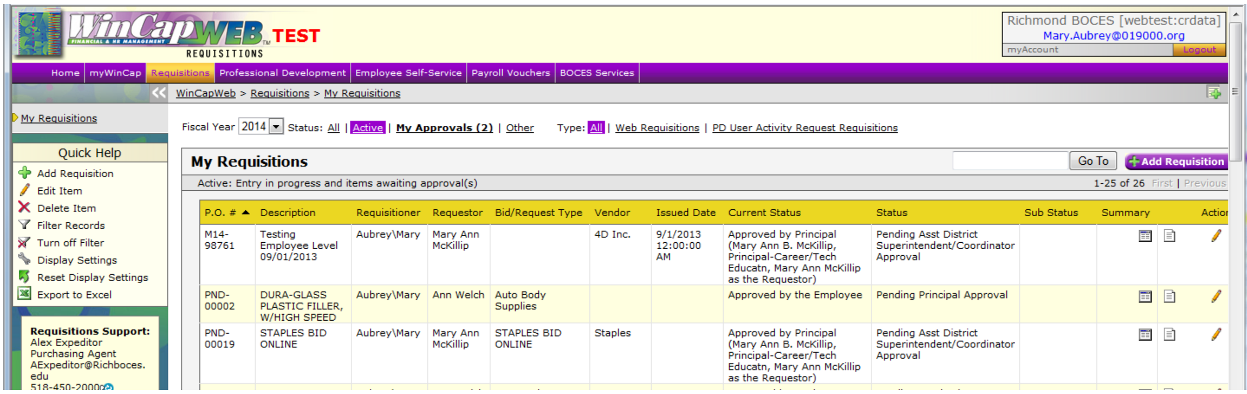


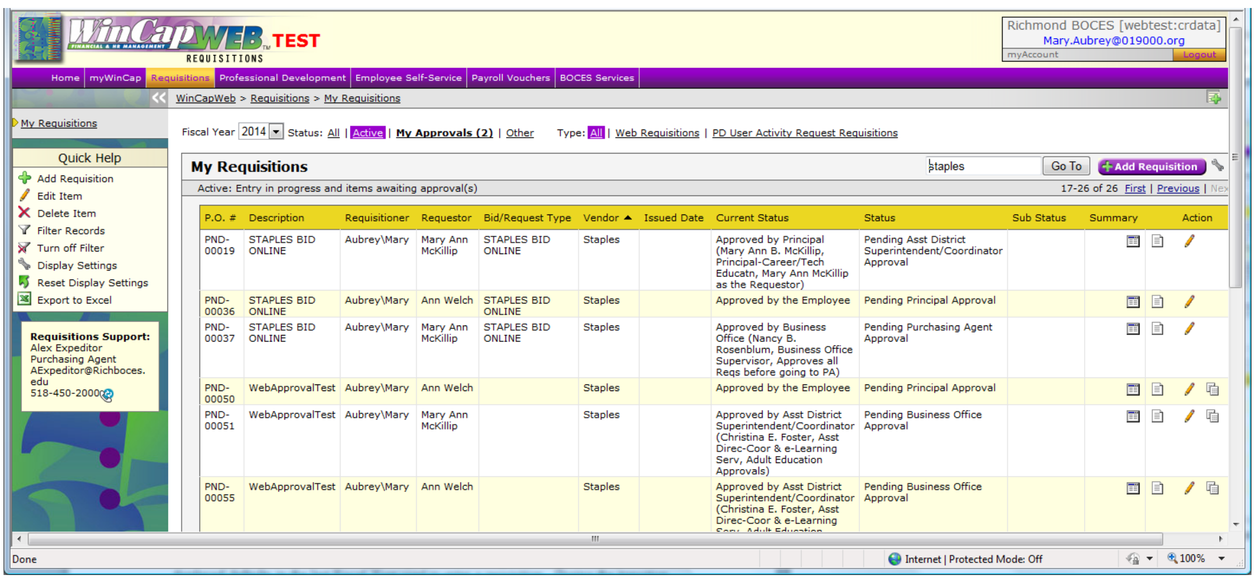
There are filtering options to assist the user in locating their requisitions. A drop-down menu for fiscal year is available to pull requisitions from a particular year. The year displayed defaults to the last Fiscal Year used to enter a requisition. During the transition of fiscal years, users need to be aware of which year they using to add requisitions. Requisitions can also be filtered based on their Status:

All –displays all orders for the requisitioner for that year
Active –displays pending orders that are still in the approval process. BRQs are also displayed within this tab until the budget development year is closed.
My Approvals – if the requisitioner requires Employee Approvals, this is the tab where the requisitioner would find those orders
Other – displays all orders not found in Active

On the My Requisitions bar, several features are available.

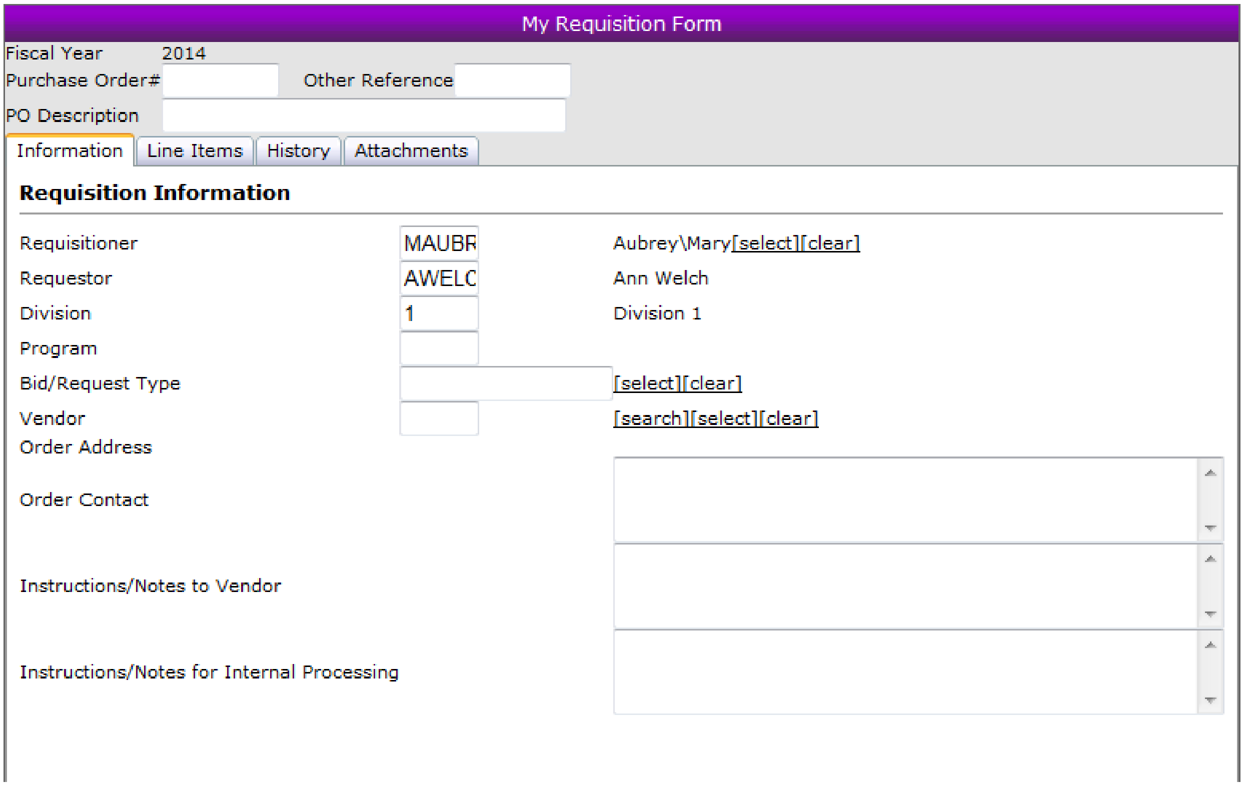
1. Go To – if there is more than one screen of PO#s, this feature allows the user to enter information to create a specific search. The search will focus on the column currently being sorted on. For example, if the user clicks on the Vendor column header and then enters a specific vendor in the Go To field, those vendor POs will be brought to the top of the display.





Note: Clicking on a column heading the first time will sort the data within the column from least to most for values or from A to Z. Clicking on the header a second time will reverse the sort; most to least or Z to A.

2. Select the correct year at the top of the window before selecting the  button to open a new “My Requisition Form”.



My Requisition Form

Fiscal Year 2014

Purchase Order# Other Reference

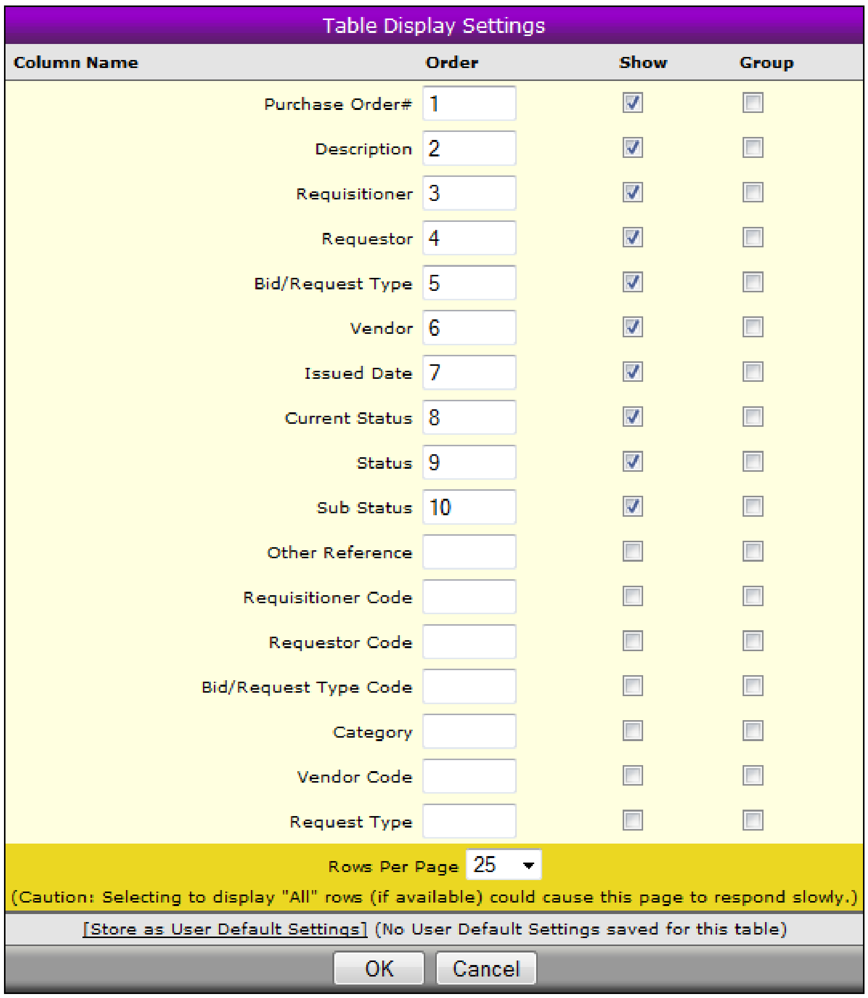
PO Description

Information | Line Items | History | Attachments

Requisition Information

Requisitioner	MAUBR	Aubrey\Mary[select][clear]
Requestor	AWELC	Ann Welch
Division	1	Division 1
Program		
Bid/Request Type		[select][clear]
Vendor		[search][select][clear]
Order Address		
Order Contact		
Instructions/Notes to Vendor		
Instructions/Notes for Internal Processing		

3. Table Display Settings – Allows user to customize the columns displayed on the “My Requisitions” grid. There is also an option to select the number of rows (records) per page to display. Selecting “All” records could cause the page to respond slowly. Once the display settings have been selected, the user can set them as their default by clicking on “[Store as user Default Settings]”. If the settings are not to be the permanent default settings, just click OK to use them for this session. If a default display setting exists, it will replace the current grid upon the next opening of the user’s requisitions.



4. Reset Display Settings – Resets display settings back to the original default.

5. Export to Excel – Exports the current grid to excel.

6. There are three options under the “Action” column:

1) View Requisition – allows preview of the issued and pending requisitions. If the requisition has been issued, this will be the only option under "Action" that is available.

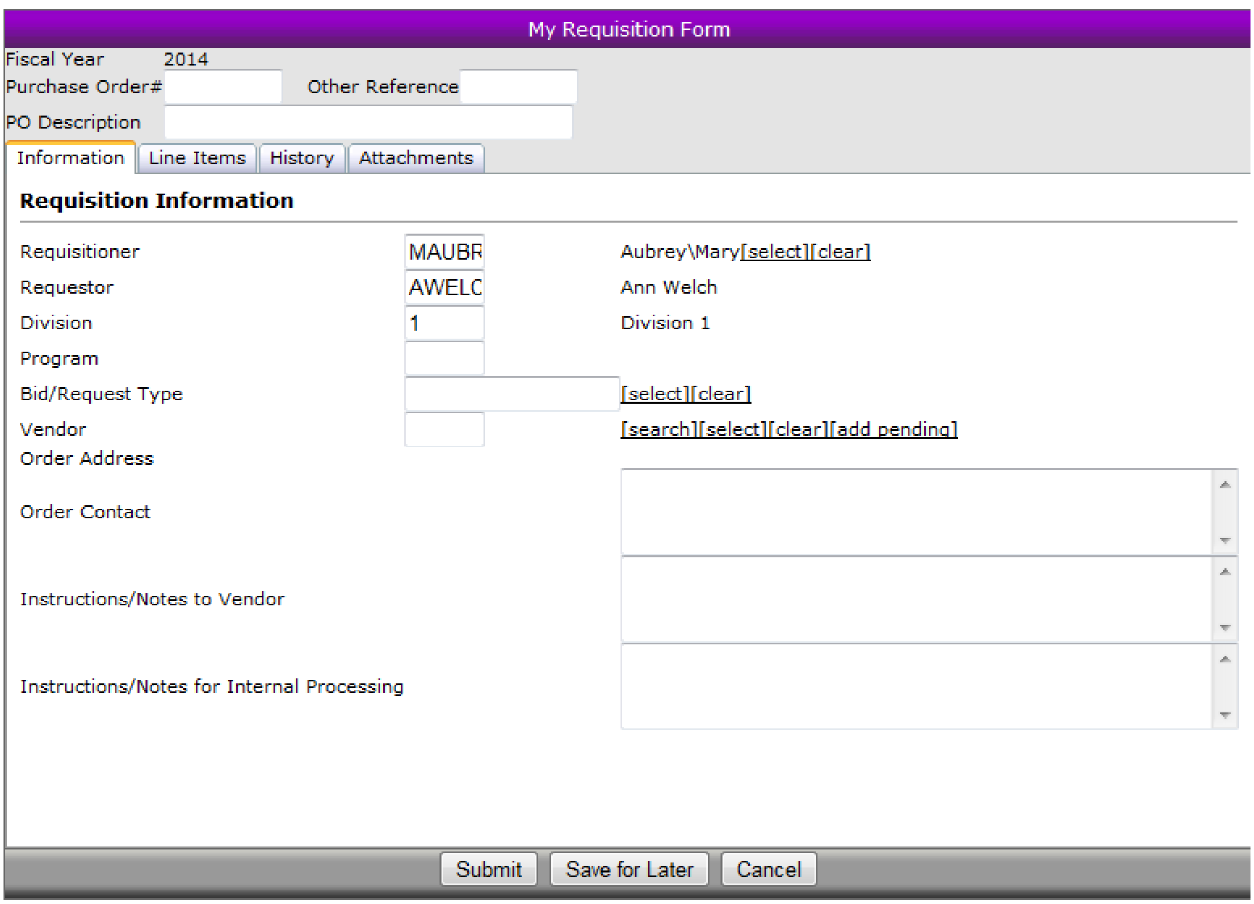
2) Edit Requisition – allows modifications of pending requisitions.

3) Withdraw Requisition – If the requisitioner no longer wants to receive these goods, this option withdraws the order from the approval process.

Adding Requisition

To add a requisition, click on the purple Add Requisition button

This directs you to the **Information Tab** of the WEB Requisition.



At the top of the screen, a PO Description can be added if desired; otherwise, a PO description defaults in based on the first line item's description.

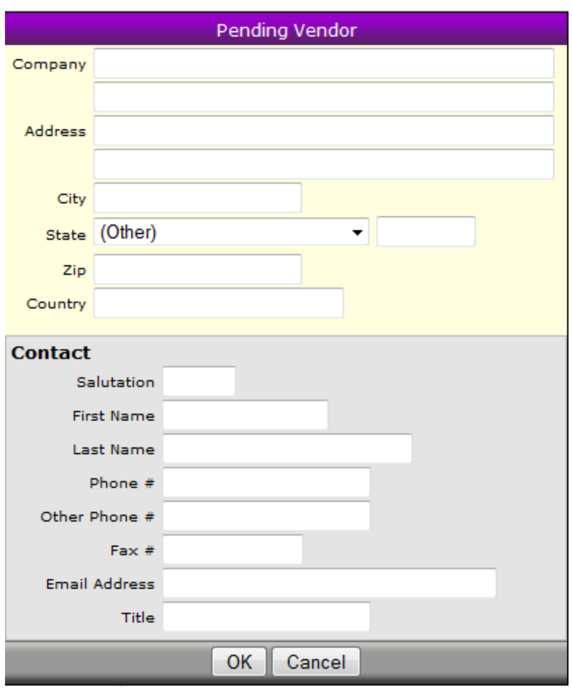
If requisitioner has one requisitioner ID, it will automatically default based on the *WinCap* setup, if the requisitioner has multiple requisitioner ID's, select the appropriate requisitioner ID from the IDs listed when "Select" is clicked.

If this is a bid order, populate the appropriate bid using the "Select" feature. This automatically makes the catalog available to select items from. The vendor information is automatically populated upon approval.

If the request is not a bid order, choose the appropriate vendor, by utilizing the search or select option. Search allows the user to type in the vendor name to pull a list of possible names to choose from. The Select option opens a vendor listing that can be sorted by column and the Go To can be used to locate a specific vendor. Clicking on the vendor ID will bring the vendor information into the requisition. The order address and order contact will default in based on the information stored in *WinCap*.

Note: Do not enter a vendor if a bid is selected above the vendor field. The vendor comes from the items in a bid/catalog.

If the site utilizes pending vendors and the requisitioner has rights to add pending vendors, that option is also available. When the user clicks on "[add pending]", a Pending Vendor form will open for the appropriate information to be entered. Click OK upon completion.

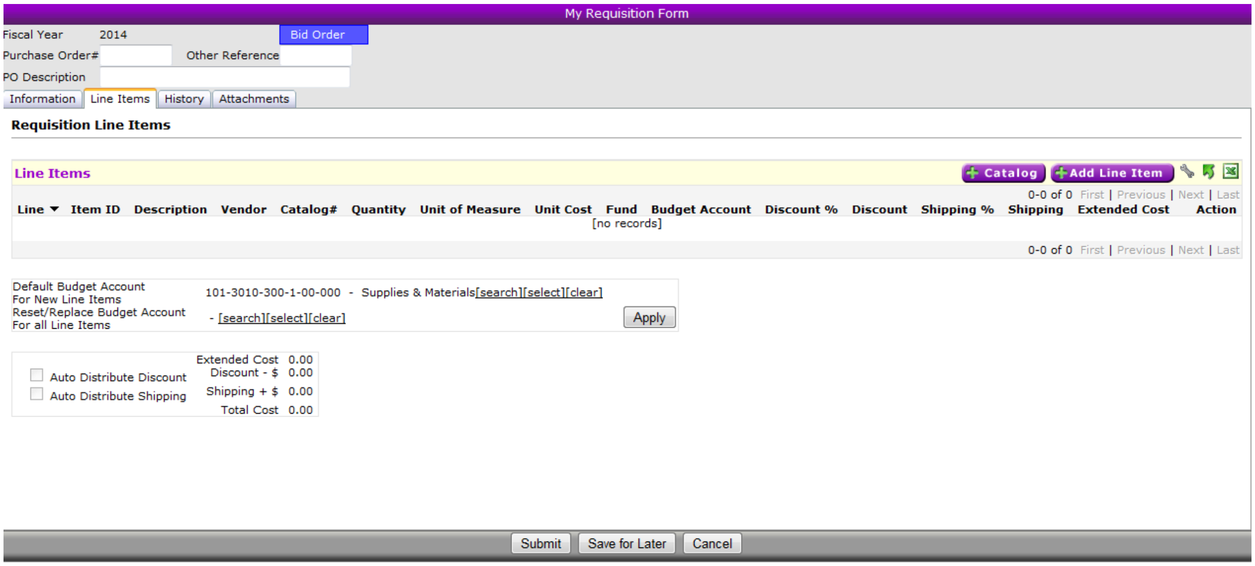


The options to enter Instructions/Notes to Vendor and Instructions/Notes for Internal Processing are optional.

Instructions/Notes to Vendor – This information appears in the Vendor Notes tab in *WinCap*

Instructions/Notes for Internal Processing – This information appears in the Notes Icon on the Requisition in *WinCap*

Line Items Tab


My Requisition Form

Fiscal Year 2014 | Bid Order

Purchase Order# | Other Reference

PO Description

Information | Line Items | History | Attachments

Requisition Line Items

Line Items | Catalog | Add Line Item

0-0 of 0 First | Previous | Next | Last

Line	Item ID	Description	Vendor	Catalog#	Quantity	Unit of Measure	Unit Cost	Fund	Budget Account	Discount %	Discount	Shipping %	Shipping	Extended Cost	Action
[no records]															

0-0 of 0 First | Previous | Next | Last

Default Budget Account For New Line Items: 101-3010-300-1-00-000 - Supplies & Materials[search][select][clear]

Reset/Replace Budget Account For all Line Items: - [search][select][clear] Apply

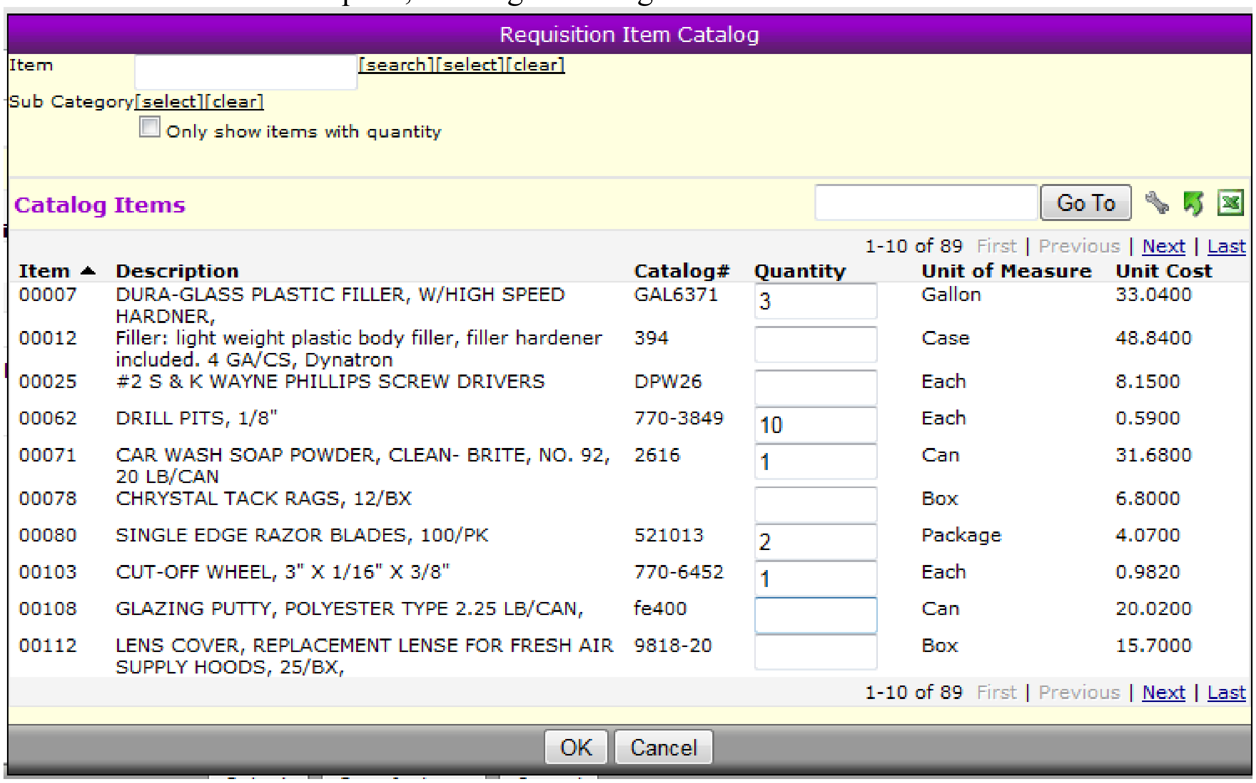
Auto Distribute Discount
Auto Distribute Shipping

Extended Cost	0.00
Discount - $	0.00
Shipping + $	0.00
Total Cost	0.00

Submit | Save for Later | Cancel

If a bid with catalog items was specified on the Information tab, the user has the ability to add items using the catalog by clicking on the 

button. This option opens the bid catalog listing where quantitites can be entered on multiple items at one time. When the selection is complete, clicking OK brings the items into the Line Items tab.


Requisition Item Catalog

Item [search][select][clear]

Sub Category[select][clear]

Only show items with quantity

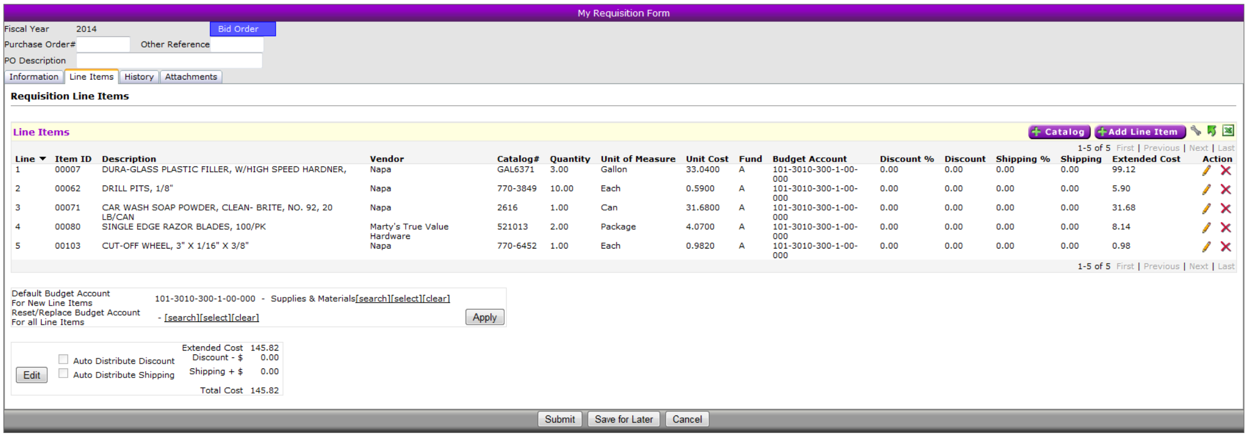
Catalog Items Go To

1-10 of 89 First | Previous | Next | Last

Item	Description	Catalog#	Quantity	Unit of Measure	Unit Cost
00007	DURA-GLASS PLASTIC FILLER, W/HIGH SPEED HARDNER,	GAL6371	3	Gallon	33.0400
00012	Filler: light weight plastic body filler, filler hardener included. 4 GA/CS, Dynatron	394		Case	48.8400
00025	#2 S & K WAYNE PHILLIPS SCREW DRIVERS	DPW26		Each	8.1500
00062	DRILL PITS, 1/8"	770-3849	10	Each	0.5900
00071	CAR WASH SOAP POWDER, CLEAN- BRITE, NO. 92, 20 LB/CAN	2616	1	Can	31.6800
00078	CHRYSTAL TACK RAGS, 12/BX			Box	6.8000
00080	SINGLE EDGE RAZOR BLADES, 100/PK	521013	2	Package	4.0700
00103	CUT-OFF WHEEL, 3" X 1/16" X 3/8"	770-6452	1	Each	0.9820
00108	GLAZING PUTTY, POLYESTER TYPE 2.25 LB/CAN,	fe400		Can	20.0200
00112	LENS COVER, REPLACEMENT LENSE FOR FRESH AIR SUPPLY HOODS, 25/BX,	9818-20		Box	15.7000

1-10 of 89 First | Previous | Next | Last

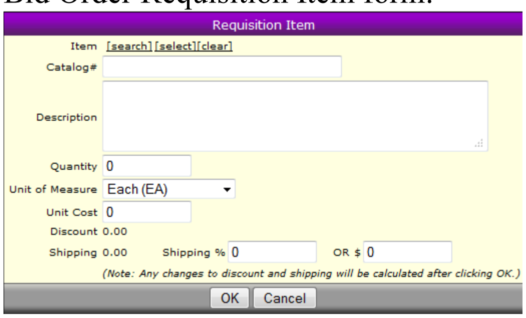
OK | Cancel



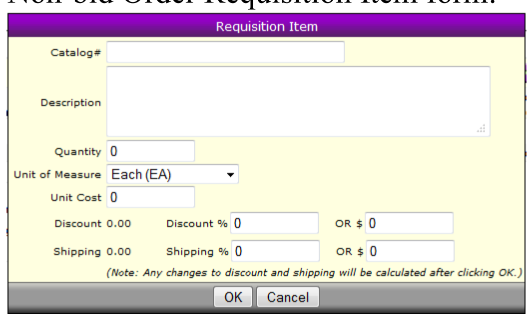
The 

button can also be used on a bid order as well as on a regular order. Once “Add Line Item” is selected, the “Requisition Item” screen is displayed.

Bid Order Requisition Item form:



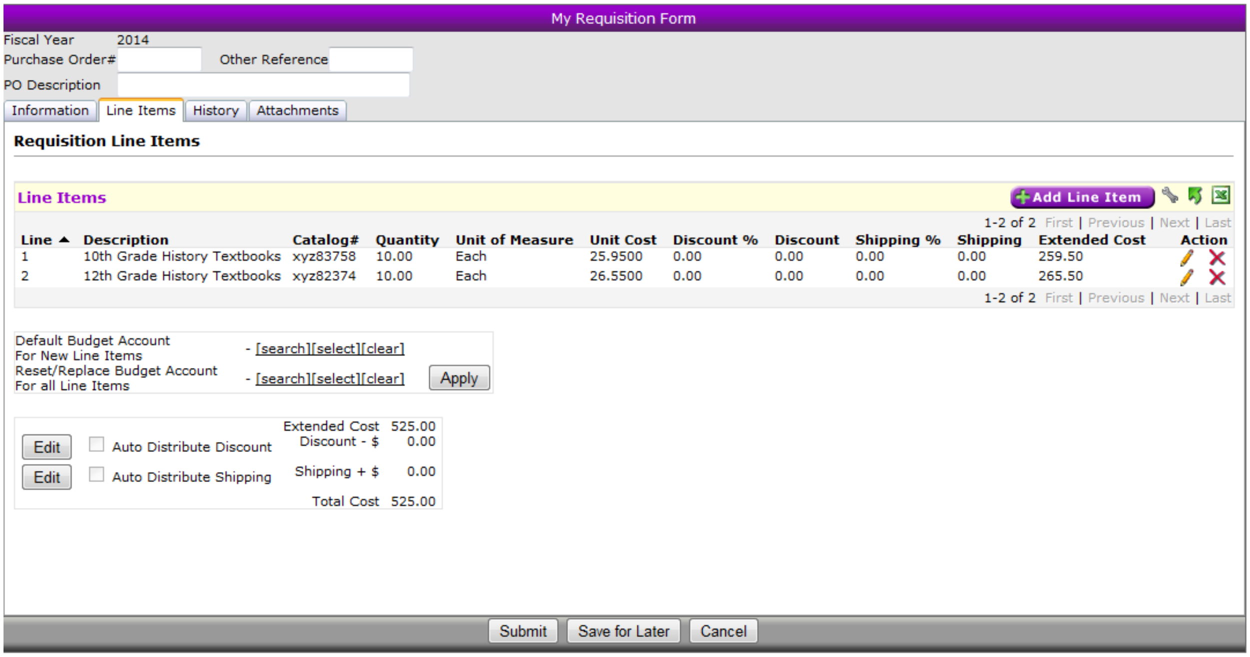
Non-bid Order Requisition Item form:



If using the Bid Order Requisition Item form, the entry of an item fills in the catalog#, Description, Unit of Measure, and Unit Cost. The user must enter the quantity and any shipping charges or discount.

If using the Non-bid Order Requisition Item form, enter a Catalog# (if known), Description, Quantity, Unit of Measure and Unit Cost. Enter a dollar or percentage amount for shipping and/or discount for this line only, as needed. Note that discounts are not allowed for bid items.

Continue to add additional line items, as needed.

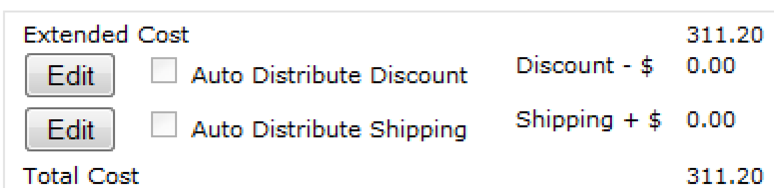


To edit or delete line item information, use the pencil or red X under the Action column.

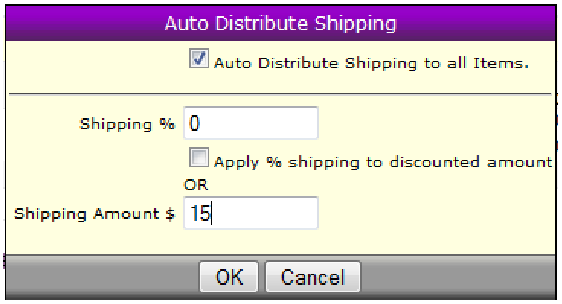
Edit –clicking on the pencil will allow the user to edit a line item.

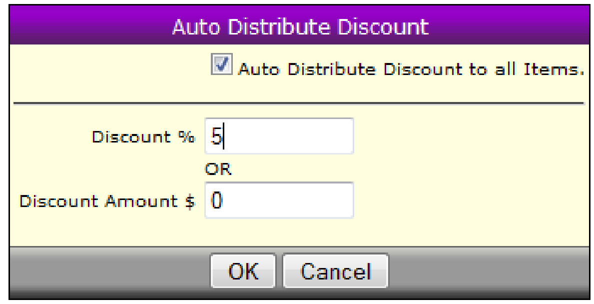
Delete – if a line item was created in error, clicking on the red X will delete the line.

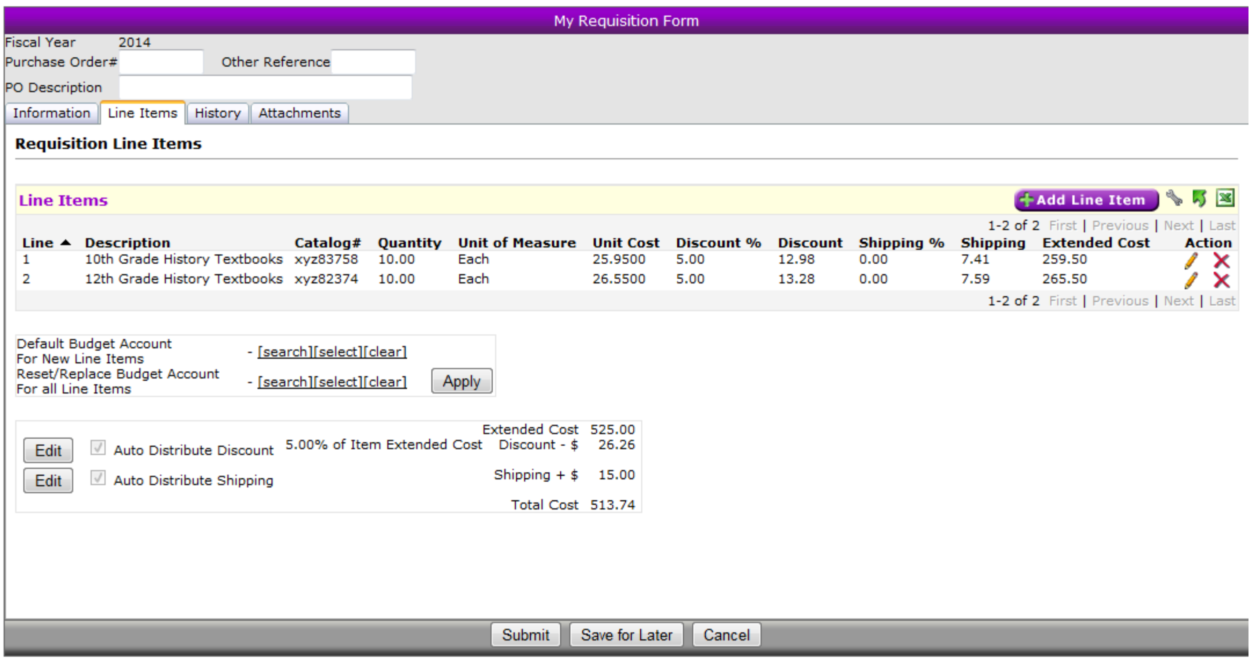
From the “Requisition Line Items” display, the Shipping/Discount can be edited/added as a percent or dollar amount to all line items.



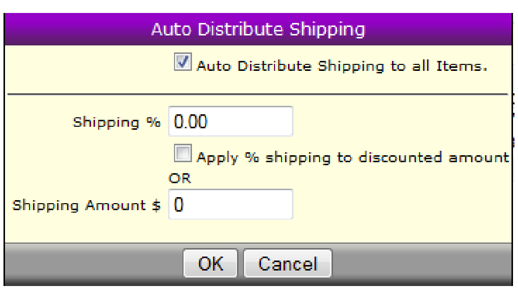
The “Edit” button opens a form that allows the user to enter or edit shipping or discount amounts. Amounts can also be entered on the individual line items and then modified in this form to be applied across all items. Lump sum amounts can be entered on either the discount or Shipping lines and shows as a lump sum if the Auto Distribute Discount to all Items is not checked. If this option is checked, then the amount entered either in percentage or dollar amount, is applied across all line items.

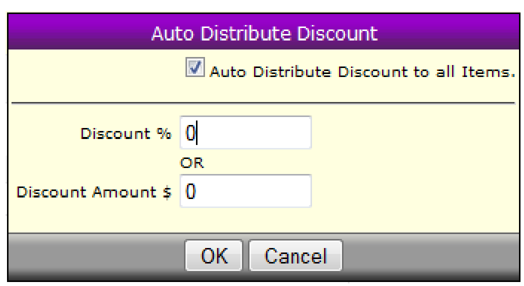




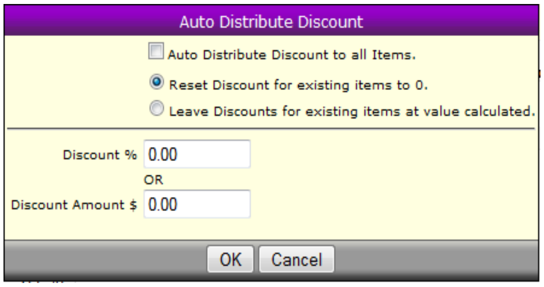


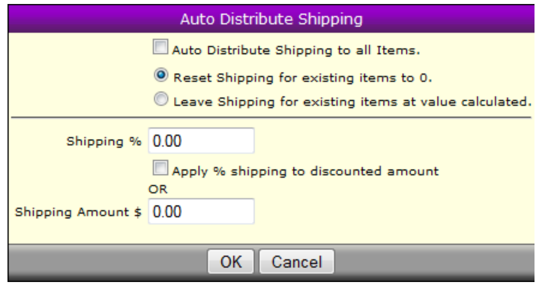
If either shipping or discount was entered in error and the amount needs to be zeroed out, click on the edit button and replace the amount entered with a 0.



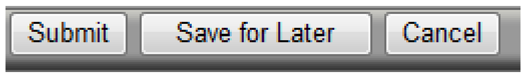


Or, if the auto distribute needs to be turned off, unchecking the option will prompt the user to either Reset the Discount for existing items to 0 or Leave the Shipping for existing items at value calculated (unchanged at the line item, but no longer auto distributing).





Submit, Save for Later, Cancel



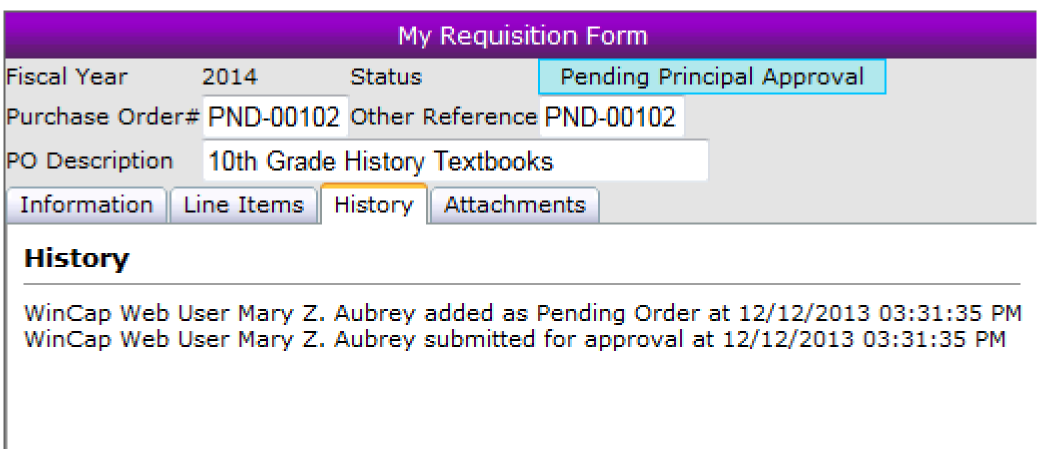
Submit – This creates the requisition in *WinCap*, at the employee level with a PND number.

Submit for Later – This saves the current requisition as an entry in progress with a PND number

Cancel – This cancels the current requisition with out saving

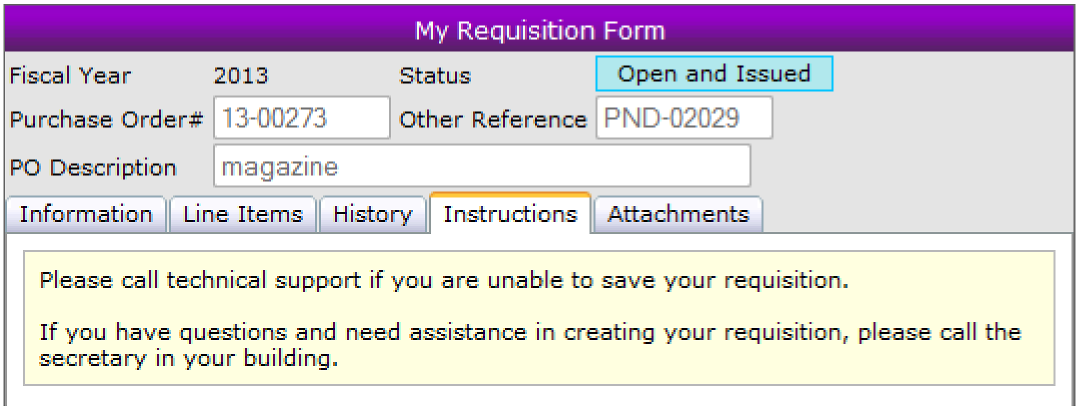
History Tab

This tab displays all transactions for the requisition number within the WEB and *WinCap*.



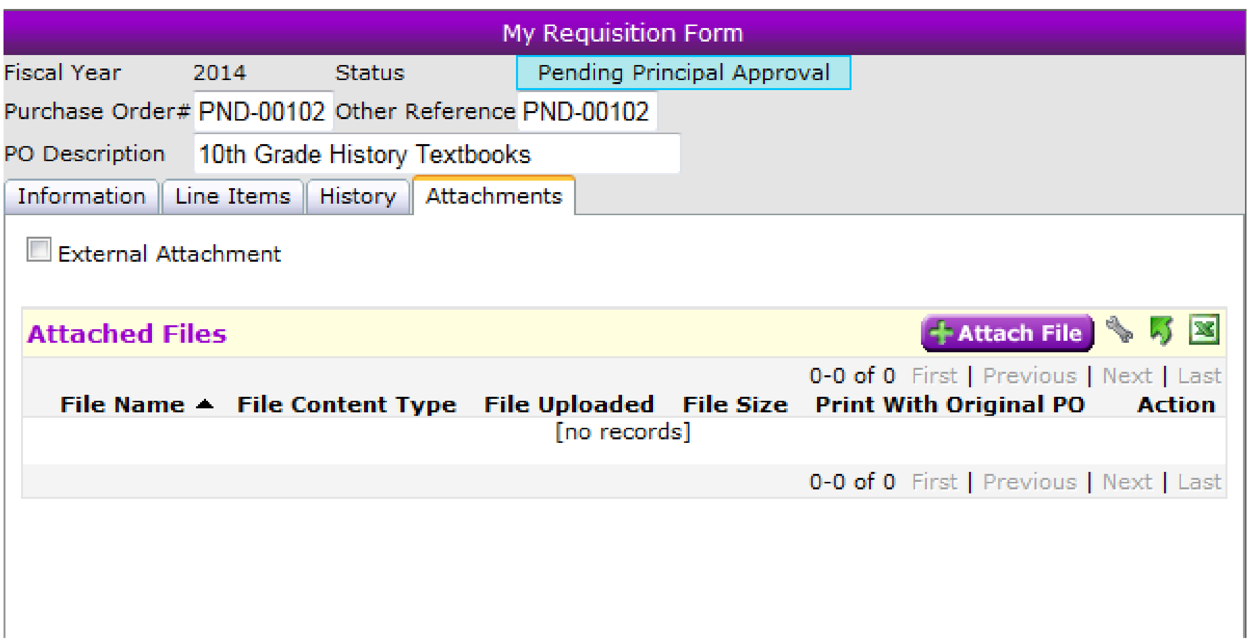
Instructions Tab

This tab appears on every requisition. Your district inserts appropriate documentation and procedures for creating WEB Requisitions, as shown in the example below:

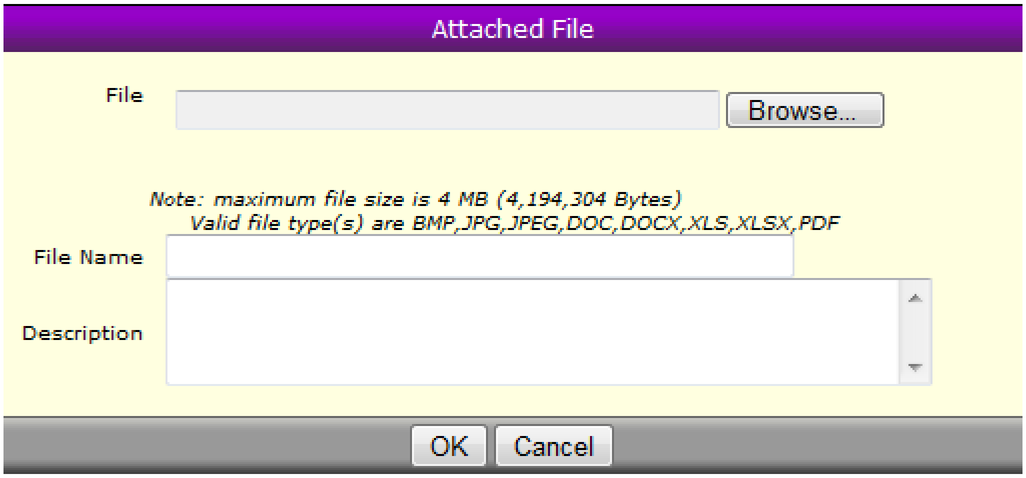


Attachments

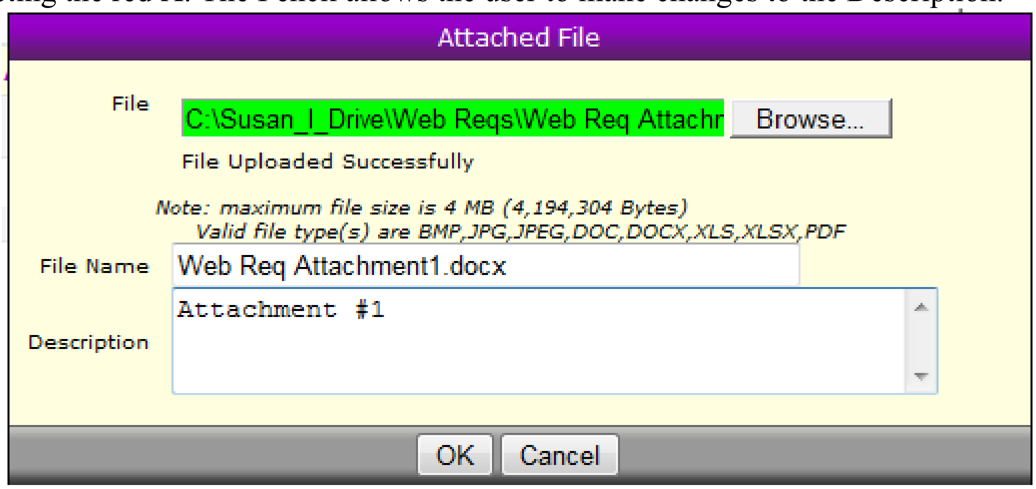
The Attachment tab allows the user to attach an actual document instead of just indicating an attachment is needed by checking the External Attachment box. When the user is ready to attach a document, click the Attach File button.

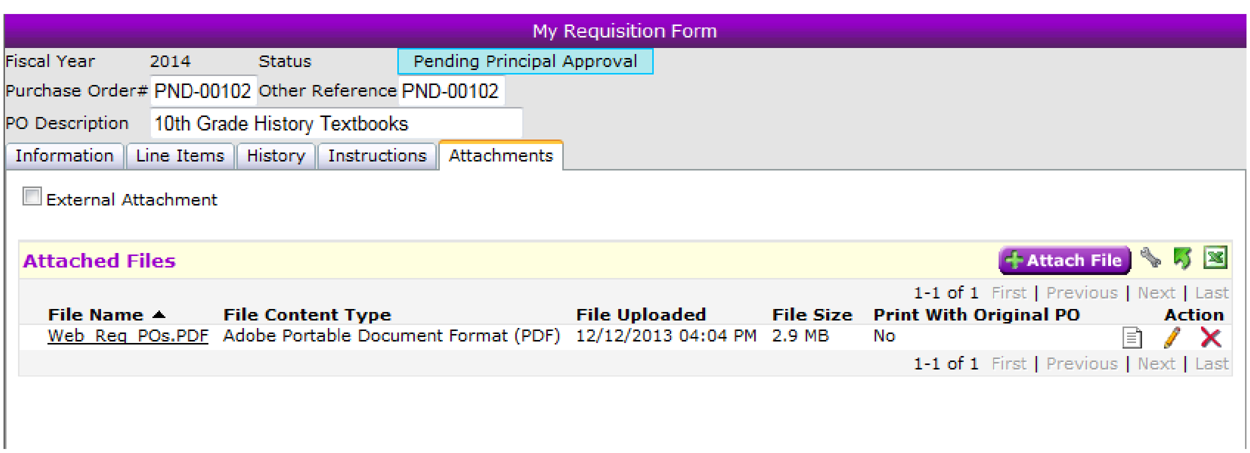


A window displays where the user can select the Browse button to find the file needed.



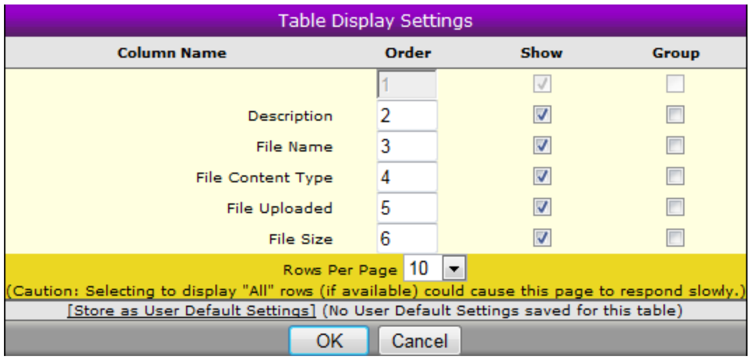
When the file is found, the user selects it by double clicking. The selected file automatically comes into the display. The user is able to add a description that allows additional information in defining the file. Multiple attachments can be added. The process can be run as many times as needed. The user can delete an attachment by selecting the red X. The Pencil allows the user to make changes to the Description.





Once the file is attached, the user is able to click on the File Name to view it; however, the file is not available for editing within Web Requisitions.

All Fields are available on the wrench to be displayed in the order required for your site.



If a requisition is submitted without an attachment, one could be added by an approver in WinCap or on the Web. If the Web Req user edits the requisition, they are able to access the attachment at that time. If the attached file is large, there may be a delay in retrieval when opening it for the first time.

When submitting the requisition to WinCap with the attachment, there could be a slight delay in downloading the attachment into WinCap. The delay is always based on the size of the file.

Note: The original External Attachment checkbox is still available for those documents that need to be attached in WinCap after the requisition is submitted.