

St. Lucie

PUBLIC SCHOOLS



Excel Training

Requisition Import
May 16, 2016

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Requisition Import

- Use the template for all imports
- Only 4 Columns of data are required
 - M/N ; Description; Quantity; Unit Cost
- **COLUMN A**
 - M/N – Stands for Merchandise or Narrative
 - (M) Merchandise – used when entering items for purchase
 - (N) Narrative – descriptive sentence(s) that should be included on the PO, but are not associated with a dollar amount.
- **COLUMN B**
 - Description of item, could be item numbers, ISBN, book titles or all of the above
 - All descriptive information has to be included in this one column
 - If needed, use concatenate to join text strings together

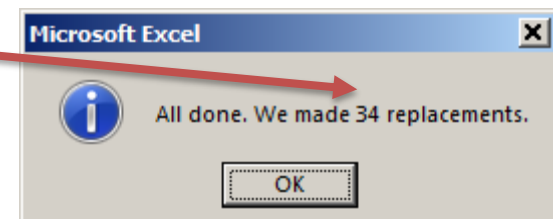
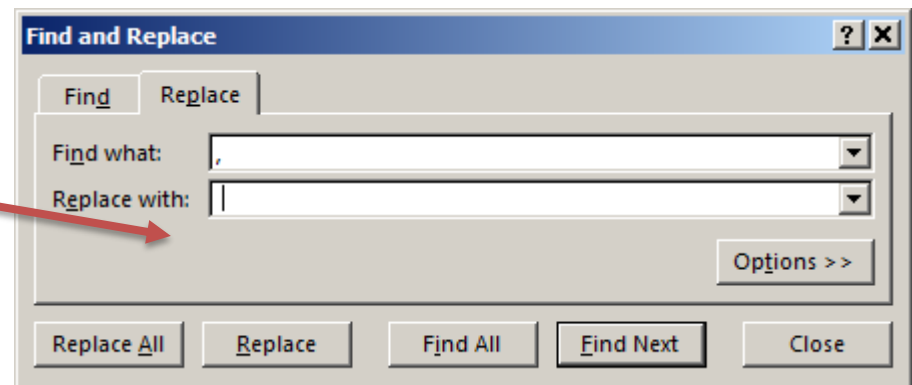
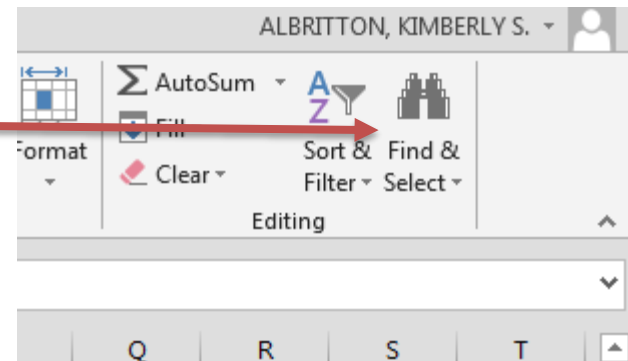
Requisition Import - Continued

- **COLUMN C**
 - Enter the Quantity for this line item.
- **COLUMN D**
 - Enter the cost per item
- The file **CANNOT** contain any commas, use the find/replace to remove commas and insert a space

Merchandise (M) or Narrative (N)	Description	Quantity	Unit Cost
M	978-1-4263-1872-6 300 Bite-Size Facts about In	1.00	16.90
M	978-0-553-49904-9 365 Days of Wonder: Mr. Br	1.00	14.99
M	978-1-4263-2452-9 5,000 Awesome Facts Abou	1.00	19.99
M	978-1-4263-1049-2 5,000 Awosome! Facts abou	1.00	19.95
M	978-1-4844-7443-3 Amelia Bedelia on the Job	1.00	13.95
M	978-1-4965-0220-9 Attack of the Mud Creature	1.00	19.49
M	978-1-59889-325-0 Attack of the paper bats	1.00	17.49
M	978-1-101-93485-2 Auggie & Me: Three Wonde	1.00	16.99
M	978-1-4342-3772-9 Avalanche Alert	1.00	18.49
M	978-1-4844-7213-2 Battle for the Nether	1.00	20.95
M	978-0-375-85860-4 Bear Ate Your Sandwich	1.00	16.99
M	978-1-59889-323-6 Beast Beneath the Stairs	1.00	17.49
M	978-1-4844-7726-7 Beneath	1.00	16.95
M	978-1-4494-2043-7 Big Nate and Friends	1.00	20.95
M	978-0-06-211111-1 Big Nate Blasts Off	1.00	13.99
M	978-0-06-199661-0 Big Nate Goes for Broke	1.00	12.99
M	978-0-06-199665-8 Big Nate in the Zone	1.00	13.99
M	978-0-06-211108-1 Big Nate Lives It Up	1.00	13.99
M	978-0-06-194438-3 Big Nate on a Roll	1.00	12.99
M	978-1-4494-0718-6 Big Nate Out Loud	1.00	20.95

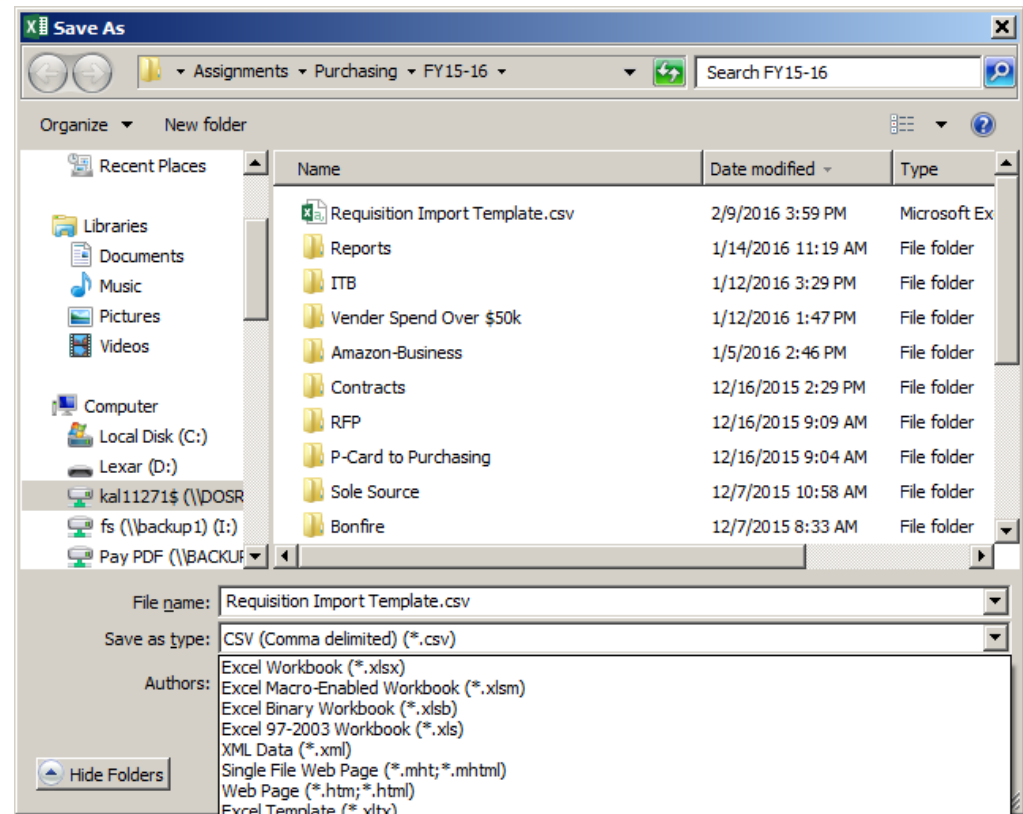
Requisition Import - Continued

- Click Find & Select, then click Replace.
- In “Find What” enter a comma (,)
- In “replace with”, click in the white box and hit the space bar one time.
- Click replace all
- Excel will show how many commas were removed



Requisition Import - Continued

- Once all items/columns are entered, click File, Save As
- Enter the File Name
- On the “Save as Type” click the drop down and select CSV (comma delimited) (*.csv)



Requisition Import - Continued

- Go into Skyward and click “add” in requisitions
- Select All info (as normal) on the first Requisition screen (requisition master information)
- Click Save and Import Detail Lines

RQ - 10740 - 05.16.02.00.08 - Internet Explorer

ice=wsFin/foreqmast001.w?isPopup=true

Accounting

115 - June 30, 2016

requisition amount (YMA).

requisition detail line (YDA).

Save and Add Detail

Save and Import Detail Lines

Back

S PO BOX 98581 CHICAGO IL 60693-8581

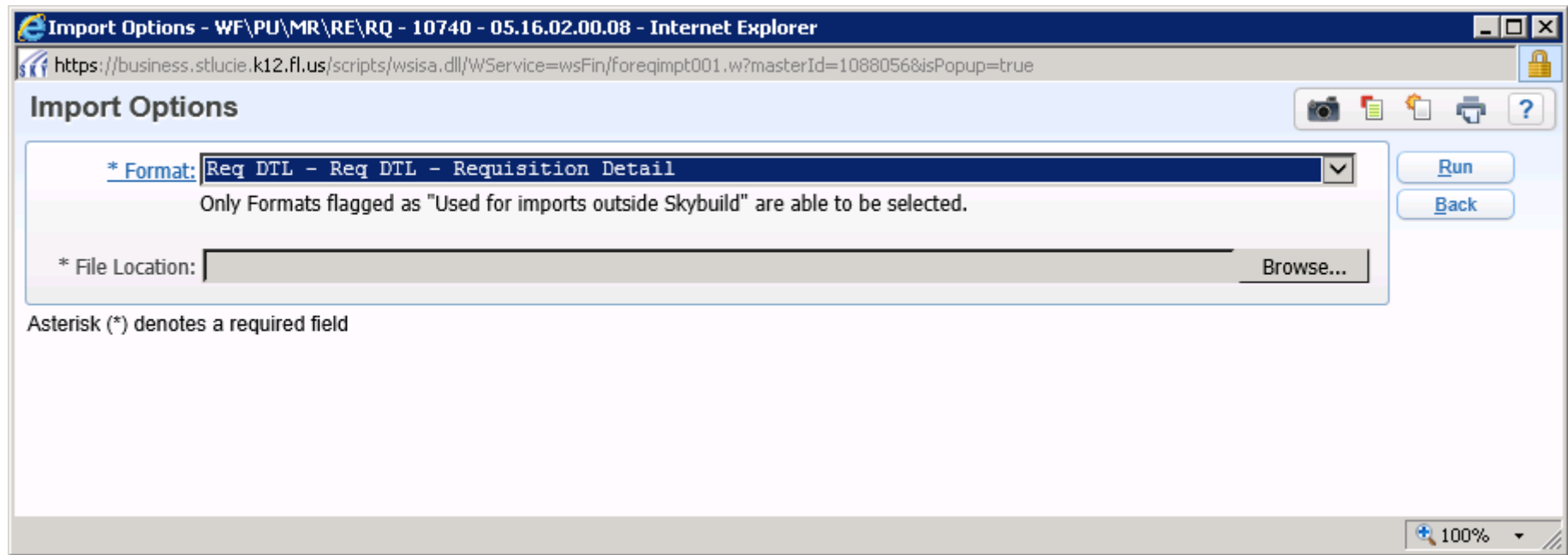
10680 ACADEMIC WAY PORT ST. LUCIE FL 3498

Schools 4204 Okeechobee Rd. Ft. Pierce, FL 34

100%

Requisition Import - Continued

- The below screen will appear



The screenshot shows a web browser window titled "Import Options - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer". The address bar shows a URL from business.stlucie.k12.fl.us. The page title is "Import Options". The form contains a dropdown menu for "Format" with the selected value "Req DTL - Req DTL - Requisition Detail". Below the dropdown is a note: "Only Formats flagged as 'Used for imports outside Skybuild' are able to be selected." There is a required field for "File Location" with a "Browse..." button. On the right side of the form are "Run" and "Back" buttons. At the bottom left, a note states: "Asterisk (*) denotes a required field". The browser status bar at the bottom right shows "100%".

Import Options - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer

https://business.stlucie.k12.fl.us/scripts/wsisa.dll/WSservice=wsFin/foreqimpt001.w?masterId=1088056&isPopup=true

Import Options

* Format: Req DTL - Req DTL - Requisition Detail

Only Formats flagged as "Used for imports outside Skybuild" are able to be selected.

* File Location: Browse...

Asterisk (*) denotes a required field

Run Back

100%

- Browse to the file you saved (as a CSV) and select it, then click open

Requisition Import - Continued

- Click Run

Import Options - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer

https://business.stlucie.k12.fl.us/scripts/wsis.dll/WService=wsFin/foreqimpt001.w?masterId=1088056&isPopup=true

Import Options

* **Format:** Req DTL - Req DTL - Requisition Detail

Only Formats flagged as "Used for imports outside Skybuild" are able to be selected.

* **File Location:** H:\My Documents\Assignments\Purchasing\FY15-16\Import Templates\Requisition Import Template-REE.csv Browse...

Asterisk (*) denotes a required field

Run Back

100%

- Allow the process to run, once it is done you should see this:

Request Complete

Requisition Detail Line Import for PO ID: 1088056 has finished processing.

View Report Back

Requisition Import - Continued

- Click View Report
- You need to view (and save this report if you see any error messages)

The screenshot shows a web browser window with the address bar displaying a URL from business.stlucie.k12.fl.us. The page content includes a header with the following information:

1impttool001.p 28-2 05.16.02.00.07	St. Lucie School District Req DTL Import Report	05/13/16	Page:1 3:34 PM
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Below the header, the report content is as follows:

File Information
C:\fakepath\Requisition Import Template-REE.csv (Requisition Import Template-REE.csv) ==> Imported

Errors for Req DTL - C:\fakepath\Requisition Import Template-REE.csv

Line #	Value	Error Message
--------	-------	---------------

Update Counts for Req DTL - C:\fakepath\Requisition Import Template-REE.csv

Lines with Errors:	0
Record(s) Created:	152
Record(s) Updated:	0
Record(s) Unchanged:	0

Line(s) Imported:	152

***** End of report *****

At the bottom of the browser window, there is a navigation bar with icons for back, forward, and search, along with a page indicator showing '1 / 1'.

Requisition Import - Continued

- What your requisition should look like:

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.16.02.00.08 - Internet Explorer
https://business.stlucie.k12.fl.us/scripts/wsisa.dll/WService=wsFin/foreqdetl001.w?importdetail=yes

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information
Batch Number: **WEBREQ**
Requisition Number: **0001088056**
Group: **(020) Palm Point K-8**
Fiscal Year: **2015 - 2016**
Vendor: **FOLLETT EDUCATIONAL SERVICES**
PO BOX 98581
CHICAGO IL 60693-8581
Invoice To: **(Default) St. Lucie Public Schools 4204**
Okeechobee Rd. Ft. Pierce, FL 34947-5414

Accounting: **Account allocation by total requisition amount.**
Amount: **2,694.53**
Ship To: **PALM POINTE**
Description: **TEST**

[Edit Master](#)
[Notes](#)
[Attachments](#)

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

Requisition Detail Line Items

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

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc	Original Unit Cost	T
100		978-1-4263-1872-6 300 Bite-Size Facts about Incredible Edibles!	1		16.90000	16.90		0		
110		978-0-553-49904-9 365 Days of Wonder: Mr. Browne's Book of Precepts	1		14.99000	14.99		0		
120		978-1-4263-2452-9 5 000 Awesome Facts About Everything!	1		19.99000	19.99		0		
130		978-1-4263-1049-2 5 000 Awesomel Facts about Everything!	1		19.95000	19.95		0		
140		978-1-4844-7443-3 Amelia Bedelia on the Job	1		13.95000	13.95		0		
150		978-1-4965-0220-9 Attack of the Mud Creatures	1		19.49000	19.49		0		
160		978-1-59889-325-0 Attack of the paper bats	1		17.49000	17.49		0		
170		978-1-101-93485-2 Auggie & Me: Three Wonder Stories	1		16.99000	16.99		0		
180		978-1-4342-3772-9 Avalanche Alert	1		18.49000	18.49		0		
190		978-1-4844-7213-2 Battle for the Nether	1		20.95000	20.95		0		
200		978-0-375-85860-4 Bear Ate Your	1		16.99000	16.99		0		

[Add](#)
[Edit](#)
[Delete](#)
[Mass Add Detail](#)
[Add Requisition Accounts](#)
[Import Detail Lines](#)

Requisition Import - Continued

- Checks and Balances
 - Your requisition total MUST match the total on your quote.
 - If they don't match, something did not import
- Once your items are all entered, add requisition accounts and continue the requisition like normal.