

LEON COUNTY SCHOOL DISTRICT



SKYWARD USERS MANUAL

**LEON COUNTY SCHOOL DISTRICT
PURCHASING / RECEIVING**



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Chapter 1. Requisitions

This chapter describes how to create requisitions using the Requisitions Main Screen from the SKYWARD web client. Initially access to create requisitions will be limited to the Bookkeeper or other designated staff.

What is Requisition Entry?

Requisition Entry allows users to enter requests for items that they would like to have purchased. These requests follow an approval chain, eventually turning fully approved requisitions into Purchase Orders.

When would I use Requisition Entry?

This area would be used whenever you need an item purchased that requires approval.

Overview

The high-level processes required to create a requisition are outlined below.

Step 1: [Navigate to the Requisitions Main Screen](#)

Step 2: Add a New Requisition

Step 3: Enter Master Requisition Information

Step 4: Enter Requisition Information

Step 5: Add Requisition Detail Lines

Step 6: Add Requisition Accounts Distribution

Step 7: Submit for Approval

Step 1: Navigate to Requisitions Main Screen

Click on Financial Management (FM),
Purchasing (PU), Requisitions (RE)

💡 **Breadcrumbs: FM/PU/RE**

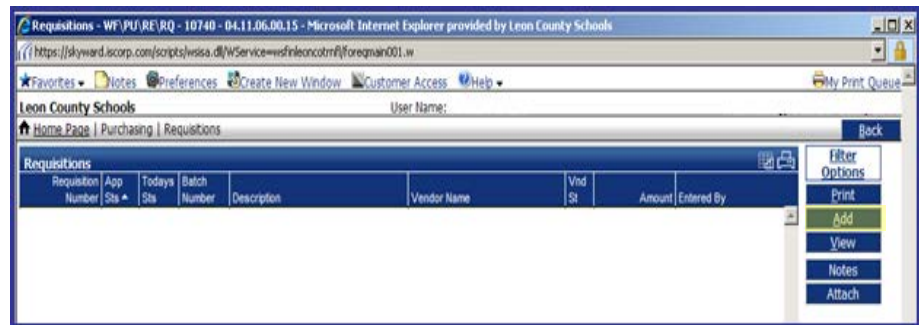
The **Requisitions Main** screen opens.



Step 2: Add a New Requisition

Click **[Add]** from the
Requisitions Main Screen to
add a new requisition

The **Requisition Master
Information** Screen opens.



Step 3: Enter Master Requisition Information

FIELD	FIELD DESCRIPTION
Requisition Group	The dropdown list contains a list of all Cost Centers that you have rights to create *requisitions for. *If the requisition requires an ERF then select the appropriate group that contains ERF required in the title i.e. Leon and Leon ERF REQ
Fiscal Year	Defaults to the current Fiscal Year
Account allocation by total requisition amount (YMA)	Indicates that the accounting to pay this Purchase Order will be based on the total amount of the PO.
Account allocation by each requisition detail line (YDA)	Indicates that the accounting to pay this Purchase Order will be designated for each line item detail on the PO. Accounting has to be added for each item purchased
This is a Blanket Requisition\PO	Select this option to enter Blanket PO's
Description	Generic description describing the contents of the requisition
Batch Number	Enter your Cost Center Number
Vendor	Click the dropdown to select a Vendor. Be sure to select the ORDER

FIELD	FIELD DESCRIPTION
	FROM Vendor
Ship To	Click the drop down to select a location to ship to Will be setup to default to the Cost Center; can be edited.
Attention	Defaults to Bookkeeper Name
Due Date	Defaults to today's date
Ship Date	Defaults to today's date
Ship Via	Preferred shipping method (UPS, FedEx, Freight, Standard, etc.)
Project Grant	N\A
Contract	N\A

💡 Required fields are marked with an (*).

Click the **[Save and Add Detail]** button to add individual line items to the requisition one at a time or **[Save and Mass Add Detail]** to add line items in groups of five at a time to the requisition.

The **Requisition Detail Lines\Accounting** screen opens.

Step 4: Add Requisition Detail Lines

Enter the following information on **Requisition Detail Lines\Accounting** screen

FIELD	FIELD DESCRIPTION
Line Number	The requisition group to use. The dropdown list contains a list of all Cost Centers that you have rights to

FIELD	FIELD DESCRIPTION
	create Requisitions for.
Line Type	Merchandise – An item that you are ordering. Narrative – A text line that will print at the bottom of the PO.
Catalog	N\A
Quantity	Total number ordered
Unit of Measure	Can be entered or selected from a lookup table; HRS, BOX, LBS, etc.
Unit Cost	Cost per unit of measure
Total Amount	Calculated based on Quantity x Unit Cost
Description	Line Item Description

Click **[Save]** to add the line item.

The information is added to the **Requisition Detail Lines\Accounting** screen as depicted below.

Click **[Add]** to add additional line items one at a time.

Click **[Edit]** to edit the selected line item

Click **[Delete]** to delete the selected line item

Click **[Mass Add]** to add additional line items in groups of five at a time

Click **[Save and Finish Later]** to save your work to be completed at a later time

Once all line items are entered, accounting information can be entered.

Click **[Add Requisition Accounts]** to add account details to the requisition.

The following **Account Distribution** screen opens.

Add Requisition Account Distribution

OVERVIEW

	Fund	Type	Func.	Object	Facility	Project	Sub-Project	Program
OLD	110	E	5100	3900	0021	23019	00000	05100
NEW	1100	E	5100	3900	0021	23019	00000	05100

Account Distribution - WF\PU\RE\RQ - 10740 - 04.11.06.00.15 - Windows Internet Explorer

https://skyward.iscorp.com/scripts/wsa.dll/WService=wsfinleoncotrnl/facctmdist001.w?isPopup=true

Home Page | Requisitions | Requisition Master Information | Requisition Detail Lines/Accounting | Account Distribution

Available Accounts - Available Accounts for Clearance Group 0051 RICKARDS HIGH SCHOOL

Fnd	T	Func	Obj	Fac	Proj	Subpr	Prog	Funds Available	Selected
1100	E	7800	5200	0051	00000	00000	00000	\$29,445.00	<input checked="" type="checkbox"/>
1100	L	0000	0000	0000	00000	00000	00000		<input type="checkbox"/>
1100	Q	0000	0000	0000	00000	00000	00000		<input type="checkbox"/>
8910	A	0000	0000	0021	00000	00000	00000		<input type="checkbox"/>
8910	A	0000	0000	0031	00000	00000	00000		<input type="checkbox"/>
8910	A	1110	0000	0031	00000	00000	00000		<input type="checkbox"/>
8910	A	1110	0000	0041	00000	00000	00000		<input type="checkbox"/>
8910	A	1110	0000	0451	00000	00000	00000		<input type="checkbox"/>
8910	A	1110	0000	0501	00000	00000	00000		<input type="checkbox"/>
8910	A	1110	0000	0531	00000	00000	00000		<input type="checkbox"/>
8910	A	1113	0000	0451	00000	00000	00000		<input type="checkbox"/>

26 records displayed

Account Number:

Quick Key:

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

Selected Accounts

Account Number	Amount	Percent
1000E7800 5200 0051 00000 00000 00000	100.00	100.00

Remove
Remove All

Account Number Information

Code	Description
1000	GENERAL FUNDS
7800	PUPIL TRANSPORT SERVICES
5200	TEXTBOOKS
0051	RICKARDS HIGH SCHOOL
00000	BASE BUDGET
00000	PRIM
00000	BUD

Check Spelling
Save Account Distrib
Back

Click Save Account Distrib

Select Account from Available Accounts

Done Internet | Protected Mode: Off 75%

The Available Accounts section displays all accounts that you have access to. Select the appropriate account to allocate funds.

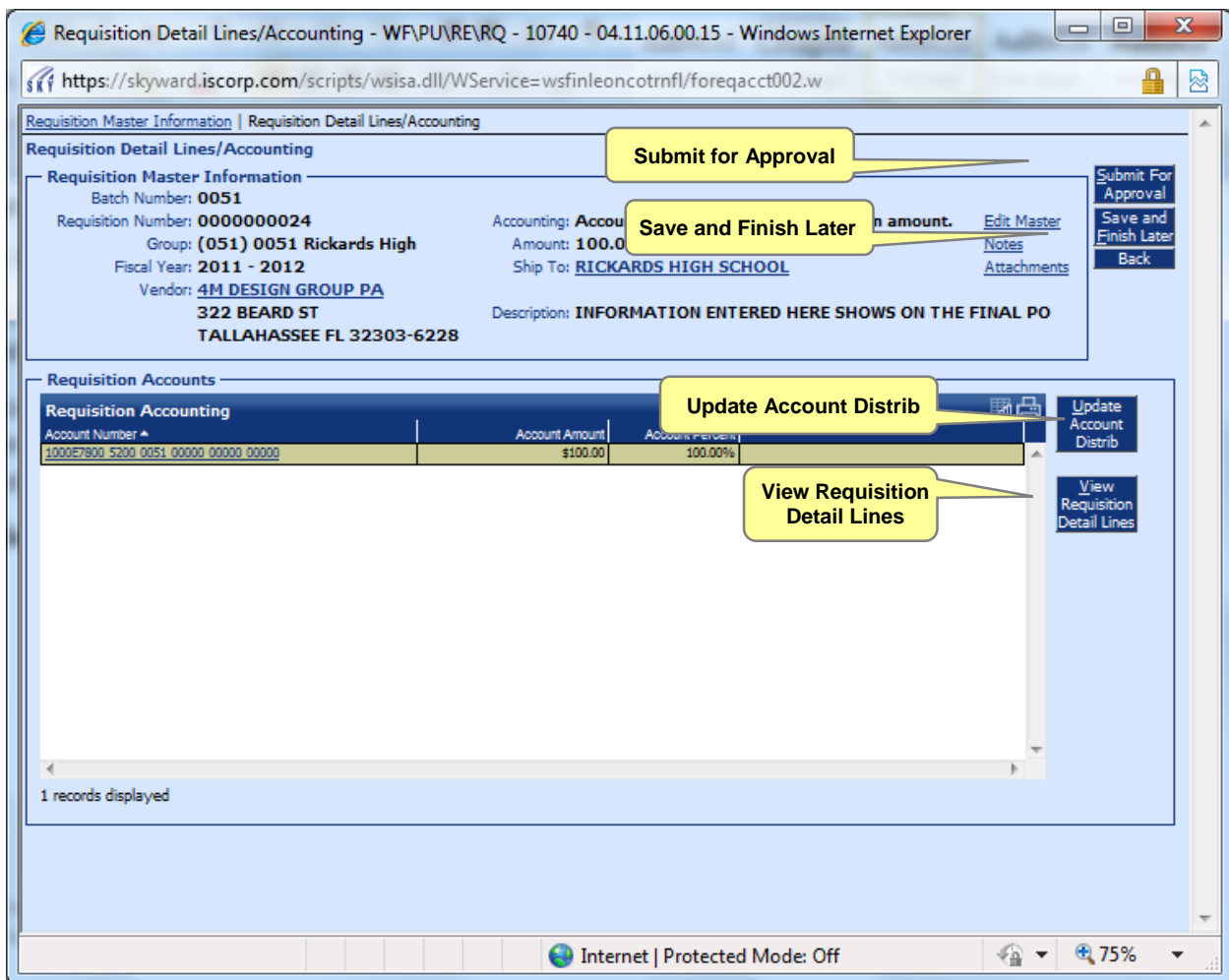
💡 More than one account can be selected.

The Account Number Information Section displays accounting information about the selected account.

The account can be distributed by amount or percentage across all selected accounts.

💡 The percentage must equal 100, or the total amount allocated across the selected accounts must equal the requisition amount.

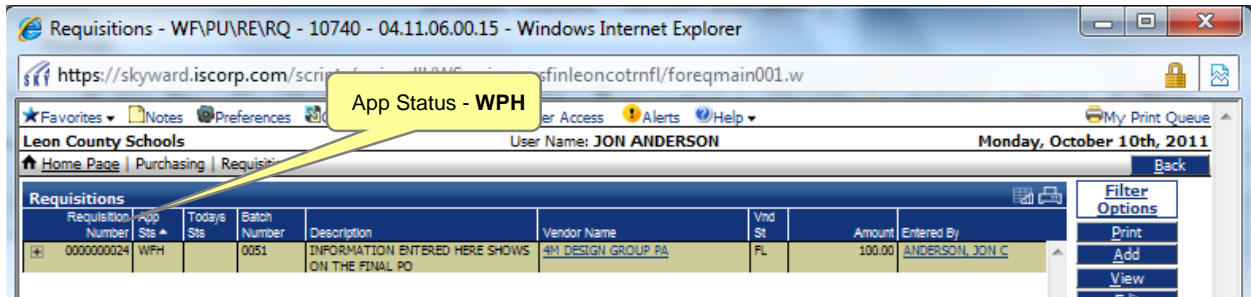
Click [**Save Account Distrib**] to save the account distribution and return to the **Requisition Detail Lines\Accounting** screen shown below.



Click the [**Submit for Approval**] button to route the requisition to the Principal\Director for approval.

You will be returned to the **Requisitions Main** screen which now shows the requisition with a status of WPH-Waiting for Higher approval.

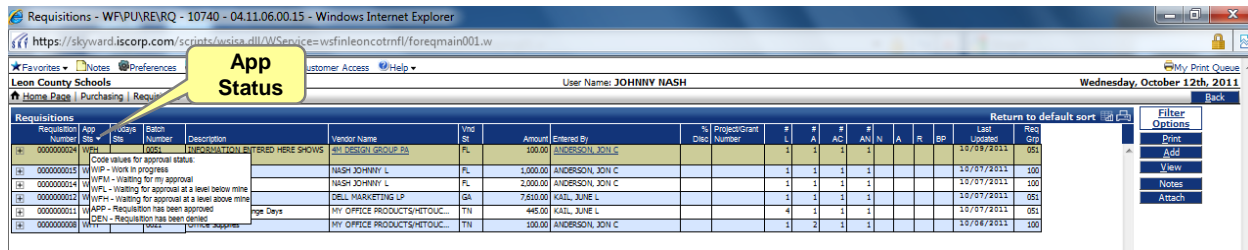
- 💡 If you decide to click **[Save and Finish Later]** you will be returned to the **Requisitions Main** screen and the requisition would have a status of WIP – **Work in Progress**.
- 💡 See a full list of status codes explained later in this section.



Your role is now complete until the requisition is approved and becomes a Purchase Order.

To view a list requisition status codes:

Click the **Drop down Arrow** located in the upper right corner of the App Status column.

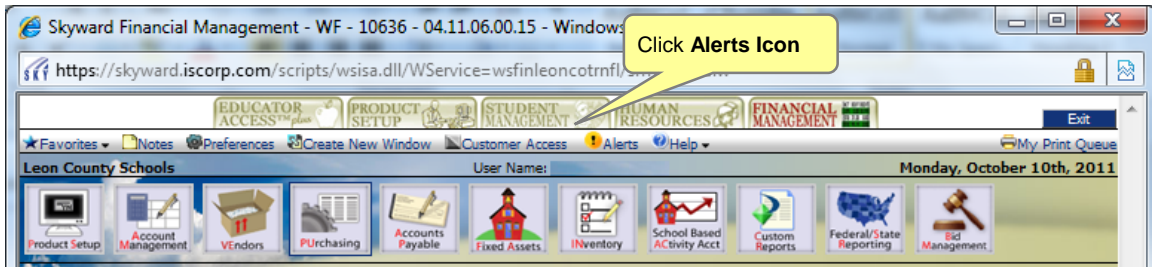


The following list of various approval statuses is displayed.

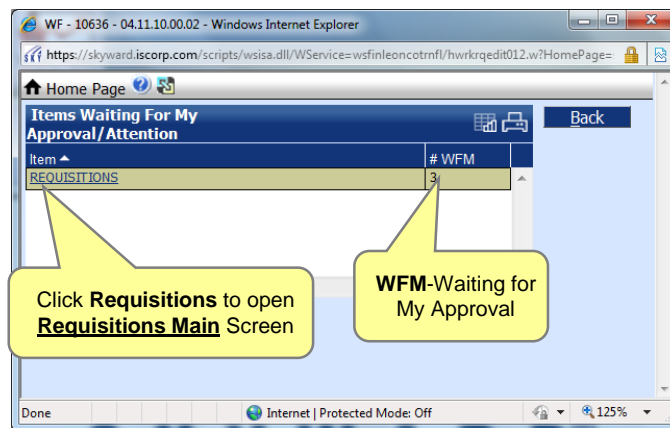
Code Values for approval status:	
WIP	Work in progress
WFM	Waiting for my approval
WFL	Waiting for approval at a level below mine
WFH	Waiting for approval at a level above mine
APP	Requisition has been approved
DEN	Requisition has been denied

Chapter 2. Approving a Requisition

The approval process in Skyward is multifaceted. Preferences can be set to notify approvers via email when requisitions are waiting for their approval. The alerts icon on the Skyward Main Screen indicates that there are requisitions awaiting your approval. The **Requisitions Main** Screen displays the current status of any requisition that you are a part of the approval workflow.



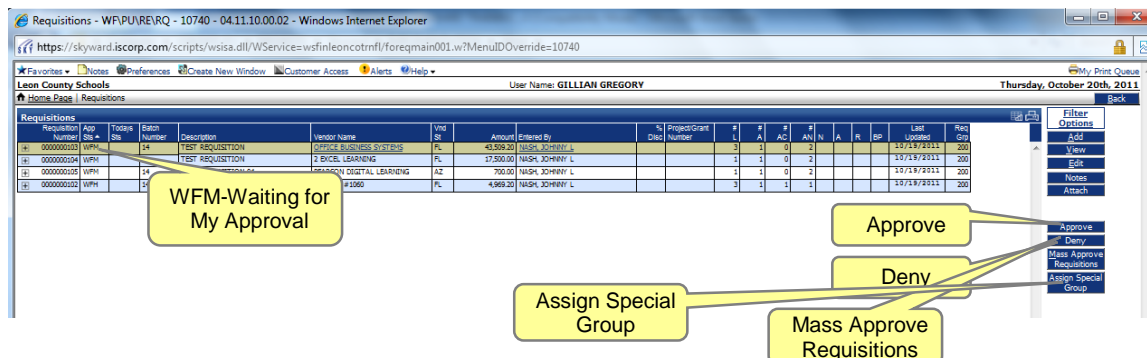
Click the [Alerts] icon from the Main Window to open the following window - “Items Waiting for My Approval/Attention”.



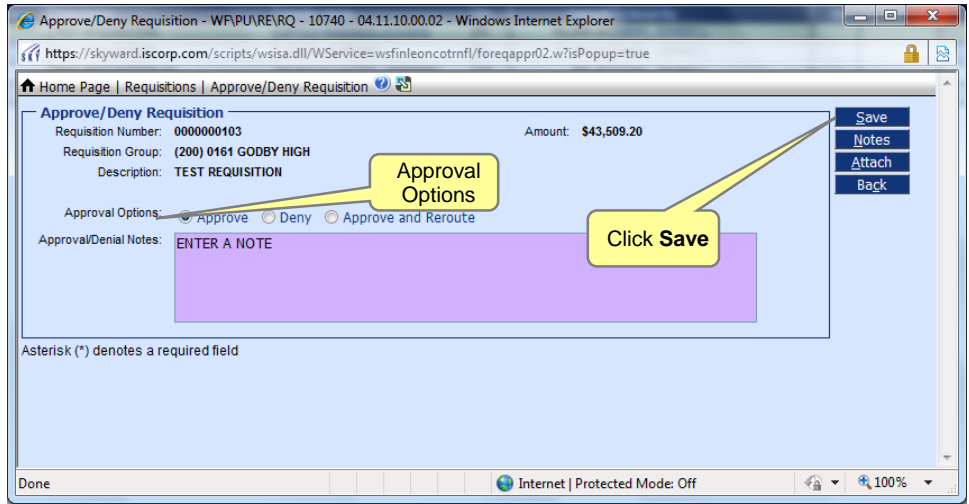
Click the Requisitions line to open the “Requisitions Main” Screen.

*Note the status “WFM”

The “Requisitions Main” screen contains all requisitions with requisitions needing my approval\attention listed first.

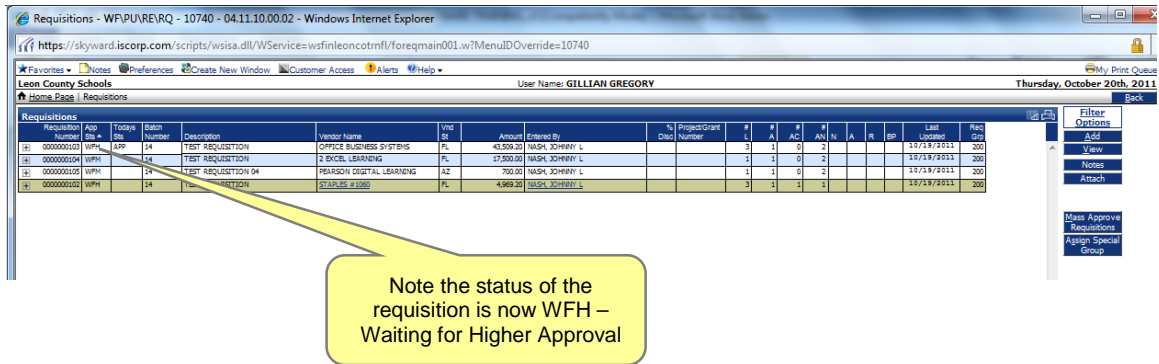


Click the **[Approve]** button to access the “Approve/Deny Requisition” screen



Click the **[Approve]** radio button and enter a note.

Click **[Save]** to exit and return to the “Requisitions Main” screen



Chapter 3. Delete a Requisition

The screenshot shows a web browser window displaying a requisition management interface. The browser title is "WF\PU\REVRQ - 10740 - 04.09.06.02.02 - Windows Internet Explorer". The page header includes "Skyward School District", "User Name: Ron Burgundy", and "Thursday, December 17th, 2009". The main content area features a table of requisitions and a "Confirm Delete" dialog box.

Requisition Number	App Sts	Today's Sts	Description	Vendor Name	Vnd St	Amount	Entered By
0000003080	WIP		Email PO test	Abbott	WI	30.00	Burgundy

1. Click Delete to remove a requisition.

2. Click Yes to confirm.

Confirm Delete
Are you sure you wish to delete this record (0000003080 Email PO test)?

Yes No

1 records displayed

Requisition Number:

Chapter 4. Clone a Requisition

The screenshot shows a web browser window displaying a requisition management system. The browser title is "WFPUREVRQ - 10740 - 04.09.06.02.02 - Windows Internet Explorer". The page header includes "Skyward School District", "User Name: Ron Burgundy", and "Thursday, December 17th, 2009".

The main content area shows a table of requisitions:

Requisition Number	App Sts	Today's Sts	Description	Vendor Name	Vnd St	Amount	Entered By
0000003080	WIP		Email PO test	Abbott	WI	30.00	Burgundy, R

A yellow callout box with the text "1. Click Clone to clone a requisition." points to the "Clone" button in the "Filter Options" menu for the first requisition.

Below the table, the "Requisition Master Information" form is displayed. A yellow callout box with the text "2. You have created a clone of the original requisition." points to the "Description" field, which contains "Email PO test".

The form includes the following fields:

- Requisition Group: 000 - another test
- Fiscal Year: 2009 - 2010 July 1, 2009 - June 30, 2010
- Account allocation by total requisition amount (selected)
- Account allocation by each requisition detail line (unselected)
- This requisition is used to restock a warehouse (unselected)
- * Description: Email PO test
- * Vendor: Abbott 1512 10th PO BOX 1606 Hatley WI 54440
- * Ship To: Ostrowscr Lawrence S 183 Scramble avenue ANYWHERE WI 55555
- Invoice To: (Default) Invoice To: School District of Bloomer 1310 17th Ave Bloomer, WI
- Attention: Ron Burgundy
- * Due Date: 11/19/2009 Thursday
- Ship Date: 11/19/2009 Thursday
- Ship Via: [empty]

Chapter 5. Attach a Note to the Requisition

The image shows two overlapping browser windows from a Windows Internet Explorer. The top window displays a requisition list with the following data:

Requisition Number	App Sts	Today's Sts	Description	Vendor Name	Vnd St	Amount	Entered By
0000003080	WIP		Email PO test	Abbott	WI	30.00	Burgundy, Ron

A yellow callout box points to the 'Notes' button in the 'Filter Options' menu, containing the text: "1. Click Notes to attach a note to your requisition."

The bottom window shows the 'Add/Edit Note for Requisition# 0000003080' form. The form contains the following fields and values:

- Note Category: TEST NOTE
- Entered Date: 12/17/2009
- Entered Time: 4:30 PM
- Entered By: Burgundy, Ron
- Note: Test Note

A yellow callout box points to the 'Note' text area, containing the text: "2. Enter any note information to attach to a requisition."

At the bottom of the form, there is a checkbox for 'Protected (Read only to all users except the user that entered it.)' and a note: "Asterisk (*) denotes a required field".

Chapter 6. Receiving

The following chapter explains how merchandise and services are received in SKYWARD.

When would you add a receiving record?

You would add a receiving record when you receive items from your PO.

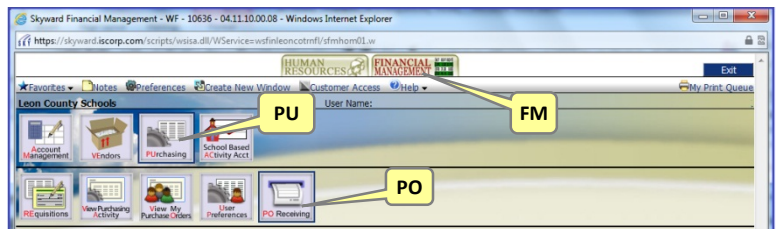
Why would you add a receiving record?

You would add a receiving record to keep track of what has been received compared to how much was ordered.

Step 1: Navigate to the Receiving Screen

Click on Financial Management (FM),
Purchasing (PU), PO Receiving (PO)

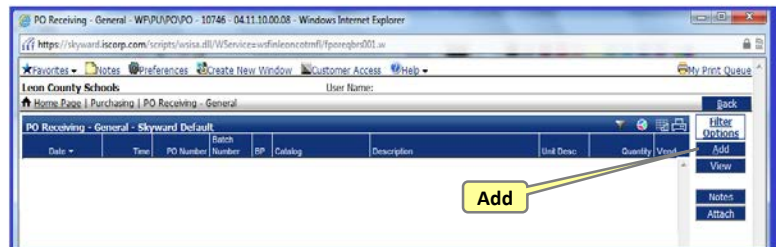
 **Breadcrumbs: FM\PU\PO**



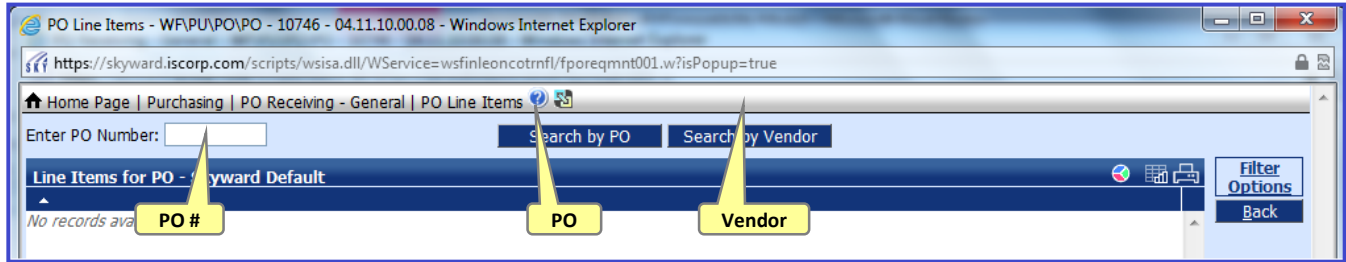
Step 2: Add a Receiving Record

The **PO Receiving – General** screen opens.
The PO Receiving screen lists previous
receiving records added by you.

Click Add to add a new receiving record.



The **PO Line Items** screen opens

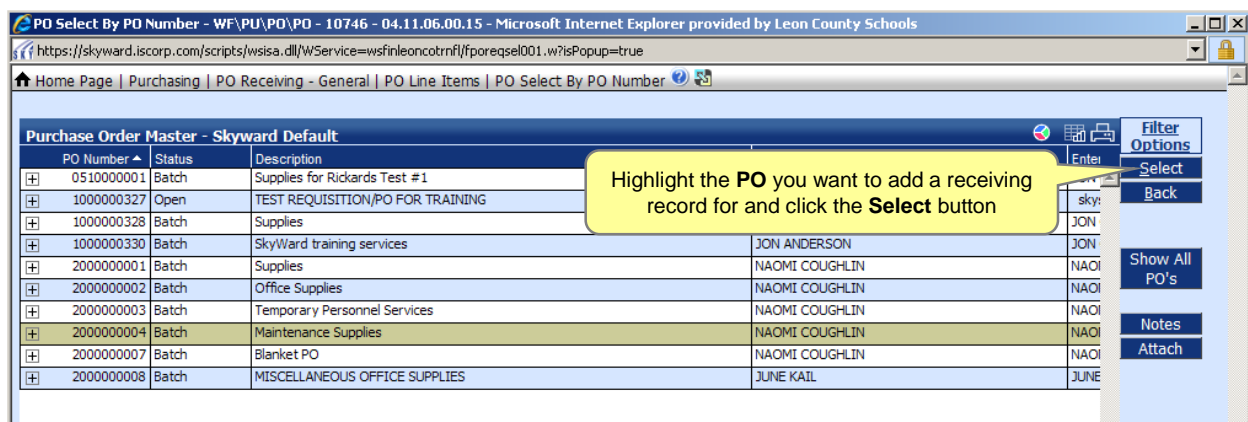


To begin the receiving process you must first find the Purchase Order that you want to add a receiving record for.

You can search for PO's by PO Number, Vendor or by viewing all PO's.

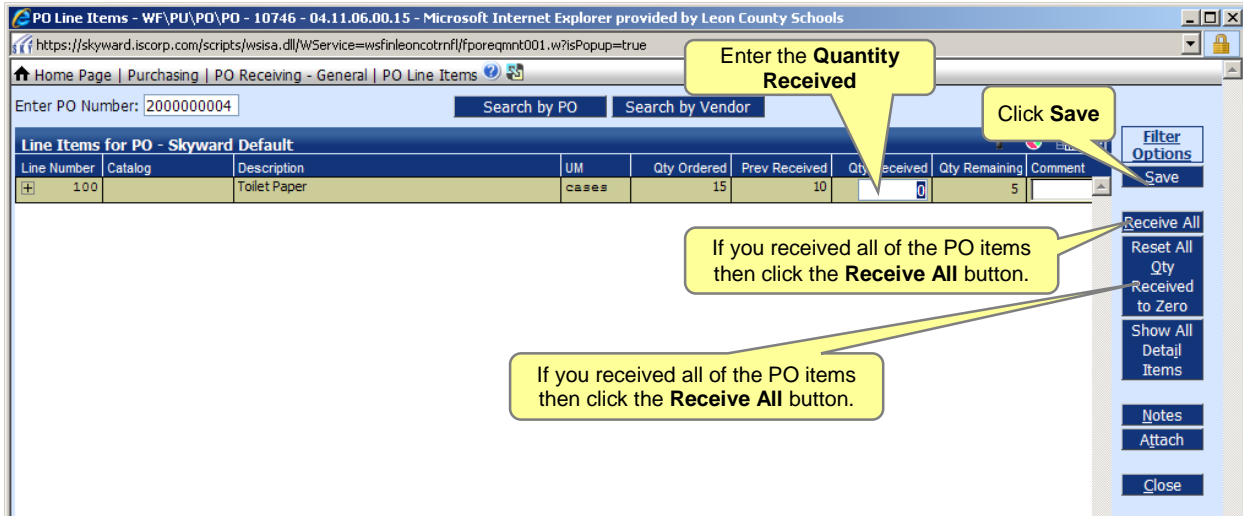
Click **[Search by PO]**

The **PO Select by PO Number** screen is displayed containing all of your open Purchase Orders



Highlight the PO that you want to add a receiving record for:

Click **[Select]** to open the **PO Line Items** screen



Line Number, Catalog, Description, Unit of Measure (UM), Qty Ordered and Previous Received are all pre-populated from the Purchase Order and existing receiving records.

Enter the quantity received in the Qty Received field.

- 💡 You cannot receive more than the Qty Remaining. The Qty Remaining will update as you enter values.
- 💡 If you have received all items on the PO then Click **[Receive All]** to automatically populate the Quantity Received with the Quantity Remaining.
- 💡 Click **[Reset All Qty Received to Zero]** to reset the Quantity Received to 0. This does not affect any previously received quantities.
- 💡 Click

Enter any comments in the Comments field.

Click [Save] to save the record

You are returned to the PO Receiving – General screen.

The receiving process is COMPLETE.

Chapter 7. PO Receiving Attachments

What are PO Receiving Attachments?

PO Receiving Attachments enable a user to add a Document File and/or a URL to a PO Receiving record.

When would I use PO Receiving Attachments?

A user can add a Document, Purchase Order for an electronic record of receipt.

From the **PO Receiving – General** screen

Click the **[Attach]** button

PO Receiving - General - Skyward Default

Date	Time	PO Number	Batch Number	BP	Catalog	Description	Unit Desc	Quantity	Vend
10/07/2011	2:59 PM	2000000004	0161			Toilet Paper	cases	10.00	OSCE
10/07/2011	2:57 PM	2000000001	0161			Pencils	each	5.00	MY OF
10/07/2011	12:25 PM	510000001	0051			Professional Services	HRS	50.00	NASH
10/03/2011	4:58 PM	1000000328	03			Pencils	Each	10.00	NATIC
10/03/2011	4:52 PM	1000000327	ABC			WIDGETS		5.00	SKYW
10/03/2011	4:52 PM	1000000327	ABC			WHATZITS?		10.00	SKYW
09/21/2011	3:35 PM	1000000327	ABC			WIDGETS		5.00	SKYW
09/21/2011	3:35 PM	1000000327	ABC			THINGS		4.00	SKYW

Click Attach

The **PO Number Attachments** screen opens

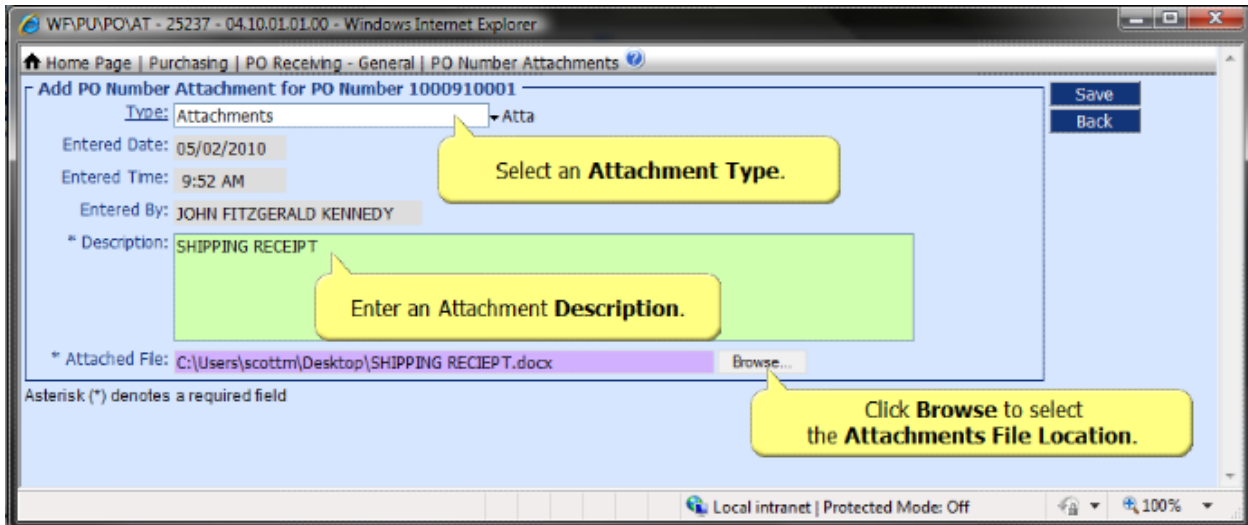
Available PO Number Attachments for PO Number 100910001

Type	Description	Entered By	Entered Date	Entered Time	File Size
No records available					

To add a Document, click Add File.

Click **[Add File]** to add a Document

The **Add PO Number Attachment** screen opens



Enter the requested information

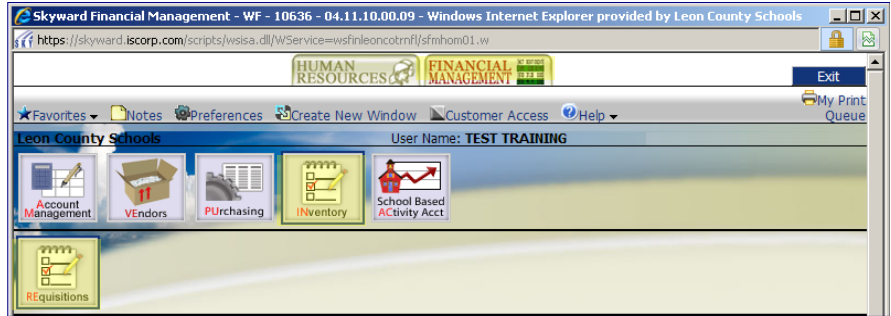
FIELD	FIELD DESCRIPTION
<i>Type</i>	Select the type of attachment from a pre-populated list of document types.
<i>Entered Date</i>	Defaults to today's day
<i>Entered Time</i>	Current time
<i>Entered By</i>	Defaults to Current User
<i>Description</i>	Description of the attachment
<i>Attached File</i>	Click Browse and select a file to upload

Click [Save]

Chapter 8. Ordering From the Warehouse

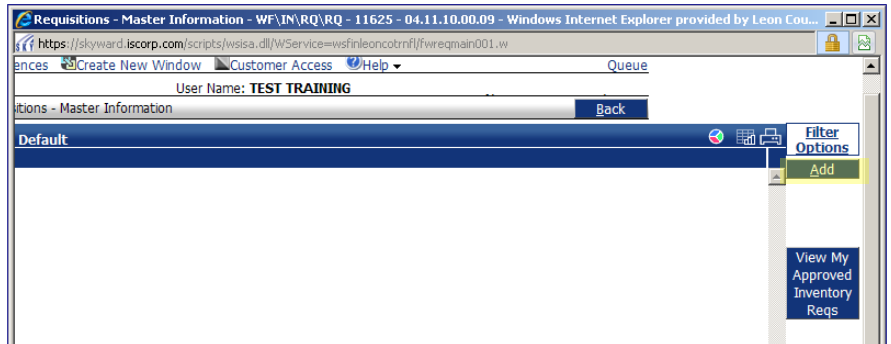
STEP 1: Navigate to the Inventory Requisitions Screen

Click Financial Management (WF), Inventory (IN), Requisitions (RE)



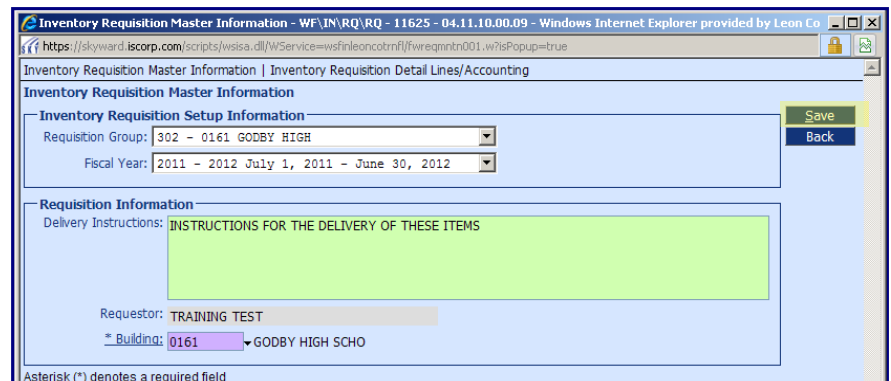
Step 2: Add a Warehouse Requisition

Click the **[Add]** button



Complete the Requisition Information Screen.

Click the **[Save]** button



Select the item from the Warehouse that you would like to order.

Requisition Detail Line Items - WF\IN\RQ\RQ - 11625 - 04.11.10.00.09 - Windows Internet Explorer provided by Leo...

Available Items

Select Items By Item Code

Display Items from Warehouse: All Available Warehouses

Code	Item Description	Item Class	Unit Of Measure	QTY On Hand	Unit Value	Qty Comm	Qty BackOrd	Qty Sel
000700	CRAYONS, 8 COUNT, LARGE	SCHSUP	BOX	3,565	0.93392	0	0	
000710	CRAYONS, 8 COUNT, LARGE	SCHSUP	BOX	1,013	0.53518	0	0	
000711	CRAYONS, MULTICULTURAL	SCHSUP	BOX	428	0.32495	0	0	
000712	CRAYONS, MULTICULTURAL	SCHSUP	BOX	664	0.65511	0	0	
000720	CRAYONS, 16 COUNT, LARGE	SCHSUP	BOX	1,221	1.40779	0	0	
000740	CUPS, PAPER COLD DRINK	SCHSUP	BOX	1,719	2.42000	0	0	
000745	ENVELOPES, COIN	SCHSUP	BOX	72	8.72208	0	0	
000800	ENVELOPES, KRAFT 10X13	SCHSUP	BOX	89	10.05292	0	0	
000820	ENVELOPES, LEGAL SIZE	SCHSUP	BOX	132	7.10000	0	0	

488 records displayed

Selected Items

Code	Item Description	Class	UOM	Order Qty	Unit Value	Extended Cost
000711	CRAYONS, MULTICULTURAL	SCHSUP	BOX	1	0.32495	0.32

Remove
Remove All

Verify Quantity on Hand

Requisition Detail Line Items - WF\IN\RQ\RQ - 11625 - 04.11.10.00.09 - Windows Internet Explorer provided by Leo...

Available Items

Select Items By Item Code

Display Items from Warehouse: All Available Warehouses

Inventory Item Details - WF\IN\RQ\RQ - 11625 - 04.11.10.00.09 - Windows Internet Explorer provided by Leo...

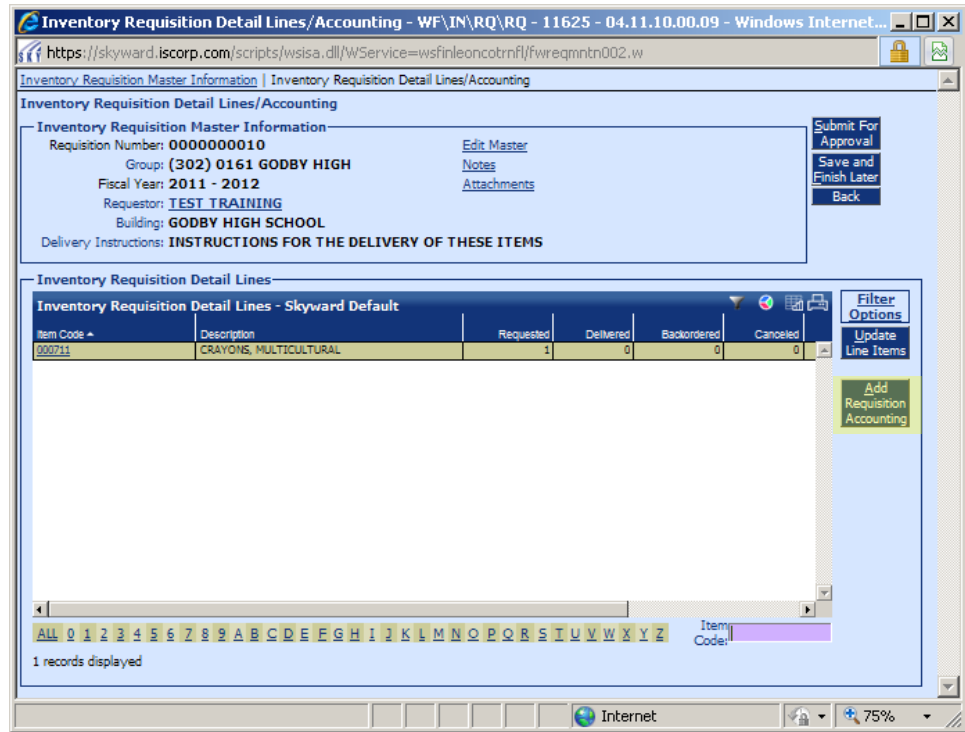
Item: 000711
 Active: yes
 Class: SCHOOL SUPPLIES (SCHSUP)
 Unit Of Measure: BOX (BOX)
 Item GL Account: 110041151 0000 0000 00000 00000 00000
 Allow Backorders: yes
 Last Vendor: Information Not Available
 Manufacturer: NIA
 Item Description: CRAYONS, MULTICULTURAL 8 COUNT REGULAR BINNEY & SMITH ONLY

Unit Cost: .32495
 Quantity On Hand: 428
 Total Cost: 139.08
 On Order: 0
 Committed: 0
 Backorder: 0
 Reorder Point: 150
 Economic Reorder Quantity: 0

Back

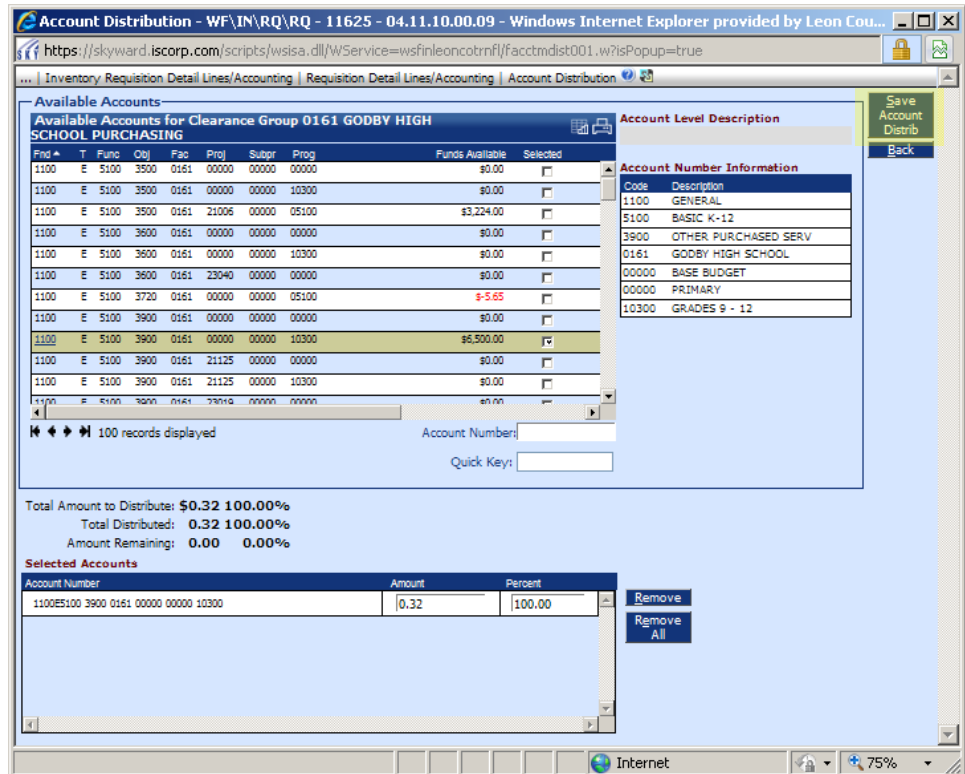
save
save
All

Click the **[Add Requisition Accounting]** button

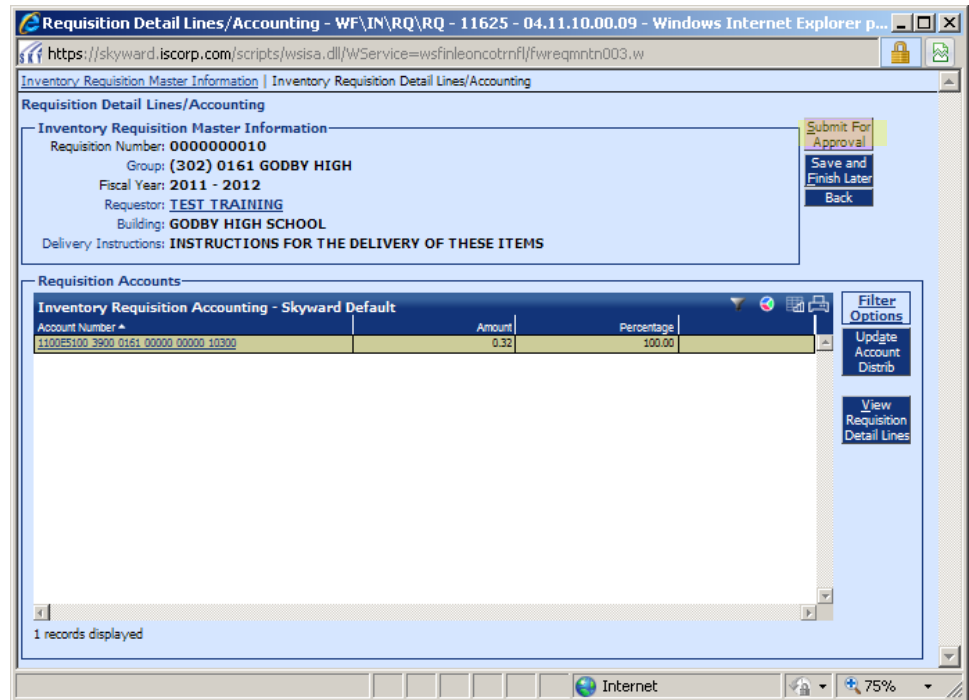


Select Account Distribution

Click the **[Save Account Distrib]** button



Click the **[Submit for Approval]** button



The re requisition is approved and submitted automatically to the Warehouse to be fulfilled.

