

Skyward User's Manual



Skyward School Business Suite, Purchasing / Receiving

Prepared for
Leon County School District

*Date: January 2014
Version 2.0*

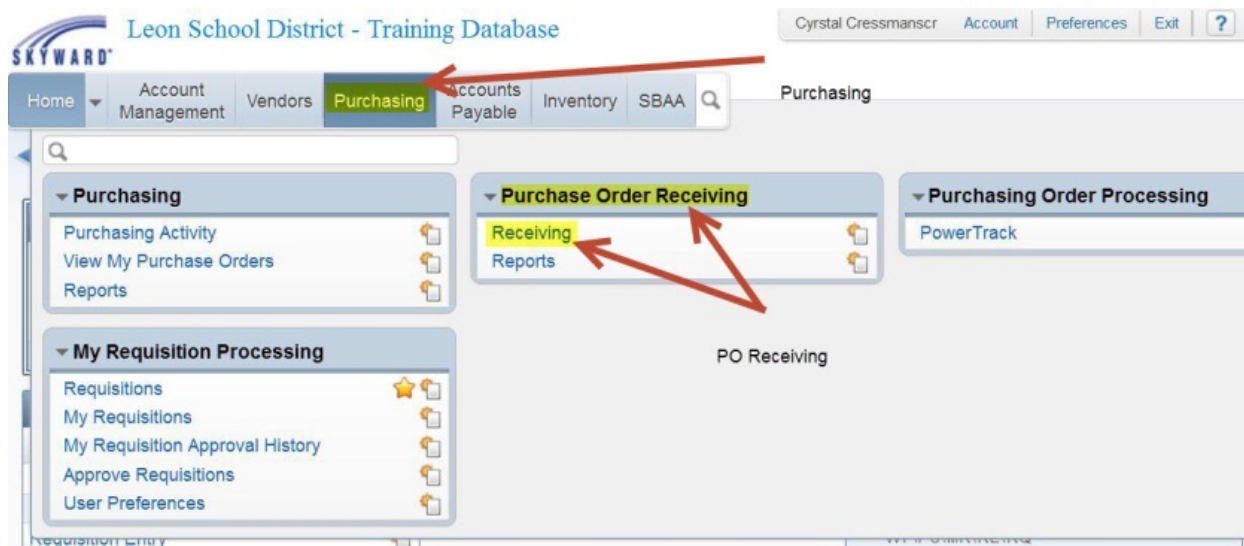


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DOCUMENT CONTROL

Title		Skyward School Business Suite: Purchasing	
File Name		LCS SKYWARD TRAINING-PURCHASING_v2 December 13 2013 NS version.docx	
Milestone		Configuration Management	
Last Edited		8/25/2015 12:40 PM	
Number of Pages		42	
Version	Revision Date	Revision Comments	Author
1.0	6/10/2012	Created Document	PMO
2.0	8/25/2015	Updated	NMS

Chapter 1. Logging into Skyward

The Skyward Web application is accessible via the Leon County Schools/Employee page or desktop icon. Double-click the icon to launch the Skyward Web application.



via a

The URL is

<https://skyward.iscorp.com/scripts/wsisd.dll/WService=wsfinleoncofl/qloadhome001.w?t=32925&dp=68007&eid=ovhgEakabdbbkrpR>

The following login screen will appear. Enter your Skyward Login ID and Password.

 A screenshot of the Skyward login interface. At the top is the Skyward logo (a blue arc above the word 'SKYWARD'). Below the logo, the text reads 'Leon School District - Training Database' and 'Leon County Schools Training Database'. The login form contains:

- 'Login ID:' followed by a text box containing 'mccullionm'.
- 'Password:' followed by a text box with ten black dots.
- A 'Sign In' button.
- A link for 'Forgot your Login/Password?'.
- A version number '05.13.10.00.02-10.2' in the bottom right corner of the form area.
- A 'Login Area:' dropdown menu with 'All Areas' selected.

The Skyward Login ID & Password is the same as your LCS network user ID & password. The Skyward password will automatically update when you update your LCS network user ID & password.

If you require assistance logging in please contact the IT Help Desk, (850) 487-7524

The Main Screen will open, displaying modules you can access.

Chapter 2. Approving a Requisition

The approval process in Skyward is multifaceted. Individual User Preferences can be set to notify approvers via email when requisitions are waiting for their approval. In addition, 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.


The following is a list of the various Requisition Approval Codes

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


Step 1: Alerts Icon

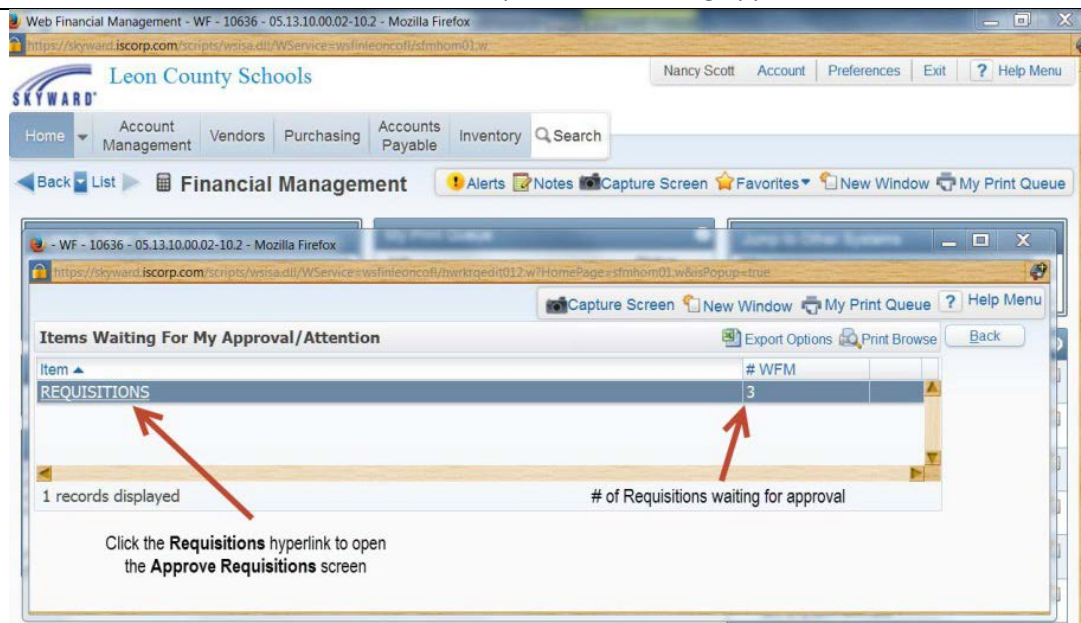
If there are Requisitions awaiting your approval then the Alerts icon will be visible on the Home Page.

From the Main Screen

2.1.1 Click the  icon from the Skyward Home Page.

The **Items Awaiting My Attention/Approval** screen opens

2.1.2 Click the Requisitions line to open the “**Requisitions Main**” Screen.
 Note the status “WFM” and the count of requisitions awaiting approval.



The **Approve Requisitions** screen opens

Step 2: Approve/Deny Requisitions

Approve Requisitions

Approve Requisitions - WF\PU\MR\AR\AR - 29487 - 05.13.10.00.02-10.2 - Mozilla Firefox

Leon County Schools

Nancy Scott Account Preferences Exit ? Help Menu

Home Account Management Vendors Purchasing Accounts Payable Inventory Search

Back List Approve Requisitions (Add Alerts Notes Capture Screen Favorites New Window My Print Queue)

of Reqs Appr: 0 Total Amt Appr: \$0.00
of Reqs Den: 0 Total Amt Den: \$0.00

Click to submit the checked items → Submit Approvals & Denials

Views: General Filters: Nancy Return to default sort Print

Requisition Number	Amount	Approve	Deny	Appr & Reroute	Pending	App Sts	A/D Level	Batch Number	Description
0000034657	963.51	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WFM	3 22		COFFEE MUGS FOR SSLS2013
0000034795	5,188.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WFM	5 9614		REPLACING 4 EXISTING WINDOWS. GODBY WO#258215 9614-7299-D REQ. BY EMORY COOK
0000034250	10,500.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PEN	5 9614		MAINTENANCE CNG CLASS FOR (4)

Select if you want to add notes → Approve w/Notes Deny w/Notes

Click the appropriate checkbox to Approve, Deny or Approve & Reroute

500 3 records displayed Requisition Number: _____

2.2.1 Click the the Approve or Deny checkbox or

2.2.2 Click the Approve & Reroute checkbox. The **Select Who to Reroute To** screen opens. Select the user to reroute the requisition to. The person routed to is inserted in the approval process.

Select who to Reroute To - WF\PU\MR\AR\AR - 29487 - 05.13.02.00.12-10.2 - Mozilla Firefox

Select who to Reroute To

Select who to Reroute this Requisition To

Requisition Number: 0000023984

Reroute To: DROP LIST OF REROUTE APPROVERS

Approval Notes: ENTER NOTE HERE

Save Back

Asterisk (*) denotes a required field

2.2.3 Click the **Approve w/Notes** button to approve the Requisition and add an approval note. The **Add Approval Note** screen opens.

Add Approval Note - WF\PU\MR\AR\AR - 29487 - 05.13.02.00.12-10.2 - Mozilla Firefox


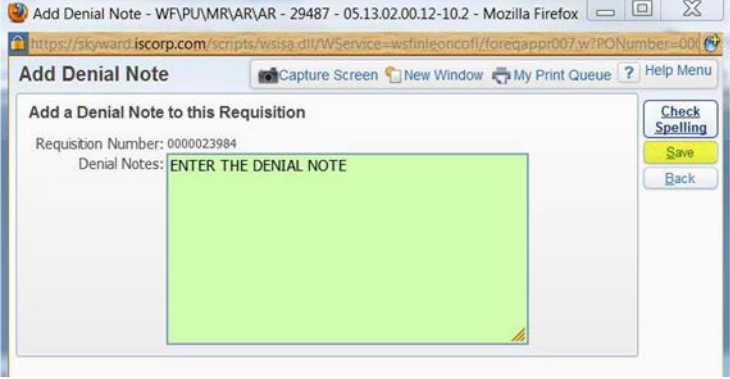

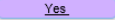
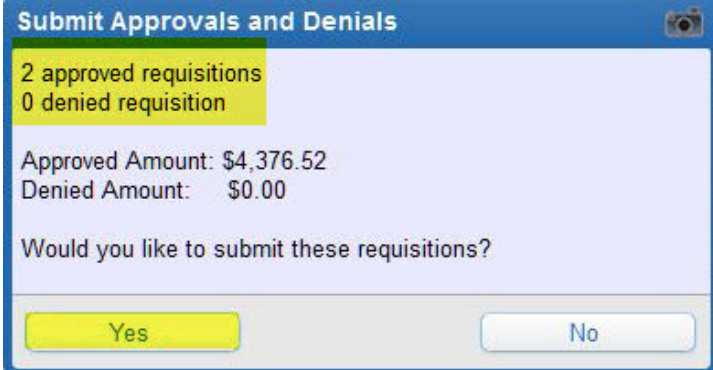
Add Approval Note

Add an Approval Note to this Requisition

Requisition Number: 0000023984

Approval Notes: ENTER THE APPROVAL NOTE

Check Spelling Save Back

<p>2.2.4</p>	<p>Click the  button to deny the Requisition and add a denial note. The Add Denial Note screen opens</p>	
<p>2.2.5</p>	<p>Once Selections are made, click the  button to process the selections. Click the  button to submit the requisitions to the next approver.</p>	

Chapter 3. Enter a Requisition

This chapter describes how to create requisitions using the Requisitions Main Screen from the SKYWARD web client. User access to create requisitions is requested by the Principal or designated site administrator by submitting the required Skyward Access Form to the Technology & Information Services Department.

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 to purchase goods or services with a Purchase Order.

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

Before you begin:

- 💡 Type the requisition in **ALL CAPS**
- 💡 Check your line of coding to make sure you have your budget in place before you start the requisition. If you do not have the funds in place for the requisition, you will need to submit a budget amendment.
- 💡 If you would like the original PURCHASE ORDER to come to you after it prints,
 - make the 1st detail line a **narrative** line
 - choose “DON’T MAIL” from the drop down list and the words “RETURN VENDOR COPY” will be entered in the detail line (you can also just type “RETURN VENDOR COPY”).

The screenshot shows the 'Requisition Detail Lines/Accounting' page in the Skyward web client. The browser address bar shows the URL: <https://skyward.iscorp.com/scripts/wsaia.dll/WService=wsaieconcoll/reqdet001.w>. The page title is 'Requisition Detail Lines/Accounting'. There are navigation buttons for 'Capture Screen', 'New Window', 'My Print Queue', and 'Help Menu'.

Requisition Master Information

Batch Number: 9613	Accounting: Account allocation by total requisition amount.
Requisition Number: 000036858	Amount: 1,133.94
Group: (220) PERMITTING OFFICE ERF	Ship To: FACILITIES AND CONSTRUCTION
Fiscal Year: 2013 - 2014	Blanket PO: This is a Blanket PO
Vendor: KONICA MINOLTA BUS SOL USA	Description: PERMITTING-LEASE OF BIZHUB C284E COPIER MONTHS 1-6
500 DAY HILL ROAD	
WINDSOR CT 06095	
Invoice To: (Default)	

Requisition Detail Lines

This should be the first detail line. Inserting this line of narrative means that once this requisition prints as a PO, it will not be mailed, it will be returned to the originator. It will be the originator's responsibility to pass the PO on to the vendor.

* Line Number:

Line Type: Merchandise Narrative

Narrative:

Quantity:

* Amount:

Total Amount:

Description:

Asterisk (*) denotes a required field

The following is the Desktop view of the web version of Skyward. To navigate to the Financial Management or Human Resources Module, select the appropriate system in the “**Jump to Other Systems**” panel or click the [**Home**] button and select the appropriate system.

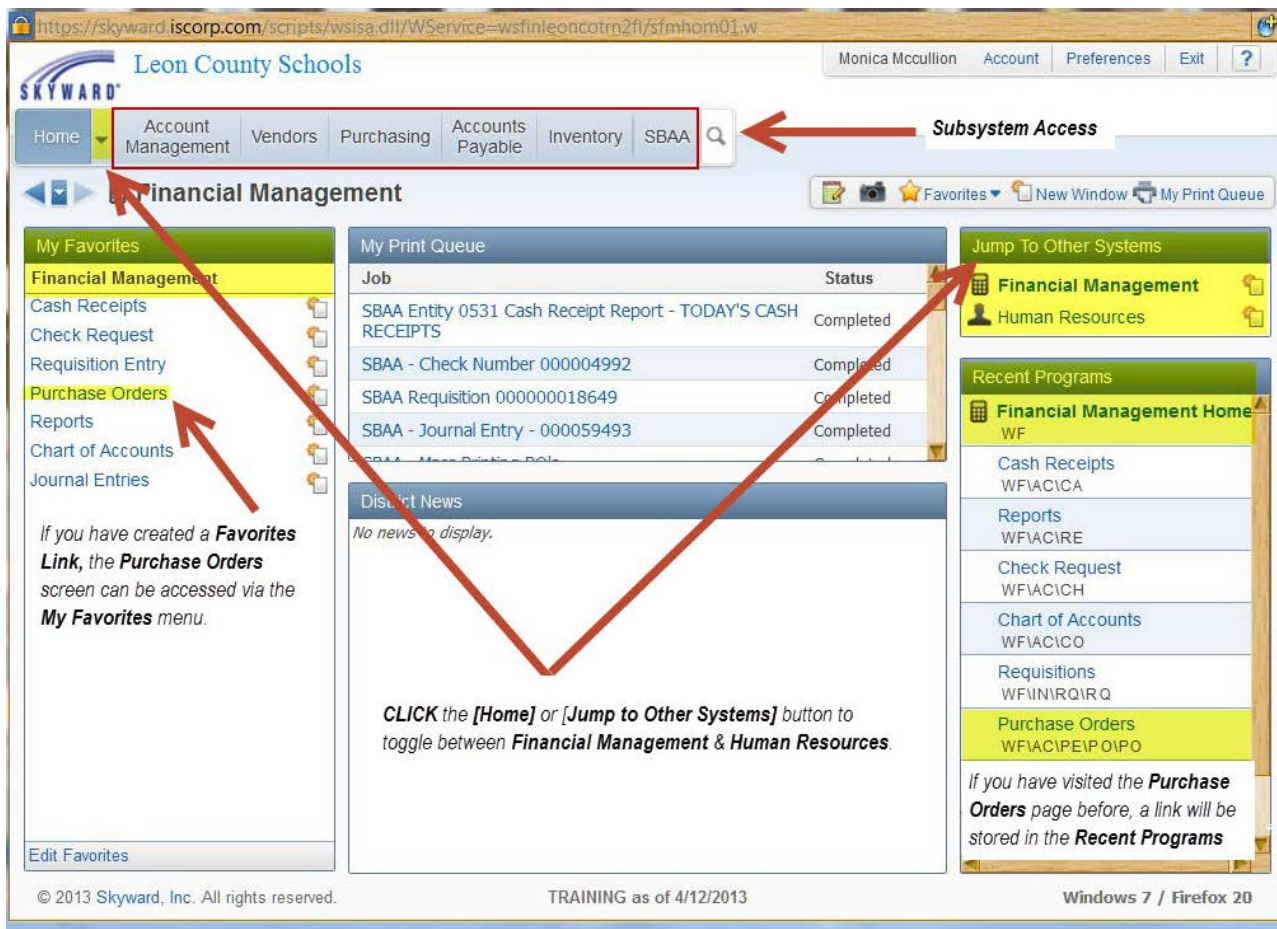
Step 1: Navigate to the Financial Management System

Requisitions are entered in the Financial Management Module. Verify that you are in the Financial Management Module.

From the Main Screen

3.1.1 Click ON **JUMP TO OTHER SYSTEMS: Financial Management** or

3.1.2 Click the  Button and select **Financial Management** from the selection of systems



https://skyward.iscorp.com/scripts/w/sisa.dll/WService=wsfinconcotn2fl/sfmhom01.w

Leon County Schools

Monica Mccullion Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Inventory SBAA

Subsystem Access

Financial Management

My Favorites

Financial Management

Cash Receipts

Check Request

Requisition Entry

Purchase Orders

Reports

Chart of Accounts

Journal Entries

If you have created a **Favorites Link**, the **Purchase Orders** screen can be accessed via the **My Favorites** menu.

Edit Favorites

My Print Queue

Job	Status
SBAA Entity 0531 Cash Receipt Report - TODAY'S CASH RECEIPTS	Completed
SBAA - Check Number 000004992	Completed
SBAA Requisition 00000018649	Completed
SBAA - Journal Entry - 000059493	Completed

District News

No news to display.

CLICK the [**Home**] or [**Jump to Other Systems**] button to toggle between **Financial Management** & **Human Resources**.

Jump To Other Systems

Financial Management

Human Resources

Recent Programs

Financial Management Home WF

Cash Receipts WF1AC1CA

Reports WF1AC1RE

Check Request WF1AC1CH

Chart of Accounts WF1AC1CO

Requisitions WF1N1RQ1RQ

Purchase Orders WF1AC1PE1P01PO

If you have visited the **Purchase Orders** page before, a link will be stored in the **Recent Programs**

© 2013 Skyward, Inc. All rights reserved. TRAINING as of 4/12/2013 Windows 7 / Firefox 20

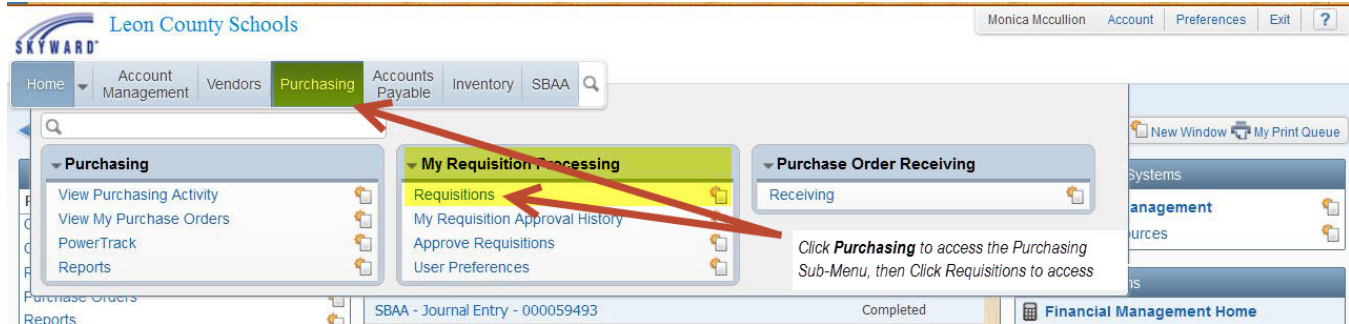
Step 2: Navigate to Requisitions Main Screen

Requisitions are entered under the Financial Management Module. Verify that you are in the Financial Management Module.

From the Financial Management System Main Screen

3.2.1 Select **Purchasing** from the Financial Main Menu,

3.2.2 Select **MY REQUISITION PROCESSING: Requisitions**

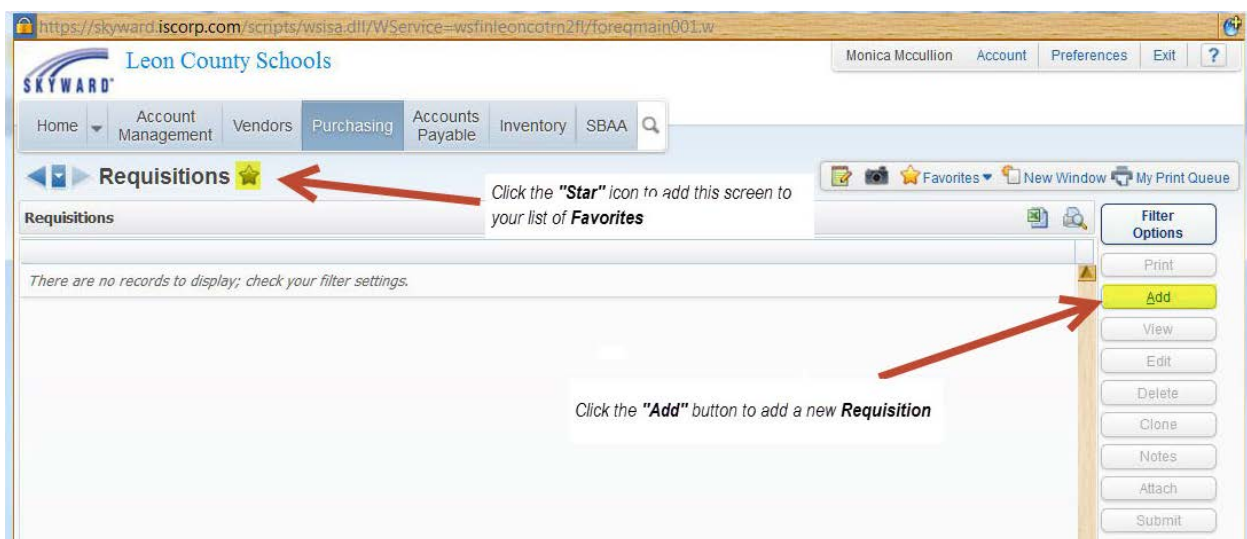


The **Requisitions Main** screen opens

Step 3: Add a New Requisition

From the Requisitions Main Screen:

3.3.1 Click the **Add** button.



The **Requisition Master Information** screen opens.

REQUISITION SETUP INFORMATION

FIELD	FIELD DESCRIPTION
Requisition Group	The drop down list contains a list of all Purchase Order Groups that you have rights to create requisitions for. *There are two Purchase Order Groups for each cost center, one group with the cost center name and one with cost center name ERF. Each are separate groups with their own group number. Use the first group if your requisition is less than \$750. Use the ERF group if it is more than \$750.
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 Purchase Order.

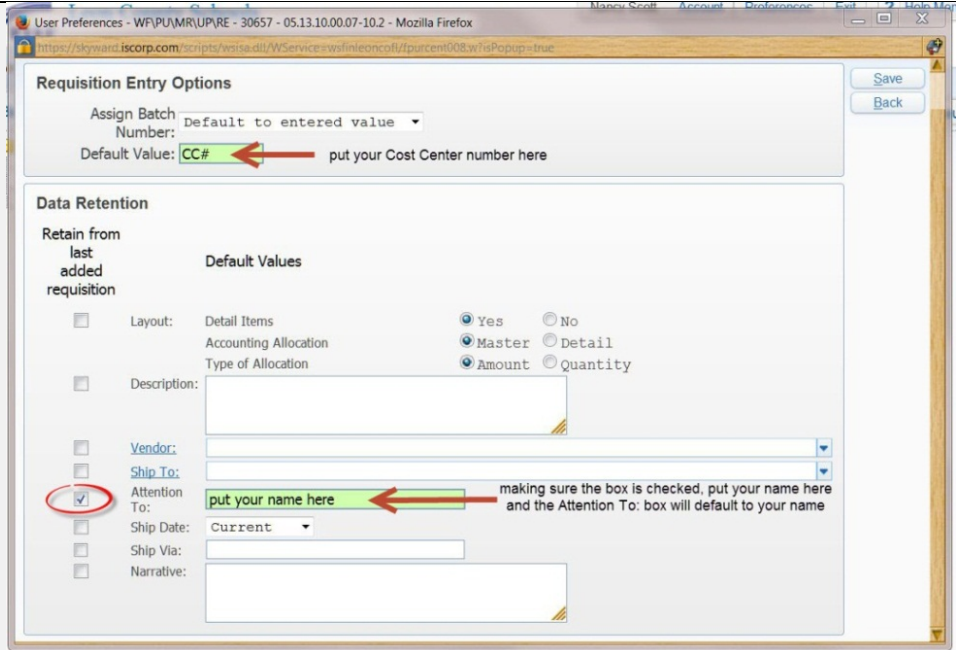
Account allocation by each requisition detail line (YDA)	Indicates that the accounting to pay this Purchase Order will be designated for each line item detail on the Purchase Order. Accounting has to be added for each item purchased.
This is a Blanket Requisition/Purchase Order	Select this option to create a Blanket Purchase Order. This is the only chance during the requisition process that you have to make this choice. 💡 If the Purchasing Agent determines that the requisition submitted does not meet the criteria for the Purchase Order as entered, it will be denied, returned to WIP status and will need to be reentered correctly.
This Requisition is Used to Restock A Warehouse	THIS SHOULD ONLY BE SELECTED BY WAREHOUSE PERSONNEL. If incorrectly selected, it will cause problems with the requisition that will usually end with it being denied and having to be reentered.

Step 4: Enter Requisition Master Information

The Requisition Master Information Screen is used to enter the Purchase Order header information.

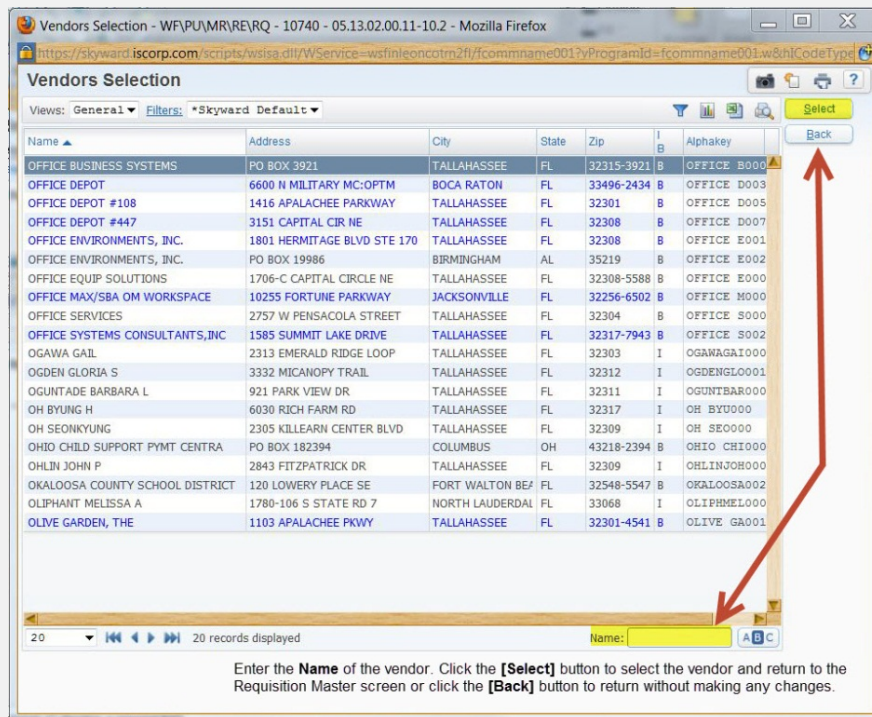
3.4.1 Enter Requisition Master Information

FIELD	FIELD DESCRIPTION
Batch Number	This should be your cost center number. Purchasing uses the Batch Number field for ease of sorting requisitions. 💡 From the Purchasing tab, select Purchasing/My Requisition Processing select User Preference . Choose Requisition Entry Options and make your selections for category defaults.



REQUISITION INFORMATION

Description	Generic description describing the contents of the requisition – for internal use only. *This description displays within Skyward only, it does not print on the Purchase Order.
Vendor	Enter a vendor. <ul style="list-style-type: none"> • Begin typing the name of the vendor and the system will display matches as you type or • Click the <u>*Vendor</u> hyperlink to open a new window “Vendors Selection” <ul style="list-style-type: none"> ○ Enter the name of the vendor ○ Click the Select button to select vendor and return to the Requisition Master Screen or ○ Click the Back button to return to Requisition Master Screen without making a selection.




💡 If the vendor does not exist, forward an **Application for Vendor Status** to the vendor. The vendor should complete and fax the form to Finance @ 850-487-7869. Once the form is received and verified Finance will add the vendor to the Master Vendor File. The **Application for Vendor Status** can be found at <http://www.leon.k12.fl.us/public/business/purchasing/BookkeepersManual.htm> or on the District’s forms page.


Ship To	Setup to default to the Cost Center; can be edited by clicking the drop down to select a location.
Attention	Defaults to Bookkeeper Name
Due Date	Defaults to today’s date
Ship Date	Defaults to today’s date
Ship Via	N\A
Contract	N\A

💡 Required fields are marked with an (*).

Step 5: Add Requisition Detail Lines

The Requisition Detail Lines/Accounting screen is used to enter specific line item quantities and cost to the requisition. Once all pertinent information is entered

3.5.1 Click the  button to add individual line items to the requisition one at a time or

3.5.2 Click the  to add line items in groups of five at a time to the requisition

3.5.3 Enter the following information on Requisition Detail Lines section

REQUISITION DETAIL LINES ENTRY

FIELD	FIELD DESCRIPTION
Line Type	Merchandise – An item that you are ordering that has a Quantity, Amount and a Total Amount . Narrative – A text line only. Quantity, Amount and a Total Amount are not entered, default is zero.
Line Number	The beginning line number is 100. As you add lines Skyward, by default, adds line numbers in increments of 10 (100, 110, 120, etc.). If you wish to add a new line in between existing lines, you can insert a number that falls between the default numbers. See below for example. 💡 Use the narrative line “Do Not Mail” to insert “Return Vendor Copy” on the first line if you want the Purchase Order sent to you instead of the vendor.

Requisition Detail Lines/Accounting - WFP\PU\MR\REQ - 10740 - 05.13.10.00.03-10.2 - Mozilla Firefox

https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinleconcotrn211/foreqdet001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting


Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **0531**
 Requisition Number: **0000025410**
 Group: **(065) 1060 SCRAMBLED PO GROUP**
 Fiscal Year: **2012 - 2013**
 Vendor: **Ambient computer services ltd**
7428 Scramble avenue
Scramble WV 55555

Accounting: **Account allocation by total requisition amount.**
 Amount: **453.08**
 Ship To: **C2 internet ltdscr**
 Blanket PO: **This is a Blanket PO**
 Description: **SCRAMBLE DATA 25410**

Requisition Detail Lines

Line Number: 

Line Type: Merchandise Narrative

Narrative:

Quantity:

* Amount:

Total Amount:

Description:

Buttons: Save, Back

Asterisk (*) denotes a required field

Line Numbers determine where that detail line will be placed in the requisition.

Requisition Detail Line Items

Views: General Filters: *Skyward Default

Merchandise line - Quantity Amount & Total Amount are required.

Line	Catalog Code	Description	Quantity	Amount	Total Amount	Comm Code
99		PLEASE RETURN PO TO REQUESTOR	0	0.00	0.00	
100		DATA 100 SOFTWARE	1	453.08	453.08	
104	Narrative line - Quantity, Amount & Total Amount not entered so the default is zero	INCLUDES LICENSE FOR 10 MACHINES	0	0.00	0.00	
105		DELIVERY CHARGES ARE INCLUDED IN ORIGINAL PRICE	0	0.00	0.00	
110		HOURS OF DELIVERY ARE MONDAY - FRIDAY 8:00 A.M. - 3:00 P.M.	0	0.00	0.00	

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

Catalog Code	N/A
Description	Item being ordered or text with instructions, directions or contract information
Quantity	Total number ordered for that line
Unit of Measure	Can be entered or selected from a lookup table; EA, HRS, BOX, LBS, etc.
Unit Cost	Cost per unit of measure
Total Amount	Automatically calculated based on Quantity x Unit Cost

3.5.4 Click the [Save](#) button to add the line item. The information is added to the Requisition Detail Lines/Accounting screen as depicted below.

Click the [Add](#) button to add additional line items one at a time

Click the [Edit](#) button to edit the selected line item

Click the [Delete](#) button to delete the selected line item

Requisition Detail Lines/Accounting - WF\PU\MR\REQ - 10740 - 05.13.02.00.12-10.2 - Mozilla Firefox

https://skyward.iscorp.com/scripts/wvisa.dll?WService=wsfinleconcotm2fl/foreqdeti001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

click when requisition is complete & ready for approval

Requisition Master Information

Batch Number: 0531
 Requisition Number: 0000024162
 Group: (066) DEERLAKE MIDDLE ERF
 Fiscal Year: 2012 - 2013
 Vendor: OFFICE DEPOT #108
 1416 APALACHEE PARKWAY
 TALLAHASSEE FL 32301
 Invoice To: (Default)

Accounting: Account allocation by total requisition amount.
 Amount: 2,340.00
 Ship To: DEERLAKE MIDDLE SCHOOL
 Blanket PO: This is a Blanket PO
 Description: ENTER THE DESCRIPTION OF TEH PURCHASE. THIS DESCRIPTION DOES NOT PRINT ON THE PURCHASE ORDER, IT ONLY DISPLAYS IN SKYWARD

Edit Master
 Notes
 *Attachments

click to save and add to or edit later

Submit For Approval
 Save and Finish Later

opens 1 additional detail line

Requisition Detail Line Items

Views: General Filters: *Skyward Default

Line	Catalog Code	Description	Quantity	Amount	Total Amount	Comm Code
100		ENTER THE DESCRIPTION OF THE ITEMS PURCHASED	1	2,340.00	2,340.00	

click to edit highlighted line

deletes highlighted line

opens 5 additional detail lines

add account detail lines

Add
 Edit
 Delete
 Mass Add Detail
 Add Requisition Accounts

20 1 records displayed

Click the [Mass Add Detail](#) button to add additional lines in groups of 5 at a time

Click the [Save and Finish Later](#) button to save your work to be completed at a later time.

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

3.5.5

Click the [Add Requisition Accounts](#) button to add accounting information to the requisition.

The Account Distribution screen opens as depicted on the next page.

Step 6: Add Account Distribution

Account Distribution: 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 for multi-line coding.

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.

ACCOUNT DISTRIBUTION


The screenshot shows the 'Account Distribution' web application interface. It features a table of available accounts, a summary of distribution totals, and a section for selected accounts with their respective amounts and percentages. Annotations include:

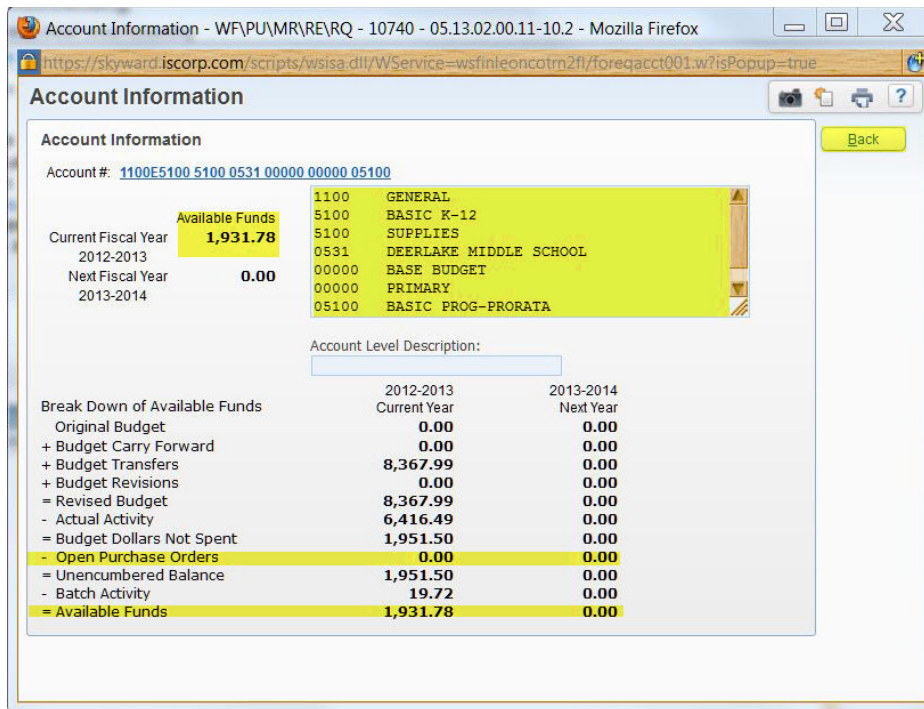
- Click the FUND hyper link to display account balances**: Points to the 'FUND' column header in the available accounts table.
- Select the check box to use the account**: Points to the 'Selected' checkbox in the available accounts table.
- Description of the highlighted account**: Points to the 'Account Number Information' section on the right.
- Enter the account number**: Points to the 'Account Number' input field.
- Selected accounts & the distribution of budget**: Points to the 'Selected Accounts' table.


Fnd	T	Func	Obj	Fac	Proj	Subpr	Prog	Funds Available	Selected
1100	E	5100	3320	0531	33001	A0000	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	3500	0531	21006	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	00000	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	21006	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	21125	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	23019	00000	05100	\$1,420.00	<input type="checkbox"/>
1100	E	5100	5100	0531	00000	00000	00000	\$35,883.57	<input type="checkbox"/>
1100	E	5100	5100	0531	00000	00000	05100	\$1,931.78	<input checked="" type="checkbox"/>
1100	E	5100	5100	0531	20009	00000	05100	\$231.20	<input type="checkbox"/>
1100	E	5100	5100	0531	21125	00000	00000	\$7,892.83	<input checked="" type="checkbox"/>
1100	E	5100	5100	0531	21126	00000	00000	\$15.00	<input type="checkbox"/>
1100	E	5100	5100	0531	21126	00000	00000	\$11,305.37	<input type="checkbox"/>
1100	E	5100	5100	0531	22057	00000	00000	\$0.00	<input type="checkbox"/>


Account Number	Amount	Percent
1100E5100 5100 0531 00000 00000 05100	750.00	75.00
1100E5100 5100 0531 21125 00000 00000	250.00	25.00


To view Account Balance information click the FUND hyperlink for any account or click account in the Select Accounts section.


Click the  button to return to the Account Distribution screen.




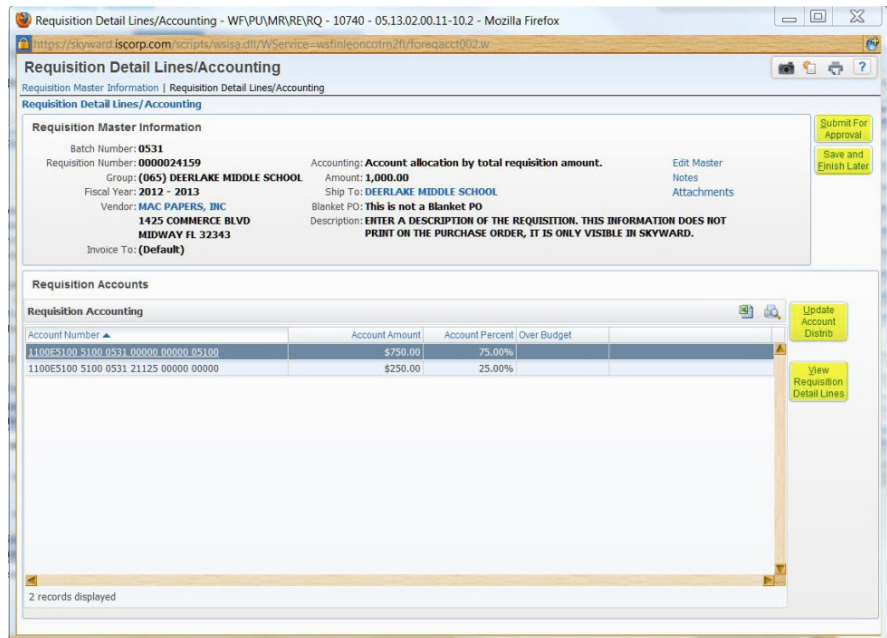
3.6.1 Click the  button to save the account distribution and return to the Requisition Detail Lines/Accounting screen as shown below.

Click the  button to submit the requisition for approval

Click the  button to save the requisition w/out submitting.

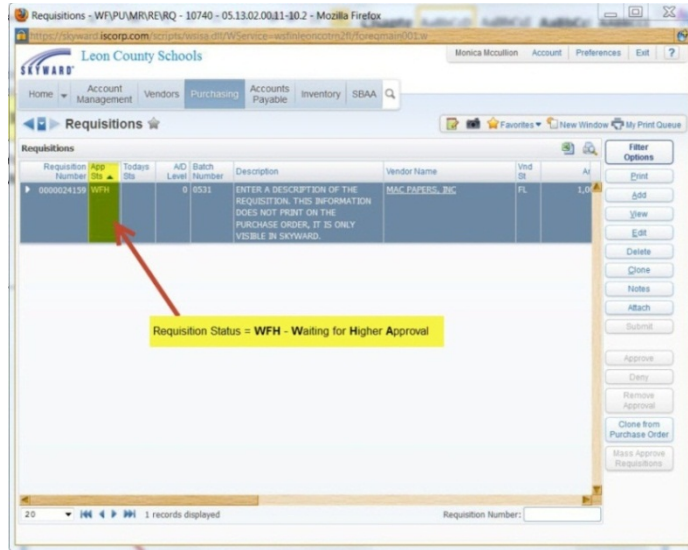
Click the  button to return to the Account Distribution screen to modify the distribution of funds

Click the  button to toggle through the **Requisition Detail Line Items** section to modify/view the line items entered on the requisition. Any changes in total amount of the requisition will require you to modify the account distribution.



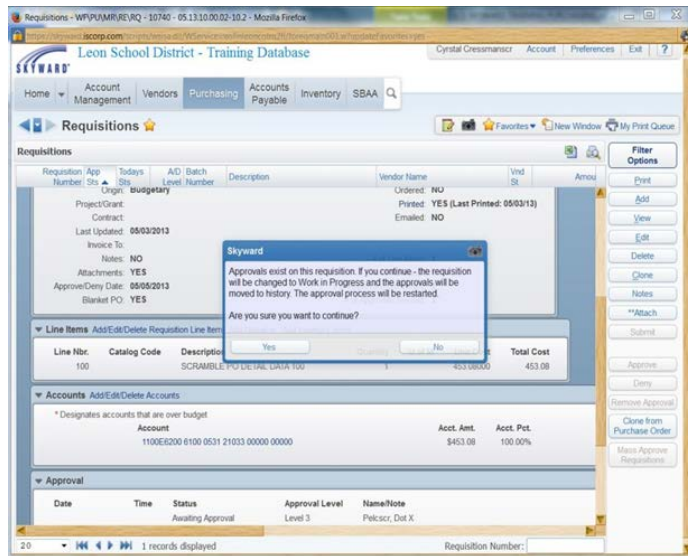
3.6.2

Click the **Submit For Approval** button to submit the requisition for approval. You will be returned to the Requisitions Main screen, which now shows the requisition with a status of **WFH-Waiting For Higher** approval.



If you decide to click the **Save and Finish Later** button, you will be returned to the Requisitions Main screen and the requisition will have a status of **WIP – Work In Progress**.

Full list of Requisition Approval Codes explained below.



Note: once the requisition has been submitted (in WFH status), if the originator makes a change to the requisition or adds an attachment, the requisition is brought back into WIP status and must be re-submitted starting the approval process from the beginning.

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

REQUISITION APPROVAL CODES	
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 4 Blanket Purchase Orders

For a blanket purchase order, the **QUANTITY IS ALWAYS ONE (1)** and you **RECEIVE ON THE DOLLAR AMOUNT**.

Blanket purchase orders are a subset of automated purchase orders and by Board Purchase Policy have a maximum annual limit of \$30,000 and monthly limit of \$2,500. They are used for repetitive purchases of like items from a particular vendor.

Step 1: Navigate to the Financial Management System

Requisitions are entered under the Financial Management Module. Verify that you are in the Financial Management Module.


From the Main Screen

4.1.1 Click ON **JUMP TO OTHER SYSTEMS: Financial Management** or

4.1.2 Click the  Button and select **Financial Management** from the selection of systems

Step 2: Navigate to Requisitions Main Screen

From the Financial Management System Main Screen


4.2.1 Select  from the Financial Main Menu,

4.2.2 Select **MY REQUISITION PROCESSING: Requisitions**

The **Requisitions Main** screen opens

Step 3: Add a New Requisition for a Blanket Purchase Order

From the Requisitions Main Screen:

4.3.1 Click the  button.

The **Requisition Master Information** screen opens.

Step 4: Enter Requisition Master Information

The Requisition Master Information Screen is used to enter the Purchase Order header information.

4.4.1 Enter Requisition Master Information

Requisition Master Information - WF\PU\MR\REQ - 10740 - 05.13.10.00.07-10.2 - Mozilla Firefox

https://skyward.iscorp.com/scripts/wsisadll/WSservice=wsfinleconcof/foreqmast001.w?isPopup=true

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 065 - DEERLAKE MIDDLE SCHOOL

Fiscal Year: 062 - DESOTO TRAIL ELEMENTARY ERF
063 - BUCK LAKE ELEMENTARY SCHOOL
064 - BUCK LAKE ELEMENTARY ERF

Account allocation: Account allocation by total requisition amount (YMA)
 Account allocation by each requisition detail line (YDA)

This is a Blanket
 This requisition is used to restock a warehouse.

065 - DEERLAKE MIDDLE SCHOOL
066 - DEERLAKE MIDDLE ERF
067 - FT. BRADEN ELEMENTARY SCHOOL
068 - FT. BRADEN ELEMENTARY ERF
069 - LINCOLN HIGH SCHOOL
070 - LINCOLN HIGH ERF
071 - HAWKSRISE ELEMENTARY SCHOOL
072 - HAWKSRISE ELEMENTARY ERF
073 - CHILES HIGH SCHOOL
074 - CHILES HIGH ERF
075 - SWIFT CREEK MIDDLE SCHOOL
076 - SWIFT CREEK MIDDLE ERF
077 - CANOPY OAKS ELEMENTARY SCHOOL
078 - CANOPY OAKS ELEMENTARY ERF
079 - ROBERTS ELEMENTARY SCHOOL
080 - ROBERTS ELEMENTARY ERF
081 - ROND ELEMENTARY SCHOOL

* Batch Number: 24

* Description: ENTER THE DESCRIPTION OF THE PURCHASE
*THIS DESCRIPTION DOES NOT PRINT ON THE PURCHASE ORDER, IT ONLY DISPLAYS IN SKYWARD

* Vendor: OFFICE DEPOT #108 1416 APALACHEE PARKWAY TALLAHASSEE FL 32312

* Ship To: DEERLAKE MIDDLE SCHOOL 9902 DEER LAKE WEST TALLAHASSEE FL 32312

Invoice To: (Default)

Annotations:
- Red arrow pointing to group 065: use this group when requisition is less than \$750
- Red arrow pointing to group 066: use this group when requisition is more than \$750

Requisition Master Information - WF\PU\MR\REQ - 10740 - 05.13.02.00.11-10.2 - Mozilla Firefox

https://skyward.iscorp.com/scripts/wsisadll/WSservice=wsfinleconcof/foreqmast001.w?isPopup=true

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 065 - DEERLAKE MIDDLE SCHOOL

Fiscal Year: 2012 - 2013 July 1, 2012 - June 30, 2013

Account allocation by total requisition amount (YMA)
 Account allocation by each requisition detail line (YDA)

This is a Blanket Requisition/Purchase Order
 This requisition is used to restock a warehouse.

Requisition Information

* Batch Number: 0531

* Description: ENTER THE DESCRIPTION OF THE PURCHASE
*THIS DESCRIPTION DOES NOT PRINT ON THE PURCHASE ORDER, IT ONLY DISPLAYS IN SKYWARD

* Vendor: OFFICE DEPOT #108 1416 APALACHEE PARKWAY TALLAHASSEE FL 32312

* Ship To: DEERLAKE MIDDLE SCHOOL 9902 DEER LAKE WEST TALLAHASSEE FL 32312

Invoice To: DEERLAKE MIDDLE SCHOOL

Attention: MONICA MCCULLION

* Due Date: 04/25/2013 Thursday

Ship Date: 04/25/2013 Thursday

Ship Via:

Project/Grant:

Contract:

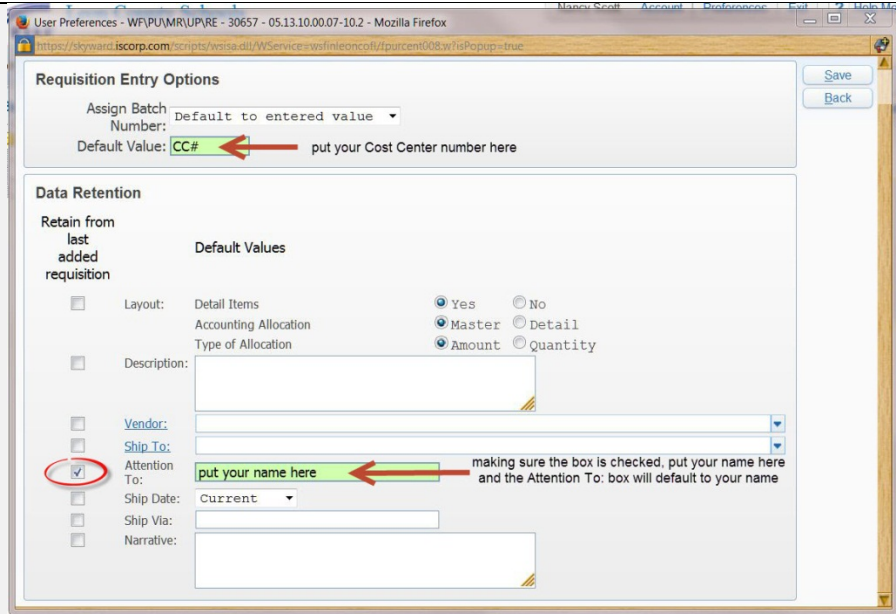
Asterisk (*) denotes a required field

Annotation:
- Red arrow pointing to 'This is a Blanket Requisition/Purchase Order': Select this option to create a Blanket Purchase Order

REQUISITION SETUP INFORMATION	
FIELD	FIELD DESCRIPTION
Requisition Group	The drop down list contains a list of all Purchase Order Groups that you have rights to create requisitions for. *There are two Purchase Order Groups for each cost center, one group with the cost center name and one with cost center name ERF. Each are separate groups with their own group number. Use the first group if your requisition is less than \$750. Use the ERF group if it is more than \$750.
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 Purchase Order.
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 Purchase Order. Accounting has to be added for each item purchased.
This is a Blanket Requisition/Purchase Order	Select this option to create a Blanket Purchase Order. This is the only chance during the requisition process that you have to make this choice. 💡 If the Purchasing Agent determines that the requisition submitted does not meet the criteria for the Purchase Order as entered, it will be denied, returned to WIP status and will need to be reentered correctly.
This Requisition is Used to Restock A Warehouse	THIS SHOULD ONLY BE SELECTED BY WAREHOUSE PERSONNEL. If incorrectly selected, it will cause problems with the requisition that will usually end with it being denied and having to be reentered.

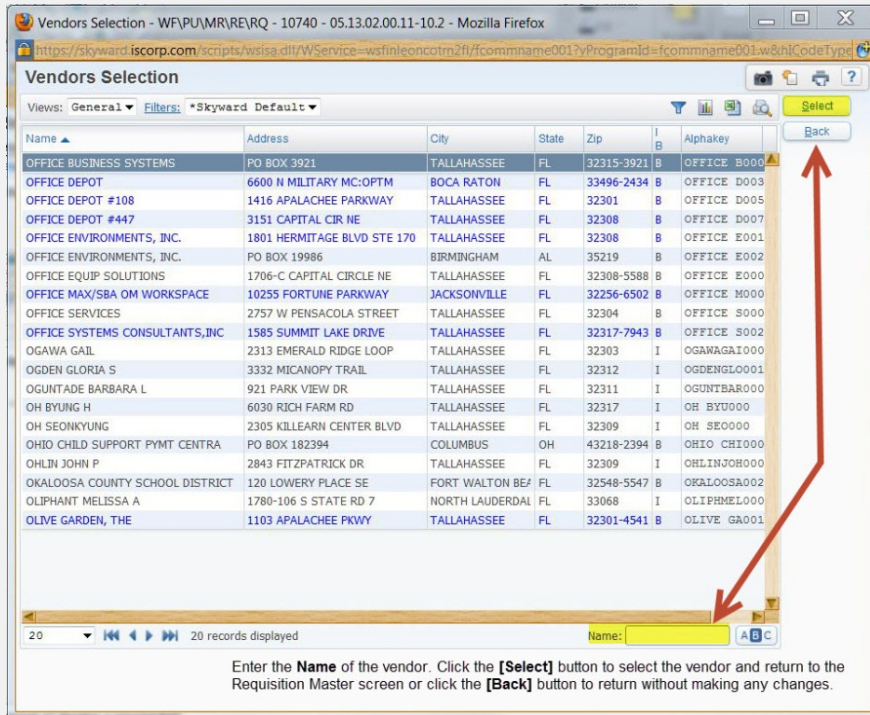
REQUISITION INFORMATION

FIELD	FIELD DESCRIPTION
Batch Number	This should be your cost center number. Purchasing uses the Batch Number field for ease of sorting requisitions. 💡 From the Purchasing tab, select Purchasing/My Requisition Processing select User Preference . Choose Requisition Entry Options and make your selections for category defaults.



Description	Generic description describing the contents of the requisition – for internal use only. *This description displays within Skyward only, it does not print on the Purchase Order.
-------------	--

Vendor	<p>Enter a vendor.</p> <ul style="list-style-type: none"> • Begin typing the name of the vendor and the system will display matches as you type or • Click the *Vendor hyperlink to open a new window “Vendors Selection” <ul style="list-style-type: none"> ○ Enter the name of the vendor ○ Click the Select button to select vendor and return to the Requisition Master Screen or ○ Click the Back button to return to Requisition Master Screen without making a selection.
---------------	---




Enter the **Name** of the vendor. Click the **[Select]** button to select the vendor and return to the Requisition Master screen or click the **[Back]** button to return without making any changes.


💡 If the vendor does not exist, forward an **Application for Vendor Status** to the vendor. The vendor should complete and fax the form to Finance @ 850-487-7869. Once receiving and verifying the completed form, Finance will add the vendor to the Master Vendor File. The **Application for Vendor Status** can be found at <http://www.leon.k12.fl.us/public/business/purchasing/BookkeepersManual.htm> or on the District’s form page.

Ship To	Setup to default to the Cost Center; can be edited by clicking the drop down to select a location.
Attention	Defaults to Bookkeeper Name
Due Date	Defaults to today’s date
Ship Date	Defaults to today’s date
Ship Via	N\A
Contract	N\A

Step 5: Add Requisition Detail Lines

The Requisition Detail Lines/Accounting screen is used to enter specific line item quantities and cost to the requisition. Once all information is entered on the master detail screen:

4.5.1 Click the  button to add individual line items to the requisition one at a time.

4.5.2 Click the  to add line items in groups of five at a time to the requisition.

4.5.3 Enter the following information on Requisition Detail Lines section

REQUISITION DETAIL LINES ENTRY

FIELD	FIELD DESCRIPTION
Line Number	The default beginning line number is 100. As you add lines, Skyward, by default, adds line numbers in increments of 10 (100, 110, 120, etc.). If you wish to add a new line in between existing lines, you can insert a number that falls between the default numbers. See below for example.
Line Type	Merchandise – An item that you are ordering has a Quantity, Amount and a Total Amount. Narrative – For text only.
Quantity	Defaults to 1 for Blanket Purchase Orders
Amount	Enter the total amount of the Purchase Order
Total Amount	Defaults to the value entered in the Amount field
Description	Item being ordered (merchandise line) or text with instructions, directions, or contract information (narrative line).

Requisition Master Information

Batch Number: **0531**
 Requisition Number: **000024160**
 Group: **(065) DEERLAKE MIDDLE SCHOOL**
 Fiscal Year: **2012 - 2013**
 Vendor: **OFFICE DEPOT #108**
1416 APALACHEE PARKWAY
TALLAHASSEE FL 32301
 Invoice To: **(Default)**

Accounting: **Account allocation by total requisition amount.**
 Amount: **0.00**
 Ship To: **DEERLAKE MIDDLE SCHOOL**
 Blanket PO: **This is a Blanket PO**
 Description: **ENTER THE DESCRIPTION OF THE PURCHASE *THIS DESCRIPTION DOES NOT PRINT ON THE PURCHASE ORDER, IT ONLY DISPLAYS IN SKYWARD**

Requisition Detail Lines

* Line Number:
 Line Type: Merchandise
 Narrative
 * Quantity:
 * Amount:
 Total Amount:
 * Description:

Asterisk (*) denotes a required field

4.5.4 Click the button to add the line item
 The information is added to the Requisition Detail Lines/Accounting screen as depicted below.

Requisition Master Information

Batch Number: **0531**
 Requisition Number: **000024162**
 Group: **(066) DEERLAKE MIDDLE ERF**
 Fiscal Year: **2012 - 2013**
 Vendor: **OFFICE DEPOT #108**
1416 APALACHEE PARKWAY
TALLAHASSEE FL 32301
 Invoice To: **(Default)**

Accounting: **Account allocation by total requisition amount.**
 Amount: **2,340.00**
 Ship To: **DEERLAKE MIDDLE SCHOOL**
 Blanket PO: **This is a Blanket PO**
 Description: **ENTER THE DESCRIPTION OF TEH PURCHASE. THIS DESCRIPTION DOES NOT PRINT ON THE PURCHASE ORDER, IT ONLY DISPLAYS IN SKYWARD**


Requisition Detail Line Items


Line	Catalog Code	Description	Quantity	Amount	Total Amount	Comm Code
100		ENTER THE DESCRIPTION OF THE ITEMS PURCHASED	1	2,340.00	2,340.00	


Annotations:


- click when requisition is complete & ready for approval (points to Submit For Approval)
- click to save and add to or edit later (points to Save and Finish Later)
- opens 1 additional detail line (points to Add)
- click to edit highlighted line (points to Edit)
- deletes highlighted line (points to Delete)
- opens 5 additional detail lines (points to Mass Add Detail)
- add account detail lines (points to Add Requisition Accounts)


Your options, as indicated above, are:

Click the  button to add additional line items one at a time

Click the  button to edit the selected line item


Click the  button to delete the selected line item

Click the  button to add additional lines in groups of 5 at a time

Click the  button to save your work to be completed at a later time

Once you have made your choices and all line items are entered, accounting information can be entered.

4.5.5

Click the  button to add account details to the requisition.

The Account Distribution screen opens.

Step 6: Add Account Distribution

The Account Distribution: Available Accounts section displays all accounts that you have access to. **If you do not see an account that you need, please contact Finance.** 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.

ACCOUNT DISTRIBUTION

Account Distribution - W:\PU\MR\REQ - 10740 - 05.13.02.00.11-10.2 - Mozilla Firefox

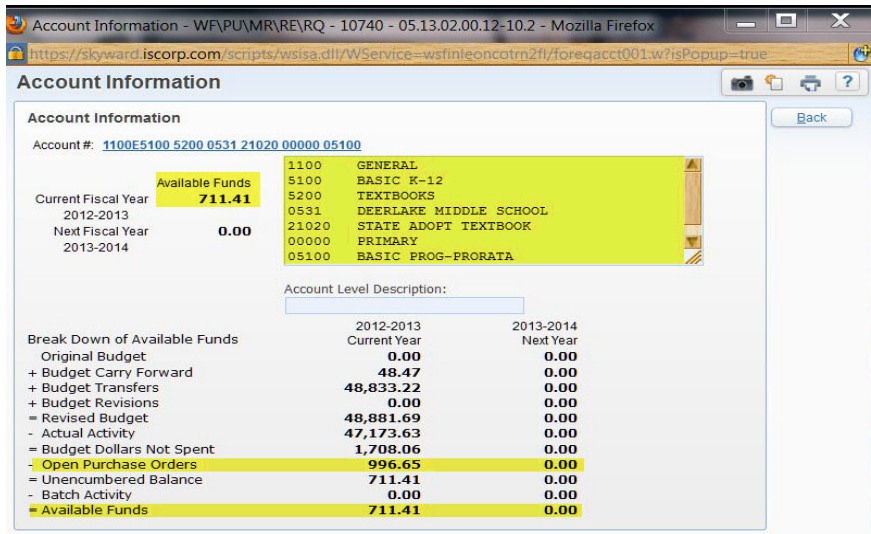
Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Func	Obj	Fac	Proj	Subpr	Prog	Funds Available	Selected
1100	E	5100	3500	0531	21006	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	21006	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	21006	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	21006	00000	05100	\$0.00	<input type="checkbox"/>
1100	E	5100	3900	0531	23019	00000	05100	\$1,420.00	<input type="checkbox"/>
1100	E	5100	5100	0531	00000	00000	00000	\$35,883.57	<input type="checkbox"/>
1100	E	5100	5100	0531	00000	00000	05100	\$1,931.78	<input checked="" type="checkbox"/>
1100	E	5100	5100	0531	20009	00000	05100	\$231.00	<input type="checkbox"/>
1100	E	5100	5100	0531	21125	00000	00000	\$1,092.83	<input checked="" type="checkbox"/>
1100	E	5100	5100	0531	21125	00000	05100	\$15.00	<input type="checkbox"/>
1100	E	5100	5100	0531	21126	00000	00000	\$11,305.37	<input type="checkbox"/>
1100	E	5100	5100	0531	22057	00000	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0531	22010	00000	00000	\$0.00	<input type="checkbox"/>

Total Amount to Distribute: **\$1000.00 100.00%**
 Total Distributed: **\$1000.00 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
1100E5100 5100 0531 00000 00000 05100	750.00	75.00
1100E5100 5100 0531 21125 00000 00000	250.00	25.00



To view Account Balance information Click the FUND hyperlink for any account or Click account in the Select Accounts section. Click the [Back](#) button to return to the Account Distribution screen.

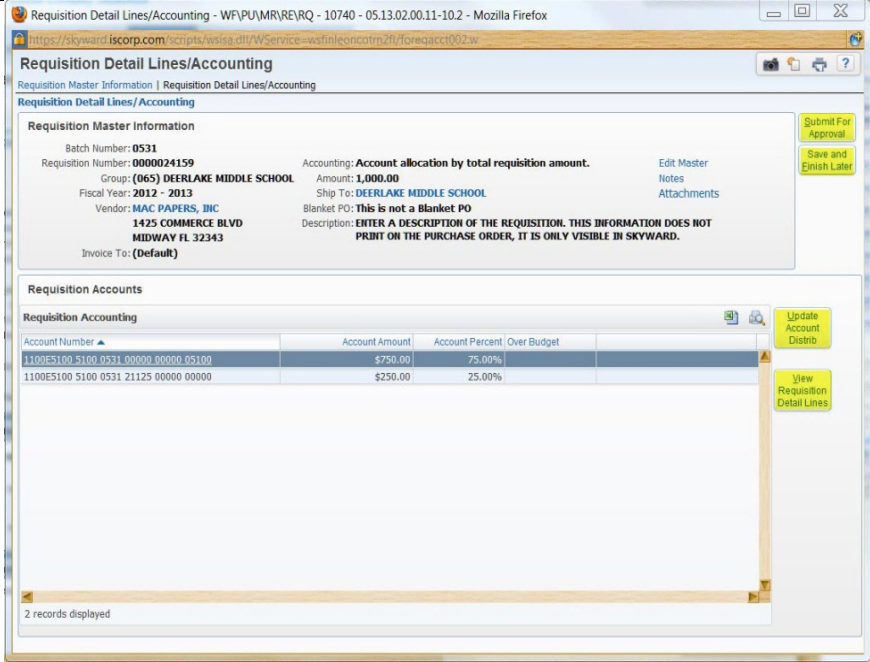
4.6.1 Click the [Save Account Distrib](#) button to save the account distribution and return to the Requisition Detail Lines/Accounting screen shown below.

Click the [Submit For Approval](#) button to submit the requisition for approval

Click the [Save and Finish Later](#) button to save the requisition w/out submitting

Click the [Update Account Distrib](#) button to return to the Account Distribution screen to modify the distribution of funds

Click the [View Requisition Detail Lines](#) button to toggle through the **Requisition Detail Line Items** section to modify/view the line items entered on the requisition. Any changes in total amount will require you to modify the Account Distribution.



4.6.2 Click the [Submit For Approval](#) button to submit the requisition for approval

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

💡 If you decide to click the [Save and Finish Later](#) button, you will be returned to the Requisitions Main screen and the requisition would have a status of **WIP – Work In Progress**.

Requisitions - WF\PU\MR\RE\RQ - 10740 - 05.13.10.00.02-10.2 - Mozilla Firefox
 https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinleoncotm211/foreqmain001.w

Leon School District - Training Database
 Crystal Cressmanscr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Inventory SBAA

Requisitions

Requisition Number	App Sts	Today's Sts	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount
▶ 0000025410	WFH		2	0531	SCRAMBLE DATA 25410	Ambient computer services...	WW	453.08

Requisition Status = WFH (Waiting For Higher approval)

20 1 records displayed Requisition Number:

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

Chapter 5. Delete a Requisition

A requisition can be deleted by the originator at any time **prior to the requisition receiving final approval** to become a Purchase Order. At that time, only the Purchasing Director or designee can delete the requisition.

Step 1: Delete a Requisition

5.1.1 Navigate to the Main Requisitions screen.

5.1.2 Select the requisition you want to delete. Verify that the Status is not **APP**. Click the to remove the requisition and confirm the deletion.

The screenshot shows the Skyward Requisitions screen for Leon County Schools. The browser address bar shows the URL: https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinleconcotrn2f/foreqmain001.w?updateFavorites=yes. The user is logged in as Monica Mccullion. The main navigation menu includes Home, Account Management, Vendors, Purchasing, Accounts Payable, Inventory, and SBAA. The Requisitions screen displays a table with one record:

Requisition Number	App Sts	Todays Sts	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount
0000024162	WIP		0	0531	ENTER THE DESCRIPTION OF THE PURCHASE. THIS DESCRIPTION DOES NOT PRINT ON THE PURCHASE ORDER, IT ONLY DISPLAYS IN SKYWARD	OFFICE DEPOT #108	FL	2,340.00

A 'Confirm Delete' dialog box is displayed in the center of the screen, asking: "Are you sure you wish to delete this record (0000024162 0)?". The dialog box has two buttons: "Yes" and "No". The "Delete" button in the right-hand menu is highlighted in yellow.

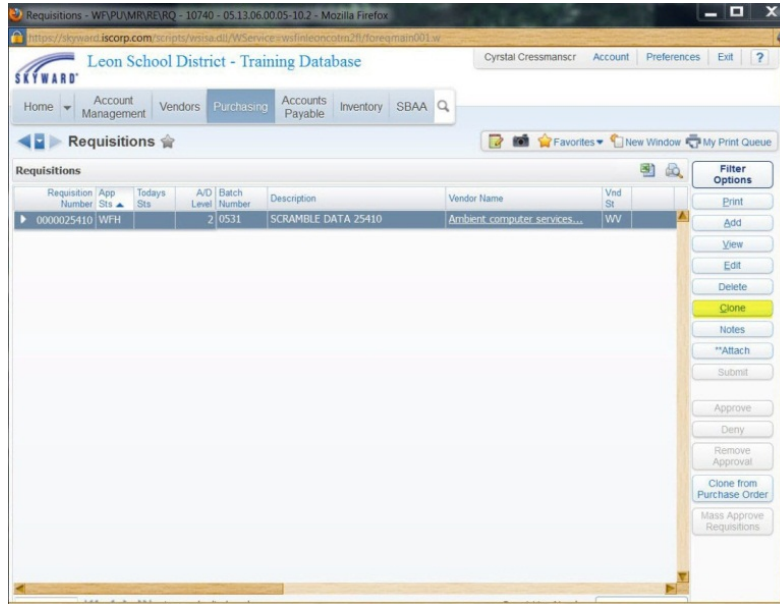
5.1.3 Click the button to confirm deletion.

Chapter 6. Clone a Requisition

The cloning feature in Skyward allows you to clone a requisition to start the process of creating a requisition. This feature could be used at the beginning of the year for reoccurring blanket Purchase Orders.

From the Requisitions Main Screen:

Select the Requisition that you wish to clone. Click the [Clone](#) button.



The Clone Requisition screen opens. Click the [Clone](#) button.

The **Requisition Master Information** screen opens. The clone function will copy **ALL** information on the selected requisition **including accounting information**. This can be edited in a later screen.

Requisitions - WF\PU\MR\RE\RQ - 10740 - 05.13.06.00.05-10.2 - Mozilla Firefox

https://skyward.iscorp.com/scripts/wsisa.dll/WSservice=wsfinleoncotn2fl/foreqmain001.w

Leon School District - Training Database

Crystal Cressmanscr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Inventory SBAA

Requisitions

Requisition Number	App Sts	Today's Sts	A/D Level	Batch Number	Description	Vendor Name	Vnd St
0000025410	WFH		2	0531	SCRAMBLE DATA 25410	Ambient computer services...	WV

Filter Options

- Print
- Add
- View
- Edit
- Delete
- Clone
- Notes
- **Attach
- Submit
- Approve
- Deny
- Remove Approval
- Clone from Purchase Order
- Mass Approve Requisitions

Make any necessary changes (year, quantity, names) in the description and line items of the new requisition.

Chapter 7. Attachments

Any user with appropriate access to create or approve a requisition can add an attachment to a requisition at any time during the approval process. The attachments, once added, are visible to all users and approvers of the requisition. The attachment is also a part of the permanent record and is available for viewing once the requisition becomes a Purchase Order.

- 💡 An attachment cannot be viewed in Skyward if the attachment is created from a file on the server. It is advisable to create a folder on your Desktop to store your attachments in and pull from this folder when adding the attachment to a requisition.

Step 1: Navigate to the Financial Management System

Verify that you are in the Financial Management Module.

From the Main Screen

7.1.1 Click ON **JUMP TO OTHER SYSTEMS: Financial Management** or

7.1.2 Click the **Home** Button and select **Financial Management** from the selection of systems

Leon County Schools

Monica Mccullion Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Inventory SBAA

Subsystem Access

Financial Management

My Favorites

Financial Management

Cash Receipts

Check Request

Requisition Entry

Purchase Orders

Reports

Chart of Accounts

Journal Entries

If you have created a **Favorites Link**, the **Purchase Orders** screen can be accessed via the **My Favorites** menu.

Edit Favorites

My Print Queue

Job	Status
SBAA Entity 0531 Cash Receipt Report - TODAY'S CASH RECEIPTS	Completed
SBAA - Check Number 000004992	Completed
SBAA Requisition 000000018649	Completed
SBAA - Journal Entry - 000059493	Completed

District News

No news to display.

CLICK the [Home] or [Jump to Other Systems] button to toggle between **Financial Management & Human Resources**.

Jump To Other Systems

Financial Management

Human Resources

Recent Programs

Financial Management Home WF

Cash Receipts WFIACICA

Reports WFIACIRE

Check Request WFIACICH

Chart of Accounts WFIACICO

Requisitions WFINIRQIRQ

Purchase Orders WFIACIPEIPO

If you have visited the **Purchase Orders** page before, a link will be stored in the **Recent Programs**

© 2013 Skyward, Inc. All rights reserved. TRAINING as of 4/12/2013 Windows 7 / Firefox 20

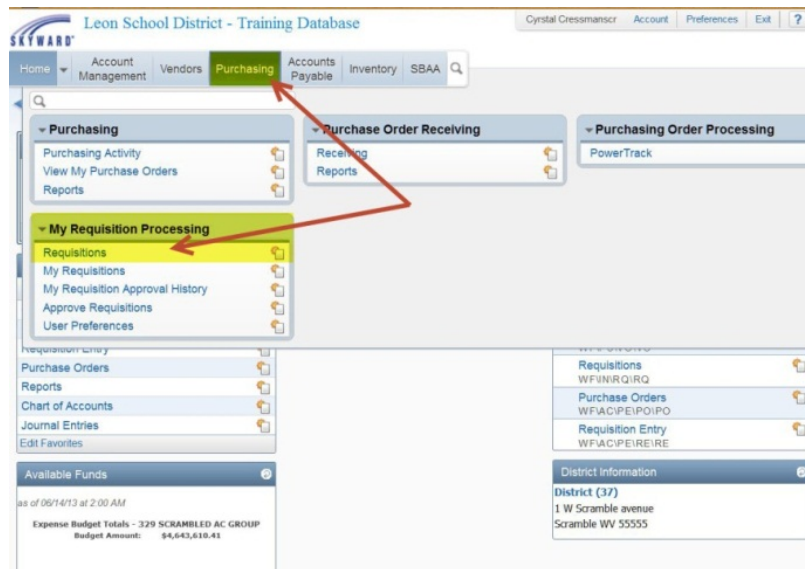
Step 2: Navigate to Requisitions Main Screen

Verify that you are in the Financial Management Module.

From the Financial Management System Main Screen

7.2.1 Select **Purchasing** from the Financial Main Menu,

7.2.2 Select **MY REQUISITION PROCESSING: Requisitions**

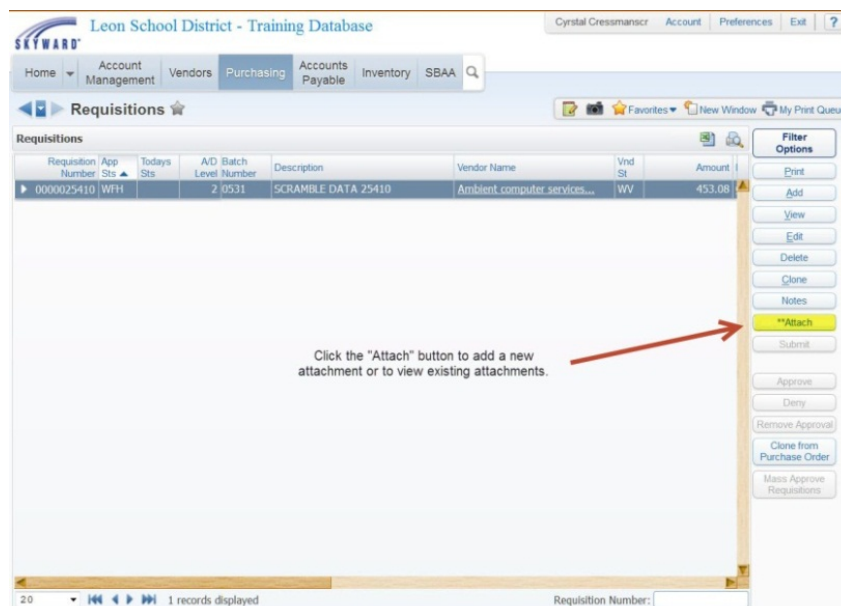


The **Requisitions Main** screen opens

From the Requisitions Main Screen:

7.2.3 Select the Requisition that you wish to add an attachment to

7.2.4 Click the **Attach** button.



The **Requisition Attachments** screen opens.

Step 3: Add a New Attachment

The Add Requisitions Attachment Screen is used to add a new Attachment or view existing Attachments

7.3.1 Click the button. The Add Requisitions Attachment screen opens

Add Requisitions Attachment

REQUISITION SETUP INFORMATION

FIELD	FIELD DESCRIPTION
*Type	The drop down list contains a list of all valid Attachment Types - cannot be left blank Sample valid attachment types are <ul style="list-style-type: none"> • Additional Support • Attachments • Bid Information • Board Agenda
Entered Date	Defaults to the current Date - cannot be changed
Entered Time	Defaults to the current Time - cannot be changed
Enter By	Defaults to the user logged in - cannot be changed
*Description	Enter a description of the attachment – cannot be left blank

7.3.2 Click the button

You will be returned to the Requisitions Main Screen where the button will now contain ** indicating the presence of an Attachment for the Requisition.

Chapter 8. Attach a Note to a Requisition

Any user with appropriate access to create or approve a requisition can add a note to a requisition at any time during the approval process. Notes, once added, are visible to all users and approvers of the requisition. The note is a part of the permanent record and is also available for viewing once the requisition becomes a Purchase Order. The note will not print on the Purchase Order.

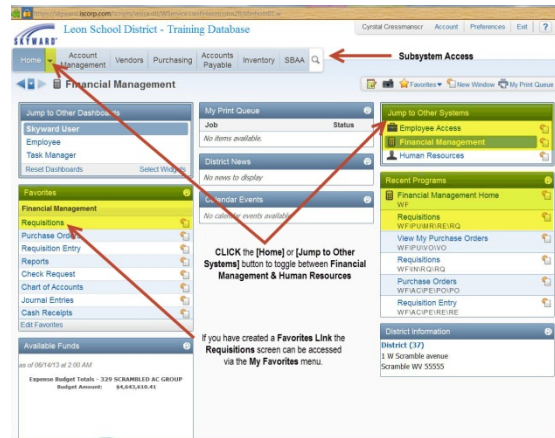
Step 1: Navigate to the Financial Management System

Verify that you are in the Financial Management Module.

From the Main Screen

8.1.1 Click ON **JUMP TO OTHER SYSTEMS: Financial Management** or

8.1.2 Click the Button and select **Financial Management** from the selection of systems



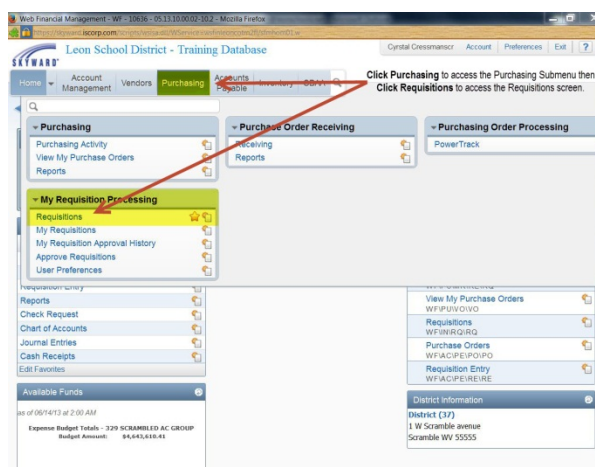
Step 2: Navigate to Requisitions Main Screen

Verify that you are in the Financial Management Module.

From the Financial Management System Main Screen

8.2.1 Select from the Financial Main Menu,

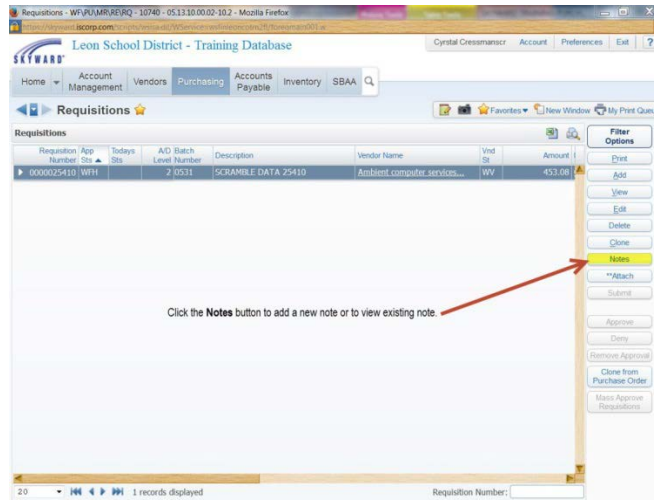
8.2.2 Select **MY REQUISITION PROCESSING: Requisitions**



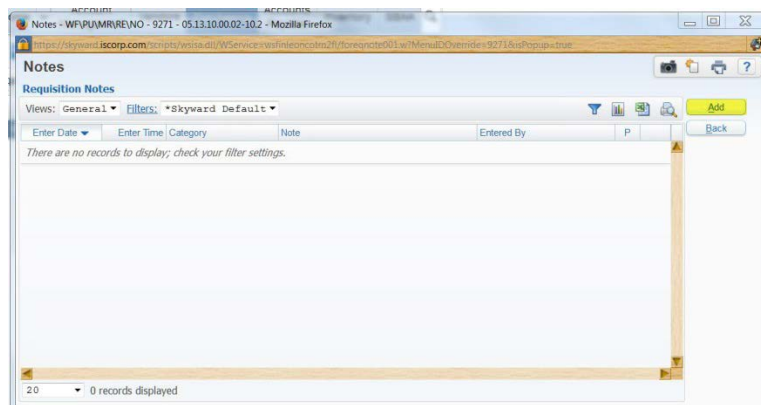
The **Requisitions Main** screen opens

From the Requisitions Main Screen:

8.2.3 Click the button.

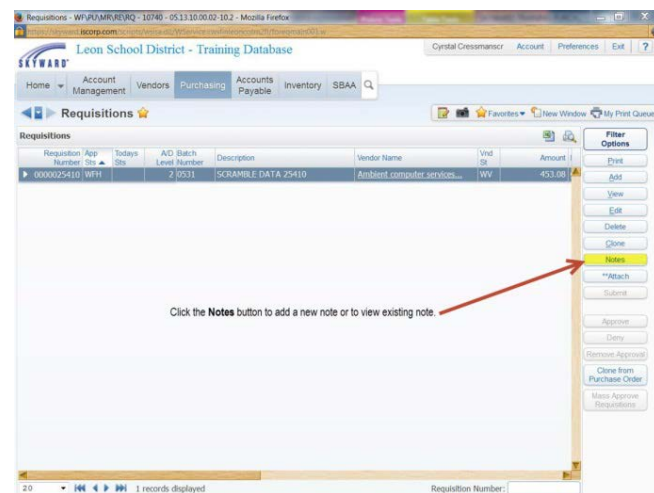


The **Notes** screen opens.



Step 3: Add a New Note

The Notes Screen is used to add a new Note or view existing Notes.



8.3.1 Click the **Add** button

8.3.2 Add/Edit Note Information

Notes - WFPUMR\RENO - 9271 - 05.13.10.00.02-10.2 - Mozilla Firefox

Notes

Add/Edit Note for Requisition# 0000025410

* Note Category: NOTE TO PURCHASING

Entered Date: 10/24/2013

Entered Time: 9:25 AM

Entered By: Cressmanscr, Crystal U

* Note: ENTER THE NOTE HERE

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

Asterisk (*) denotes a required field

REQUISITION SETUP INFORMATION

FIELD	FIELD DESCRIPTION
*Note Category	The drop down list contains a list of all valid Note Categories - cannot be left blank Sample categories are <ul style="list-style-type: none"> • Business Justification [16] • Close PO - All Items Received [39] • ERF [25] • Note To Finance [14] • Note To Purchasing[15] • Other [44]
Entered Date	Defaults to the current Date- cannot be changed
Entered Time	Defaults to the current Time - cannot be changed
Enter By	Defaults to the user logged in - cannot be changed
*Note	Enter the note
Protected	Select the protect option to prevent anyone from modifying the note once it is saved.

8.3.3 Click the button

You will be returned to the Requisitions Main Screen where the button will now contain ** indicating the presence of a note for the requisition.

Chapter 9. Receiving

The following 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 Purchase Order.

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. You would add a receiving record, and attach an invoice to alert Finance that a payment needs to be made.

Step 1: Navigate to the Receiving Screen

From the Financial Management Screen

9.1.1 Click on Financial Management (FM), Purchasing (PU), Purchase Order Receiving

 **Breadcrumbs: FM\PU\PO**



Leon School District - Training Database

Cyrstal Cressmanscr Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Inventory SBAA

Financial Management Financial Management

Jump to Other Dashboards

Skyward User

Employee

Task Manager

My Print Queue

Job Status

No Items available.


District News

Jump to Other Systems

Employee Access

Financial Management

Human Resources



Leon School District - Training Database

Cyrstal Cressmanscr Account Preferences Exit ?

Home Account Management Vendors **Purchasing** Accounts Payable Inventory SBAA

Purchasing

Purchasing Activity

View My Purchase Orders

Reports

My Requisition Processing

Requisitions

My Requisitions

My Requisition Approval History

Approve Requisitions

User Preferences

Purchase Order Receiving

Receiving Reports

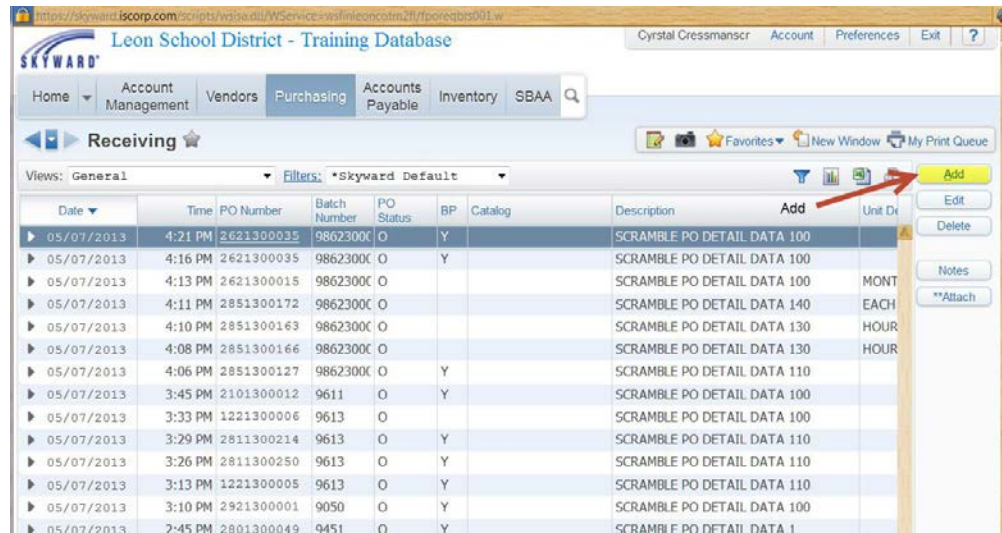
Purchasing Order Processing

PowerTrack

PO Receiving

Step 2: Add a Receiving Record

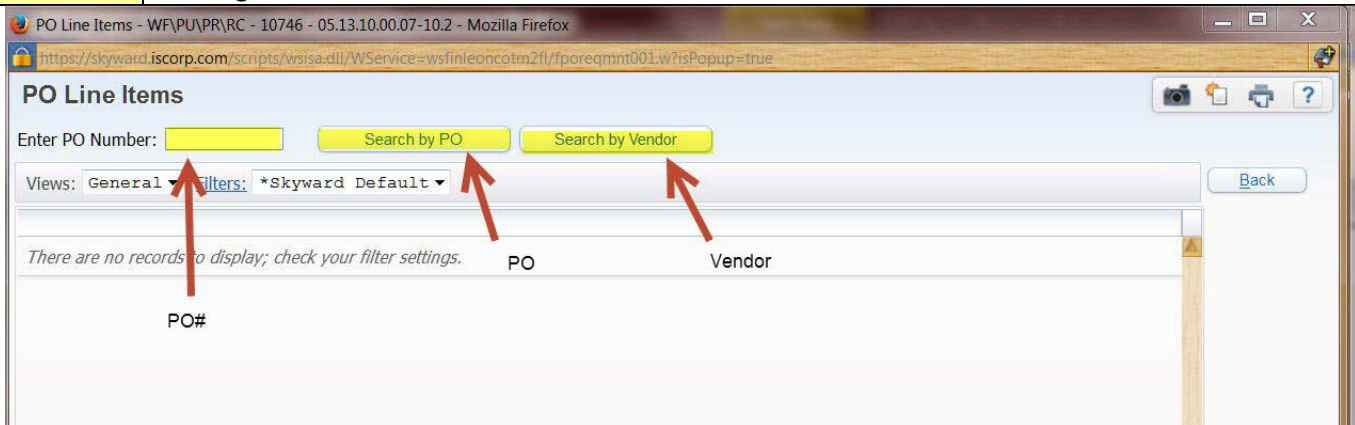
9.2.1

Purchase Order **Receiving – General**Click on **“Add”** to add a new receiving record.

The **PO Line Items** screen opens

9.2.2

To begin the receiving process you must first enter the Purchase Order number that you want to add a receiving record to. You can search for Purchase Order's by Purchase Order Number, Vendor or by viewing all Purchase Orders.



9.2.3

Click **[Search by PO]**

Step 3: Receiving on a NON BLANKET (by Quantity)

9.3.1 Enter the quantity received in the **Qty Received** field.

💡 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.

PO Line Items - WF\PU\PR\RC - 10746 - 05.13.10.00.07-10.2 - Mozilla Firefox
 https://skyward.iscorp.com/scripts/wvsa.dll/WService=wsfintecom29/fporeqmnt001.w?SPopup=true

PO Line Items
 Enter PO Number: 3061300005 Search by PO Search by Vendor Enter quantity received Click Save after entering information Save

Views: General Filters: *Skyward Default

Line Number	Catalog	Description	UM	Qty Ordered	Prev Received	Qty Received	Qty Rem
▶ 100		SCRAMBLE PO DETAIL DATA 100		1	0	0	
▶ 110		SCRAMBLE PO DETAIL DATA 110		1	0	0	
▶ 120		SCRAMBLE PO DETAIL DATA 120		1	0	0	
▶ 160		SCRAMBLE PO DETAIL DATA 160		10	0	0	
▶ 170		SCRAMBLE PO DETAIL DATA 170		1	0	0	
▶ 220		SCRAMBLE PO DETAIL DATA 220		5	0	0	

Receive All
 Reset All Qty Received to Zero
 Show All Detail Items
 Notes
 **Attach
 Close

Click if you wish to receive all of the PO items
 Click if you wish to reset the Quantity Received to zero.

20 6 records displayed Line Number:

💡 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 Purchase Order 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.

9.3.2 Enter any comments in the Comments Field (invoice #, partial pay, final pay and close, etc.)

9.3.3 Attach receiving documents and invoices

Step 4: Receiving on a BLANKET (by Amount).

9.4.1 Enter the amount received in the **Amount Received** field.

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

PO Line Items

Enter PO Number:

Views: Filters:

Number	Catalog	Description	UM	Blanket PO Amount	Prev Amt Received	Amount Received	Amount Remaining	Comment
110		BLANKET FOR MISC OFFICE SUPPLIES		700.00	373.16	99.99	226.85	INV# 1506606066

Expand All Collapse All Modify Details (displaying 2 of 2) View Printable Details

PO Line Item Receiving Information

Date	Time	Unit of Measure	Blanket PO Amount	PO Recd Amount	Blanket PO Received By	Comment
08/07/12	1:57 PM		700.00	116.37	RILES, CHERYL T	INV#1487638362
08/09/12	11:55 AM		700.00	5.30	RILES, CHERYL T	INV#619760868-001
09/25/12	1:56 PM		700.00	32.99	RILES, CHERYL T	
09/25/12	2:01 PM		700.00	9.44	RILES, CHERYL T	INV#626261705-001
09/27/12	11:12 AM		700.00	172.00	RILES, CHERYL T	INV#1499747524
09/27/12	11:14 AM		700.00	-29.97	RILES, CHERYL T	CREDIT #1501926397
09/27/12	11:15 AM		700.00	36.47	RILES, CHERYL T	INV#1501878180
09/27/12	11:30 AM		700.00	30.56	RILES, CHERYL T	INV#1502273035

Notes Add Notes

No Notes exist for this receiving record.

1 records displayed

Line Number:

Annotations:

- 1. Enter dollar amount you are receiving
- 2. Enter invoice # or other notes
- 3. Attach invoice BEFORE clicking save.
- 4. Save
- This shows amount remaining on the PO
- This shows the receiving history for this PO

- 💡 You cannot receive more than the **Amount Remaining**.
- 💡 The **Amount Remaining** will update as you enter values.
- 💡 If you have received all items on the Purchase Order then click **[Receive All]** to automatically populate the **Amount Received** with the **Amount Remaining**.

Click **[Reset All Amount Received to Zero]** to reset the Amount Received to 0. This does not affect any previously received amounts.

Step 5: Adding an Attachment

The Add Requisitions Attachment Screen is used to add a new attachment or view existing attachments

9.5.1 Click the **Add File** button. The Add Requisitions Attachment screen opens

Attachments

Available Attachments for PO Number 2611300005

Type	Description	Entered By	Entered Date	Entered Time	File Size	Original File
invoice	CREDIT #1501926397 <\$29.97> 8/28/12	CHERYL T RILES	09/27/2012	11:14 AM	114 KB	OD 150192639
invoice	#1487638362 \$116.37 7/24/12	CHERYL T RILES	08/07/2012	1:57 PM	200 KB	OFFICE DEPOT 1487638362.pdf
invoice	#1499747524 \$172.00 8/23/12	CHERYL T RILES	09/27/2012	11:12 AM	225 KB	OD 1499747524.pdf
invoice	#1501878180 \$36.47 8/28/12	CHERYL T RILES	09/27/2012	11:15 AM	222 KB	OD 1501878180.pdf
invoice	#1502273035 \$30.56 8/29/12	CHERYL T RILES	09/27/2012	11:29 AM	114 KB	OD 1502273035.pdf
invoice	#619760868-001 \$5.30 8/6/12	CHERYL T RILES	08/09/2012	11:55 AM	100 KB	OD 619760868-001.pdf
invoice	#624465329-001 \$32.99 9/13/12	CHERYL T RILES	09/25/2012	1:56 PM	89 KB	OD 624465329-001.pdf
invoice	#626261705-001 \$9.44 9/25/12	CHERYL T RILES	09/25/2012	2:01 PM	98 KB	OD626261705-001.pdf

#1 Click add file (points to Add File button)

#2 Choose the type of attachment (points to Type dropdown)

#3 Describe attachment - invoice #, credit memo, etc. (points to Description field)

#4 Find attachment (should be on your hard drive, not the server). (points to Browse... button)

#5 Click Save (points to Save button)

8 records displayed

Chapter 10. Receiving PO Attachments

What are PO Receiving Attachments?

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

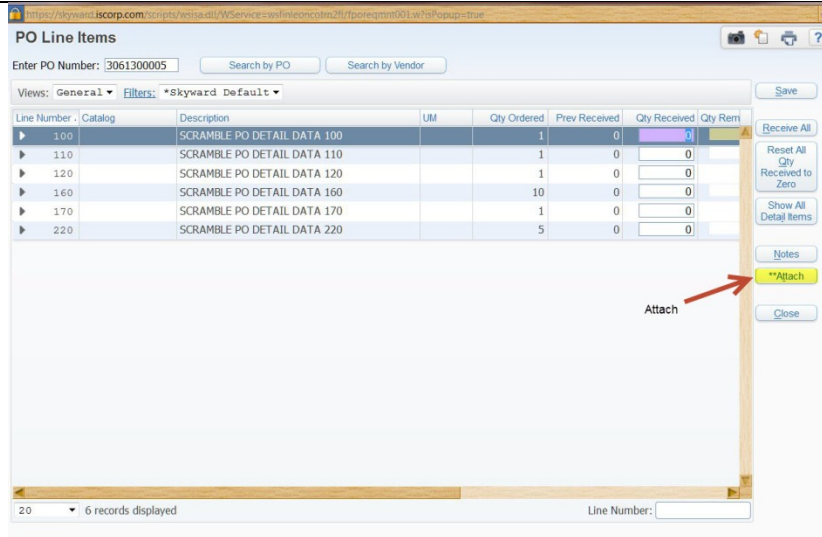
When would I use PURCHASE ORDER Receiving Attachments?

A user can add a document, to the Purchase Order for an electronic record of receipt.

Step 1: Navigate to the PO Receiving - General Screen

From the Financial Management Screen

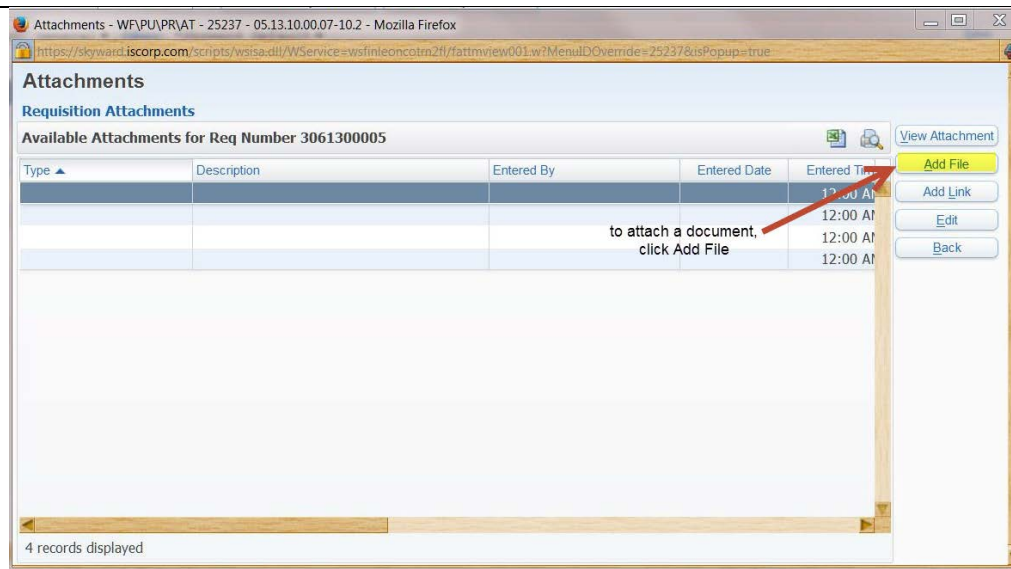
10.1.1 Click the Attach button.



The Attachments screen opens.

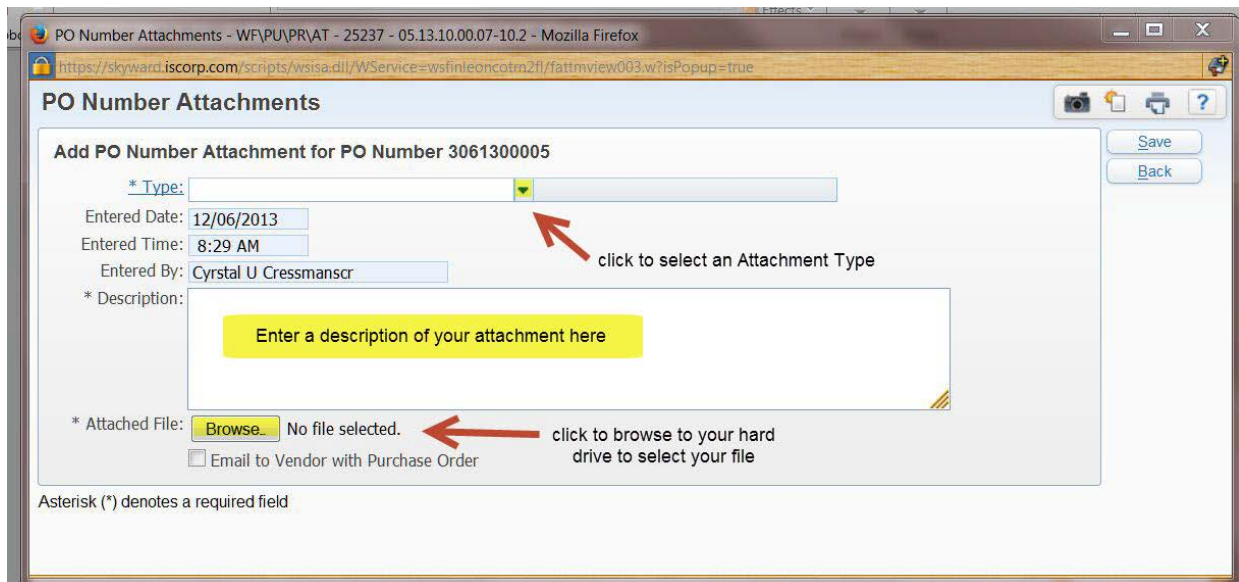
10.1.2 Click Add File to attach a document

💡 The file must be on your local hard drive (not the server) for Skyward to “see” it. It is suggested that you make a folder on your desktop called “Skyward Attachments” for these files.



Step 2: Entering an Attachment

10.2.1 Enter the requested information.



Field	Description
Entered Date	default's to today's date
Entered Time	current time
Entered By	defaults to current user
Type**	select the type of attachment from pre-populated list of document types
Desription**	description of attachment
Attached File**	click browse and select a file to upload
<p>** Categories cannot be left blank. The drop down Type list contains a list of Type categories, sample categories are:</p> <ul style="list-style-type: none"> • Additional Support • Attachments • Bid Information • Board Agenda • Invoice • PTSA • Receipt 	
10.2.2	Click Save to save the record.
10.2.3	You are returned to the PO Receiving – General screen. The receiving process is COMPLETE.