Entering Requisitions (Purchase Orders) in Skyward

Tutorial available on District Website under Staff Resources:
https://www.afasd.net/district/staff-resources.cfm

<u>Reasons to enter a requisition:</u>
1. Obtain a purchase order number for an order.
2. Purchase item(s) for the District.
3. Pay someone for services provided to the District.

Note! The following instructions include how to enter a "regular" requisition. For instructions on how to enter a requisition from an online vendor, please see the PO Training Document for Online Vendors under staff tools.

1. **Click <u>Skyward Employee Access</u>**
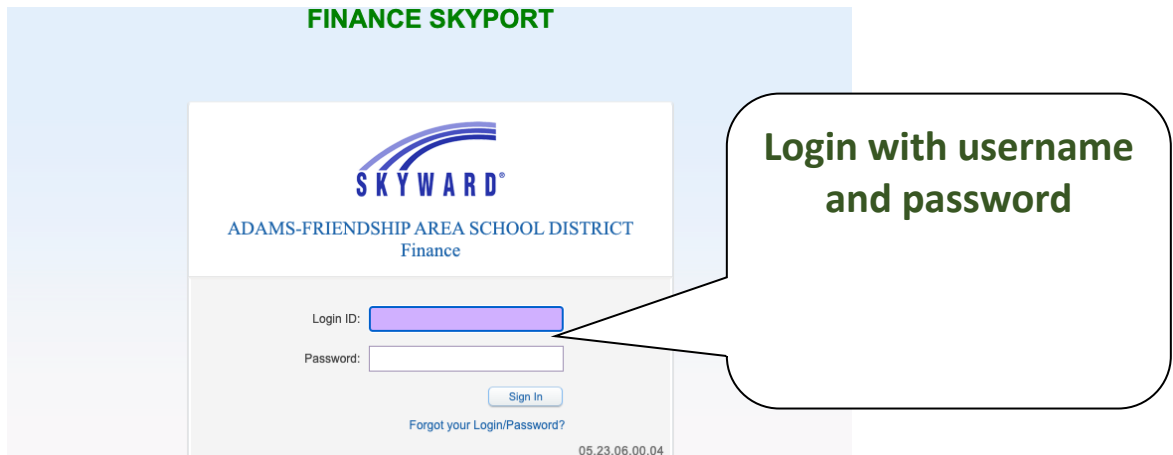
2. **Ensure you are in the "Financial Management" system.** The list of systems with your account is dependent upon your level of access.

ADAMS-FRIENDSHIP AREA SCHOOL DISTRICT

SKYWARD

| Home | Account Management | Vendors | Purchasing | 🔍 |

Financial Management

Click on "Purchasing"

Jump to Other Dashboards

*Calendar

Employee

Reset Dashboards   Select Widgets

ADAMS-FRIENDSHIP AREA SCHOOL DISTRICT

SKYWARD

| Home | Account Management | Vendors | Purchasing | 🔍 |

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▼ Purchasing

Purchasing Activity
View My Purchase Orders

▼ My Requisition Processing

Requisitions

Click on "Requisitions"

Reset Dashboards   Select Widgets

My Time Off Status

Not available when logged into the Secured Access Area

ADAMS-FRIENDSHIP AREA SCHOOL DISTRICT

SKYWARD

| Home | Account Management | Vendors | Purchasing | 🔍 |

◀ ▼ ▶ Requisitions ☆   📝 📷 ⭐Favorites▼ 💬New Window 🖨My Print Queue

Views: My Requisitions   Filters: *Skyward Default

| PO Number | Status | A/D Level | Batch Number | Description | Vendor Name | Vnd St | Amount | Entered By | % Disc | Project/Grant Number | # L | # A N | A | R | BP | Last Updated | Req Grp | PO ID | Fiscal Year | Current Level |

There are no records to display; check your filter settings.

Print
Add
View
Edit
Clone
Notes
Attach
Submit

Add from Online Catalog
Clone from Purchase Order

Select "Add" from the right menu.
A new window will appear.

skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinadamsfriendshipwi

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 410 – AF High School
Fiscal Year: 2023 – 2024 July 1, 2023 – June 30, 2024
○ Account allocation by total requisition amount (YMA).
○ Account allocation by each requisition detail line (YDA).

Requisition Information

* Batch Number: 25
* Description:

* Vendor:
* Ship To: ADAMS FRIENDSHIP AREA SCH DIST   201 W SIXTH ST FRIENDSHIP WI
Attention:
* Due Date: 07/25/202   Tuesday
Ship Date: 07/25/2023
Ship Via:
Contract:

Asterisk (*) denotes a required field

Save and Add Detail
Save and Mass Add Detail
Back

1. Select the correct fiscal group that you are making the purchase for. If you are unsure, please contact the Business Office.

2. Enter a brief description of the item(s) being ordered.

3. Enter the Vendor. If you slowly type the vendor's name, a list of available vendors will display. *For p-card purchases use BMO Harris Bank as the vendor.*

4. In the "Attention" box, enter the Building and Last name of Staff Member. For example, Mrs. Smith at A-F Elementary would enter "Elementary-Smith"

5. Click "Save and Mass Add Detail."

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skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinadamsfriendshipwi/foreqdetl002.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 27
Requisition Number: 0000054675
Group: (410) AF High School
Fiscal Year: 2023 - 2024
Vendor: **BMO HARRIS BANK**

Accounting: **Account allocation by t**
Amount: 0.00
Ship To: **ADAMS FRIENDSHIP A**

Description: **test**

Requisition Detail Lines

* Line Number: 100
Line Type: ○ Merchandise ○ Narrative
Catalog:
* Quantity: 0
Unit of Measure:
* Unit Cost: 0.00000
Total Amount: 0.00
* Description:

Reset

Requisition Detail Lines

* Line Number: 110
Line Type: ○ Merchandise ○ Narrative
Catalog:
* Quantity: 0
Unit of Measure:
* Unit Cost: 0.00000

Reset

Save
Back

Please note that shipping should be entered on a separate line from the item(s) ordered.

Enter each item being ordered on a separate "line number"

For each item (line number) you are purchasing, enter:
*Quantity
*Unit of measure
*Unit cost
*Detailed description

When complete – click "Save"

Requisition Detail Lines/Accounting

🔗 skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinadamsfriendshipwi/foreqdetl001.w

Requisition Detail Lines/Accounting   📷 📋 🖨 ?

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information   [Submit For Approval]

Batch Number: **27**   [Save and Finish Later]

Requisition Number: **0000054675**   Accounting: **Account allocation by total requisition amount.**   [Edit Master]   [Back]

Group: **(410) AF High School**   Amount: **2.00**   [Notes]

Fiscal Year: **2023 - 2024**   Ship To: **ADAMS FRIENDSHIP AREA SCH DIST**   [Attachments]

Vendor: **BMO HARRIS BANK**

Description: **test**

Requisition Detail Line Items

Views: [General ▾] Filters: [*Skyward Default ▾]   🔽 📊 📥 🔍   [Add]

Line ▲	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc	Un
100		test	1	EACH	1.00000	1.00		0	
110		shipping charges	1	EACH	1.00000	1.00		0	

[Edit]
[Delete]
[Mass Add Detail]
[Add Requisition Accounts]

> First, review everything on this page to ensure it is correct. Once review is complete, click "Add Requisition Accounts"

Account Distribution

Account Distribution   📷 📋 🖨 ?

Available Accounts (Accounts are displayed based on Account Clearance access)   [Save Account Distrib]   [Back]

📥 🔍

Account Level Description

Fnd ▲	T	Loc	Obj	Func	Prj	Funds Available	Selected
10	E	410	310	120000	000	$200.00	☐
10	E	410	310	121000	000	$0.00	☐
10	E	410	310	123000	000	$0.00	☐
10	E	410	310	125400	000	$0.00	☐
10	E	410	310	125500	000	$700.00	☐
10	E	410	310	126000	000	$0.00	☐
10	E	410	310	127000	000	$0.00	☐
10	E	410	310	129400	000	$0.00	☐
10	E	410	310	129900	000	$0.00	☐
10	E	410	310	131000	400	$0.00	☐
10	E	410	310	132000	000	$0.00	☐
10	E	410	310	132000	400	$0.00	☐
10	E	410	310	133000	000	$300.00	☐
10	E	410	310	133000	400	$0.00	☐

Account Number Information

Code	Description
10	GENERAL FUND
410	HIGH SCHOOL
310	PERSONAL SERVICES
120000	REGULAR CURRICULUM

2023-2024 Available Funds By
[Individual Account]

⏮ ◀ ▶ ⏭ 100 records displayed   Account Number: [_____]

Quick Key: [_____]

Total Amount to Distribute: **$1.00 100.00%**
Total Distributed: **$0.00   0.00%**
Amount Remaining: **$1.00 100.00%**

Selected Accounts

Account Number	Amount	Percent

> 1. Find and click the account code for your purchase.

> *Please note that you can click on an account on the left and the description will appear in the box in the upper right-hand corner.*

> 2. Verify that the correct code appears in the bottom box under "Selected Accounts".

> 3. Click "Save Account Distrib." in the top right corner.

4

- Your window will now return to the previous screen, but the account number will be listed.
- ***Please review all of this information for accuracy.***
- Once review is complete, click "Submit for Approval"

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **27**

Requisition Number: **0000054675**

Group: **(410) AF High School**

Fiscal Year: **2023 - 2024**

Vendor: **BMO HARRIS BANK**

Accounting: **Account allocation by total requisition amount.**

Amount: **2.00**

Ship To: **ADAMS FRIENDSHIP AREA SCH DIST**

Description: **test**

[Edit Master] [Notes] [Attachments]

[Submit For Approval] [Save and Finish Later] [Back]

Requisition Accounts

Requisition Accounting

Account Number ▲	Account Amount	Account Percent	Over Budget	
10 E 410 411 127000 000	$2.00	100.00%		

[Update Account Distrib] [View Requisition Detail Lines] [Add Asset Detail]

After you click "Submit for Approval", the requisition will go through the approval chain of Team Leader (if applicable), Building Principal and Business Office. You will receive an email when the requisition is approved and becomes a purchase order.

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