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)

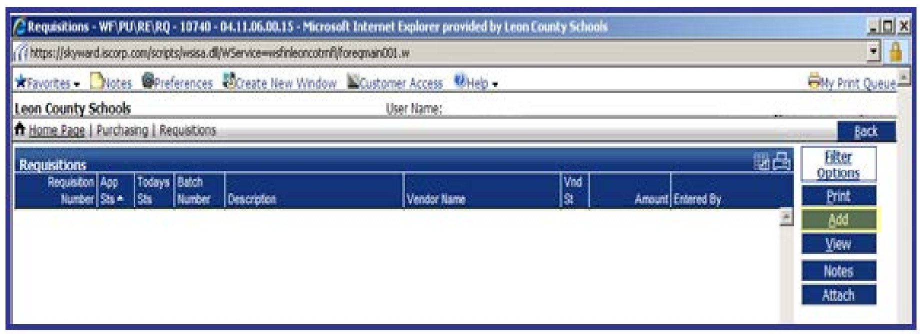
Breadcrumbs: FM/PU/RE

The **Requisitions Main** screen opens.

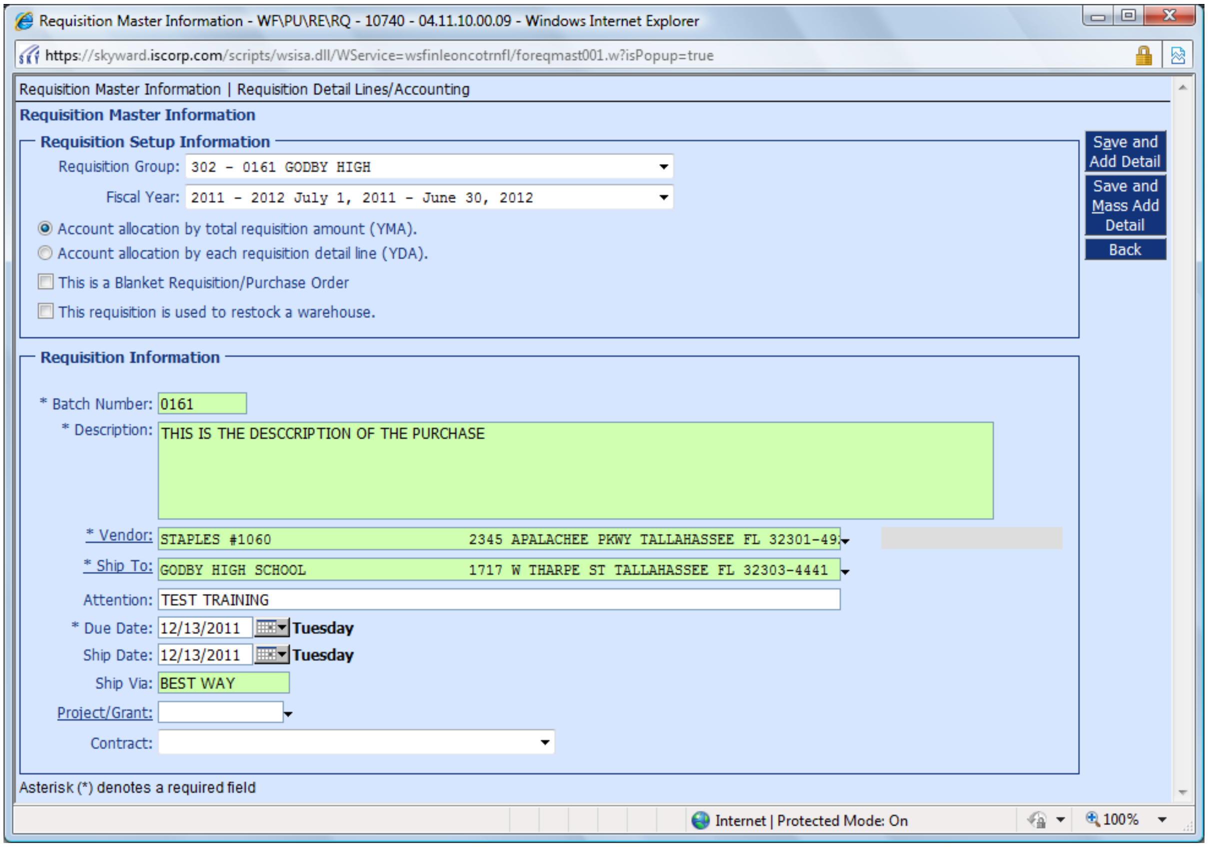
Step 2: Add a New Requisition

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 drown drop 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 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 drop down to select a Vendor. Be sure to select the ORDER

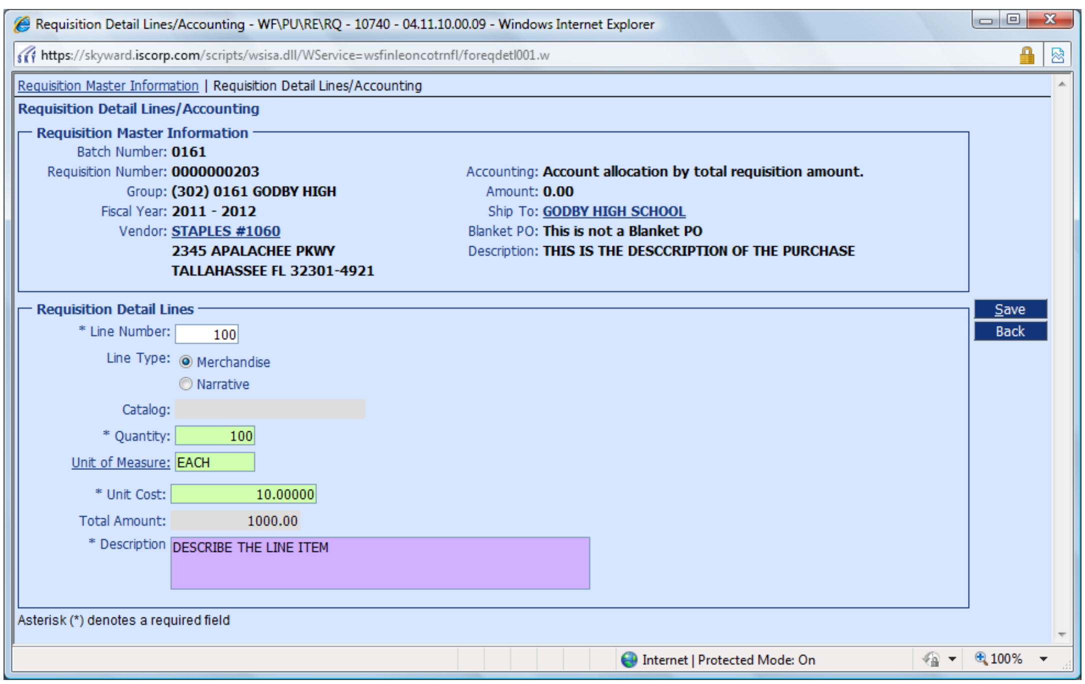
FIELD	FIELD DESCRIPTION
	FROM Vendor
Ship To	Click the drop down to select a location to ship to Will be setup to default to the Cost Center; can be edited.
Attention	Defaults to Bookkeeper Name
Due Date	Defaults to today's date
Ship Date	Defaults to today's date
Ship Via	Preferred shipping method (UPS, 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 drown drop list contains a list of all Cost Centers that you has 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.

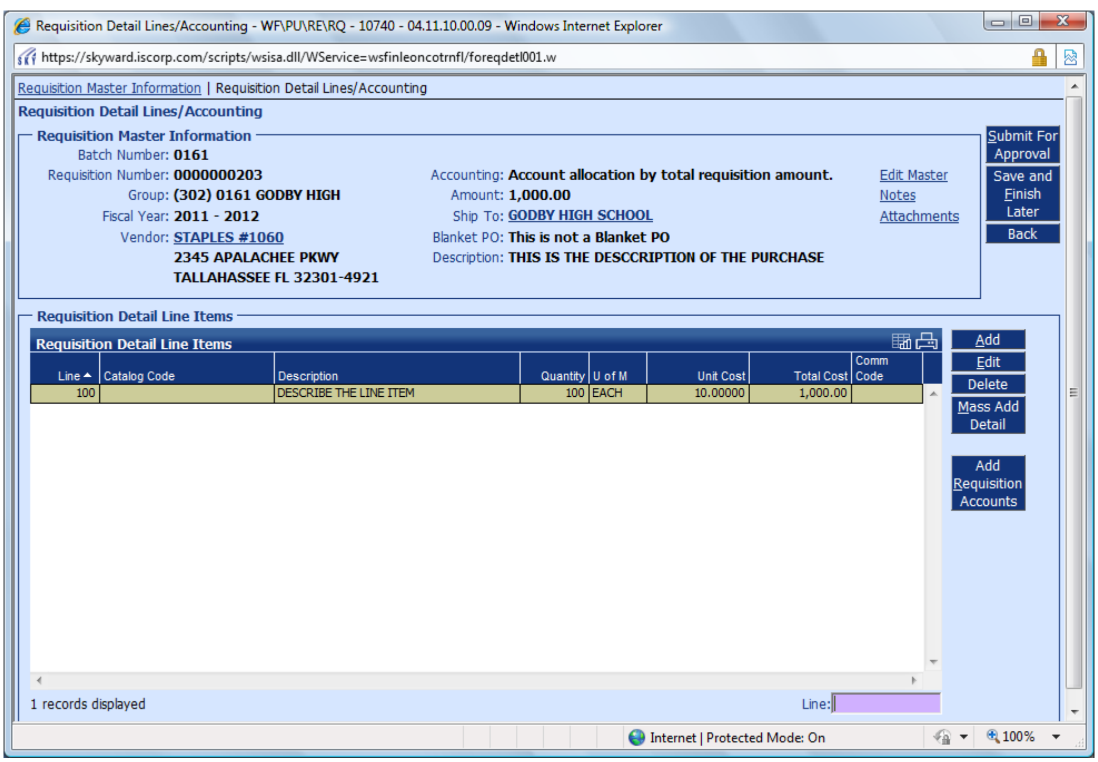
Click **[Add]** to add additional line items one at a time.

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.

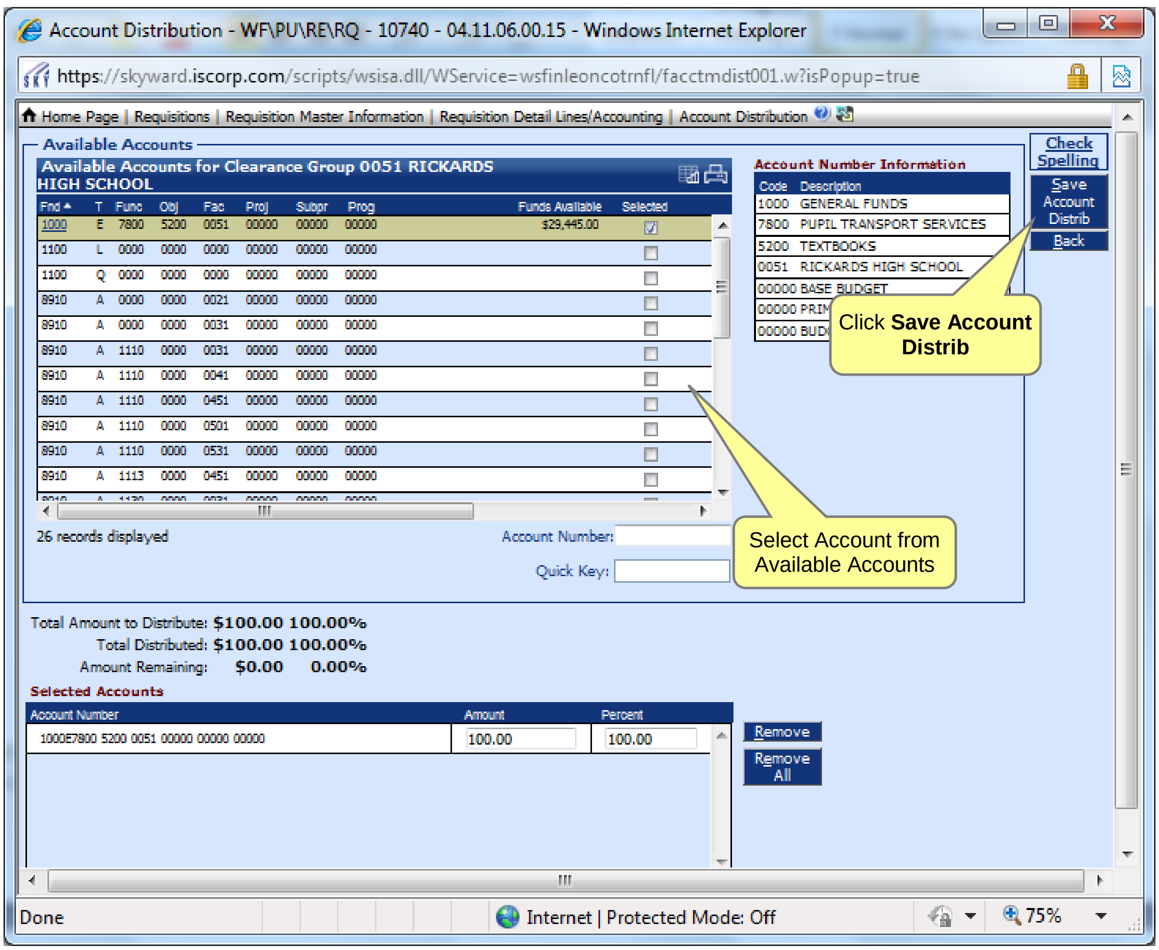
Click **[Add Requisition Accounts]** to add account details to the requisition.

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



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

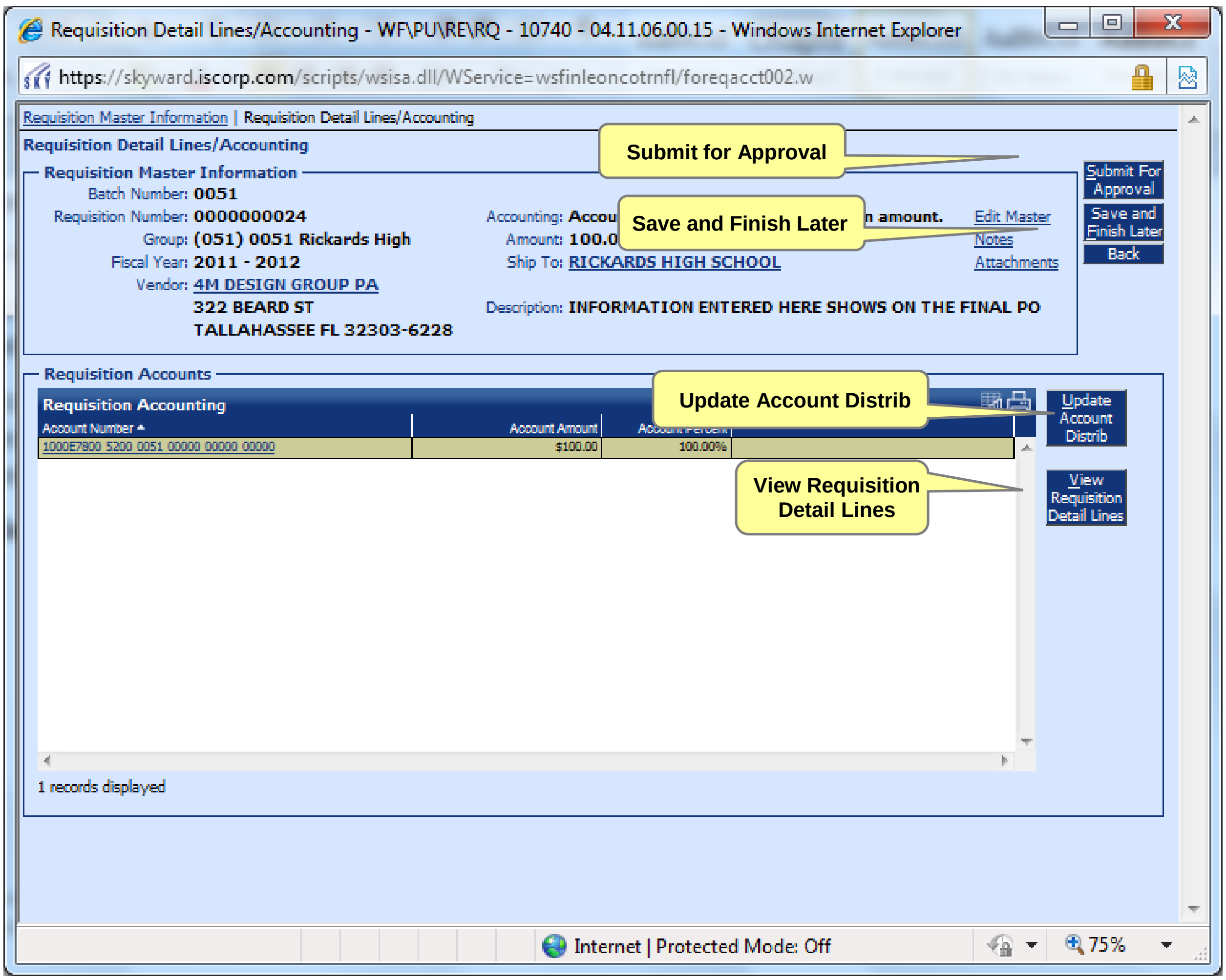
- More than one account can be selected.

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.

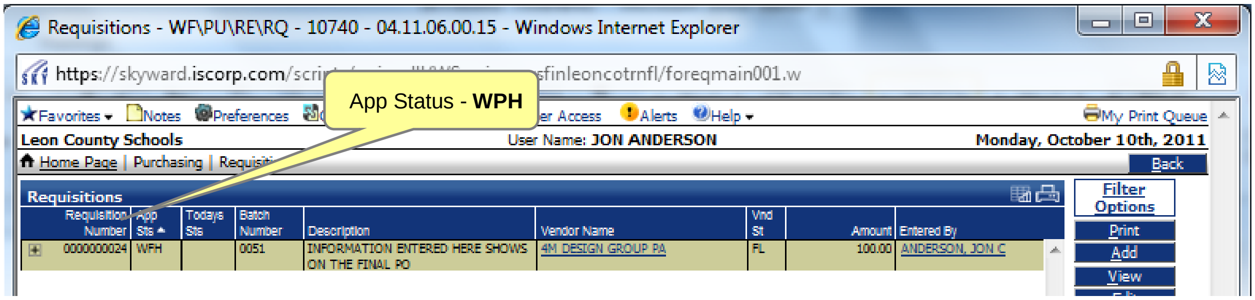
Click **[Save Account Distrib]** to save the account distribution and return to the **Requisition Detail Lines\Accounting** screen shown below.



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.**

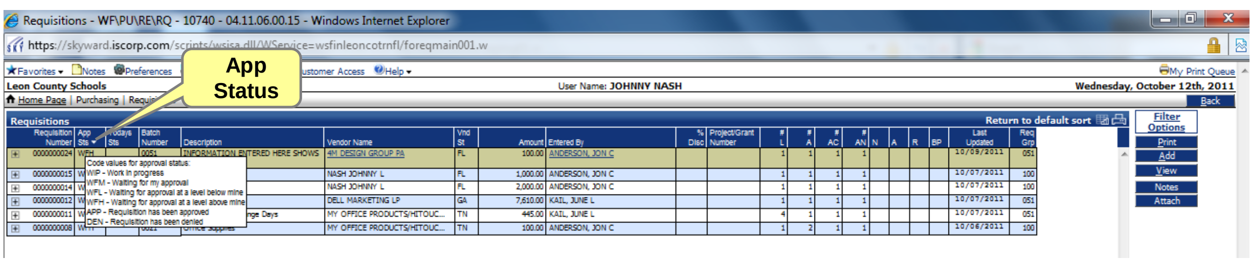
- If you decide to click **[Save and Finish Later]** you will be returned to the **Requisitions Main** screen and the requisition would have a status of WIP – **Work in Progress**.
- See a full list of status codes explained later in this section.



You 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.

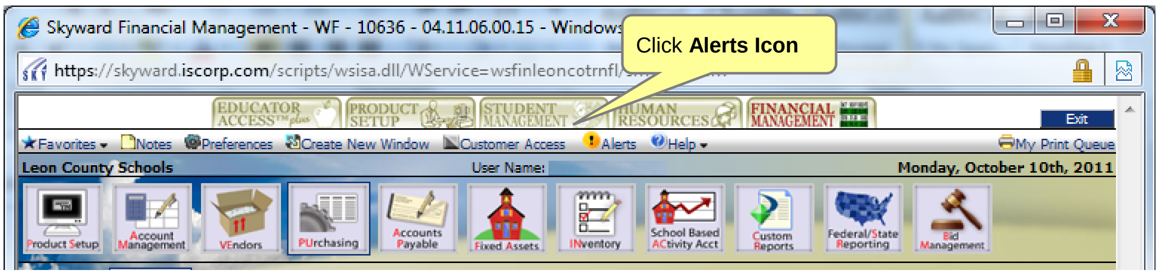


The following list of various approval statuses is displayed.

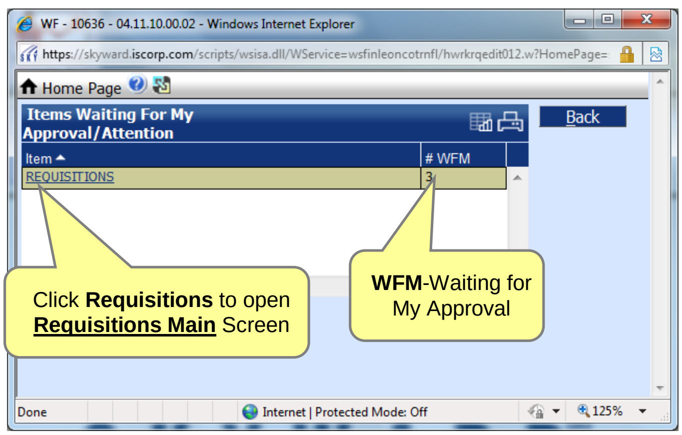
Code Values for approval status:	
WIP	Work in progress
WFM	Waiting for my approval
WFL	Waiting for approval at a level below mine
WFH	Waiting for approval at a level above mine
APP	Requisition has been approved
DEN	Requisition has been denied

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.



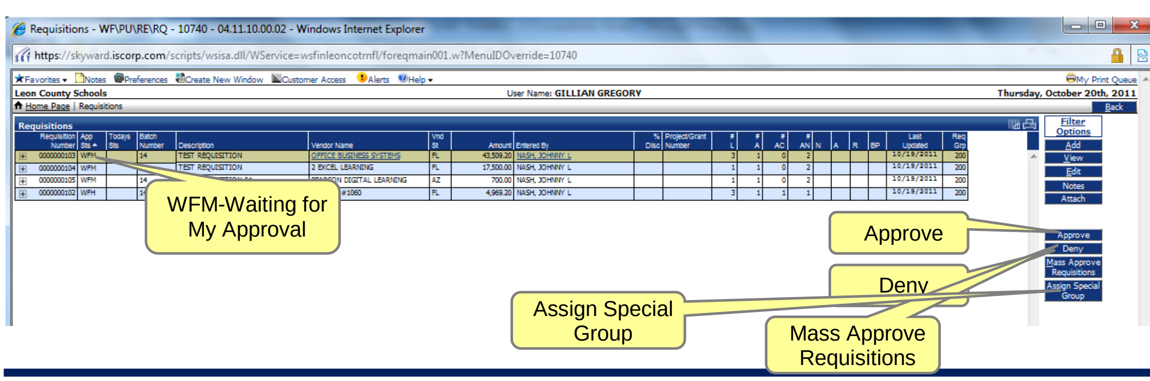
Click the **[Alerts]** icon from the Main Window to open the following window - **"Items Waiting for My Approval/Attention"**.



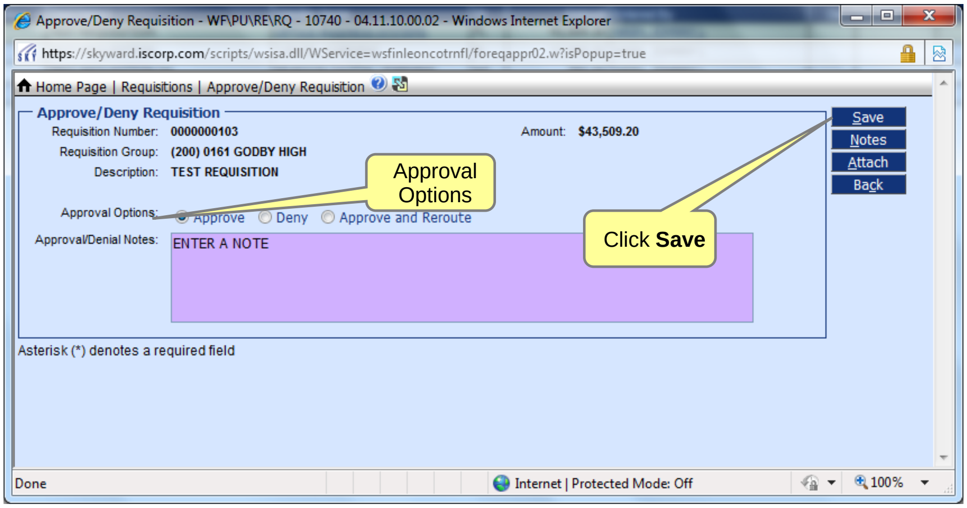
Click the Requisitions line to open the "**Requisitions Main"** Screen.

*Note the status "WFM"

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

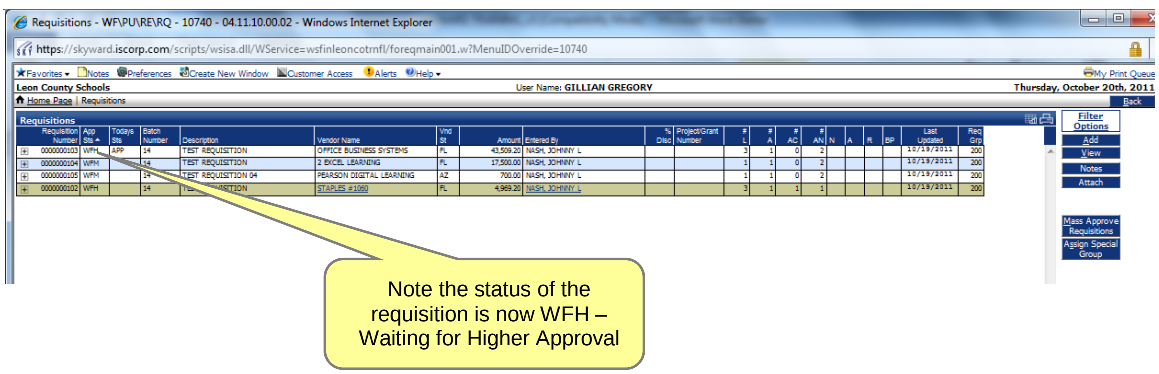


Click the **[Approve]** button to access the “**Approve/Deny Requisition”** screen

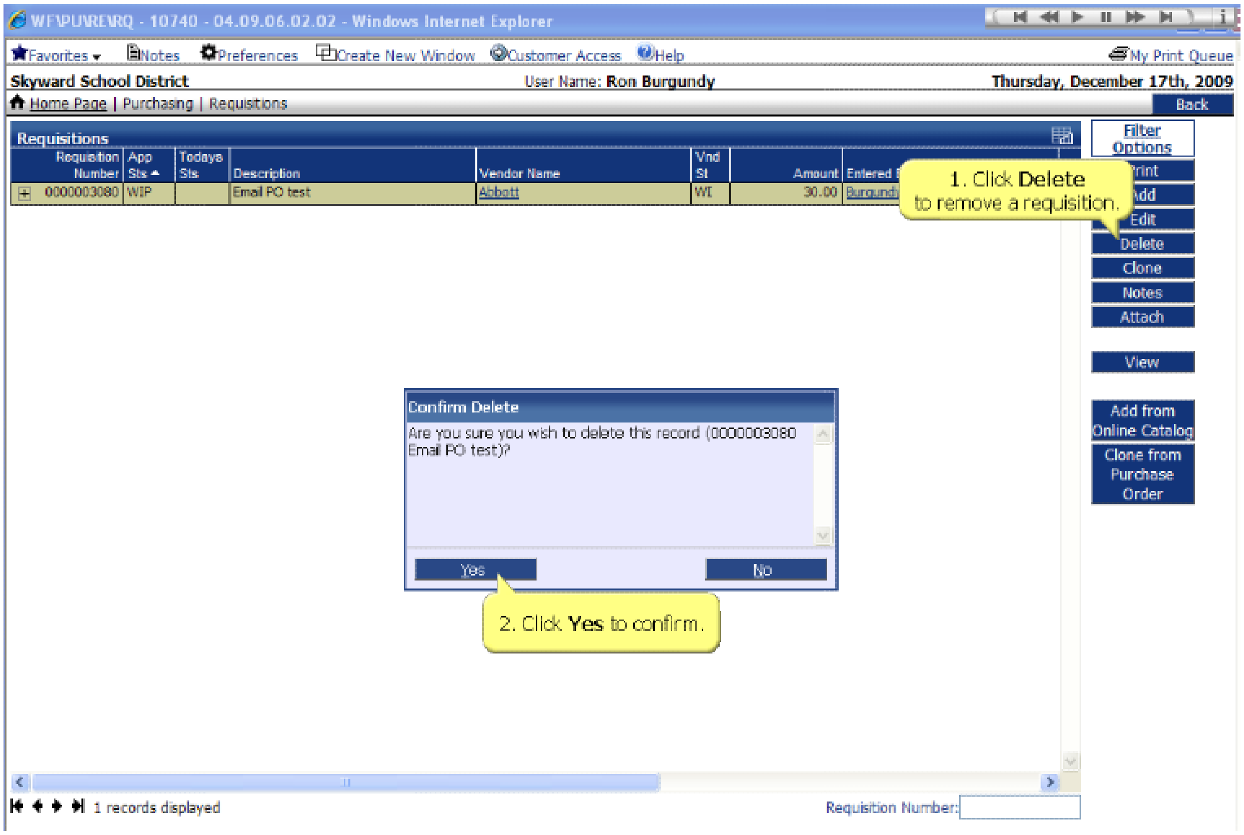


Click the **[Aprove]** radio button and enter a note.

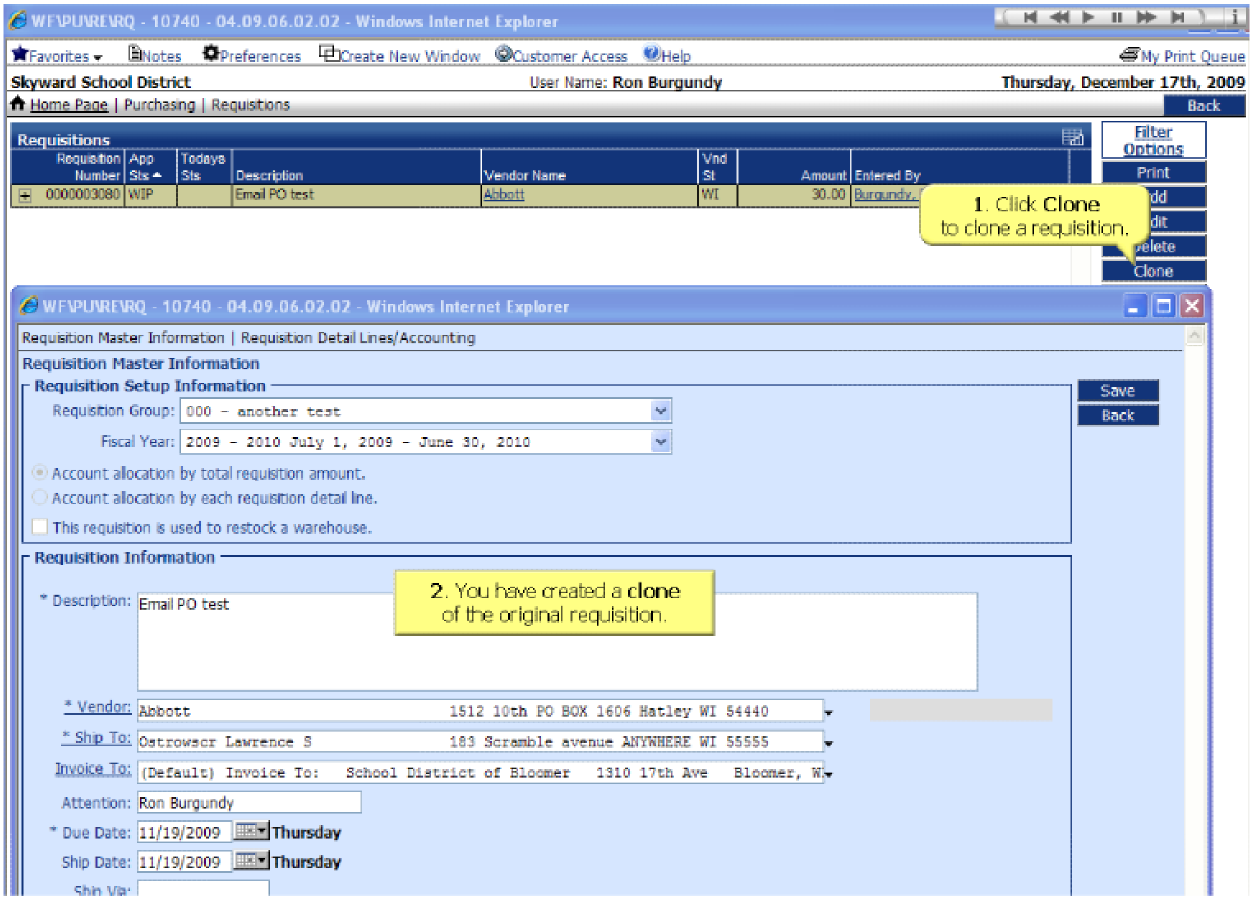
Click **[Save]** to exit and return to the “**Requisitions Main”** screen



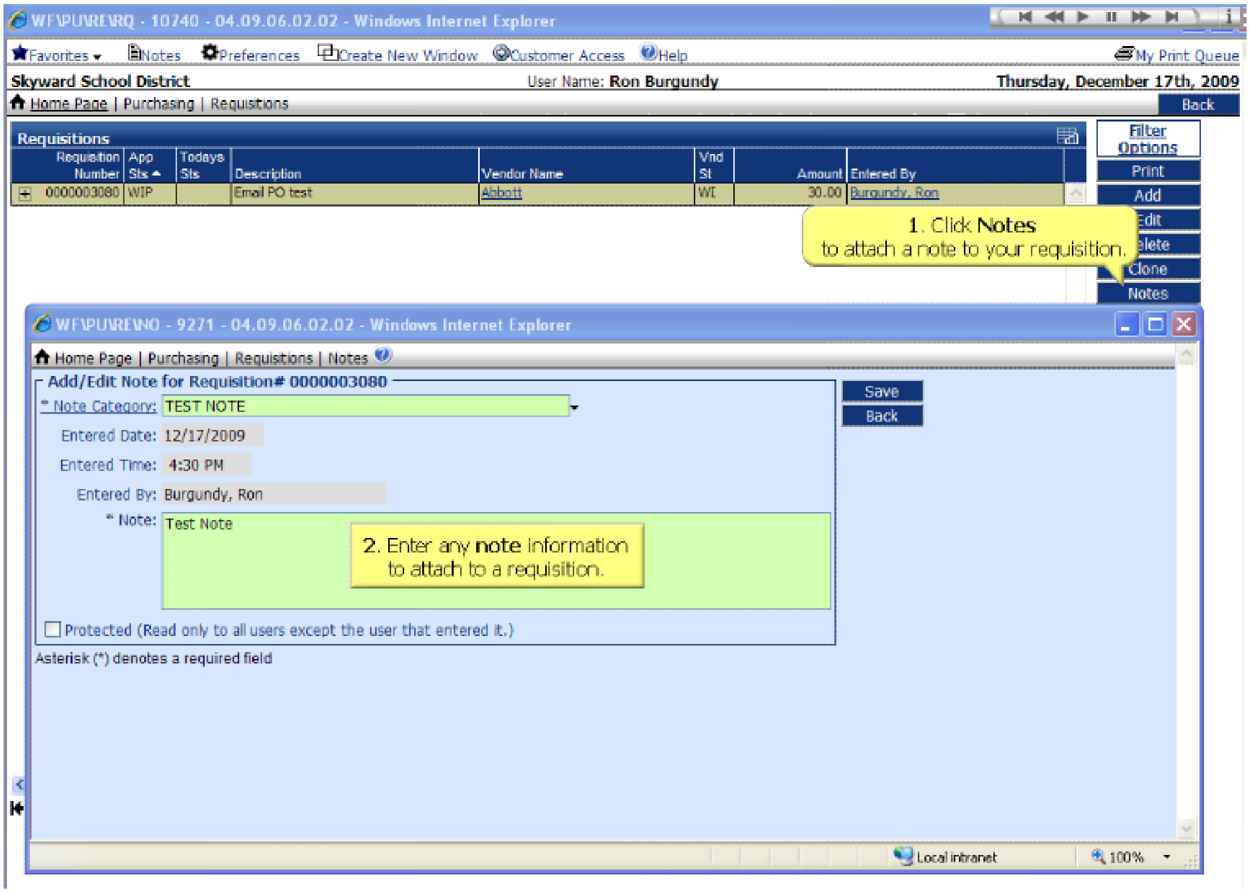
Chapter 3. Delete a Requisition



Chapter 4. Clone a Requisition



Chapter 5. Attach a Note to the Requisition



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.

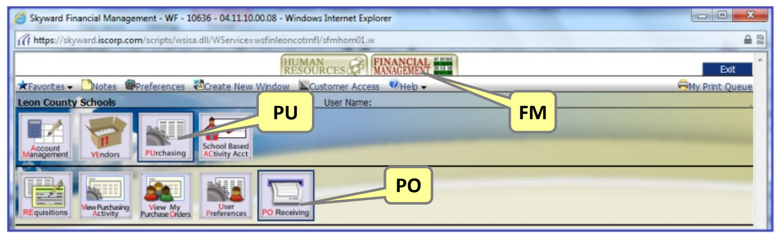
Why would you add a receiving record?

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)

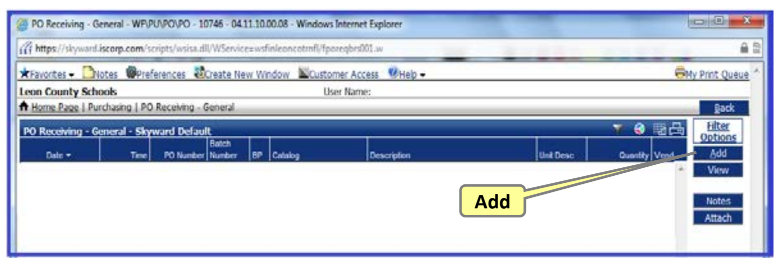
Breadcrumbs: FM\PU\PO



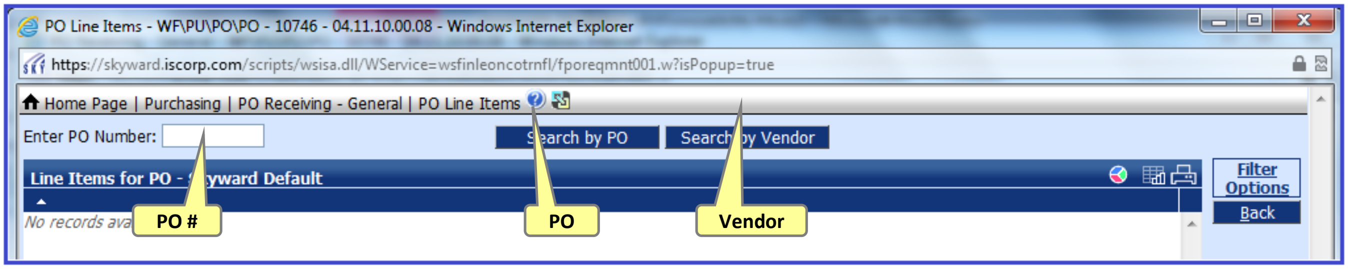
Step 2: Add a Receiving Record

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

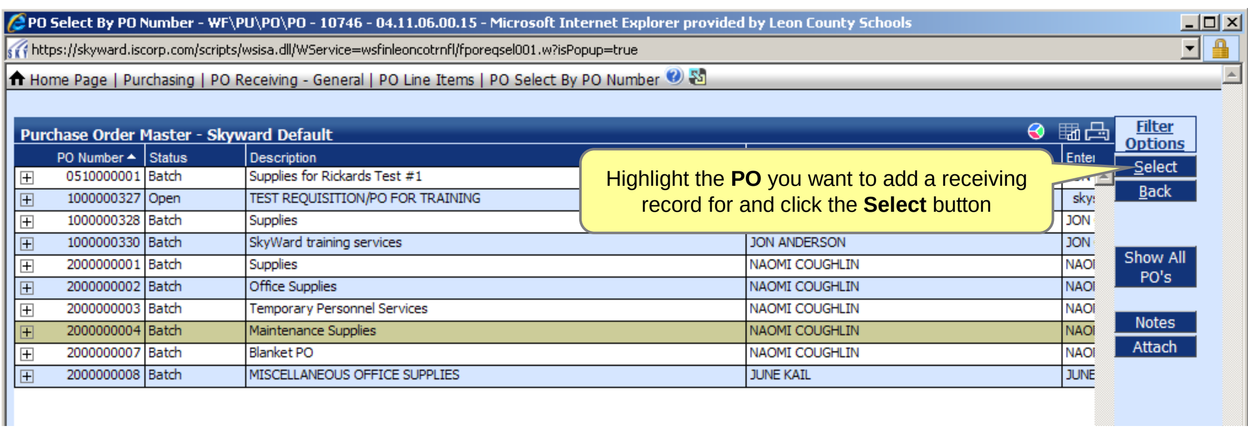


To begin the receiving process you must first find the Purchase Order that you want to add a receiving record for.

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

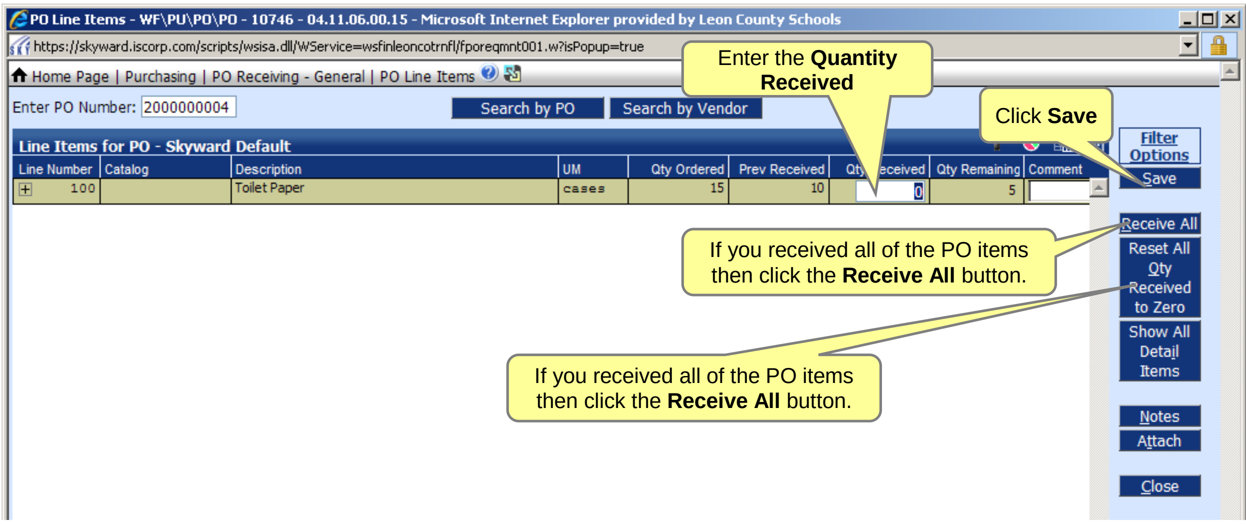
Click **[Search by PO]**

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?

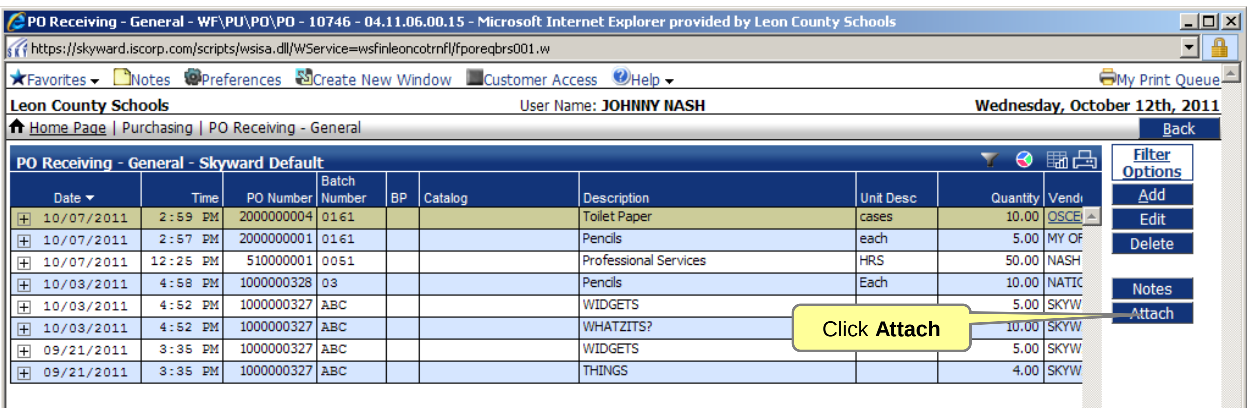
PO Receiving Attachments enable a user to add a Document File and\or a URL to a PO Receiving record.

When would I use PO Receiving Attachments?

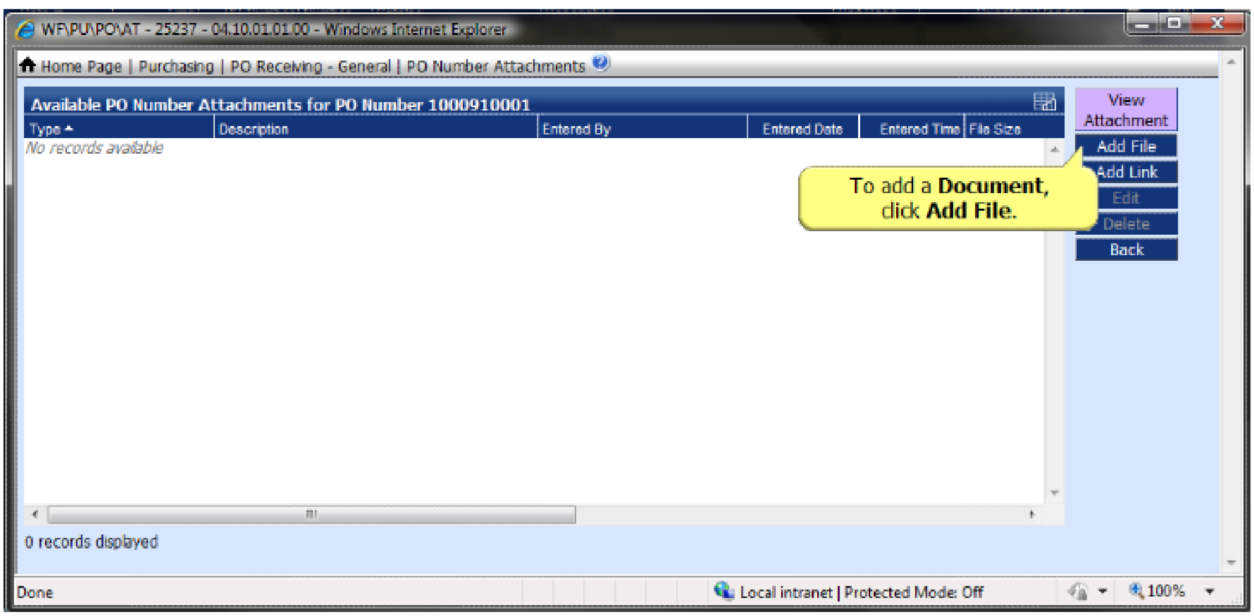
A user can add a Document, Purchase Order for an electronic record of receipt.

From the **PO Receiving – General** screen

Click the **[Attach]** button

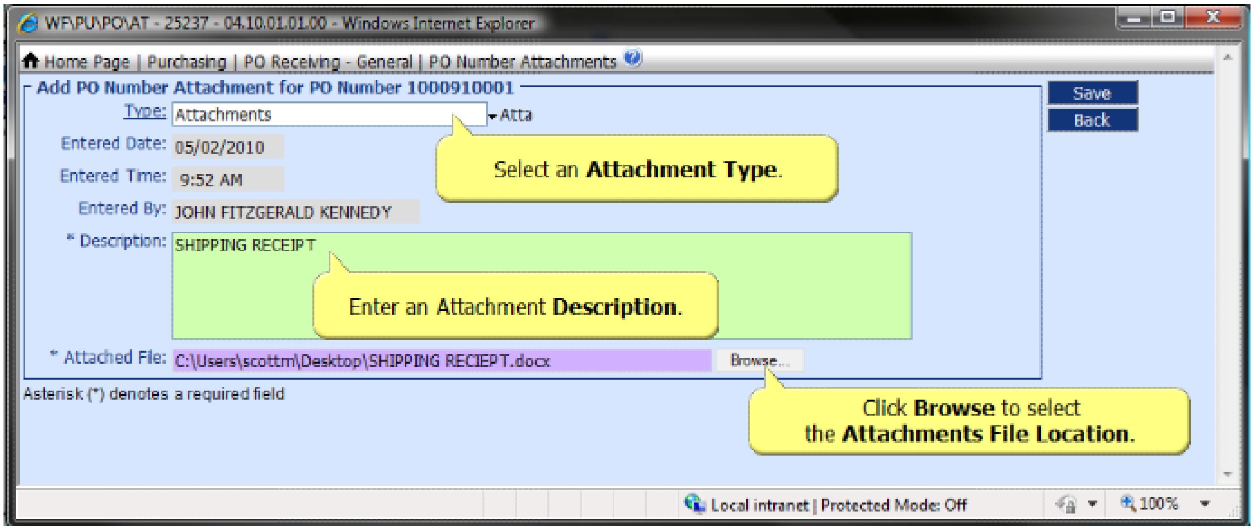


The **PO Number Attachments** screen opens



Click [Add File] to add a Document

The **Add PO Number Attachment** screen opens



Enter the requested information

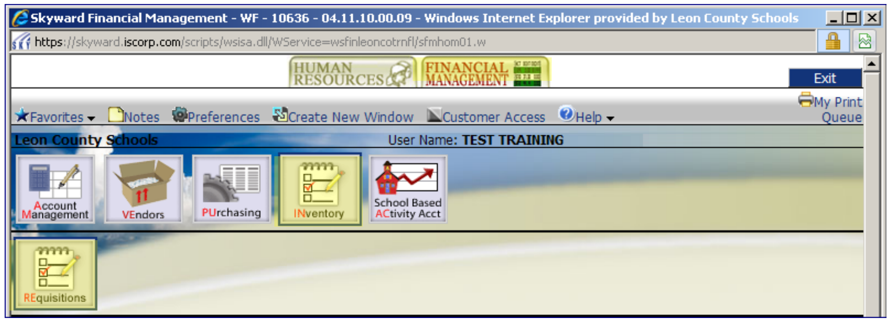
FIELD	FIELD DESCRIPTION
Type	Select the type of attachment from a pre-populated list of document types.
Entered Date	Defaults to today's day
Entered Time	Current time
Entered By	Defaults to Current User
Description	Description of the attachment
Attached File	Click Browse and select a file to upload

Click **[Save]**

Chapter 8. Ordering From the Warehouse

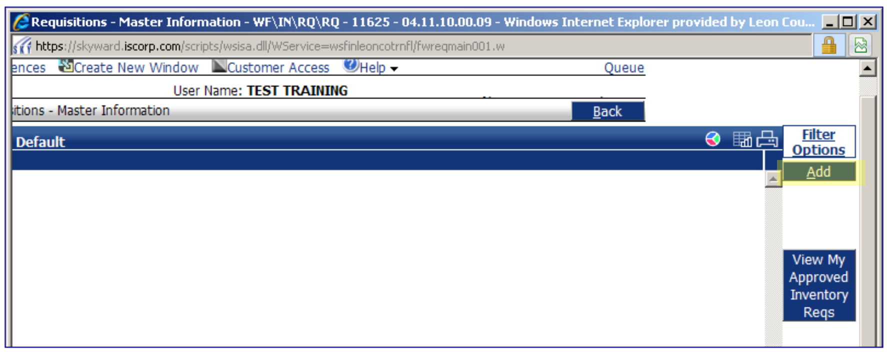
STEP 1: Navigate to the Inventory Requisitions Screen

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



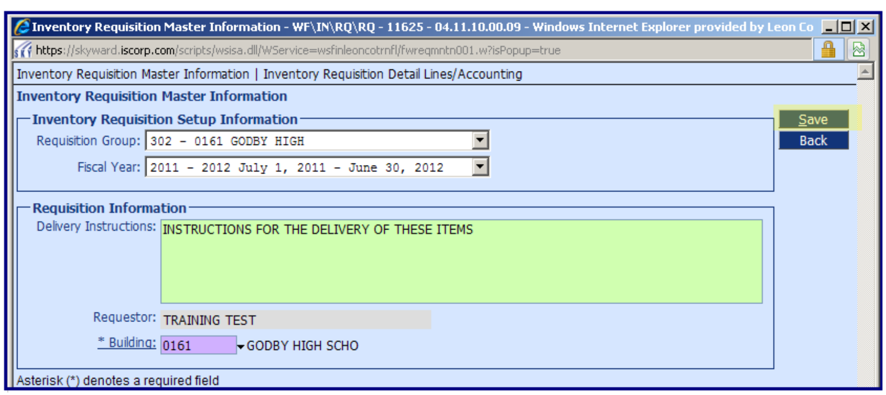
Step 2: Add a Warehouse Requisition

Click the **[Add]** button

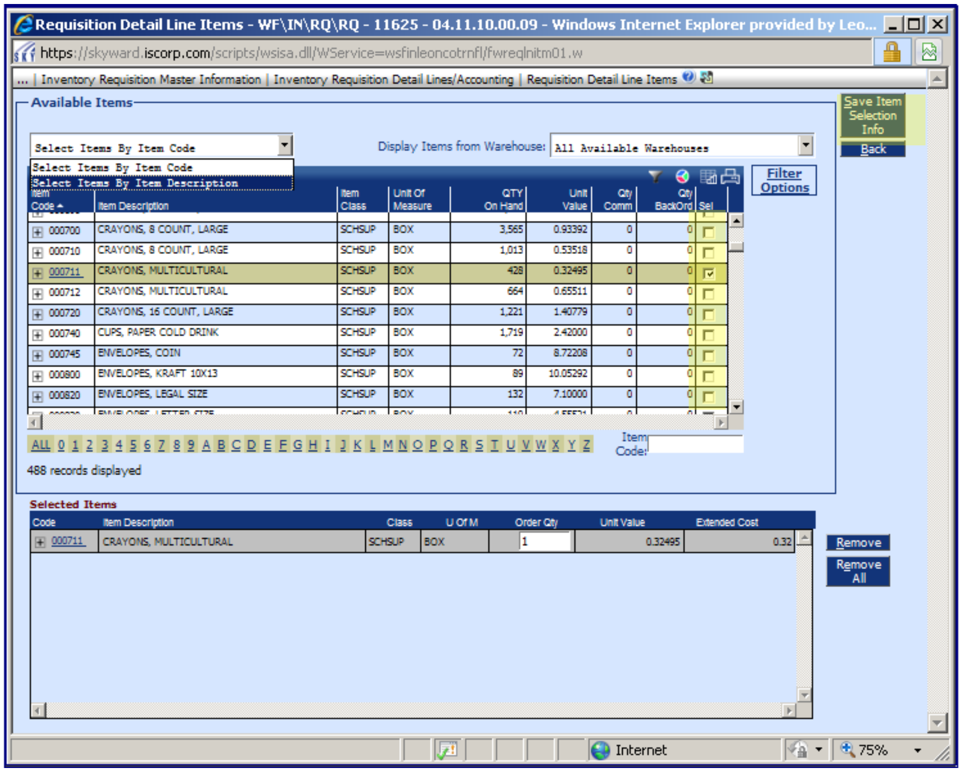


Complete the Requisition Information Screen.

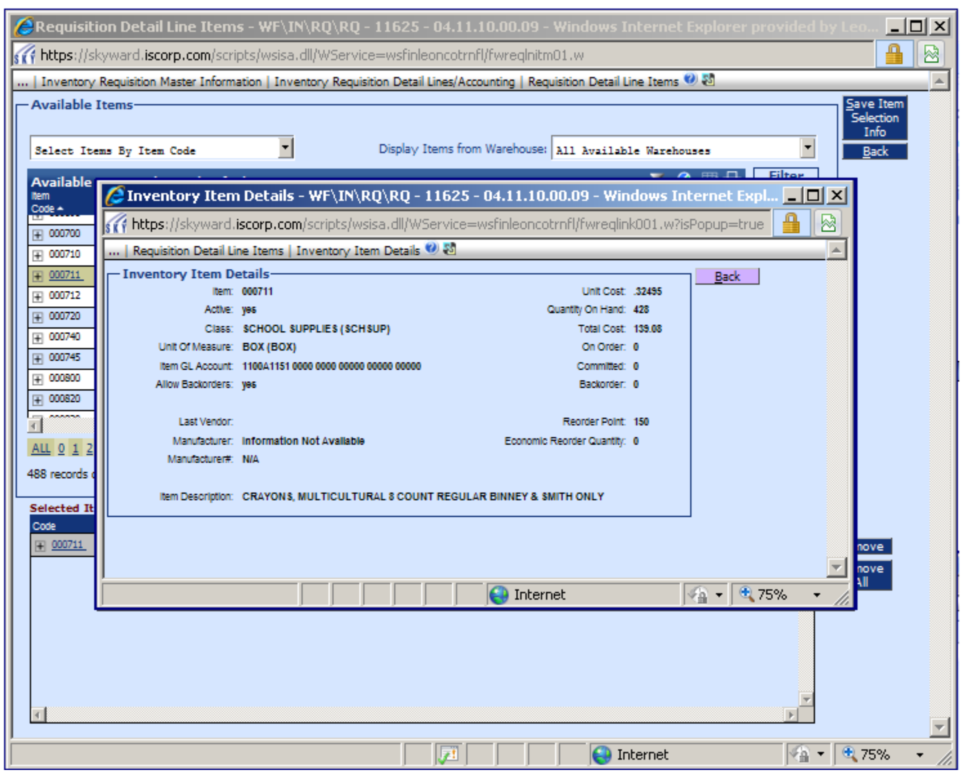
Click the **[Save]** button



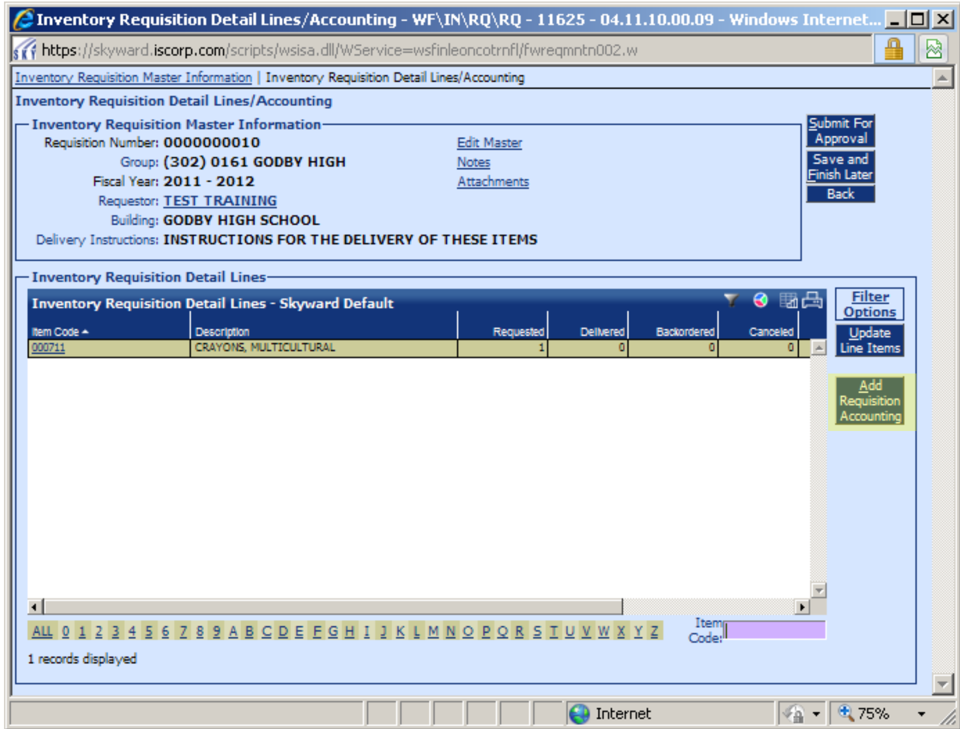
Select the item from the Warehouse that you would like to order.



Verify Quantity on Hand

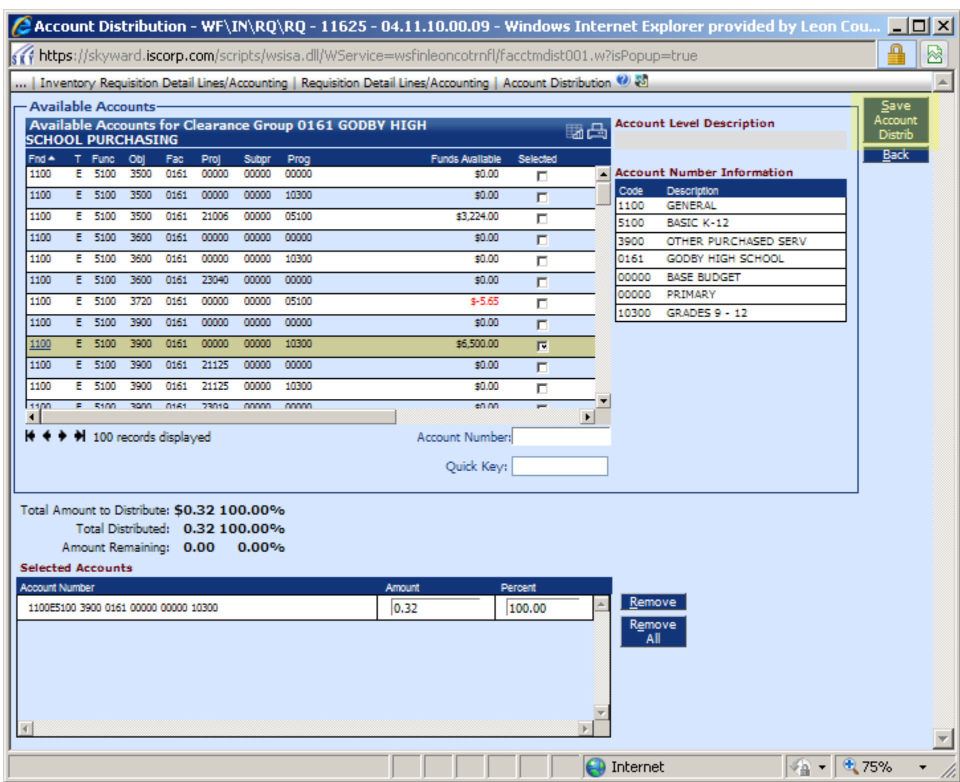


Click the **[Add Requisition Accounting]** button

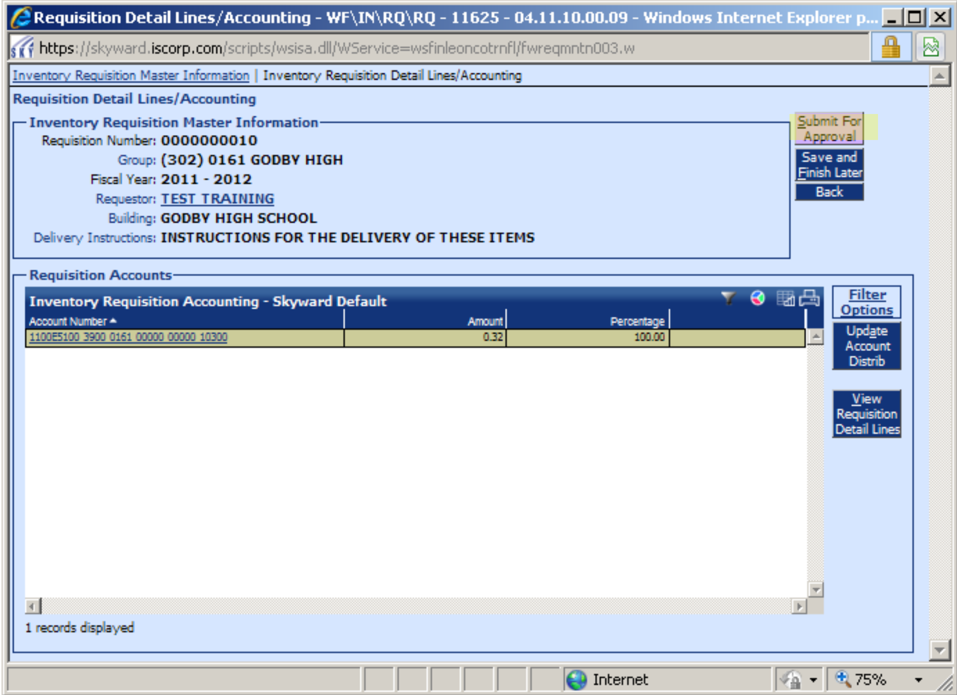


Select Account Distribution

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.