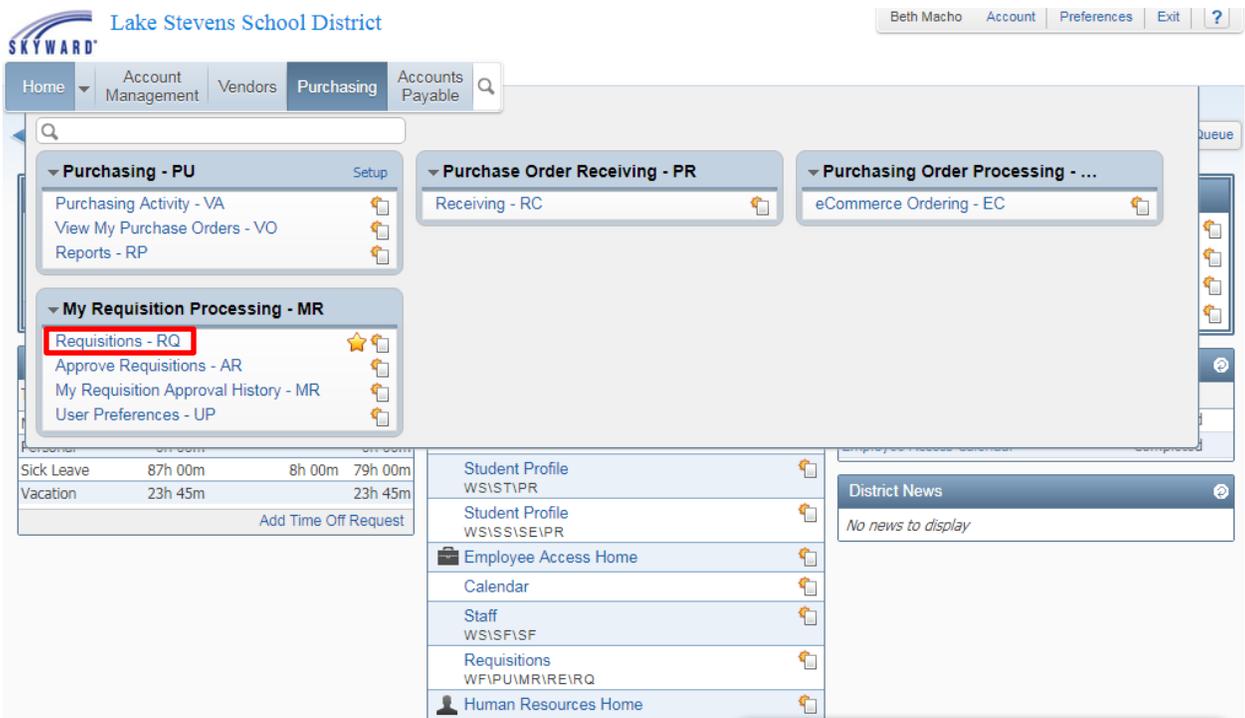


## Creating a Purchase Order in Skyward

1. Sign into Skyward.
2. Go to **Financial Management**.
  - a. Click on the drop down arrow next to the **Home** tab.
3. Go to **Purchasing > My Requisition Processing-MR>Requisitions-RQ**.



Lake Stevens School District

Beth Macho Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Search

▼ Purchasing - PU Setup

- Purchasing Activity - VA
- View My Purchase Orders - VO
- Reports - RP

▼ My Requisition Processing - MR

- Requisitions - RQ
- Approve Requisitions - AR
- My Requisition Approval History - MR
- User Preferences - UP

▼ Purchase Order Receiving - PR

- Receiving - RC

▼ Purchase Order Processing - ...

- eCommerce Ordering - EC

Sick Leave	87h 00m	8h 00m	79h 00m
Vacation	23h 45m		23h 45m

Add Time Off Request

Student Profile WS\ST\PR

Student Profile WS\S\S\SE\PR

Employee Access Home

Calendar

Staff WS\S\F\S\F

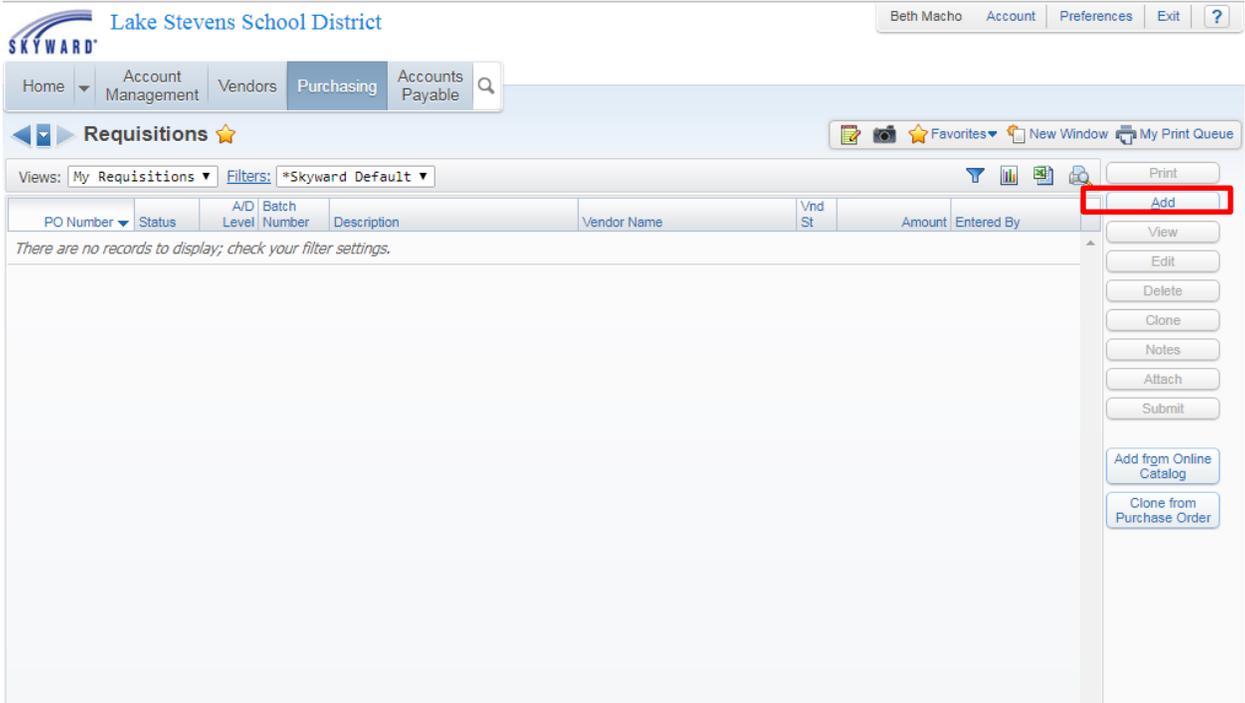
Requisitions WF\PU\MR\RE\RQ

Human Resources Home WH

District News

No news to display

4. Click the **Add** tab on the right side of the screen.



5. **Requisition Group**

- a. Select a purchase order group. If you are out at a building, you will most likely only have two groups to choose from, General Fund or ASB. Departments may have more than two to choose from. For example, Facilities has three groups, Custodial (630), Maintenance (640) and Technology (660).
- b. Make sure you select the correct fiscal year.

6. **Account Allocation** will default to **YMA**.

- a. Leave **YMA** selected if 100% of the expenditure will come out of one budget (account) code or if there is only one line item and it is being split between account codes.
- b. Select **YDA**, if there are multiple line items and each will be charged to a different code. For example, staples are coming out of one account code, pencils are being charged to another.

7. **This requisition is used to restock a warehouse** is always unchecked.

8. **Batch Number** auto populates, so don't enter anything into that field.

9. Enter a description of what is being purchased in the **Description** field.
  - a. This information doesn't print on the PO but is there for your reference. It can be general. An example would be "open purchase order for office supplies".
  
10. In the **Vendor** field, start typing your vendor name.
  - a. If there are multiple options for the same vendor, pick the one that says "**order from/remit to**".
  - b. If you are unable to locate the vendor, please supply the Purchasing Technician (Terri Smith) with a current W-9 and contact information from the vendor. This will need to include a mailing address for purchase orders and a remit to address for payment. The Purchasing Technician will notify you when the vendor has been added to the vendor file.
  
11. Select the **Ship to**.
  - a. If you are located at a building, you will only have the option of your school. Departments may have multiple options.
  - b. Please list the name of the recipient of the order in the **Attention** field or leave this blank if the order is not for a specific staff member.
  
12. **Due Date & Ship Date** will auto populate so leave them as is.
  
13. **Ship via, Project/Grant** and **Contract can be left blank**. The district doesn't use these fields.
  
14. The **Tax** field auto populates with the current tax rate.
  - a. If it's an Open PO for the entire school year or the item being purchased is not taxable, select **Other** with 0.00% tax
  
15. Click on **Save and Add Detail**.

**Requisition Master Information**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

**Requisition Setup Information**

Requisition Group: 610 - Operations

Fiscal Year: 2019 - 2020 September 1, 2019 - August 31, 2020 Requisition entry not allowed for current Fiscal Year.

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

This requisition is used to restock a warehouse.

**Requisition Information**

\* Batch Number: 04

\* Description: Test Tech PO

\* Vendor: DELL MARKETING LP/DELL USA LP PO BOX 802816 CHICAGO IL 60680-2816

\* Ship To: EDUCATIONAL SERVICE CENTER 12309 22ND ST NE LAKE STEVENS WA 98258

Attention: TECHNOLOGY Tax: 9.0000%

\* Due Date: 09/04/2019 Wednesday Other: 00.00%  
 0 \$

Ship Date: 09/04/2019 Wednesday

Ship Via:

Project/Grant:

Contract:

Asterisk (\*) denotes a required field

Buttons: Save and Add Detail, Mass Add Detail, Back

16. Leave the **Line Number** as **“100”**.

17. Leave **Catalog** blank. The district doesn't use this field.

18. There are two ways you can enter the **Unit of Measure**.

OPTION 1:

**Quantity** enter 1.

**Unit of Measure** select *AMT* (or select from other choices).

**Total Amount-** pre -tax amount for the purchase order.

**Description** type out a description of what is being purchased. Include the quote number in the description if there is one. This description should have enough detail that the multiple level approvers know what is actually being purchased.

**Click Save**

**Requisition Detail Lines/Accounting**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Detail Lines/Accounting**

**Requisition Master Information**

Batch Number: **04**  
 Requisition Number: **0000173800**  
 Group: **(610) Operations**

Fiscal Year: **2019 - 2020**  
 Vendor: **DELL MARKETING LP/DELL USA LP**  
**PO BOX 802816**  
**CHICAGO IL 60680-2816**

Accounting: **Account allocation by total requisition amount.**  
 Subtotal: **0.00** Tax: **0.00**  
 Total: **0.00** Other: **0.00**  
 Ship To: **EDUCATIONAL SERVICE CENTER**  
 Description: **Test Tech PO**

**Requisition Detail Lines**

\* Line Number:

Line Type:  Merchandise   
 Narrative

Catalog:

\* Quantity:  Taxable:

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description

Asterisk (\*) denotes a required field

**OPTION 2**

**Quantity** -enter the quantity being purchased.

**Unit of Measure** select *EACH* (or select other unit of measure from list)

**Total Amount** enter pre- tax amount for a single item.

**Description** type out a description of item being purchased including quote number if there is one.

**Click Save**

**Click Add** to enter each item, repeat above steps

### Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

Batch Number: **04**  
 Requisition Number: **0000173800**  
 Group: **(610) Operations**

Accounting: **Account allocation by total requisition amount.**  
 Subtotal: **0.00** Tax: **0.00**  
 Total: **0.00** Other: **0.00**  
 Ship To: **EDUCATIONAL SERVICE CENTER**

Fiscal Year: **2019 - 2020**  
 Vendor: **DELL MARKETING LP/DELL USA LP**  
**PO BOX 802816**  
**CHICAGO IL 60680-2816**

Description: **Test Tech PO**

---

**Requisition Detail Lines**

\* Line Number:  [Save](#)  
[Back](#)

Line Type:  Merchandise  Narrative

Catalog:

\* Quantity:  Taxable:  [View Tax](#)

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description: 

last Item being purchased  
Quote: XXX

Asterisk (\*) denotes a required field

## 19. Click Add Requisition Accounts

### Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

Batch Number: **04**  
 Requisition Number: **0000173800**  
 Group: **(610) Operations**

Accounting: **Account allocation by total requisition amount.** [Edit Master](#)

Subtotal: **105.00** Tax: **9.45**  
 Total: **114.45** Other: **0.00** [Notes](#)  
[Attachments](#)

Fiscal Year: **2019 - 2020**  
 Vendor: **DELL MARKETING LP/DELL USA LP**  
**PO BOX 802816**  
**CHICAGO IL 60680-2816**

Ship To: **EDUCATIONAL SERVICE CENTER**  
 Description: **Test Tech PO**

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

---

**Requisition Detail Line Items**

Views:  Filters:

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc
100		last Item being purchased Quote: XXX	7	EACH	15.00000	105.00		0

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

20. Type in the Account Code in the **Account Number** field. Hit enter. Verify that the number you typed in is the number that is highlighted.

21. Check the box and click **Save Account Distrib.**

- a. If there are multiple accounts being charged, adjust the percentages in **Selected Accounts** before clicking on **Save Account Distrib.**

**Account Distribution**

Available Accounts

Fnd	T	Gl	Ppss	Aa	Obbb	Lill	4444	5555	S	Funds Available	Selected
10	E	530	9700	64	5626	0000	0000	0000	0	\$15,000.00	<input type="checkbox"/>
10	E	530	9700	64	5650	0000	0000	0000	0	\$0.00	<input checked="" type="checkbox"/>
10	E	530	9700	64	7301	0000	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7330	0000	0000	0000	0	\$2,000.00	<input type="checkbox"/>
10	E	530	9700	64	7340	0000	0000	0000	0	\$5,000.00	<input type="checkbox"/>
10	E	530	9700	64	7349	0000	0000	0000	0	\$2,500.00	<input type="checkbox"/>
10	E	530	9700	64	7349	2010	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7349	3200	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7349	8100	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7349	8300	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7350	0000	0000	0000	0	\$500.00	<input type="checkbox"/>
10	E	530	9700	64	7350	3200	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7350	4020	0000	0000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	64	7350	8300	0000	0000	0	\$0.00	<input type="checkbox"/>

Account Number:  Quick Key:

Total Amount to Distribute: **\$105.00 100.00%**  
Total Distributed: **\$105.00 100.00%**  
Amount Remaining: **\$0.00 0.00%**

**Selected Accounts**

Account Number	Amount	Percent
* 10 E 530 9700 64 5650 0000 0000 0000 0	105.00	100.00

Account Level Description

Account Number Information

Code	Description
10	General Fund
	EXPENDITURES
	GENERAL DISTRICT SUPPORT
64	MAINTENANCE
5650	Tech Supplies
0000	DISTRICT OFFICE
0000	Unassigned
0000	Unassigned
0	NON-LOCAL

2019-2020 Available Funds By Individual Account

Save Account Distrib

Remove

Remove All

22. Once you click **Save Acct Distrib** and **Submit for Approval**, a PO number will be assigned to your requisition. It will be in a “pending approval” status.

23. The first level approver (the Principal at your building if you are out in a building) will receive an email that indicates that they have a purchase order waiting for their approval. Once they have approved the purchase order, it will go to the Assistant Superintendent and Purchasing Technician for approval and printing.

24. Three copies of each purchase order are printed, one white, one yellow and one green.

- a. The white copy goes to the vendor. Please let the Purchasing Technician know if it you will be emailing this copy.
- b. The yellow copy goes to initiator and is signed off and sent in with the packing slip(s) to Accounts Payable when the order has been received.
- c. The green copy goes to Accounts Payable for their reconciliation/records.

25. If a purchase order needs to be increased (or decreased), please fill out a hard copy requisition referencing the purchase order number, vendor name, and the dollar amount of the increase or decrease. This needs to be signed by the principal or department head (budget approver). An email detailing all this information and including the principal or department head's approval could take the place of the requisition.