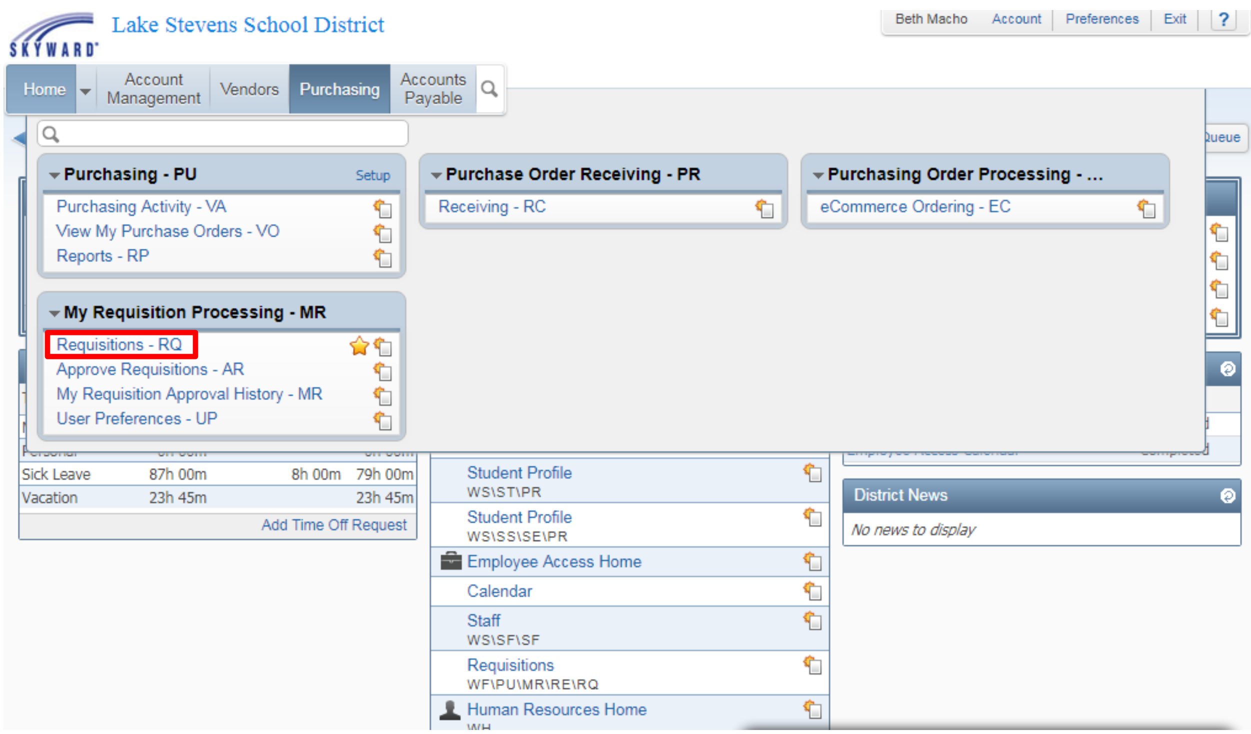
Creating a Purchase Order in Skyward

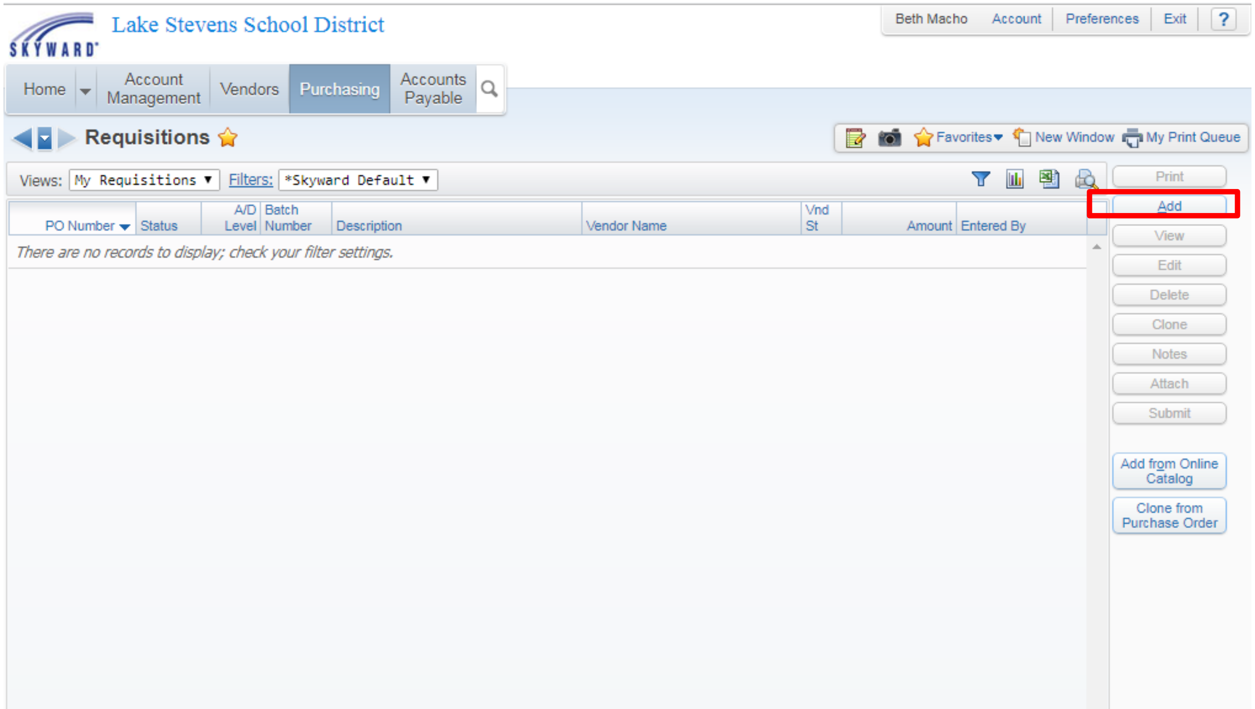
1. Sign into Skyward.

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.**



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.

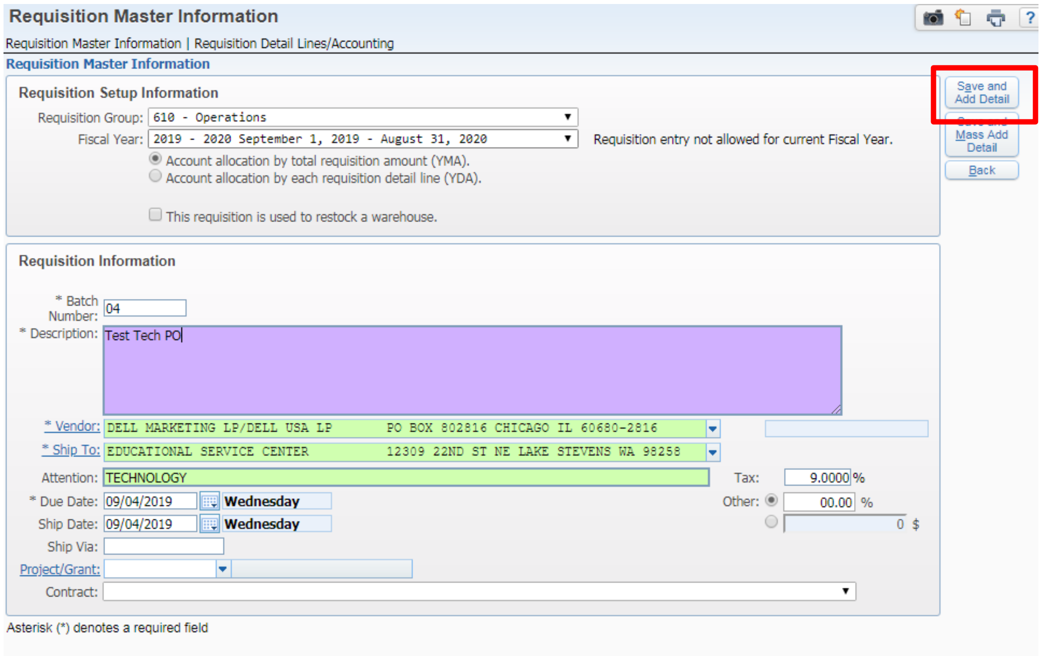
11. Select the **Ship to.**
    a. If you are located at a building, you will only have the option of your school. Departments may have multiple options.
    b. Please list the name of the recipient of the order in the **Attention** field or leave this blank if the order is not for a specific staff member.

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.**



16. Leave the **Line Number** as **"100".**

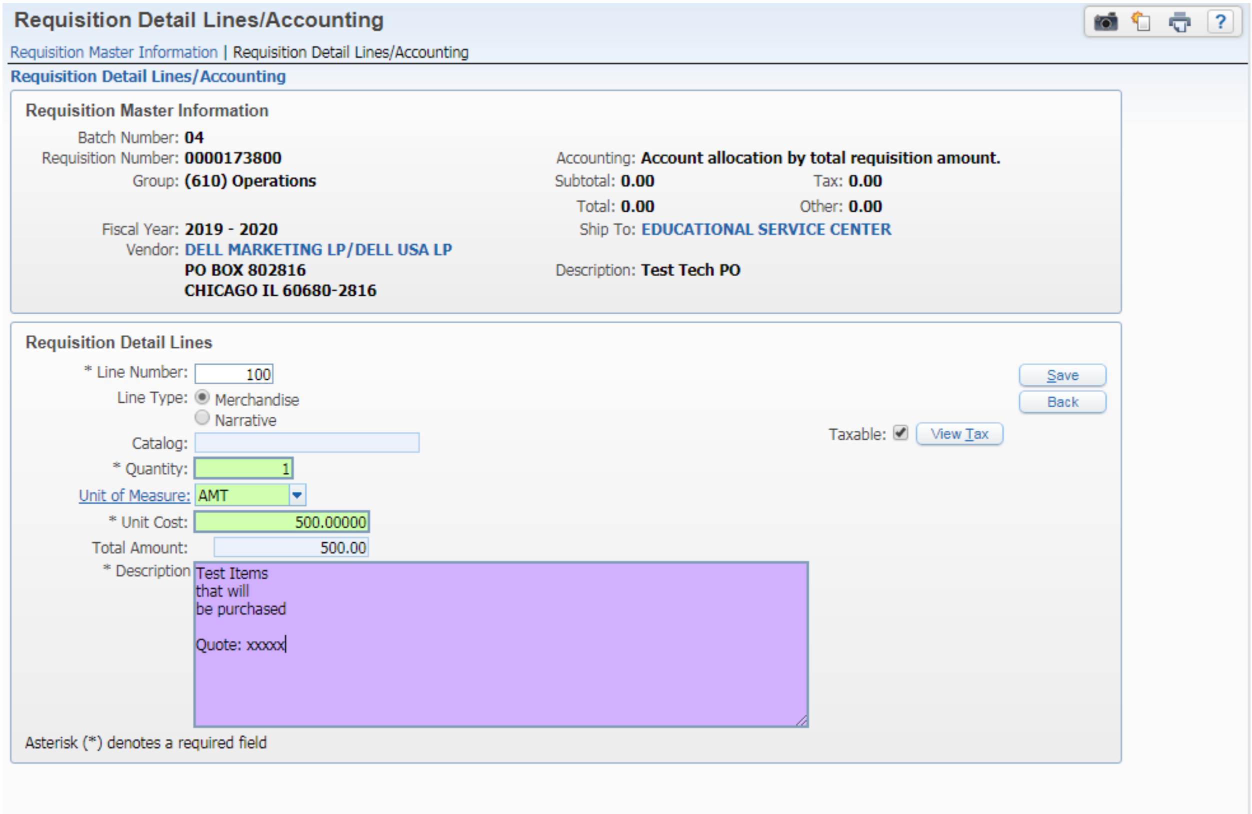
17. Leave **Catalog** blank**.** The district doesn't use this field.

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.

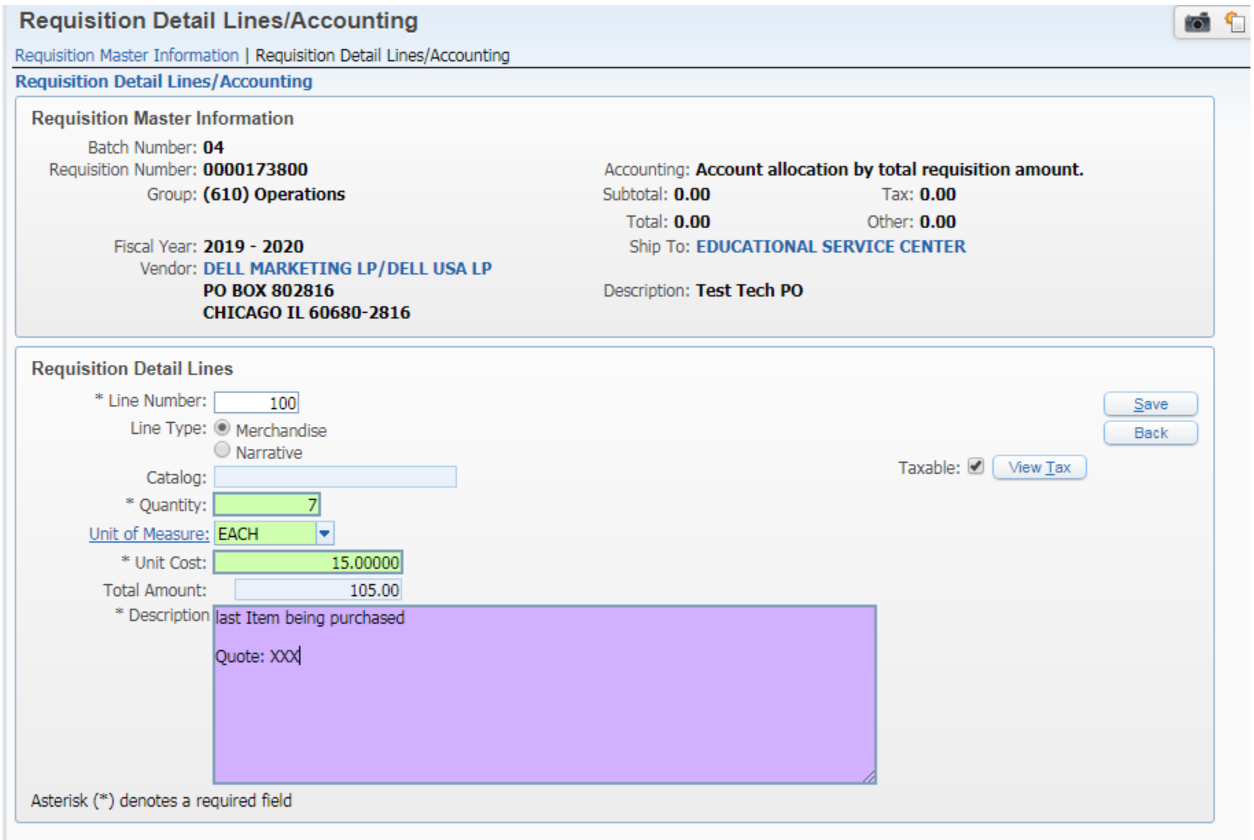
Click Save



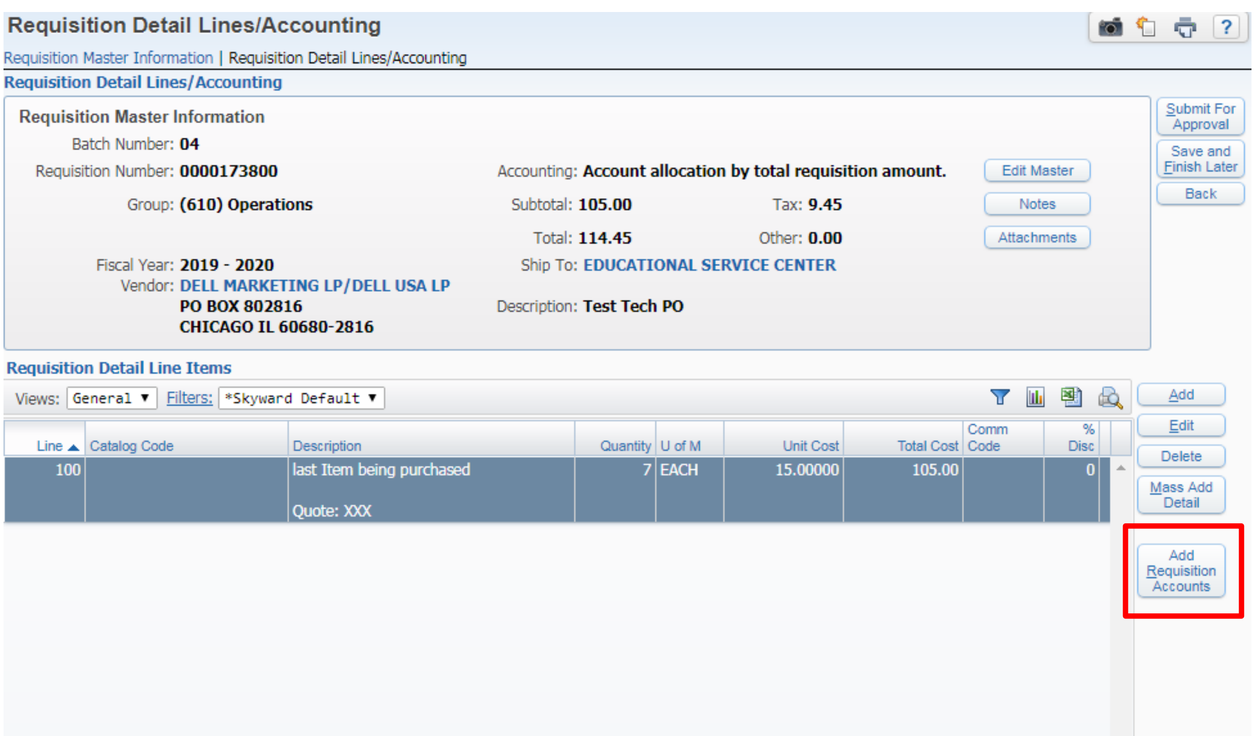
<u>OPTION 2</u>

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

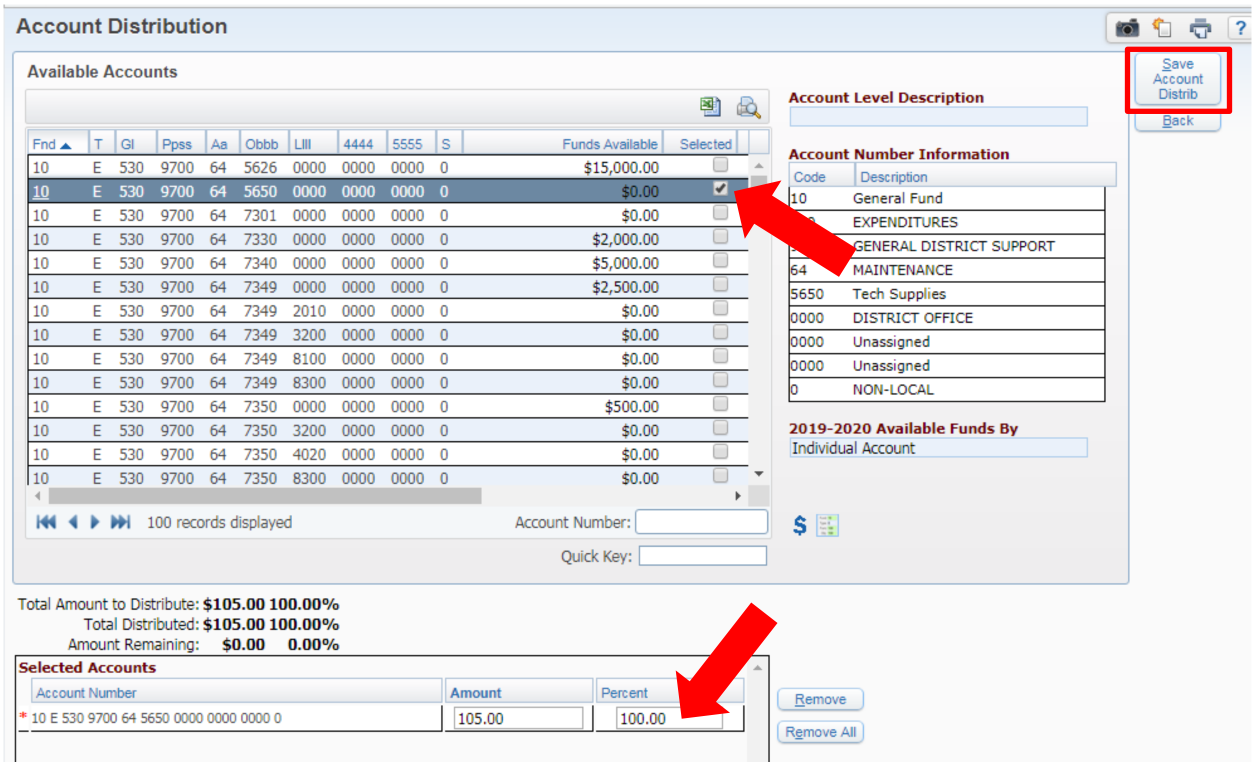


19. Click **Add Requisition Accounts**



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.**



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.