### Putting on a Purchase Requisition

In the Financial Management Section of Skyward, click Purchasing and then Requisitions.

Purchasing - PU	Setup	▼ Purchase Order Receiving - PR		- Purchasing Order Pro
<sup>9</sup> urchase Order Entry - PO	<b>2</b>	Receiving - RC	<u>(</u>	Email Purchase Orders - E
urchasing Activity - VA	<b>e</b>	Reports - RE	<b>C</b>	eCommerce Ordering - EC
iew My Purchase Orders - VO	<b>(</b>			
ccounting - PO Batch-to-Open - AB	<b>(</b>			
ccounting - PO Open-to-History - AO	<b>1</b>			
pdate History - Purchasing - UH	<b>C</b>			
Iser Preferences - UP	<b>(</b>			
Reports - RP	1			
My Requisition Processing - MR				
Requisitions - RQ	<b>2</b>			
Approve Requisitions - AR	4			
My Requisition Approval History - MR	<b>C</b>			
Isor Proforances - LIP	87			

On the right hand side, click add.

Home + Account Veod	ors Production Accounts Payable /	Fixed Inventory Custom Q			
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Awws: My Requisitions 🔹	Effes: *Skyward Default *			T 🖬 🗐 💩	Peed
Regulation A/D Number - Status Level	Balch Number Description	Vendor Name	Vinit	Annual Entered By	실려
here are no records to display; che	ck your filter settings.			4	
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### **Requisition Master Information**:

<b>Requisition Mas</b>	ster Information	📷 🕤 🖶 ?
Requisition Master Infor	mation   Requisition Detail Lines/Accounting	
Requisition Master In	formation	
Requisition Setup	Information	Save and Add Detail
Requisition Group:	087 - Purchasing 🔻	Save and
Fiscal Year:	2019 - 2020 July 1, 2019 - June 30, 2020 🔻	Mass Add
	<ul> <li>Account allocation by total requisition amount (YMA).</li> <li>Account allocation by each requisition detail line (YDA).</li> </ul>	<u>B</u> ack
	This requisition is used to restock a warehouse.	
Requisition Setup i Requisition Group: Fiscal Year:	087 - Purchasing       ▼         2019 - 2020 July 1, 2019 - June 30, 2020       ▼            • Account allocation by total requisition amount (YMA).       ▼            • Account allocation by each requisition detail line (YDA).            • This requisition is used to restock a warehouse.	Add Detai Save and Mass Add Detail <u>B</u> ack

Requisition Group: This should reflect your <u>school or department location</u>.

**Fiscal Year:** This will be the current fiscal year but remember that between May and June you have the option of current and next year budgets. Please pay close attention to which year you want your purchase to be made in during that time frame.

#### In the Requisition Information section:

Description:	Gample Requisition	n				
Vendor:	INNOVATIVE PR	INT CONSULTING LLC	PO BOX 95011 SOUT	H JORDAN UT 84095	<b>•</b>	
* Ship To:	PURCHASING		7905 S REDWOOD RD	WEST JORDAN UT 84088	-	
Attention:	KRIS WISHART, (8	801) 567-8708, kris.wishar	t@jordandistrict.org			
ue Date: 0	05/14/2020	🗘 Thursday				
hip Date:	05/14/2020	🗘 Thursday				
Ship Via:						
Contract:						•
<b>Descr</b> i buying Payme	<b>iption</b> : T g. It is for ent" infor as the put	his area is for your referen mation in this rchase orders	r internal note ce only. Please s description b , so please pu	s or description e note that if yo oox it will not b t that informat	ns of wh ou put " e seen i ion in y	nat you are Complete by those th our line it

**Vendor**: Put in the vendor name here. If you can't find your vendor please call Purchasing for assistance.

**Ship To**: This is where you want your item shipped to such as your school or department location.

**Attention**: This will default to you, but we ask that you put in the name of the person who Purchasing can contact regarding the specifics of this purchase. *Please list their name, phone number and email address.* 

Requisition Master Information		10 1 - ?
Requisition Master Information   Requisition Detail Lines/Accounting		
Requisition Master Information		
Requisition Setup Information		Save and Add Detail
Requisition Group: 087 - Purchasing	•	Save and
Fiscal Year: 2019 - 2020 July 1, 2019 - June 30, 2020	•	Mass Add
<ul> <li>Account allocation by total requisition amount (YMA).</li> <li>Account allocation by each requisition detail line (YDA).</li> </ul>	).	Back
☐ This requisition is used to restock a warehouse.		

### When all information is complete click Save and Add Detail.

### **Requisition Detail Lines/Accounting:**

Requisition Detail Lines/Accou	nting	📷 ጎ 🖶 ?
Requisition Master Information   Requisition De	tail Lines/Accounting	
Requisition Detail Lines/Accounting		
Requisition Master Information Batch Number: 04 Requisition Number: 0000227411 Group: (087) Purchasing Fiscal Year: 2019 - 2020 Vendor: INNOVATIVE PRIN PO BOX 95011 SOUTH JORDAN UT	Accounting: Account allocation by total requisition amount. Amount: 0.00 Ship To: PURCHASING Description: Sample Requisition 84095	
Requisition Detail Lines  * Line Number: 100 Line Type: Merchandise Catalog: * Quantity: 0 Unit of Measure: * Unit of Measure: * Unit Cost: 0.0 Total/Amount: * Description Asterisk (*) denotes a required field	Save Back 00000 0.00	
Line Number:	This will automatically default starting at 100 an by 10 for each additional line item you add.	ld increases
Line Type:	Merchandise is for all items you are ordering. Narrative will be explained in detail below.	
Catalog:	This is for Inventory specific items in the wareho also free form meaning you can put Model # or B here.	use. It is brand name in
Quantity:	The number of each item you are wanting to orde	er.

### Unit of Measure: see chart below.

Unit of Measure Codes	3			1	1	Ō	1
Views: General Views: **	ikyward Default ▼	T			3	Select	
Unit of Measure Code	Description					Add	
EA	EACH			<b>^</b>		<u>E</u> dit	
FT	FOOT					Delete	
GL	GALLON					Back	5
GR	GROSS				_	Duon	
HR	HOUR						
IN	INCH						
LB	POUNDS						
LF	LINEAR FOOT						
LG	LARGE						
LŤ	LITER						
M	THOUSANDS						
MONTH	MONTH(s)						
oz	OUNCE						
PD	PAD						
PK	PACKAGE						
PR	PAIR						
PT	PINT						
QT	QUART						
RL	ROLL						
RM	REAM						
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4							
20 • • • • • 20	records displayed Unit of Measure Code:		ľ	BC			

### Requisition Detail Lines/Accounting (cont.)

Requisition Detail Lines	
* Line Number: 100	Save
Line Type:  Merchandise	Back
Narrative	
Catalog:	
* Quantity: 1	
Unit of Measure: EA	
Unit Cost: 68.00000	
Total Amount: 68.00	
* Description Toner for Brother Super G3 Laser Fax - Model <u>4750e</u>	
Asterisk (*) denotes a required field	

**Unit Cost:** This is the price per unit for the items you are ordering.

**Total Amount:** Skyward will automatically total this for you.

**Description:** This is all the information related to the item you are purchasing, the size, brand, color, etc., be very detailed with your description as this is what the vendor will see on your purchase order.

sition Detail Lines		
* Line Number:	100	~
Line Type: 🔘	Merchandise	
$\bigcirc$	Narrative	
Catalog:	▼	
* Quantity: 📃	1	
Unit of Measure: EA		
* Unit Cost:	68.00000	
Total Amount:	68.00	
* Description Tor	er for Brother Super G3 Laser Fax - Model 4750e	
tes a requir	ed field	

This is what the screen will look like after you save each line item. You will click the **Add** to continue adding line items to your Purchase Requisition.



### Narrative:

Requisition Detail Line	s			
* Line Number:	110			Save
Line Type:	Merchandise			Back
	🖲 Narrative			
Narrative:		-	?	
Quantity:	0			
Unit of Measure:				
Unit Cost:	0.00000			
Total Amount:	0.00			
Description	This item needs to be QEM	nd not remanufactured.		
	See attached quote – (	Quote #123456BCA		
Asterisk (*) denotes a requ	uired field			

**Line Type: Narrative** is for special instructions or notes that will need to be printed on the Purchase Order. It does not allow for quantity or unit cost. It is just the description box.

#### Additional Line Item for Shipping Cost:

Please remember to add a line item on each Purchase Requisition for shipping costs whether you have the actual cost or just an estimate.

Requisitio	n Detail Line Items									
Views: G	eneral ▼ Filters: *Skywar	d Default ▼					T 🔟	1	Q,	<u>A</u> dd
Line 🔺	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc		Edit
100		Toner for Brother Super G3 Laser Fax - Model 4750e	1	EA	68.00000	68.00		0	*	Mass Add
110		This item needs to be OEM and not remanufactured.	0		0.00000	0.00				Detail
120		Shipping cost	1	EA	5.00000	5.00		0		View Requisition
										Accounts

#### Click Save and you will be returned to this screen:

Requisit	ion Master Information	n							Submit Fo	
Ba	atch Number: 14								Save and	
Requisition Number: 0000227627 Group: (087) Purchasing Fiscal Year: 2019 - 2020		27 Acco	unting: Accou	nt allocation	n by total requisit	ion amount.	Edit I	Master	Einish Late	
		chasing A	mount: 68.00				N	Notes		
		<b>20</b> S	hip To: PURCH	IASING			Attacl	ments		
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Line 🔺	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm	% Disc	Eun	
100		Toner for Brother Super G3 Laser Fax Model 4750e	(- 1	EA	68,00000	68.00		0 *	Mass Add	
110		This item needs to be OEM and not remanufactured.	(		0.00000	0.00			Detail	
								(	Add Requisition	

Once all your line items are added you will then add your Requisition Accounts. (These are the budget accounts that apply to this Purchase Requisition.)

### Add Requisition Accounts -

Follow the instructions for adding account codes

Acco	unt	Dist	ributi	ion								6		Ō	?
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\*\*\* Please note you can use multiple account codes. Just put in the percentage or dollar amount for each account code entered. \*\*\*

## Click Save Account Distrib.

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19	E	.087	9998	2590	331	\$0.00					
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To Add Notes:

Click the Notes button above the Attachments button

### Click Add

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skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/foreqnote	001.w?MenelDOverride=9271&is	Popup=true				
Notes				10	) 🕤 📅	?
Requisition Notes						
Views: General ▼ Filters: *Skyward Default ▼			<b>T</b>	2	<u>A</u> dd	
Enter Date  Enter Time Category Note	Entered By	Р			Back	k
There are no records to display; check your filter settings.						
					-	
4 20 ▼ 0 records displayed				+		

### This screen will come up:

Here you will pick the Note Category, which is usually just the \*\*\*Notes\*\*\* category but you can choose from the list below:

lotes		
Add/Edit Note fo	or Requisition: 0000227627	Save
* Note Category:		Ba <u>c</u> k
Entered Date:	05/18/2020	
Entered Time:	10:05 AM	
Entered By:	WISHART, KRIS NOELLE	
* Note:		
	//	
Protected (Rea	d only to all users except the user that entered it.)	
sterisk (*) denote:	s a required field	

### These are the Note Categories:

il I	Notes - WF\PU\MR\RE\NO - 9271 - 05.20.02.00.06 - Google Chrome		—		×
D MA	skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/foreqnote002	2.w?isPopup=tr	ue		
	Notes		1	1	?
In.k	Note Categories				
	Views: General  Filters: *Skyward Default	7 🔟 🖲	) 💩	Select	
e f	Description A	Source		<u>A</u> dd	
orv:	*** Note***	PON	<b>^</b>	Edit	5
to	*Teacher App	PON			
ie.	3 quotes	PON		Delete	
ne:	9th Grade Reading books	PON		Back	
By:	All Notes	PON		Daon	
te:	Attachment being sent in district mail	PON			
	Bid Number Information	PON			
	books	PON			
	Closed Purchase Order	PON			
Dot	Construction	PON			
Rea	CSIP	PON			
ote	Delivery	PON			
	Delivery Instructions	PON			
	Dorothy, thank you for getting bids on this order.	PON			
	Emergency	PON			
	Finding needed	PON			
	Ilene	PON			
	Items that Do Not Require Procurement	PON			
	Media Coor.	PON			
	Note	PON			

### These notes are special instructions you need to get to the buyer.

Notes	
Add/Edit Note for Re	equisition: 0000227627
* Note Category: ***	Note*** Back
Entered Date: 05/1	18/2020
Entered Time: 10:0	05 AM
Entered By: WIS	SHART, KRIS NOELLE
* Note: Plea	ise make sure the product is OEM
Protected (Read on	nly to all users except the user that entered it.)
Asterisk (*) denotes a re	equired field
After you type	e in the Notes then click Save:

### \*\*Before you submit for approval make sure all quotes or documents are attached\*\*

<u>Attachments</u> are for quotes, not just the selected Vendor Quote but all your quotes for the buyers to review.

### You add attachments by first clicking on the Attachments button.

quisition Master Information   Requisition Detail Lines/Acc	counting				
quisition Detail Lines/Accounting					
Requisition Master Information					Submi Appre
Batch Number: 04					Save
Requisition Number: 0000227411	Accounting: Acc	ount allocation by to	tal requisition amount.	Edit Master	Einish
Group: (087) Purchasing	Amount: 159	0.00		Notes	Bac
Fiscal Year: 2019 - 2020	Ship To: PU	RCHASING		Attachments	
Vendor: INNOVATIVE PRINT CONSULT PO BOX 95011 SOUTH JORDAN UT 84095	TNG LLC Description: Sar	nple Requisition			
Requisition Accounts					
equisition Accounting				۹ 🖳	Update Account
ccount Number 👗	Account Amount	Account Percent			Distrib
0 E 087 9850 2590 610	\$159.00	100.00%		· · · · · · · · · · · · · · · · · · ·	

This is the screen that will come up:

### Click on the Add File.

Attachments - WF\PU\MR\RE\AT - 10734 - 05.20.02.00.06 - Google	Chrome		-	- 🗆	X
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Attachments					
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There are no records to display; check your filter settings.				Add File	<u>,</u>
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This is the screen it will bring up.

Type: There are only two choices Attachment or pdf. Choose Attachment.

<ul> <li>skyfinjordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/fattmview003.w?isPop</li> </ul>	pup=true	~
Add Requisition Attachment for Req Number 0000227627	Save Back	?
* Attached File: Choose File No file chosen Email to Vendor with Purchase Order Asterisk (*) denotes a required field ecords displayed	•	

### **Description:** Put in a brief summary of the attachment.

quisition Attachments		📷 🛍 🖶 🤅
dd Requisition Attachment for Req N	lumber 0000227627	Save
* Type: Attachments	▼ PO	Back
Entered Date: 05/18/2020		
Entered Time: 10:17 AM		
Entered By: KRIS NOELLE WISHA	RT	
Description: (3) Quotes		
* Attached File: Choose File No file Email to Vendor with	chosen h Purchase Order	
erisk (*) denotes a required field		

**Attached File:** Click on this button to link to your computer where you can pick the files you want to attach.

**Email to Vendor with Purchase Order:** The buyer will make sure the right file is attached to the Purchase Order.

Then Click Save.	
Requisition Attachments	🙋 🖞 🦷 ?
Add Requisition Attachment for Req Number 0000227627	<u>Save</u>
* Type: Attachments PO	Back
Entered Date: 05/18/2020	
Entered Time: 10:17 AM	
Entered By: KRIS NOELLE WISHART	
Description: (3) Quotes	
* Attached File: Choose File 2018 - 2019 Toners.xlsx	
Email to Vendor with Purchase Order	
Asterisk (*) denotes a required field	_

### This is what it will look like after you have saved it.

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#### Submit **Requisition Master Information** For Batch 14 Number: Approval Save and Requisition Number: 0000227627 Accounting: Account allocation by total requisition amount. Edit Master Finish Later Group: (087) Purchasing Amount: 73,00 \*\*Notes Ship To: PURCHASING Fiscal 2019 - 2020 Year: \*\*Attachmen Vendor: INNOVATIVE PRINT CONSULTING LLC PO BOX 95011 Description: Sample Requisition SOUTH JORDAN UT 84095 **Requisition Detail Line Items** Views: General • Filters: \*Skyward Default • Add 1 B Y % Disc Total Cost Code Edit Quantity U of M Line A Catalog Code Unit Cost Description Toner for Brother Super G3 Laser 68.00000 68.00 Delete Fax - Model 4750e Mass This item needs to be OEM and 110 0 0.00000 0.00 Add not remanufactured. Detail 120 1 EA 5.00 0 Shipping cost 5.00000 View Requisition Accounts

Now you can click the Submit for Approval button.

You have completed the Purchase Requisition process. Please remember to never print your Requisition when it has been approved and is sitting in **Batch** status.

PO Number 🔺	Req Number	Vendor Name	(	Status	Description	Amount	Bat Nu
0752000421	0000227497	CONSERVE A WATT LIGHTING		Batch	Fort Herriman Middle-lights	640.20	07
0752000424	0000227515	CONSERVE A WATT LIGHTING		Batch	Eastlake Elem-lights	1,846.40	08
0762000342	0000227686	CMT ENGINEERING		Batch	Testing and special inspections for Jordan Ridge Elem Remodel	5,000.00	18
0772003372	0000227669	CINTAS #180 UNIFORMS		Batch	Transportation Uniforms and Rugs	202.06	18

# Please remember you can always call Purchasing if you have any questions (801) 567-8710