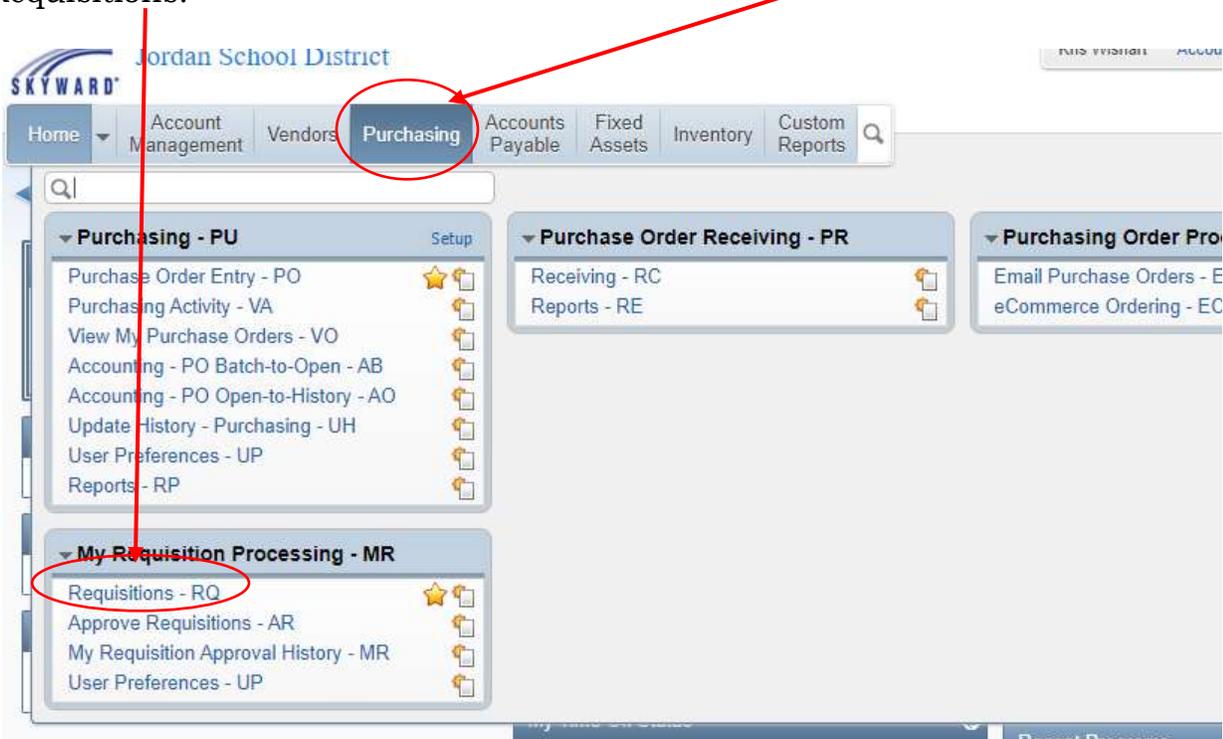
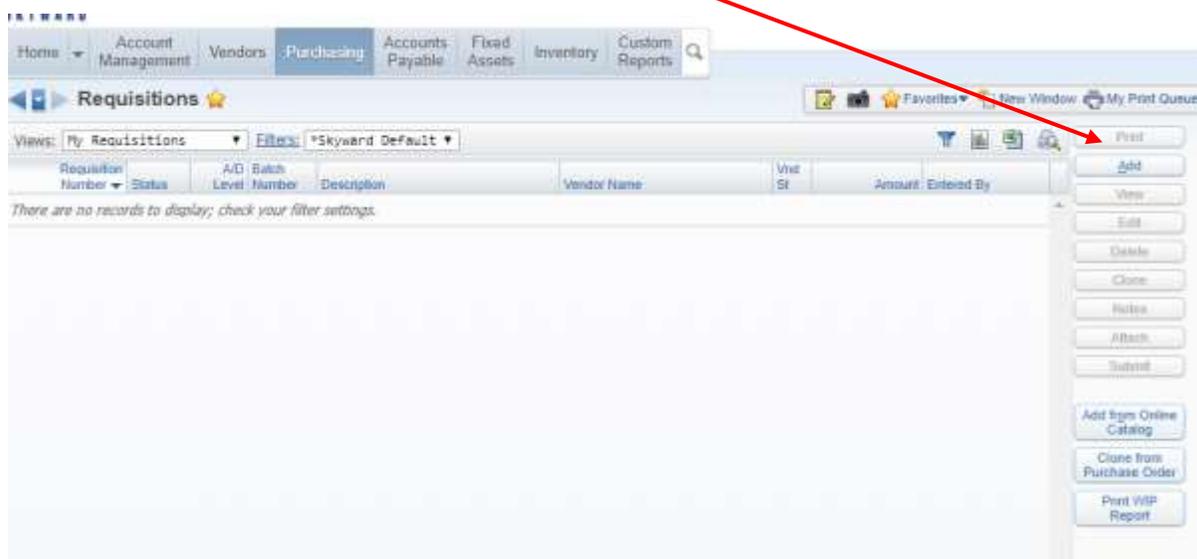


## Putting on a Purchase Requisition

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



On the right hand side, click add.



## Requisition Master Information:

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 087 - Purchasing

Fiscal Year: 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.

Save and Add Detail

Save and Mass Add Detail

Back

**Requisition Group:** This should reflect your school or department location.

**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:

Requisition Information

\* Batch Number: 14

\* Description: Sample Requisition

\* Vendor: INNOVATIVE PRINT CONSULTING LLC PO BOX 95011 SOUTH JORDAN UT 84095

\* Ship To: PURCHASING 7905 S REDWOOD RD WEST JORDAN UT 84088

\* Attention: KRIS WISHART, (801) 567-8708, kris.wishart@jordandistrict.org

\* Due Date: 05/14/2020 Thursday

\* Ship Date: 05/14/2020 Thursday

Ship Via:

Contract:

- **Description:** This area is for internal notes or descriptions of what you are buying. It is for your reference only. Please note that if you put “Complete for Payment” information in this description box it will not be seen by those that process the purchase orders, so please put that information in your line items as well.
- **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**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

Requisition Setup Information

Requisition Group: 087 - Purchasing

Fiscal Year: 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.

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

**Requisition Detail Lines/Accounting:**

**Requisition Detail Lines/Accounting**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Detail Lines/Accounting**

Requisition Master Information

Batch Number: 04

Requisition Number: 0000227411

Group: (087) Purchasing

Fiscal Year: 2019 - 2020

Vendor: INNOVATIVE PRINT CONSULTING LLC  
PO BOX 95011  
SOUTH JORDAN UT 84095

Accounting: Account allocation by total requisition amount.  
Amount: 0.00  
Ship To: PURCHASING

Description: Sample Requisition

**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

Asterisk (\*) denotes a required field

- **Line Number:** This will automatically default starting at 100 and increases by 10 for each additional line item you add.
- **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 warehouse. It is also free form meaning you can put Model # or Brand name in here.
- **Quantity:** The number of each item you are wanting to order.

**Unit of Measure:** see chart below.

Unit of Measure Code	Description
EA	EACH
FT	FOOT
GL	GALLON
GR	GROSS
HR	HOUR
IN	INCH
LB	POUNDS
LF	LINEAR FOOT
LG	LARGE
LT	LITER
M	THOUSANDS
MONTH	MONTH(s)
OZ	OUNCE
PD	PAD
PK	PACKAGE
PR	PAIR
PT	PINT
QT	QUART
RL	ROLL
RM	REAM

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

Requisition Detail Lines

\* Line Number: 100

Line Type:  Merchandise  Narrative

Catalog: [dropdown]

\* Quantity: 1

Unit of Measure: EA

\* Unit Cost: 68.00000

Total Amount: 68.00

\* Description: Toner for Brother Super G3 Laser Fax - Model 4750e

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.

**Save:** You will click Save after each line item.

The screenshot shows the 'Requisition Detail Lines' form. The 'Save' button is circled in red. The form contains the following fields:

- \* Line Number: 100
- Line Type:  Merchandise,  Narrative
- Catalog: [Dropdown]
- \* Quantity: 1
- Unit of Measure: EA
- \* Unit Cost: 68.00000
- Total Amount: 68.00
- \* Description: Toner for Brother Super G3 Laser Fax - Model 4750e

Asterisk (\*) denotes a required 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.

The screenshot shows the 'Requisition Detail Lines/Accounting' screen. The 'Add' button is circled in red. The screen displays the following information:

**Requisition Master Information**

- Batch Number: 14
- Requisition Number: 0000227627
- Group: (087) Purchasing
- Fiscal Year: 2019 - 2020
- Vendor: INNOVATIVE PRINT CONSULTING LLC  
PO BOX 95011  
SOUTH JORDAN UT 84095
- Accounting: Account allocation by total requisition amount.
- Amount: 68.00
- Ship To: PURCHASING
- Description: Sample Requisition

**Requisition Detail Line Items**

Views: General | Filters: \*Skyward Default

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	Disc
100		Toner for Brother Super G3 Laser Fax - Model 4750e	1	EA	68.00000	68.00		0

Buttons on the right side: Submit For Approval, Save and Finish Later, Back, Edit Master, Notes, Attachments, Add, Edit, Delete, Mass Add Detail, Add Requisition Accounts.

## Narrative:

Requisition Detail Lines

\* Line Number:

Line Type:  Merchandise  Narrative

Narrative:

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description:

Asterisk (\*) denotes a required field

Save Back ?

**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.

Requisition Detail Line Items

Views:  Filters:

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc
100		Toner for Brother Super G3 Laser Fax - Model 4750e	1	EA	68.00000	68.00		0
110		This item needs to be OEM and not remanufactured.	0		0.00000	0.00		
120		Shipping cost	1	EA	5.00000	5.00		0

Add Edit Delete Mass Add Detail View Requisition Accounts

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

**Requisition Master Information**

Batch Number: 14  
 Requisition Number: 0000227627  
 Group: (087) Purchasing  
 Fiscal Year: 2019 - 2020  
 Vendor: INNOVATIVE PRINT CONSULTING LLC  
 PO BOX 95011  
 SOUTH JORDAN UT 84095

Accounting: Account allocation by total requisition amount.  
 Amount: 68.00  
 Ship To: PURCHASING  
 Description: Sample Requisition

Buttons: Edit Master, Notes, Attachments, Submit For Approval, Save and Finish Later, Back

**Requisition Detail Line Items**

Views: General Filters: \*Skyward Default

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc
100		Toner for Brother Super G3 Laser Fax - Model 4750e	1	EA	68.00000	68.00		0
110		This item needs to be OEM and not remanufactured.	0		0.00000	0.00		

Buttons: Add, Edit, Delete, Mass Add Detail, Add Requisition Accounts

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

**Account Distribution**

Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Loc	Prog	Func	Obj	Funds Available	Selected
10	E	087	9850	2590	583	\$455.54	<input type="checkbox"/>
10	E	087	9850	2590	590	\$0.00	<input type="checkbox"/>
10	E	087	9850	2590	610	\$419.76	<input checked="" type="checkbox"/>
10	E	087	9850	2590	630	\$100.00	<input type="checkbox"/>
10	E	087	9850	2590	639	\$217.09	<input type="checkbox"/>
10	E	087	9850	2590	646	\$6.05	<input type="checkbox"/>
10	E	087	9850	2590	650	\$100.00	<input type="checkbox"/>
10	E	087	9850	2590	670	\$3,417.30	<input type="checkbox"/>
10	E	087	9850	2590	730	\$96.80	<input type="checkbox"/>
10	E	087	9850	2590	810	\$916.00	<input type="checkbox"/>
10	E	087	9856	1090	583	\$-38,467.46	<input type="checkbox"/>
10	E	087	9998	1090	583	\$10,187.38	<input type="checkbox"/>
10	E	087	9998	2590	331	\$0.00	<input type="checkbox"/>
10	E	087	9998	2590	583	\$1,290.60	<input type="checkbox"/>

Account Level Description: SUPPLIES

Account Number Information:

Code	Description
10	MAINTENANCE & OPERATIONS
087	PURCHASING
9850	PURCHASING DEPT
2590	BUSINESS
610	SUPPLIES

Account Number:  \$

100 records displayed

Total Amount to Distribute: \$68.00 100.00%  
 Total Distributed: \$68.00 100.00%  
 Amount Remaining: \$0.00 0.00%

**Selected Accounts**

Account Number	Amount	Percent
10 E 087 9850 2590 610	68.00	100.00

Buttons: Save Account Distrib, Back, Remove, Remove All

You can search your accounting code here and select it so that it populates in the Selected Accounts area.

\*\*\* 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.

Account Distribution

Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Loc	Proj	Func	Obj	Funds Available	Selected
10	E	087	9850	2590	583	\$455.54	<input type="checkbox"/>
10	E	087	9850	2590	590	\$0.00	<input type="checkbox"/>
10	E	087	9850	2590	610	\$419.76	<input checked="" type="checkbox"/>
10	E	087	9850	2590	630	\$100.00	<input type="checkbox"/>
10	E	087	9850	2590	639	\$217.09	<input type="checkbox"/>
10	E	087	9850	2590	646	\$6.05	<input type="checkbox"/>
10	E	087	9850	2590	650	\$100.00	<input type="checkbox"/>
10	E	087	9850	2590	670	\$3,417.30	<input type="checkbox"/>
10	E	087	9850	2590	730	\$96.80	<input type="checkbox"/>
10	E	087	9850	2590	830	\$916.00	<input type="checkbox"/>
10	E	087	9856	1090	583	\$-38,467.46	<input type="checkbox"/>
10	E	087	9998	1090	583	\$10,187.38	<input type="checkbox"/>
10	E	087	9998	2590	331	\$0.00	<input type="checkbox"/>
10	E	087	9998	2590	583	\$1,290.60	<input type="checkbox"/>

Account Level Description  
SUPPLIES

Account Number Information

Code	Description
10	MAINTENANCE & OPERATIONS
087	PURCHASING
9850	PURCHASING DEPT
2590	BUSINESS
610	SUPPLIES

Total Amount to Distribute: \$68.00 100.00%  
Total Distributed: \$68.00 100.00%  
Amount Remaining: \$0.00 0.00%

Account Number	Amount	Percent
10 E 087 9850 2590 610	68.00	100.00

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 04  
Requisition Number: 0000227411  
Group: (087) Purchasing  
Fiscal Year: 2019 - 2020  
Vendor: INNOVATIVE PRINT CONSULTING LLC  
PO BOX 95011  
SOUTH JORDAN UT 84095

Accounting: Account allocation by total requisition amount.  
Amount: 159.00  
Ship To: PURCHASING  
Description: Sample Requisition

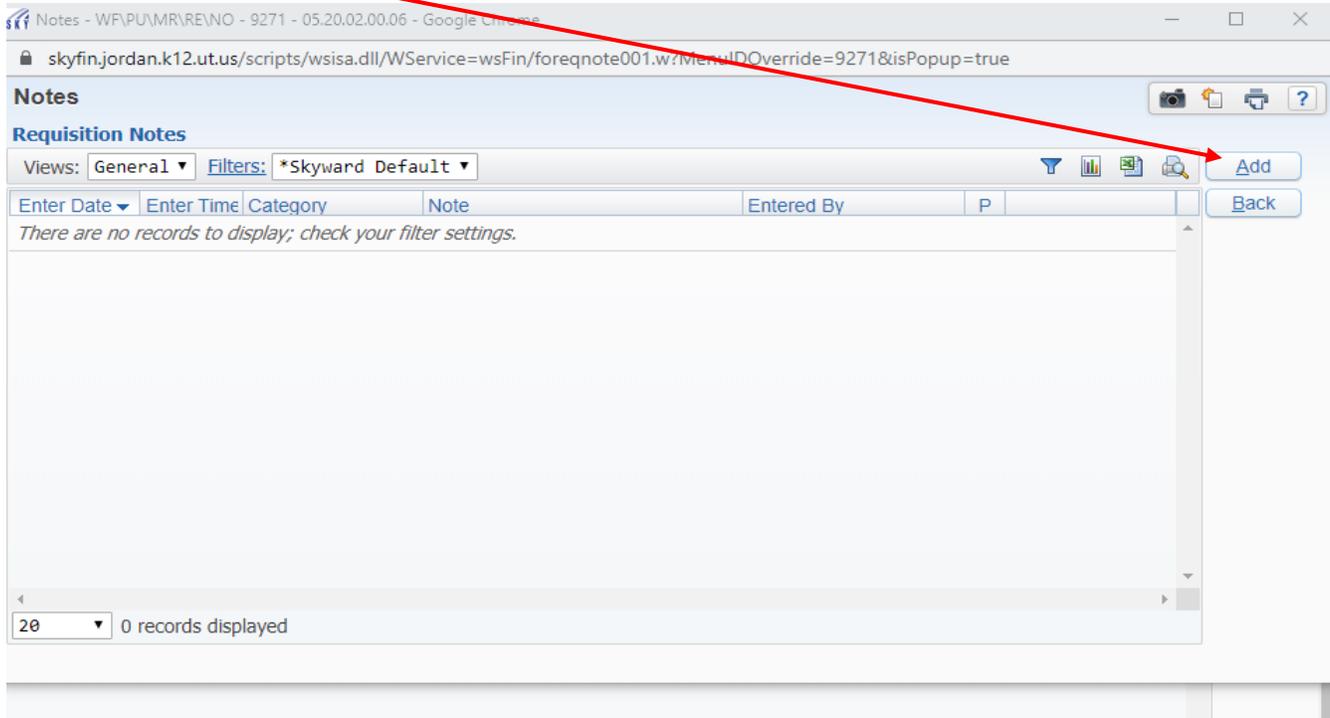
Requisition Accounts

Account Number	Account Amount	Account Percent
10 E 087 9850 2590 610	\$159.00	100.00%

To Add Notes:

Click the Notes button above the Attachments button

**Click Add**



**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:

**Notes**

**Add/Edit Note for Requisition: 0000227627**

\* Note Category:

Entered Date:

Entered Time:

Entered By:

\* Note:

Protected (Read only to all users except the user that entered it.)

Asterisk (\*) denotes a required field

## These are the Note Categories:

Description	Source
*** Note***	PON
*Teacher App	PON
3 quotes	PON
9th Grade Reading books	PON
All Notes	PON
Attachment being sent in district mail	PON
Bid Number Information	PON
books	PON
Closed Purchase Order	PON
Construction	PON
CSIP	PON
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 Coord.	PON
Note	PON

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

**Add/Edit Note for Requisition: 0000227627**

\* Note Category: \*\*\* Note\*\*\*

Entered Date: 05/18/2020

Entered Time: 10:05 AM

Entered By: WISHART, KRIS NOELLE

\* Note: Please make sure the product is OEM

Protected (Read only to all users except the user that entered it.)

Save Back

**After you type in the Notes then click Save:**

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

**Attachments** 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.**

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 04

Requisition Number: 0000227411

Group: (087) Purchasing

Fiscal Year: 2019 - 2020

Vendor: INNOVATIVE PRINT CONSULTING LLC  
PO BOX 95011  
SOUTH JORDAN UT 84095

Accounting: Account allocation by total requisition amount.

Amount: 159.00

Ship To: PURCHASING

Description: Sample Requisition

Buttons: Edit Master, Notes, Attachments, Submit For Approval, Save and Finish Later, Back

Requisition Accounts

Requisition Accounting

Account Number	Account Amount	Account Percent
10 E 087 9850 2590 610	\$159.00	100.00%

Buttons: Update Account Distrib, View Requisition Detail Lines

This is the screen that will come up:

**Click on the Add File.**

Attachments - WF\PU\MR\REV\AT - 10734 - 05.20.02.00.06 - Google Chrome

skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/fattmview001.w?MenuIDOverride=10734&isPopup=true

Attachments

Requisition Attachments

Available Attachments for Req Number 0000227627

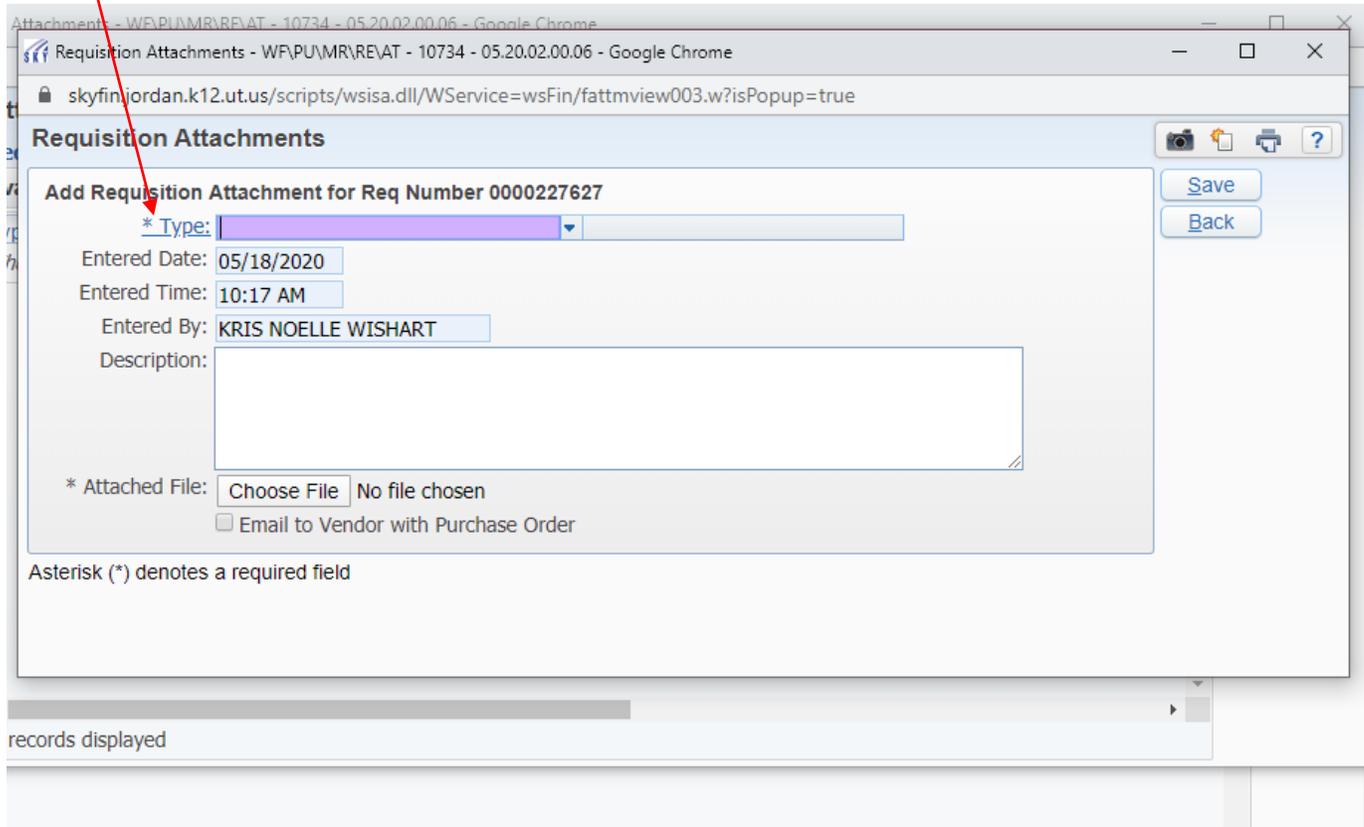
Type	Description	Entered By	Entered Date	Entered Tim	File Size
There are no records to display; check your filter settings.					

Buttons: View Attachment, Add File, Add Link, Edit, Delete, Back

0 records displayed

This is the screen it will bring up.

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

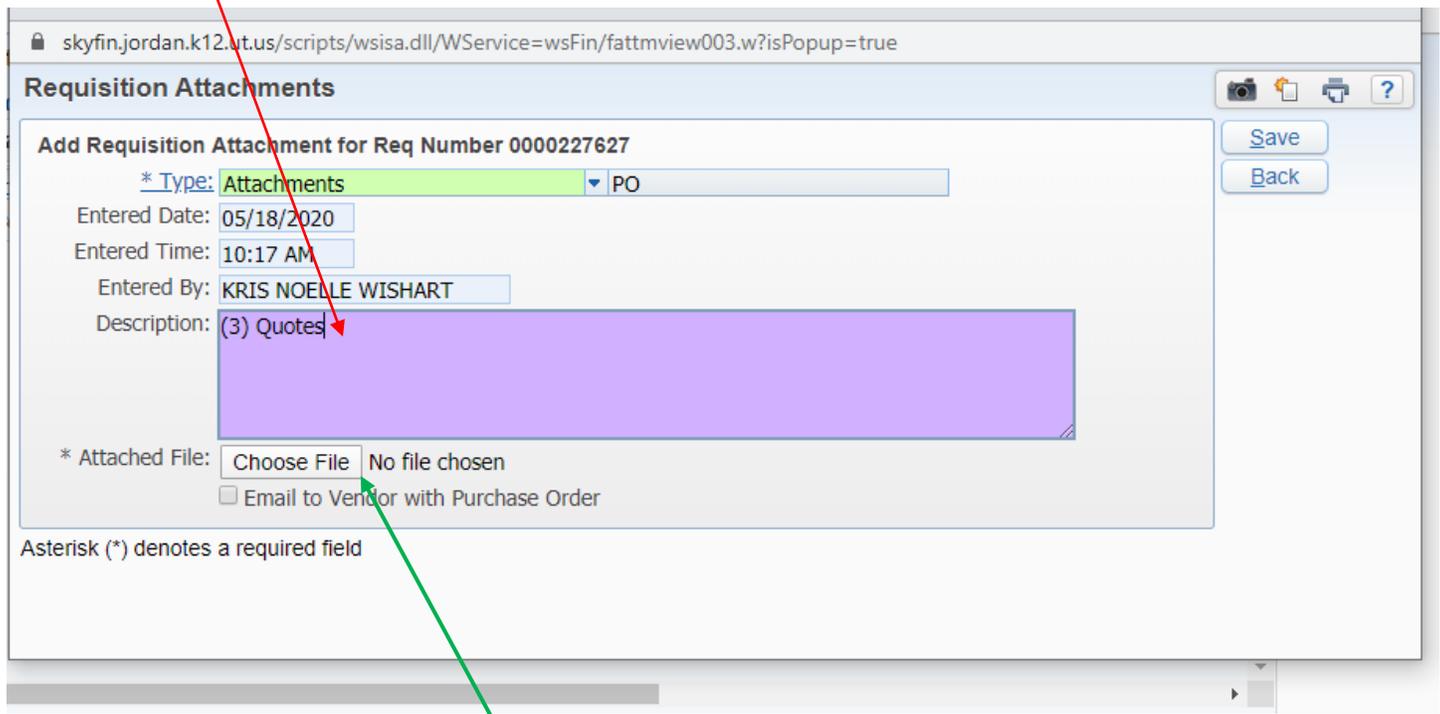


The screenshot shows a web browser window with the URL `skyfin.jordan.k12.ut.us/scripts/wsisa.dll/WService=wsFin/fattmview003.w?isPopup=true`. The page title is "Requisition Attachments". The main heading is "Add Requisition Attachment for Req Number 0000227627". The form contains the following fields:

- \* Type: A dropdown menu is highlighted in purple, with a red arrow pointing to it from the text above.
- Entered Date: 05/18/2020
- Entered Time: 10:17 AM
- Entered By: KRIS NOELLE WISHART
- Description: An empty text area.
- \* Attached File: A "Choose File" button and the text "No file chosen".
- Email to Vendor with Purchase Order

Buttons for "Save" and "Back" are on the right. A note at the bottom states "Asterisk (\*) denotes a required field".

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



The screenshot shows the same form as above, but with the following changes:

- \* Type: The dropdown menu is now set to "Attachments" and is highlighted in green. A red arrow points from the text above to this dropdown.
- Description: The text area is now filled with "(3) Quotes". A red arrow points from the text above to this field.
- \* Attached File: A green arrow points from the text below to the "Choose File" button.

The "Save" and "Back" buttons remain on the right, and the note "Asterisk (\*) denotes a required field" is still present at the bottom.

**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

\* Type: Attachments PO

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

Save

Back

Asterisk (\*) denotes a required field

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

Attachments

Requisition Attachments

Available Attachments for Req Number 0000227627

Type ▲	Description	Entered By	Entered Date	Entered Time	File Size	
Attachments	(3) Quotes	KRIS NOELLE WISHART	05/18/2020	10:23 AM	11 KB	2

View Attachment

Add File

Add Link

Edit

Delete

Back

**Click the Back button.**

Now you can click the **Submit for Approval** button.

**Requisition Master Information**

Batch Number: **14**  
 Requisition Number: **0000227627**  
 Group: **(087) Purchasing**  
 Fiscal Year: **2019 - 2020**  
 Vendor: **INNOVATIVE PRINT CONSULTING LLC**  
**PO BOX 95011**  
**SOUTH JORDAN UT 84095**

Accounting: **Account allocation by total requisition amount.**  
 Amount: **73.00**  
 Ship To: **PURCHASING**  
 Description: **Sample Requisition**

Buttons: **Submit For Approval**, **Save and Finish Later**, **Edit Master**, **\*\*Notes**, **\*\*Attachments**

**Requisition Detail Line Items**

Views: **General** | Filters: **\*Skyward Default**

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc
100		Toner for Brother Super G3 Laser Fax - Model 4750e	1	EA	68.00000	68.00		0
110		This item needs to be OEM and not remanufactured.	0		0.00000	0.00		
120		Shipping cost	1	EA	5.00000	5.00		0

Buttons: **Add**, **Edit**, **Delete**, **Mass Add Detail**, **View Requisition Accounts**

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 Nur
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**