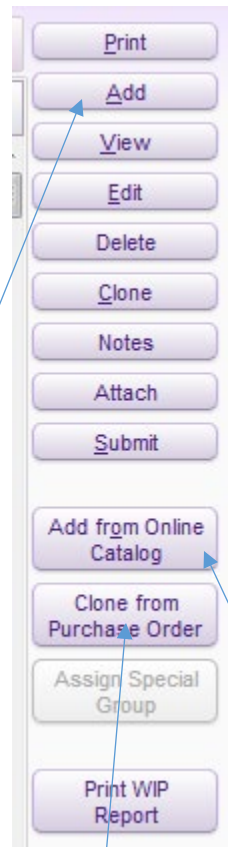


To start the requisition process, please find Purchasing on your menu toolbar.

The screenshot shows a software interface with a menu bar at the top. The menu items are: Home, Account Management, Vendors, **Purchasing**, Inventory, and Custom Reports. Below the menu bar, there are three main sections:

- Purchasing - PU** (Setup):
 - Purchase Order Entry - PO
 - Purchasing Activity - VA
 - View My Purchase Orders - VO
 - Accounting - PO Batch-to-Open - AB
 - Accounting - PO Open-to-History - AO
 - Update History - Purchasing - UH
 - User Preferences - UP
 - Reports - RP
- My Requisition Processing - MR**:
 - Requisitions - RQ** (circled in blue)
 - Approve Requisitions - AR
 - My Requisition Approval History - MR
 - User Preferences - UP
- Purchase Order Receiving - PR**:
 - Receiving - RC
 - Reports - RE
- Purchasing Order Processing ...**:
 - Email Purchase Orders - EP
 - eCommerce Ordering - EC

A yellow callout box on the right contains the text: "You will need to select Requisitions - RQ". A blue arrow points from this box to the "Requisitions - RQ" item in the "My Requisition Processing - MR" sub-menu.



The above menu will be displayed on the right hand side of your screen.

From here, you will need to select either "Add", "Add from Online Catalog" or "Clone from Purchase Order".

By selecting "Add", you will be starting a new requisition from scratch.

By selecting "Add from Online Catalog", you will be starting a requisition with one of our on-line vendors (i.e. Office Depot, Staples, Nasco, Lakeshore Learning, CDW-G, Amazon, Really Good Stuff, Frey Scientific and School Specialty.)

By selecting "Clone from Purchase Order", you will be starting a requisition based on a previous purchase order.

ADDING A REQUISITION FROM SCRATCH

Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpisd.org/scripts/wsisa.dll/WService=wsFin/foreqmast001.w?isPopup=true

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 001 - GP Fine Arts Academy
Fiscal Year: 2018 - 2019 September 1, 2018 - August 31, 2019

Account allocation by total requisition amount (YMA).
 Account allocation by each requisition detail line (YDA).
 This is a Blanket Requisition/Purchase Order.
 This requisition is used to restock a warehouse.

Requisition Information

* Description: Instructional Materials

* Vendor: FOLLETT SCHOOL SOLUTIONS, INC. 1340 RIDGEVIEW DRIVE MCHENRY IL 60050-7048

* Ship To: GRAND PRAIRIE FINE ARTS ACADEMY 102 GOPHER BLVD. GRAND PRAIRIE TX 75050

Attention: SHERRY ELLIS

* Due Date: 02/13/2019 Wednesday
Ship Date: 02/13/2019 Wednesday

Ship Via:

Project/Grant:

Contract: Classroom/Instructional Materials/Equip. Etc-Exp. 8/31/2022

Asterisk (*) denotes a required field

From this screen, you will 1st select your proper requisition group – you will have either your campus, activity fund, or DP group. Please refer to the Purchasing Procedures manual for definitions of each.

2nd – you will need to select whether this is a blanket type requisition or a line item requisition.

3rd – you will need to type your justification in the description box – please keep this brief and to the point.

4th – you may either select your vendor by clicking on the hyperlink to search or just type your vendor in the field

5th – your attention line should ALWAYS list your name (you can list the end user's name as well in this field).

6th – you will need to select a contract that best represents the items/services you are purchasing.

7th – after all the above have been added, please select the “Save and Add Detail” button.

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpsid.org/scripts/wsisa.dll/WService=wsFin/foreqdetl001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: WEBREQ	Accounting: Account allocation by total requisition amount.
Requisition Number: 0000198302	Amount: 0.00
Group: (001) GP Fine Arts Academy	Ship To: GRAND PRAIRIE FINE ARTS ACADEMY
Fiscal Year: 2018 - 2019	Blanket PO: This is not a Blanket PO
Vendor: FOLLETT SCHOOL SOLUTIONS, INC.	Description: test
1340 RIDGEVIEW DRIVE	
MCHENRY IL 60050-7048	
Contract: 17-08 RFP	

Requisition Detail Lines

* Line Number:

Line Type: Merchandise Narrative

Narrative:

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description: ****Reference Vendor Quote #1234 Dated 2/13/19****

Asterisk (*) denotes a required field

After you click the "Save and Add Detail" button, you will see the above screen.

1st – **Do not** change the line number – this is the line you will need to use for your required vendor quote. You will need to change the line type to "Narrative".

2nd – You will need to type your Quote # and Date of Quote in the Description field.

PLEASE NOTE: If you have a quote that references only a date please enter the date.

3rd – You will need to click on the "Save" button to proceed to the next line.

Requisition Detail Lines/Accounting - WF\PU\MR\REQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpsid.org/scripts/wsisa.dll/WService=wsFin/foreqdet1001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**

Requisition Number: **0000198302** Accounting: **Account allocation by total requisition amount.**

Group: **(001) GP Fine Arts Academy** Amount: **0.00**

Fiscal Year: **2018 - 2019** Ship To: **GRAND PRAIRIE FINE ARTS ACADEMY**

Vendor: **FOLLETT SCHOOL SOLUTIONS, INC.** Blanket PO: **This is not a Blanket PO**

1340 RIDGEVIEW DRIVE Description: **test**

MCHENRY IL 60050-7048

Contract: **17-08 RFP**

Submit For Approval

Save and Finish Later

Back

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	% Dis
100		**Reference Vendor Quote #1234 Dated 2/13/19**	0		0.00000	0.00		

Add

Edit

Delete

Mass Add Detail

View Requisition Accounts

200 1 records displayed Line:

After clicking on the "Save" button, you will see the above screen.

1st – You will need to click on either the "Add" button (for only 1 line item) or the "Mass Add Detail" button (for multiple line items).

Requisition Detail Lines/Accounting - WF\PU\MR\REQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpispd.org/scripts/wsisa.dll/WService=wsFin/foreqdetl002.w

MCHENRY IL 60050-7048
Contract: 17-08 RFP

Requisition Detail Lines

* Line Number:

Line Type: Merchandise
 Narrative

Catalog:

* Quantity:

Unit of Measure:

* Unit Cost:

Total Amount:

* Description:

Requisition Detail Lines

* Line Number:

Line Type: Merchandise
 Narrative

Catalog:

* Quantity:

Unit of Measure:

* Unit Cost:

Total Amount:

* Description:

After clicking on the “Mass Add Detail” button, you will see the above screen.

1st – You will need to list the vendors part number in the “Catalog” field (If there is no part number listed on your quote, please leave this blank).

2nd – You will need to enter the item quantity in the “Quantity” field.

3rd – You will need to enter a unit of measure in the “Unit of Measure” field.

4th – You will need to enter the unit cost in the “Unit Cost” field.

5th – You will need to enter the item description in the “Description” field.

6th – You will keep adding your items in the next available “Requisition Detail Lines” field.

7th – After all your lines have been added, please click on the “Save” button.

Requisition Detail Lines/Accounting - WFP\PU\MR\REQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpsid.org/scripts/wsa.dll/WService=wsFin/foreqdetl001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**

Requisition Number: **0000198302** Accounting: **Account allocation by total requisition amount.**

Group: **(001) GP Fine Arts Academy** Amount: **40.00**

Fiscal Year: **2018 - 2019** Ship To: **GRAND PRAIRIE FINE ARTS ACADEMY**

Vendor: **FOLLETT SCHOOL SOLUTIONS, INC.** Blanket PO: **This is not a Blanket PO**

1340 RIDGEVIEW DRIVE Description: **test**

MCHENRY IL 60050-7048

Contract: **17-08 RFP**

Submit For Approval

Save and Finish Later

Back

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	% Dis
100		**Reference Vendor Quote #1234 Dated 2/13/19**	0		0.00000	0.00		
110	12345	ABC Book	1	EACH	12.00000	12.00		
120	34567	123 Book	2	EACH	14.00000	28.00		

200 3 records displayed

Line:

Add

Edit

Delete

Mass Add Detail

Add Requisition Accounts

After clicking on the "Save" button, you will see the above screen.

1st – You will need to click on the "Add Requisition Accounts" button.

Account Distribution - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpsid.org/scripts/wsisa.dll/WService=wsFin/facmtdist001.w

Account Distribution

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

Fnd	T	Fc	Obj	So	Org	F	Pl	Loc	Funds Available	Selected
199	E	11	6397	00	001	0	11	001	\$945.00	<input type="checkbox"/>
199	E	11	6397	00	001	0	24	001	\$5,000.00	<input type="checkbox"/>
199	E	11	6399	00	001	0	11	001	\$4,708.72	<input checked="" type="checkbox"/>
199	E	11	6399	00	001	0	24	001	\$6,950.00	<input type="checkbox"/>
199	E	11	6399	00	001	0	25	976	\$0.00	<input type="checkbox"/>
199	E	11	6399	01	001	0	11	001	\$3,912.18	<input type="checkbox"/>
199	E	11	6399	11	001	0	11	001	\$115.11	<input type="checkbox"/>
199	E	11	6399	14	001	0	11	001	\$0.00	<input type="checkbox"/>
199	E	11	6399	16	001	0	11	001	\$500.00	<input type="checkbox"/>
199	E	11	6399	18	001	0	11	001	\$500.00	<input type="checkbox"/>
199	E	11	6399	19	001	0	11	001	\$500.00	<input type="checkbox"/>
199	E	11	6399	20	001	0	11	001	\$3,862.23	<input type="checkbox"/>
199	E	11	6399	21	001	0	11	001	\$227.10	<input type="checkbox"/>
199	E	11	6399	23	001	0	11	001	\$500.00	<input type="checkbox"/>

100 records displayed

Account Number:

Quick Key:

Total Amount to Distribute: **\$40.00 100.00%**
 Total Distributed: **\$40.00 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
199 E 11 6399 00 001 0 11 001	40.00	100.00

Remove
Remove All

Save Account Distrib
 Back

After clicking on the "Add Requisition Accounts" button, you will see the above screen.

1st – You will need to type your account code within the "Account Number" field.

2nd – After you see the account appear on the screen (under available accounts), you will need to make sure there is a check that appears on the box under "Selected". (The account number will automatically appear under the "Selected Accounts" field.)

3rd – You will need to click on either the "Save Account Distrib" button or you can add more account codes (following the same steps above).

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpsid.org/scripts/wsisadll/WService=wsFin/foreqacct002.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**
Requisition Number: **0000198302**
Group: **(001) GP Fine Arts Academy**
Fiscal Year: **2018 - 2019**
Vendor: **FOLLETT SCHOOL SOLUTIONS, INC.**
1340 RIDGEVIEW DRIVE
MCHENRY IL 60050-7048
Contract: **17-08 RFP**

Accounting: **Account allocation by total requisition amount.**
Amount: **40.00**
Ship To: **GRAND PRAIRIE FINE ARTS ACADEMY**
Blanket PO: **This is not a Blanket PO**
Description: **test**

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

Requisition Accounts

Requisition Accounting

Account Number	Account Amount	Account Percent	Over Budget
199 E 11 6399 00 001 0 11 001	\$40.00	100.00%	

Buttons: Update Account Distrib, View Requisition Detail Lines, Add Asset Detail

After clicking on the "Back" button, you will see the above screen.

1st – You will need to click on the "Attachments" button.

Attachments - WF\PU\MR\REVAT - 10734 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpisd.org/scripts/wsisa.dll/WService=wsFin/fattmview001.w?MenuIDOverride=10734&isPopup=true

Attachments

Requisition Attachments

Available Attachments for Req Number 0000198302

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

0 records displayed

View Attachment
Add File
Add Link
Edit
Delete
Back

After clicking on the “Attachments” button, you will see the above screen.

1st – You will need to click on the “Add File” button.

Requisition Attachments - WF\PU\MR\RE\AT - 10734 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpisd.org/scripts/wsisa.dll/WService=wsFin/fattmview003.w?isPopup=true

Requisition Attachments

Add Requisition Attachment for Req Number 0000198302

* Type: PO

Entered Date:

Entered Time:

Entered By:

* Description:

* Attached File: Upload a New File Scan in a New File

Boycott Israel/Form.pdf

Email to Vendor with Purchase Order

Asterisk (*) denotes a required field

After clicking on the "Add File" button, you will see the above screen.

1st – From the "Type" field drop down menu, please select Quote.

2nd – Please type the vendor quote # and date in the "Description" box.

3rd – The "Upload a New File" button needs to be selected next to the "Attached File" statement.

4th – Click on the "Browse" button and find your quote (either on your desktop, in an e-mail, etc.) and then double-click on the document to attach it.

5th – Please put a check mark in the box next to "Email to Vendor with Purchase Order". This will ensure the vendor receives the quote along with the purchase order.

PLEASE NOTE: THE VENDOR WILL RECEIVE A COPY OF THE PURCHASE ORDER AND QUOTE ONLY IF THEY HAVE AGREED TO RECEIVE PURCHASE ORDERS BY E-MAIL. IF THE VENDOR HAS NOT AGREED TO THIS, YOU WILL BE REQUIRED TO SEND ALL DOCUMENTS TO THE VENDOR YOURSELF.

6th – Click on the "Save" Button.

Attachments - WF\PU\MR\RE\AT - 10734 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpisd.org/scripts/wsisa.dll/WService=wsFin/fattmview001.w?MenuIDOverride=10734&isPopup=true

Attachments

Requisition Attachments

Available Attachments for Req Number 0000198302

Type ▲	Description	Entered By	Entered Date	Entered Time	File Size
Quote	12345 Dated 2/13/19	SHERRY DENISE ELLIS	02/13/2019	11:20 AM	106 KB

1 records displayed

View Attachment
Add File
Add Link
Edit
Delete
Back

After clicking the “Save” button, you will see the above screen.

1st – You will need to either click on the “Add File” button to continue to add other documents to the requisition or you will click on the “Back” button.

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.18.10.00.10-11.7 - Mozilla Firefox

https://skywardbiz.gpsid.org/scripts/wsis.dll/WService=wsFin/foreqacct002.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**
Requisition Number: **0000198302**
Group: **(001) GP Fine Arts Academy**
Fiscal Year: **2018 - 2019**
Vendor: **FOLLETT SCHOOL SOLUTIONS, INC.**
Contract: **17-08 RFP**

Accounting: **Account allocation by total requisition amount.**
Amount: **40.00**
Ship To: **GRAND PRAIRIE FINE ARTS ACADEMY**
Blanket PO: **This is not a Blanket PO**
Description: **test**

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

Requisition Accounts

Requisition Accounting

Account Number	Account Amount	Account Percent	Over Budget
199 E 11 6399 00 001 0 11 001	\$40.00	100.00%	

Buttons: Update Account Distrib, View Requisition Detail Lines, Add Asset Detail

After clicking on the “Back” button, you will see the above screen.

1st – You will need to click on either the “Submit For Approval” button (to complete the requisition and send it through the various approval processes) or the “Save and Finish Later” button (to save your work for you to submit at a later time)

THIS COMPLETES THE STEPS TO ADD A NEW REQUISITION INTO SKYWARD.