

# PURCHASING

## How to enter a Requisition in Skyward

The screenshot shows the Skyward web interface for Duncanville ISD. The 'Purchasing' menu is expanded, and the 'Requisitions' option is highlighted with a red box. A red arrow points to the 'Purchasing' menu item. The interface includes a navigation bar with 'Home', 'Account Management', 'Vendors', 'Purchasing', 'Accounts Payable', 'Inventory', and 'Custom Reports'. The 'Requisitions' option is located under the 'My Requisition Processing' sub-menu. Other options in the 'Purchasing' menu include 'Purchasing Activity', 'View My Purchase Orders', and 'Reports'. The right side of the screen shows various system links and status indicators.

From Financial Management select Purchasing. Select **Requisitions**.

The screenshot shows the 'Requisitions' list in the Skyward web interface. The 'Add' button is highlighted with a red box. The list displays various requisition entries with columns for Requisition Number, Status, A/D Level, Batch Number, Description, Vendor Name, Vnd St, Amount, Entered By, % Project/Grant Disc, Number, # L, # A, # N, # A, # R, # BP, and #. The 'Add' button is located in the top right corner of the list area.

Requisition Number	Status	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By	% Project/Grant Disc	Number	# L	# A	# N	# A	# R	# BP	#
0000003764	REQ	0	09	2.2.7 - parent meetings 2/9/16 & 2/12/16	D.SQUARED CATERING	TX	860.00				2	2					02
0000003740	REQ	0	08	4th grade math center order	REALLY GOOD STUFF	CT	351.55				8	7					02
0000003737	REQ	0	08	quote W6032035 - library supplies	DEMCO INC	WI	1,207.79				1	1	Y				02
0000003736	REQ	0	08	print cartridge for library	PCMG, INC.	CA	54.99				2	1	Y				02
0000003735	REQ	0	08	1.1.1 - subscription through September 30, 2016 - to lessen the gap between grade levels	LEARNING A-Z	IL	1,392.60				2	1	Y				02
0000003707	REQ	1	05	1.1.7 - book study book	BARNES & NOBLE CEDAR HILL	GA	1,697.50				1	1	Y				02
0000003704	REQ	1	05	Math Center supplies	NASCO INC	WI	249.27				11	10					02
0000003702	REQ	1	05	to purchase math center supplies	REALLY GOOD STUFF	CT	145.84				8	7					02
0000003686	REQ	1	05	1.1.1 - Motivation Math	MENTORING MINDS	TX	2,192.40				5	5	Y				02
0000003521	DEN	0	29	1.1.1 - subscription through 9/30/16 - to lessen the gap between grade levels	LEARNING A-Z	IL	1,392.60				2	1	Y				02
0000003434	DEN	0	27	printer for diagnosticians office.	SOUTHERN COMPUTER WAREH	GA	100.61				2	1	Y				01
0000003343	REQ	3	25	1.1.3 - Spanish to English dictionaries, paperback	BARNES & NOBLE CEDAR HILL	GA	310.80				2	1	Y				02

Select Add.

**Requisition Master Information**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

Requisition Setup Information

Requisition Group:

Fiscal Year: 2015 - 2016 July 1, 2015 - June 30, 2016

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**

\* Batch Number:

\* Description:

\* Vendor:

\* Ship To:

Attention:

\* Due Date:

Ship Date:

Ship Via:

Project/Grant:

Contract:

Asterisk (\*) denotes a required field

### Under **Requisition Master Information**:

1. Verify that you are in the correct Requisition group.
2. Make sure the current Fiscal Year is populated.
3. The Skyward default selection is: **YDA-Account allocation by each requisition detail line**. (You will only need to change this field if you are creating a Blanket Requisition/Purchase Order.)

### Under **Requisition Information**:

1. Enter an overall description of what you are purchasing. Be specific in your description! Finance will require detailed information to justify your purchase(s).
2. Select your Vendor and Ship To from the drop down menu.
3. The Due Date and Ship Date default to the current date.
4. Check for Contract information from the drop down box, and select if applicable.

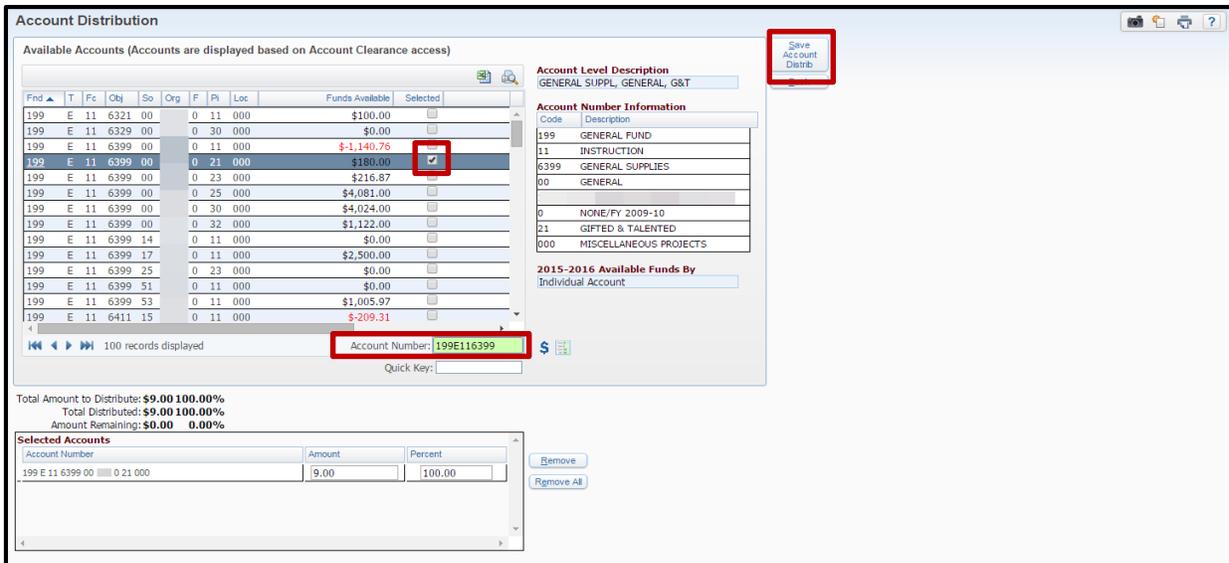
Select **SAVE AND ADD DETAIL**.

### Under **Detail Lines**:

1. Line Type should be populated with Merchandise by default.
2. Enter Quantity, Unit of Measure (if you are unsure of your choices use the drop down menu), and Unit Cost. In the Description box, add detailed information for the Vendor and Purchasing.
3. Click **SAVE**

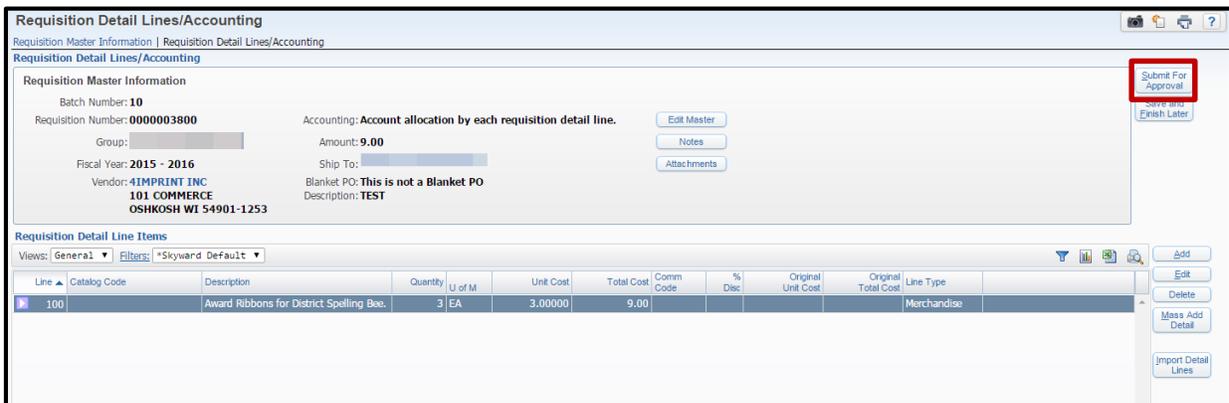
You have the option to enter a Narrative. To enter a Narrative use the drop down box to select from the various options:

1. Fax Purchase Order to Vendor
2. DO NOT Fax Purchase Order to Vendor
3. Return Purchase Order to Campus
4. Ordered Online



**Under Account Distribution:**

1. Type Budget Code you want to use in the **Account Number** box. You also have the option to scroll through your Account number list to select your Budget Code. (Please note: It is mandatory to provide a quote if you are using Federal Funds)
2. Using your mouse, place a check mark next to the selected Budget Code.
3. Select **Save Account Distrib.**



Click **Submit For Approval** – Your requisition has been submitted and will now be routed through the approval process. Once your requisition is approved, you will receive an email notification which will include your Purchase Order number.

If you requested the Purchase Order to be returned to you, then it will be scanned and sent to you via email. It will be your responsibility to get the purchase order to the vendor. If you did not request the Purchase Order to be returned to you, then the Purchasing Department will send the Purchase Order to the vendor.

## How to enter a Blanket Requisition

**Requisition Master Information**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Setup Information**

Requisition Group: [Dropdown]  
Fiscal Year: 2015 - 2016 July 1, 2015 - June 30, 2016

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

**Save and Add Detail**

**Requisition Information**

\* Batch Number: 10  
\* Description: Food/Beverages for district meetings.

\* Vendor: COSTCO WAREHOUSE 250 W HWY 67 DUNCANVILLE TX 75137  
\* Ship To: [Dropdown]  
Attention: YOUR NAME HERE  
\* Due Date: 02/10/2016 Wednesday  
Ship Date: 02/10/2016 Wednesday  
Ship Via: [Dropdown]  
Project/Grant: [Dropdown]  
Contract: CONTRACT #014-019-04-015-A EXP. 6/30/16

Asterisk (\*) denotes a required field

**Blanket requisitions are used for retail vendors and when you need to make multiple purchases from the same vendor over a period of time. Blanket purchases must not exceed the total dollar amount listed on the Purchase Order. (Sam's Club is a one time use)**

**To enter a Blanket requisition:**

- 1. Follow all steps used to enter a regular requisition with this addition: Under **Requisition Setup Information** check the box **"This is a Blanket Requisition/Purchase Order."****
- 2. Select **Save and Add Detail.****

**Requisition Detail Lines/Accounting**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Detail Lines/Accounting**

**Requisition Master Information**

Batch Number: 10  
Requisition Number: 000003809  
Group: [Dropdown] Accounting: Account allocation by each requisition detail line.  
Fiscal Year: 2015 - 2016 Amount: 0.00  
Vendor: COSTCO WAREHOUSE Ship To: [Dropdown]  
250 W HWY 67  
DUNCANVILLE TX 75137  
Contract: EPCNT NORTHWEST ISD  
Blanket PO: This is a Blanket PO  
Description: Food/Beverages for district meetings.

**Requisition Detail Lines**

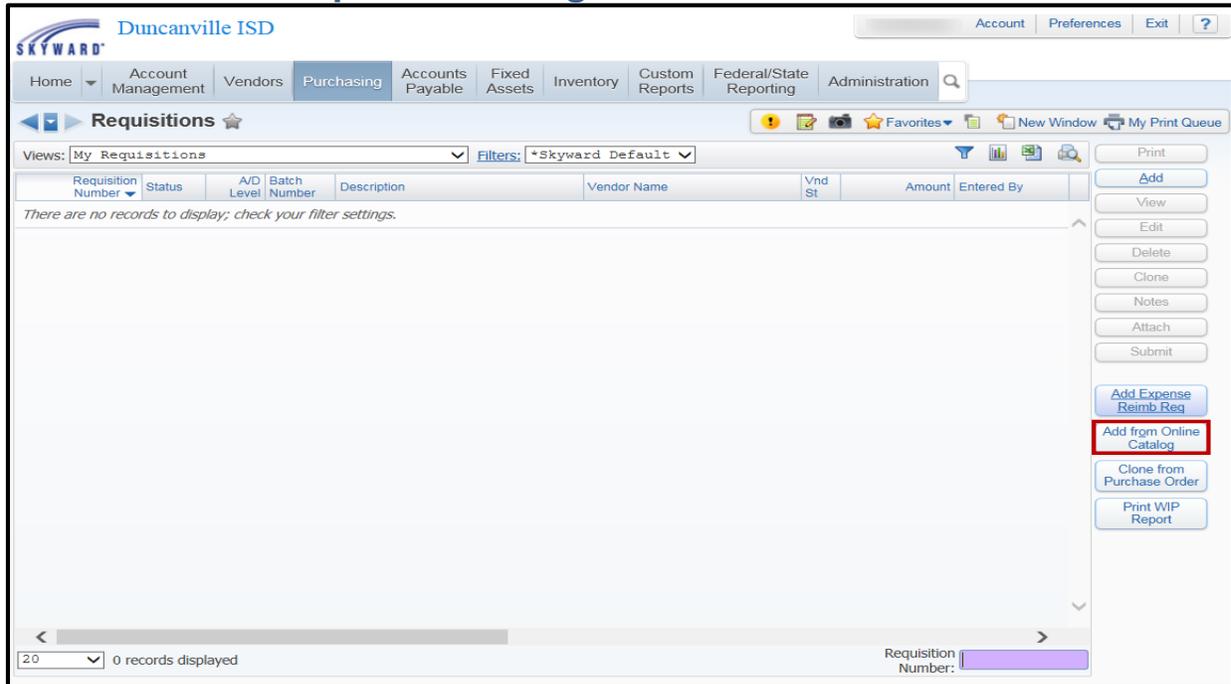
\* Line Number: 100  
Line Type:  Merchandise  Narrative  
\* Quantity: 1  
\* Amount: 200.00  
Total Amount: 200.00  
\* Description: Food/Beverages for district meetings.

**Save**

Asterisk (\*) denotes a required field

**Enter the Amount and Description, then click **SAVE**. Complete the requisition using the same process as a traditional requisition. In the Narrative always request that the Purchase Order to come back to you.**

## How to enter a Requisition though Ecommerce



To enter a requisition using **Ecommerce**, go to Financial Management/Purchasing/ My Requisition Processing/Requisitions. Select **Add from Online Catalog**.



Here you will be able to view a list of our Ecommerce vendors. Click on the image to connect to the vendors online catalog.

**Requisition Master Information**

Requisition Master Information | Requisition Detail Lines/Accounting

**Requisition Master Information**

**Requisition Setup Information**

Requisition Group: 001 - DHS  
 Fiscal Year: 2015 - 2016 July 1, 2015 - June 30, 2016

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

**Requisition Information**

\* Batch Number: 22

\* Description:

Vendor: STAPLES **\*\*Ecommerce Vendor\*\***

\* Ship To: DUNCANVILLE HIGH SCHOOL 900 W CAMP WISDOM DUNCANVILLE TX 75116

Attention: TINA RIECHERS

\* Due Date: 04/22/2016 Friday

Ship Date: 04/22/2016 Friday

Ship Via:

Project/Grant:

Contract:

Asterisk (\*) denotes a required field

Save and Add Detail  
Back

Enter your Description and Vendor/Ship To from the drop down menu. Next select the Contract Information from the drop down menu click **Save and Add Detail**.

SHOP Account Number: 70111671DAL Messages Help My Account

**STAPLES** Business Advantage Your Store Dallas, TX 4351 Dallas Ft Worth...

\$8.50 2 Items

SEARCH RECENTLY PURCHASED BROWSE CATEGORIES QUICK ORDER YOUR LISTS YOUR DASHBOARD

Download PDF Version Print

SUBTOTAL \$8.50

TOTAL \$8.50

Update Cart

SUBMIT ORDER

Continue Shopping

Items for Delivery

SORT BY: PLEASE SELECT ITEM PRICE QTY TOTAL

You will be redirected to the online catalog where you can select your items and submit your order.

**Requisition Detail Lines/Accounting**

**Requisition Master Information**  
 Batch Number: 22  
 Requisition Number: 000005776      Accounting: Account allocation by total requisition amount.  
 Group: (001) DHS      Amount: 8.50  
 Fiscal Year: 2015 - 2016      Ship To: DUNCANVILLE HIGH SCHOOL  
 Vendor: STAPLES ADVANTAGE      Blanket PO: This is not a Blanket PO  
 PO BOX 83689      Description: test  
 CHICAGO IL 60696-3689  
 \*\*\* This is an Ecommerce Requisition \*\*\*

Buttons: 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	% Disc
100	651254	Staples Sonix Gel Retractable Pens, Medium Point, 0.7 mm, Black Ink / Black Barrel, 12/Pk	1	DZN	7.99000	7.99		0
110	472506	Staples Paper Clips, Jumbo, Smooth, 1000/Pk	1	PK	0.51000	0.51		0

Buttons: Add, Edit, Delete, Add Ecommerce Narrative, Add Requisition Accounts

20      2 records displayed      Line: [ ]

**Your order will be saved in Skyward. You can view your Requisition Detail Line Items, then Add Requisition Accounts.**

**Account Distribution**

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

Fund	T	Fc	Obj	So	Org	F	Pl	Loc	Funds Available	Selected
199	E	11	6321	00	0	11	000		\$100.00	<input type="checkbox"/>
199	E	11	6329	00	0	30	000		\$0.00	<input type="checkbox"/>
199	E	11	6399	00	0	21	000		\$180.00	<input checked="" type="checkbox"/>
199	E	11	6399	00	0	25	000		\$4,081.00	<input type="checkbox"/>
199	E	11	6399	00	0	30	000		\$4,024.00	<input type="checkbox"/>
199	E	11	6399	00	0	32	000		\$1,122.00	<input type="checkbox"/>
199	E	11	6399	14	0	11	000		\$0.00	<input type="checkbox"/>
199	E	11	6399	17	0	11	000		\$2,500.00	<input type="checkbox"/>
199	E	11	6399	25	0	23	000		\$0.00	<input type="checkbox"/>
199	E	11	6399	51	0	11	000		\$0.00	<input type="checkbox"/>
199	E	11	6399	53	0	11	000		\$1,005.97	<input type="checkbox"/>
199	E	11	6411	15	0	11	000		\$-209.31	<input type="checkbox"/>

Account Number: 199E116399

Buttons: Save Account Distrib, Back

Total Amount to Distribute: \$9,000.00 100.00%  
 Total Distributed: \$9,000.00 100.00%  
 Amount Remaining: \$0.00 0.00%

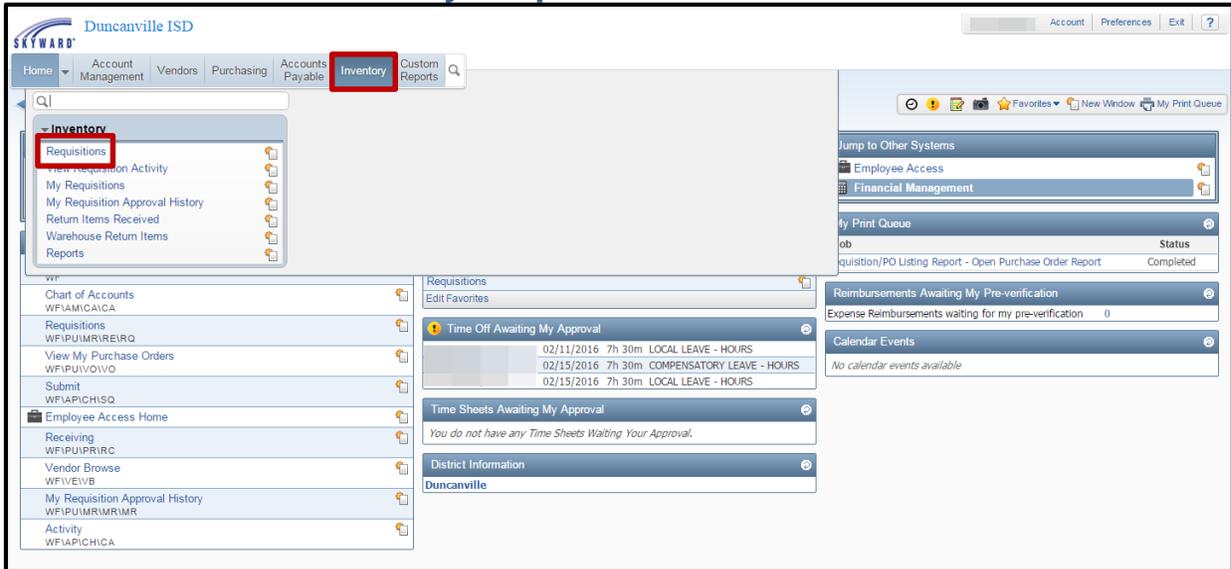
**Selected Accounts**

Account Number	Amount	Percent
199 E 11 6399 00 0 21 000	9.00	100.00

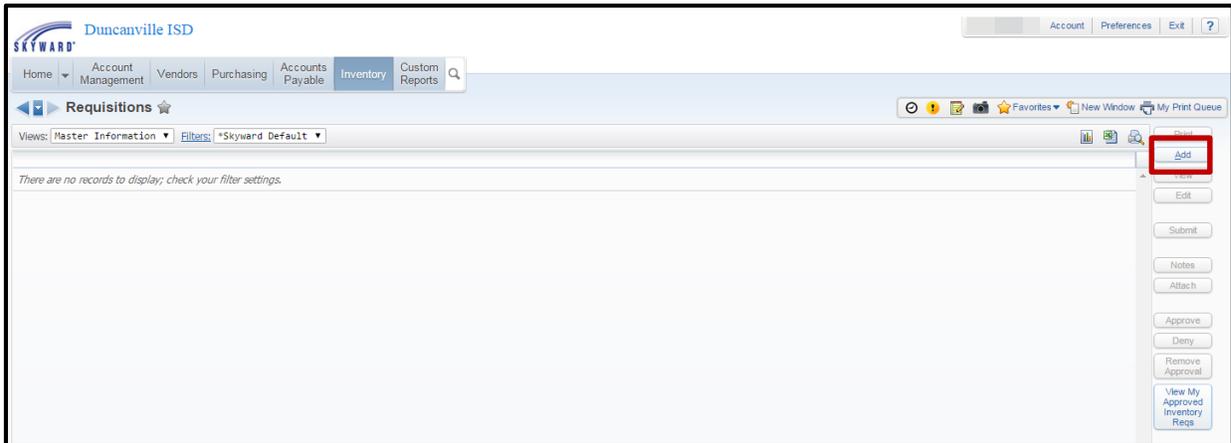
Buttons: Remove, Remove All

**Enter your Account Distribution, then Save to complete your requisition.**

# How to Enter an Inventory Requisition



From the Account Management tab, select **Inventory**, then Requisitions.



Select **ADD**.

**Inventory Requisition Master Information**

Inventory Requisition Master Information | Inventory Requisition Detail Lines/Accounting

**Inventory Requisition Master Information**

Inventory Requisition Setup Information

Requisition Group:

Fiscal Year: 2015 - 2016 July 1, 2015 - June 30, 2016

**Requisition Information**

Delivery Instructions: Please deliver to Mary Smith.

Requestor:

\* Building:

Asterisk (\*) denotes a required field

Save  
Back

### Under **Inventory Requisition Master Information**:

1. Requisition Group should be your campus or department.
2. Under Delivery Instructions you can add any special instructions for your order.
3. Select the correct building for delivery.
4. Select **SAVE**.

**Requisition Detail Line Items**

Available Items

Select Items By:  Display Items from Warehouse: WAREHOUSE

Views: General | Filters: Skyward Default

Item Code	Item Description	Item Class	Unit Of Measure	WHSE QTY On Hand	Unit Value	Qty	Comm	Back	Sel
110002	LAMINATING FILM 27"	OFFIC	BX2	13	37.12000	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
110003	MANILA PAPER 9X12	OFFIC	RM	110	4.11000	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110004	MANILA PAPER 12X18	OFFIC	RM	28	7.49000	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110060	BOX TAPE CLEAR	OFFIC	PK	20	14.90000	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110130	AA ALKALINE BATTERY	OFFIC	PK	95	5.41736	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110131	AAA ALKALINE BATTERY	OFFIC	PK	90	5.44567	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110132	D ALKALINE BATTERY	OFFIC	PK	44	7.41458	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110133	C ALKALINE BATTERY	OFFIC	PK	53	5.97925	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110134	9 VOLT BATTERY	OFFIC	PK	51	12.46000	0	0	<input type="checkbox"/>	<input type="checkbox"/>
110224	RECORDS STORAGE BOX	OFFIC	CT	81	29.95000	0	0	<input type="checkbox"/>	<input type="checkbox"/>

100 records displayed

Item Code:

**Selected Items**

Code	Item Description	Class	U OF M	Order Qty	Unit Value	Extended Cost
110002	LAMINATING FILM 27"	OFFIC	BX2	<input type="text" value="0"/>	37.12000	0.00

Remove  
Remove All

Save Item Selection Info  
Back

### Under **Requisition Detail Line Items**:

1. Select your items either by Item Description or Item Code.
2. Enter a checkmark in the box next to the item you wish to order.
3. Under Selected Items enter the order quantity.
4. Once you have entered all of your items select **Save Item Selection Information**.

**Inventory Requisition Detail Lines/Accounting**

Inventory Requisition Master Information | Inventory Requisition Detail Lines/Accounting

**Inventory Requisition Detail Lines/Accounting**

Inventory Requisition Master Information

Requisition Number: **000000674**    Edit Master    Submit For Approval

Group: \_\_\_\_\_    Notes    Save and Finish Later

Fiscal Year: **2015 - 2016**    Attachments

Requestor: \_\_\_\_\_

Building: \_\_\_\_\_

Delivery Instructions: **Please deliver to Mary Smith.**

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**Inventory Requisition Detail Lines**

Views: General    Filters: \*Skyward Default    Update Line Items

Item Code	Description	Requested	Delivered	Backordered	Canceled
110002	LAMINATING FILM 27"	1	0	0	0

Add Requisition Accounting

Select **Add Requisition Accounting**.

**Account Distribution**

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

Find	T	Fc	Obj	So	Org	F	Pi	Loc	Funds Available	Selected
199	E	11	6112	00	112	0	11	000	\$21,732.50	<input type="checkbox"/>
199	E	11	6112	00	112	0	23	000	\$277.00	<input type="checkbox"/>
199	E	11	6112	00	112	0	25	000	\$4,144.00	<input type="checkbox"/>
199	E	11	6112	00	112	0	32	000	\$548.25	<input type="checkbox"/>
199	E	11	6112	00	112	0	35	000	\$548.25	<input type="checkbox"/>
199	E	11	6112	99	112	0	11	000	\$341.50	<input type="checkbox"/>
199	E	11	6112	99	112	0	23	000	\$639.00	<input type="checkbox"/>
199	E	11	6112	99	112	0	25	000	\$1,715.00	<input type="checkbox"/>
199	E	11	6112	99	112	0	30	000	\$2,733.00	<input type="checkbox"/>
199	E	11	6117	99	112	0	11	000	\$4,776.00	<input type="checkbox"/>
199	E	11	6249	00	112	0	11	000	\$0.00	<input type="checkbox"/>
199	E	11	6249	15	112	0	11	000	\$120.00	<input type="checkbox"/>
199	E	11	6249	51	112	0	11	000	\$0.00	<input type="checkbox"/>
199	E	11	6269	51	112	0	11	000	\$0.00	<input type="checkbox"/>

100 records displayed    Account Number: \_\_\_\_\_    Quick Key: \_\_\_\_\_

Total Amount to Distribute: **\$37,121,000.00%**  
 Total Distributed: **0.00 0.00%**  
 Amount Remaining: **37,121,000.00%**

**Account Level Description**  
 SUBS., GENERAL, BASIC

**Account Number Information**

Code | Description

199 GENERAL FUND

11 INSTRUCTION

6112 SUBSTITUTE TEACHERS

00 GENERAL

0 NONE/FY 2009-10

11 BASIC EDUCATION

000 MISCELLANEOUS PROJECTS

**2015-2016 Available Funds By Individual Account**

Save Account Distrib    Back

**Selected Accounts**

Account Number	Amount	Percent
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Remove    Remove All

Under Account Distribution select your department/campus general supplies budget code and enter that in the Account Number box, then select **SAVE ACCOUNT DISTRIB.**

Inventory Requisition Detail Lines/Accounting

Inventory Requisition Master Information | Inventory Requisition Detail Lines/Accounting

**Inventory Requisition Detail Lines/Accounting**

Inventory Requisition Master Information

Requisition Number: **000000674**    Edit Master

Group: [Redacted]    Notes

Fiscal Year: **2015 - 2016**    Attachments

Requestor: [Redacted]

Building: [Redacted]

Delivery Instructions: **Please deliver to Mary Smith.**

Submit For Approval  
Save and Finish Later

Inventory Requisition Detail Lines

Views: General    Filters: \*Skyward Default

Item Code	Description	Requested	Delivered	Backordered	Canceled
110002	LAMINATING FILM 27"	1	0	0	0

Update Line Items

Add Requisition Accounting

Click **Submit for Approval.**

**This is the end of this Tutorial**