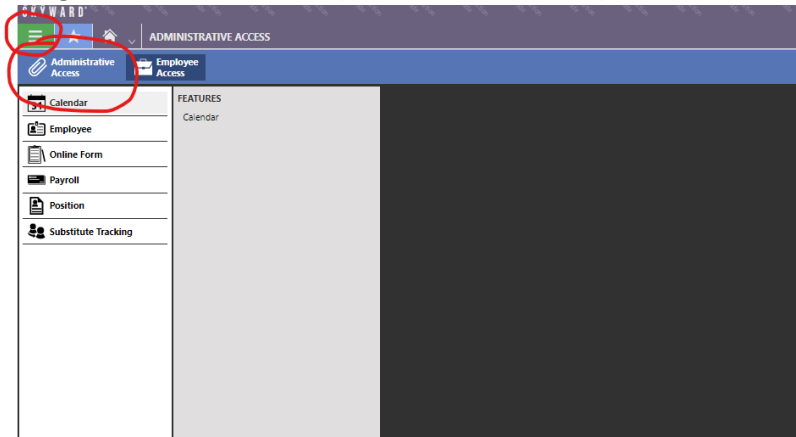


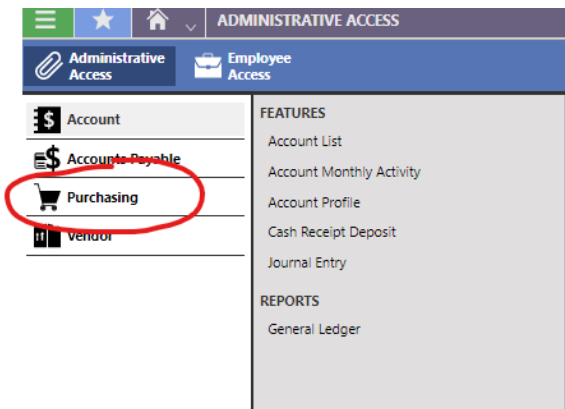
## HOW TO SUBMIT A PURCHASE ORDER REQUEST IN SKYWARD FINANCIAL:

1. Log into Skyward Financial (same website and login as paycheck access) :  
<https://skyward.iscorp.com/OfallonTWP203ILBusSTS/Session/Signin?area=Home&controller=Home&action=Index>

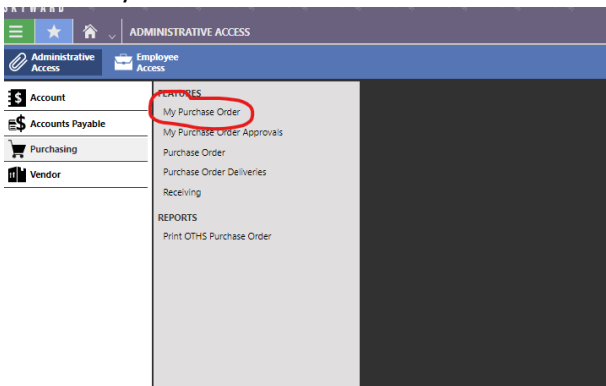
2. Navigate to the main menu (three horizontal lines) and select “Administrative Access”.



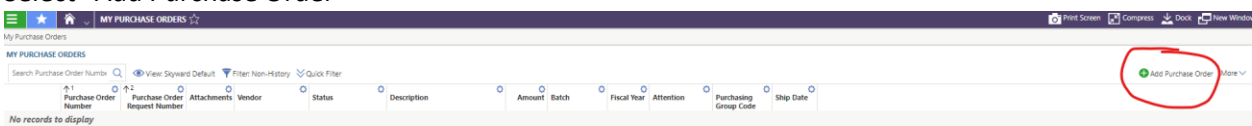
3. Select “Purchasing”



4. Select “My Purchase Order”



5. Select “Add Purchase Order”



- Select your "Purchasing Group" from the drop down menu. The menu will populate all of the groups for which you have access. Select the appropriate group for your request.

PURCHASE ORDER DETAILS

\*Purchasing Group: [Dropdown]

Type: View: Skyward Default | Filter: Skyward Default

Purchasing Group	Purchasing Group Description
Select 042	CTE-BUS PO GROUP
Select 043	CTE-PCS PO GROUP
Select 044	CTE-IND TECH PO GROUP
Select 045	CTE-OTHER PO GROUP
Select 055	INTERSCHOLASTICS PO GROUP
Select 140	CTE GRANT PO GROUP
Select 141	PERKINS PO GROUP
Select 420	TEXTBOOK PO GROUP

\*Vendor: [Dropdown]

\*Description: [Text Field]

\*Batch: [Text Field]

\*Ship To: [Dropdown]

Delivery Instruction: [Dropdown]

Attention To: [Text Field]

Commodity: [Dropdown]

Due Date: 10/30/2019 Wednesday

Contract: [Dropdown]

Ship Date: 10/30/2019 Wednesday

- Select Fiscal Year

\*Fiscal Year: 2020-2021

- Leave the blanket box unchecked unless you intend to use the purchase order as a "not to exceed" purchase order that will include multiple purchases over time. Leave the shop online box unchecked.

\*Purchasing Group: 045 | CTE-OTHER PO GROUP

\*Fiscal Year: 2019-2020

Type:  Blanket

Shop Online

\*Vendor: [Dropdown]

\*Description: [Text Field]

\*Batch: [Text Field]

\*Ship To: O'FALLON TOWNSHIP HS DISTRIC | 600 S SMILEY STREET O FALLON, IL 62269

- Select the vendor from the Vendor List. You can either begin typing the vendor's name or can use the arrow to utilize the drop down menu. (Note: if the vendor you would like to use is not available for selection, please send Jon Sparks the vendor name, address, and any other relevant information so she can add the vendor to Skyward. You will need to cancel your request until Jon has added the vendor.)

Batch	Ship To	Intruction	Attention To	Full Name	Vendor Number	Federal EIN	Full Order From Address	Purchasing Contact
Select	Select	Select	Select	AMAZON.COM CREDIT	100072		PO Box 530958 ATLANTA, GA 30353	
Select	Select	Select	Select	AMERICAN ART CLAY CO.	100075		6060 GUION ROAD INDIANAPOLIS, IN 46254-1222	
Select	Select	Select	Select	AMERICAN ASSOC FOR ADV...	100273		1200 NEW YORK AVE NW WASHINGTON, DC 20005	
Select	Select	Select	Select	AMERICAN BURLGLARY AND ...	100073		507 RUDDER ROAD FENTON, MO 63026	
Select	Select	Select	Select	AMERICAN FIDELITY (FLEX)	100005		PO Box 25510 ATTN FLEX DEPARTMENT OKLAHOMA CITY, OK 73125	
Select	Select	Select	Select	AMERICAN FIDELITY (INS)	100006		PO Box 25523 ATTN CUSTOMER SERVICE OKLAHOMA CITY, OK 73125	
Select	Select	Select	Select	AMERICAN FUNDS INVESTM...	100007		PO Box 6007 AMERICAN FUNDS SERVICE CO INDIANAPOLIS, IN 46209-...	
Select	Select	Select	Select	AMERICAN INSTITUTE BIOLO...	100274		950 HERNDON PARKWAY SUITE 450 HERNDON, VA 20170	
Select	Select	Select	Select	AMERICAN INSTITUTE FOR ...	100076		1415 BEECHWOOD ROAD FALLON, IL 62269	

10. Add a general description of the purchase request in the description field.

\*Vendor: AMAZON.COM CREDIT PO Box 530956 ATLANTA, GA 30353

\*Description: 20 iPADS, 20 IPAD CASES FOR FINANCE CLASSES

\*Batch: [ ]

\*Ship To: OFALLON TOWNSHIP HS DISTRIC 600 S SMILEY STREET O FALLON, IL 62269

Delivery Instruction: [ ]

Attention To: JULIE L KNUITSON

Commodity: [ ]

Due Date: 10/30/2019 Wednesday

11. Enter the batch. The batch should be the date of your request in the following format: YYYYMMDD

\*Batch: 20191030

\*Ship To: OFALLON TOWNSHIP HS DISTRIC 600 S SMILEY STREET O FALLON, IL 62269

Instruction: [ ]

12. The shipping address will default to the Smiley campus. Use the arrow and drop down menu if you need to change delivery to the Milburn campus.

Type: Viewer Skyward Default Filter: Skyward Default

\*Vendor: Full Name Full Mailing Address

\*Description: OFALLON TOWNSHIP HS DIS... 650 MILEBURN SCHOOL ROAD O FALLON, IL 62269

OFALLON TOWNSHIP HS DIS... 600 S SMILEY STREET O FALLON, IL 62269

\*Batch: 50 Total Records

\*Ship To: OFALLON TOWNSHIP HS DISTRIC 600 S SMILEY STREET O FALLON, IL 62269

Instruction: [ ]

Attention To: JULIE L KNUITSON

13. Optional: Add delivery instructions using the arrow and drop down menu.

14. The "Attention to:" field will automatically fill with the requester's name.

Delivery Instruction: DELIVER TO SECURITY DESK AT MAIN ENTRANCE

Attention To: JULIE L KNUITSON

Commodity: [ ]

Due Date: 10/30/2019 Wednesday

15. Leave the commodity, due date, contract, and ship date fields as is

Commodity: [ ]

Due Date: 10/30/2019 Wednesday

Contract: [ ]

Ship Date: 10/30/2019 Wednesday

16. Select "Save and Add Detail"

Enter Purchase Order Details

Save & Add Detail Save Cancel

\*Purchasing Group: SWS CTE-OTHER PO GROUP

\*Fiscal Year: 2019-2020

Type: [ ] Basket [ ] Shop Online

\*Vendor: AMAZON.COM CREDIT PO Box 530956 ATLANTA, GA 30353

\*Description: 20 iPADS, 20 IPAD CASES FOR FINANCE CLASSES

\*Batch: 20191030

\*Ship To: OFALLON TOWNSHIP HS DISTRIC 600 S SMILEY STREET O FALLON, IL 62269

Delivery Instruction: DELIVER TO SECURITY DESK AT MAIN ENTRANCE

Attention To: JULIE L KNUITSON

Commodity: [ ]

Due Date: 10/30/2019 Wednesday

Contract: [ ]

Ship Date: 10/30/2019 Wednesday

17. Complete the purchase order detail screen for every separate line item within your request. For purchase order detail type, select merchandise (this is the default).

Purchase Order Detail Type M - Merchandise

18. Leave the catalog item field blank and write the item description in the description field. Leave the commodity field blank.

Catalog Item

\*Description IPAD GENERATION 47

Commodity

19. Enter the quantity, unit of measure (optional), and unit cost. The total cost will automatically populate in the “entry amount” field. Leave the project and grant fields blank.

\*Quantity

Unit of Measure EACH EACH

\*Unit Cost (\$)

Entry Amount (\$)

Project

Grant

20. Select the appropriate account from the drop down menu. If the account you need is not listed, contact Beth Shackelford. (You may distribute between multiple accounts if desired.)

Account	Account Description	Quick Key	Category 1	Category 2	Category 3	Category 4	Funding Source	TBS Federal Fund
Select 10 E 1400 4100 45 000 000000	SUPPLIES-GENERAL-CTE-OTHER							
Select 10 E 1400 5400 45 000 000000	CAP OUTLAY-EQUIP-CTE-OTHER							

Total Records

10000.00 100.00

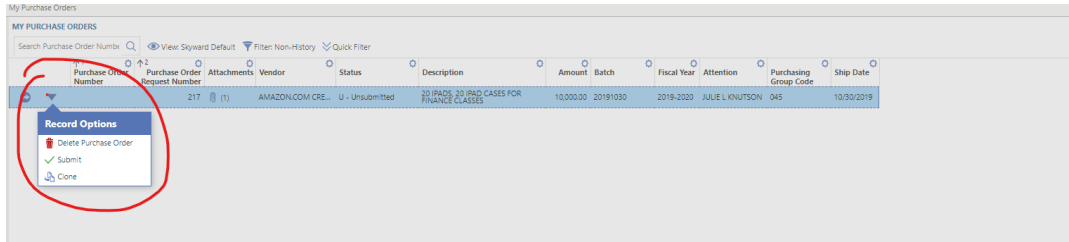
21. Do not select asset; leave the receivable box checked as is.

22. If a discount will be applied to the order, enter it as its own line item within your request. Instead of adding a positive quantity, add a negative quantity (i.e. “-1”) and enter the discount amount in the unit cost field.

23. If shipping will be applied to the order, enter it as its own line item within your request. Add a quantity of 1 and “shipping” in the description field.



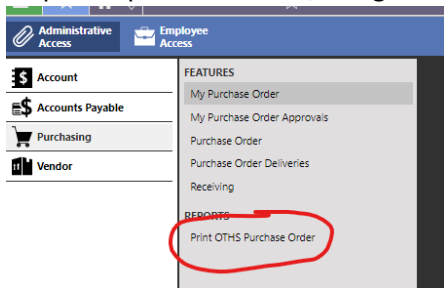
27. On the “My Purchase Orders” screen, click on the triangle next to the curved arrow and select “submit”.



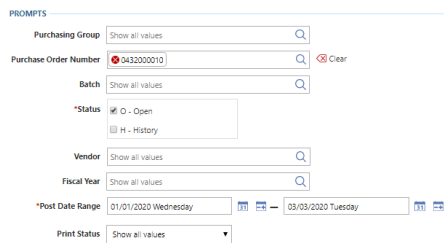
28. Your request will be sent to the business office for approval. You will receive notification when your request has been approved.

**FOLLOWING PURCHASE ORDER APPROVAL:**

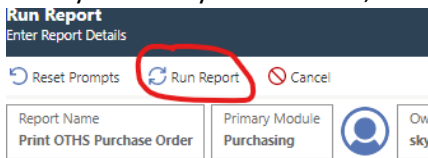
1. You will receive a message from Skyward indicating that your request was approved.
2. In Skyward Financial, navigate to Administrative Access, Purchasing, My Purchase Order to view your purchase orders.
3. To print a purchase order, navigate to Administrative Access, Purchasing, Print OTHS Purchase Order



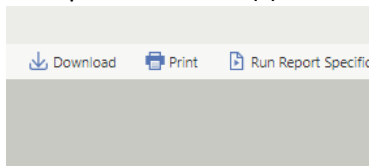
4. On the next screen, you will choose which Purchase Orders you would like to print. You can select by PO number, batch, vendor, post date range, or print status. You may use whatever option you prefer.



5. After you make your selection, click on “Run Report”



6. Your purchase order(s) will be displayed. From this screen, you can download or print your PO.



7. To submit an invoice associated with a PO, please follow the “Skyward Financial Invoice Instructions”. The invoice should be created after goods are received (creating and submitting the invoice is what authorizes the business office to pay the bill).