

REQUISITION ENTRY

Menu Path: Financial Management/Purchasing/Requisitions

Add a New Requisition

- Click **ADD** on the right-hand side

The screenshot shows the Skyward Requisitions interface for SNOQUALMIE VALLEY SD 410. The user is logged in as Amanda Heikkila. The interface includes a navigation menu with 'Home', 'Account Management', 'Vendors', 'Purchasing', and 'Accounts Payable'. The 'Requisitions' section is active, showing a table with one requisition entry. The 'Add' button is highlighted in red.

Requisition Number	Status	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By
0000147351	REQ	0	15	WEB POSTCARDS	AMAZON CAPITAL SERVICES	WA	34.71	HEIKKILA, AMANDA

Requisition Master Information

- Choose the appropriate **Requisition Group**.
- Choose the appropriate **Fiscal Year**.
- If you are creating a **BLANKET PO** be sure to check the Blanket Req. box. If you do not mark this box before proceeding you cannot return and check the box later. You will need to delete the req. and start over.
- Under the Requisition Information enter your **Description**. Use a general description for the description box (i.e. OFFICE SUPPLIES | WORKROOM COPY PAPER | ACCOUNTS PAYABLE CONFERENCE REGISTRATION).
- Select a **Vendor**; start typing in the Vendor box and the list narrows automatically as entry begins. (If it is a New Vendor, email A/P with vendor W-9 and a contact email).
- Enter and verify the **Ship To** destination.
- Change the **Attention** field as needed. The originator of this requisition will always be CC'd in email correspondence. The Attention field is to include additional individuals who will also need to be included in email correspondence with the vendor.
- Due Date & Ship Date** are filled in automatically. There is no need to adjust these dates.
- Tax is automatically 8.9%. If your school is outside the Snoqualmie tax rate be sure to update this to your locations correct tax rate listed below. Tax is based on where the item is being shipped.
- Click **Save and Mass Add Detail** in the upper right-hand corner to move to the next screen.

The screenshot shows the 'Requisition Master Information' form. The 'Requisition Setup Information' section includes fields for 'Requisition Group' (201 - BUS. OFFICE - GF) and 'Fiscal Year' (2022 - 2023 September 1, 2022 - August 31, 2023). The 'Requisition Information' section includes fields for 'Batch Number' (07), 'Description' (SAMPLE PO), 'Vendor' (COMCAST), 'Ship To' (SNOQUALMIE VLY.SCHOOL DIST #410), 'Attention' (JANE DOES), 'Due Date' (09/01/2022), and 'Ship Date' (09/01/2022). The 'Tax' field is highlighted in red, showing a rate of 8.9000%. A red box highlights the tax rates: 'TFMS | FCES | CKMS = 8.7%' and 'NBES | OES = 9%'. The 'Save and Mass Add Detail' button is also highlighted in red.

Enter the Requisition Detail Lines

- The **Line Number** will automatically populate.
- Enter the **Quantity, Unit of Measure** (optional), and the **Unit Cost**.
- The **Taxable** box will automatically be checked. Remember to uncheck this box on BLANKET Purchase Orders and orders that do not include taxable items. You can reference <https://dor.wa.gov> to help decide if your order is a taxable order.
- **Description:** This is a more detailed description of the purchase. This includes order details like the item number, item description, or the services being provided.
- If your requisition is for registration or lodging, it must include location, who is attending, dates, confirmation numbers, etc.
- Proceed to your next detail line.

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 19	Accounting: Account allocation by total requisition amount.
Requisition Number: 0000147383	Subtotal: 0.00 Tax: 0.00
Group: (201) BUS. OFFICE - GF	Total: 0.00 Other: 0.00
Fiscal Year: 2019 - 2020	Ship To: SNOQUALMIE VLY.SCHOOL DIST #410
Vendor: COMCAST	Description: SAMPLE PO
PO BOX 60533	
CITY OF INDUSTRY CA 91716-0533	

Requisition Detail Lines

* Line Number: Taxable:

Line Type: Merchandise Narrative

Catalog:

* Quantity:

Unit of Measure:

* Unit Cost:

Total Amount:

* Description:

SCROLL DOWN
There are 4
more detail lines
available below.

Shipping Charges

SHIPPING MUST BE INCLUDED ON ALL APPLICABLE REQUISITIONS

- The shipping amount needs to be listed as a dollar amount, otherwise it will not be encumbered. If you don't know what the amount is, you can state "shipping estimate" and use an amount between 10-15% of your requisition subtotal. If it is free shipping, please do the same but state "free shipping" or "no shipping" and enter \$0 for the dollar amount.
- Shipping is a taxable amount. Make sure the **Taxable** box is checked.
- Enter shipping detail as a **Merchandise** line type.
- Enter 1 as the **Quantity** regardless the shipping amount.
- Enter your **Unit Cost**
- Enter your Shipping Description (Shipping/Shipping Estimate/Free Shipping)
- Proceed to your next available detail line to add your Narrative and complete your requisition.

Requisition Detail Lines

* Line Number: Taxable:

Line Type: Merchandise
 Narrative

Catalog:

* Quantity: **EXAMPLE: Quoted Shipping**

Unit of Measure:

* Unit Cost: Total Amount:

* Description:

Requisition Detail Lines

* Line Number: Taxable:

Line Type: Merchandise
 Narrative

Catalog:

* Quantity: **EXAMPLE: Estimated Shipping
10%-15% of Subtotal**

Unit of Measure:

* Unit Cost: Total Amount:

* Description:

Requisition Detail Lines

* Line Number: Taxable:

Line Type: Merchandise
 Narrative

Catalog:

* Quantity: **EXAMPLE: Free Shipping**

Unit of Measure:

* Unit Cost: Total Amount:

* Description:

Narrative Detail Lines

ALL REQUISITIONS MUST HAVE AT LEAST ONE NARRATIVE

- The **Line Number** will automatically populate.
- Line Type: **Narrative**
- When you start typing your narrative into the **Narrative** box it will auto-fill, or you can select the drop down arrow to read your narrative options.
- Additional information for the vendor can be typed in the **Description** box as long as the **Narrative** Box is left empty.
- There are two “types” of Narratives. “Sending” & “Secondary” Narrative. Please reference **“What Narrative(s) Should I Use?”**

Requisition Detail Lines

* Line Number:

Line Type: Merchandise
 Narrative

Narrative:

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description:

Sending Narrative:
These narratives inform the Business Office how a PO should be sent to the vendor.

Requisition Detail Lines

* Line Number:

Line Type: Merchandise
 Narrative

Narrative:

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description:

Secondary Narrative:
This informs the Business Office of additional documentation that should be sent to the vendor when sending the PO.

Requisition Detail Lines

* Line Number:

Line Type: Merchandise
 Narrative

Narrative:

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description:

The description can be used to enter additional notes for the Vendor to see. These notes print on the PO and are for the vendor only.

Complete your Requisition Detail Lines

- Scroll back to the top of your detail lines and click **Save**

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 19	Accounting: Account allocation by total requisition amount.
Requisition Number: 0000147383	Subtotal: 0.00 Tax: 0.00
Group: (201) BUS. OFFICE - GF	Total: 0.00 Other: 0.00
Fiscal Year: 2019 - 2020	Ship To: SNOQUALMIE VLY.SCHOOL DIST #410
Vendor: COMCAST	Description: SAMPLE PO
PO BOX 60533	
CITY OF INDUSTRY CA 91716-0533	

Requisition Detail Lines

* Line Number: Taxable: [View Tax](#) [Reset](#)

Line Type: Merchandise Narrative

Catalog:

* Quantity: Unit of Measure:

* Unit Cost: Total Amount:

* Description:

[Save](#)
[Back](#)

Adding Attachments & Notes to your Requisition

- After you have saved your detail lines you will come to your requisition “home page”
- The button group second from the right you will see **Notes & Attachments**
- Notes: For entering notes specifically for the Business Office (the Vendor will not see these notes).
- Attachments: For adding additional documentation that will be sent by the Business Office to the Vendor with the Purchase Order.

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 19	Accounting: Account allocation by total requisition amount.	Edit Master
Requisition Number: 0000147383	Subtotal: 1,745.00 Tax: 150.07	Notes
Group: (201) BUS. OFFICE - GF	Total: 1,895.07 Other: 0.00	Attachments
Fiscal Year: 2019 - 2020	Ship To: SNOQUALMIE VLY.SCHOOL DIST #410	
Vendor: COMCAST	Description: SAMPLE PO	
PO BOX 60533		
CITY OF INDUSTRY CA 91716-0533		

[Submit For Approval](#)
[Save and Finish Later](#)
[Back](#)

Requisition Detail Line Items

Views: Filters:

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc
100		ITEM NUMBER & DESCRIPTION	2	EA	800.00000	1,600.00		0
110		SHIPPING CHARGES	1		145.00000	145.00		0
120	EMAIL	EMAIL TO VENDOR	0		0.00000	0.00		
130	QUOTE	QUOTE ATTACHED	0		0.00000	0.00		
140		DELIVER PACKAGE TO FRONT OFFICE	0		0.00000	0.00		

[Add](#)
[Edit](#)
[Delete](#)
[Mass Add Detail](#)
[Add Requisition Accounts](#)

Attachments

- Attach additional documentation to your PO Req.
- **Type:** Attachments (this is the only option)
- **Description:** Please use this area to specify what you are attaching. Use quote numbers, invoice numbers, registration numbers.
- If you are attaching documents for reference, like competing quotes, that you don't want sent to the vendor make sure you add that to the description "DO NOT SEND WITH PO"
- When you are attaching your file make sure the document you are attaching is labeled as well. Rename your files to match what you are attaching (i.e. Quote #8641125)
- Leave the "Email to Vendor with Purchase Order" UNCHECKED. This feature is not currently working.
- Select **Save** when your attachment has uploaded.

Requisition Attachments

Add Requisition Attachment for Req Number 0000147383

* Type: Attachments PO

Entered Date: 08/19/2019

Entered Time: 2:53 PM

Entered By: AMANDA G HEIKKILA

* Description: QUOTE 8641125

* Attached File: Choose File Quote #8641125.pdf

Email to Vendor with Purchase Order

Save

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Checking Vendor Information

- Before adding a **Note** to your requisition check to see if the vendor already has contact information.
- On the "home screen" select the Vendor's name.
- This will open a window showing the vendors contact information.
- If you do not see contact information or if the information you have is different from what is on file you will need to enter a **Note** with the correct information.

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 21

Requisition Number: 0000147419

Group: (201) BUS. OFFICE - GF

Fiscal Year: 2019 - 2020

Vendor: COMCAST

PO BOX 60533

CITY OF INDUSTRY CA 91716-0533

PO Contact:

Email Address 1: No email address entered.

Email Address 2: No email address entered.

Email Address 3: No email address entered.

Email PO to Vendor: No

Phone Number: (253) 288-7450 Ext.

Fax Number: (253) 288-7555

1099 Indicator: No

Discount: 0.00%

Calendar Year To Date Purchases: \$1,916.48

Discounts: \$0.00

Payments: \$1,916.48

Encumbered: \$-1,916.48

Fiscal Year To Date Purchases: \$2,627.07

Discounts: \$0.00

Payments: \$2,627.07

Encumbered: \$206.61

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Notes

- Categories: EMAIL TO/FAX TO/GENERAL/MAIL TO
- Select your **Note Category**
- Example: I have chosen the Email to Vendor as my Narrative on my purchase order. The Vendor does not have a current email on file. I would select Note Category: Email To. In the description I would enter the email I would like the purchase order and attachment emailed to. Including an employee emails that should be CCd.
- Select **Save** when your note has been entered

Notes

Add/Edit Note for Requisition: 0000147383

* Note Category: **EMAIL TO:**

Entered Date: 08/19/2019

Entered Time: 2:54 PM

Entered By: HEIKKILA, AMANDA G

* Note: vendoremail@gmail.com

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

Save
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Note that back on the “home screen” you will see ** next to the Notes & Attachments buttons. This is your confirmation that the Notes and Attachment you have added are connected to your requisition.

Next you will add your Account Requisition. Select **Add Requisition Accounts**

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 19

Requisition Number: 0000147383

Group: (201) BUS. OFFICE - GF

Fiscal Year: 2019 - 2020

Vendor: COMCAST

PO BOX 60533

CITY OF INDUSTRY CA 91716-0533

Accounting: **Account allocation by total requisition amount.**

Subtotal: 1,745.00

Tax: 150.07

Total: 1,895.07

Other: 0.00

Ship To: SNOQUALMIE VLY.SCHOOL DIST #410

Description: SAMPLE PO

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		ITEM NUMBER & DESCRIPTION	2	EA	800.00000	1,600.00		0
110		SHIPPING CHARGES	1		145.00000	145.00		0
120	EMAIL	EMAIL TO VENDOR	0		0.00000	0.00		
130	QUOTE	QUOTE ATTACHED	0		0.00000	0.00		
140		DELIVER PACKAGE TO FRONT OFFICE	0		0.00000	0.00		

Add
Edit
Delete
Mass Add Detail
Add Requisition Accounts

Adding Requisition Accounts

- Enter your account code where you see **Account Number** and hit Enter
- An account will highlight in your available accounts.
- If a check mark automatically appears that means you have entered an exact account code.
- If the box is not automatically checked make sure you confirm the highlighted account code is the correct account code. Then manually check the box.
- You can enter more than one account code. If you do so make sure you have the correct percentage at the bottom in your **Selected Accounts**
- When you are done adding account select **Save Account Distrib** to return to the home screen.

Account Distribution - 05.19.06.00.05 - Google Chrome

www2.nwrdc.wa-k12.net/scripts/cgiip.exe/WService=wsnoquas71/facctmdist001.w

Account Distribution

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

Fnd	T	GL	Pss	Aa	Obbb	Llll	4444	5555	S	Funds Available	Selected
10	E	530	9700	12	8580	6090	0100	9000	0	\$25,000.00	<input type="checkbox"/>
10	E	530	9700	12	9100	6090	0100	9000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	5610	6090	0200	9000	0	\$27,721.44	<input checked="" type="checkbox"/>
10	E	530	9700	13	5612	6090	0200	9000	0	\$6,000.00	<input type="checkbox"/>
10	E	530	9700	13	5630	6090	0200	9000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	5650	6090	0200	9000	0	\$45.00	<input type="checkbox"/>
10	E	530	9700	13	5990	6090	0200	9000	0	\$10,000.00	<input type="checkbox"/>
10	E	530	9700	13	7000	0000	0200	9000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	7000	0000	0200	9063	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	7000	2300	0200	9400	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	7000	2400	0200	9000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	7000	4020	0200	9000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	7000	6090	0200	9000	0	\$0.00	<input type="checkbox"/>
10	E	530	9700	13	7000	6090	0200	9058	0	\$0.00	<input type="checkbox"/>

100 records displayed

Account Number:

Quick Key:

Total Amount to Distribute: **\$1745.00 100.00%**
 Total Distributed: **\$1745.00 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Account Number	Amount	Percent
10 E 530 9700 13 5610 6090 0200 9000 0	1745.00	100.00

Remove
Remove All

Account Level Description: General Supplies

Account Number Information:

Code	Description
10	General Fund
530	EXPENDITURES
9700	DISTRICTWIDE SUPPORT
13	BUSINESS OFFICE
5610	GEN SUPPLIES
6090	DISTRICT OFFICE
0200	BUSINESS DIRECTOR
9000	*Conversion Generated
0	Non-Local, State & Federal

2019-2020 Available Funds By: Individual Account

Save Account Distrib
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Select Submit For Approval.

Your Requisition is complete!

- Once you have submitted you can still edit your requisition, but you will need to resubmit when you are done with your edits.
- After the requisition has been fully approved the Business Office will print and send your purchase order to the Vendor based on your notes and narratives.
- Once sent, the Business Office will send you a white and a green copy of your purchase order. The white PO will stay in your school/department for your records. The green copy you will send down when you have received your full order/completed services and the PO is ready to pay and close.
- For partially completed POs send a copy of your PO with attached packing slips. The outstanding invoices will be paid for items/services received, but the Business Office will not close your purchase order until they have received the green copy.

Submit For Approval

Save and Finish Later
Back

nt allocation by total requisition amount.

00 Tax: **150.07**

07 Other: **0.00**

UALMIE VLY.SCHOOL DIST #410

LE PO

Edit Master
**Notes
**Attachments

KEY-POINTS TO REMEMBER

Hotels

- The description on hotel requisitions needs to begin with the number of rooms for the number of night.
- The date listed should be the actual night of the stay, not including the date of the checkout.
- The descriptions must include the name of the person that will be staying at the hotel, the event which they are attending, and the location if applicable
- Hotel Requisition Example: ***“One room for two nights - October 29 and 30, 2019 for Yogi Bear to attend the WWCA Conference in Pasco, WA”***

Registrations

- The descriptions must include the name of the person, event or training that they are attending, the dates, and the location
- Registration Requisition Example: ***“Registration costs for Yogi Bear to attend the WWCA Conference in Pasco, WA on October 29-31, 2019”***

Blanket Purchase Orders

- Blanket purchase orders are for any purchase order that will have multiple invoices applied throughout the fiscal year (including contracts).
- The blanket PO must not include tax, the PO will only have a total not to exceed amount.
- When creating a blanket PO make sure you check the box on the REQ MASTER before proceeding.
- There are no additional narratives for a blanket PO. Continue creating the PO as a normal purchase order with a description of services/purchases and a sending narrative.

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 201 - BUS. OFFICE - GF

Fiscal Year: 2020 - 2021 September 1, 2020 - August 31, 2021

Account allocation by total requisition amount (YMA).

Account allocation by each requisition detail line (YDA).

This is a Blanket Requisition/Purchase Order

Save and Add Detail

Save and Mass Add Detail

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Requisition Information

Comp Tax

- When items are purchased out of state and we are not charged sales tax, the district still needs to pay sales tax to our state. That won't be noted on any paperwork you have, but will be adjusted in A/P.
- You may notice on your reports that items will show a payment a bit higher than what you processed. The Comp Tax amount will show in the total invoice payment on Skyward reports.

Packing Slips

- Packing Slips are required to show an order has been received. Make sure you are attaching your packing slips to your purchase order in skyward. If not packing slip was received with your order add a note to your PO saying NO PACKING SLIP - ITEMS RECEIVED.

Invoices

- To receive payment, the Vendor must submit an invoice to the SVSD Business Office that references the purchase order number. Invoices must include a detailed description of the services/items provided as well as the dates of services/event. If a Vendor does not have an invoice an SVSD Employee is not to create an invoice for them. There are templates in Word & Excel to help the Vendors complete their own invoice.
- Once items and services have been received attach the vendor's invoice with your approval stamp to skyward.
- When ready to pay enter your invoice data to your AP Spreadsheet provided by the business office.