

Tutorial

Skyward – Online Requisition (non-eCommerce vendors or online catalog)

How to create a Purchase Order (PO) – electronically submitted as on Online Requisition for a purchase using a non-eCommerce vendor/online catalog.

Log into Skward

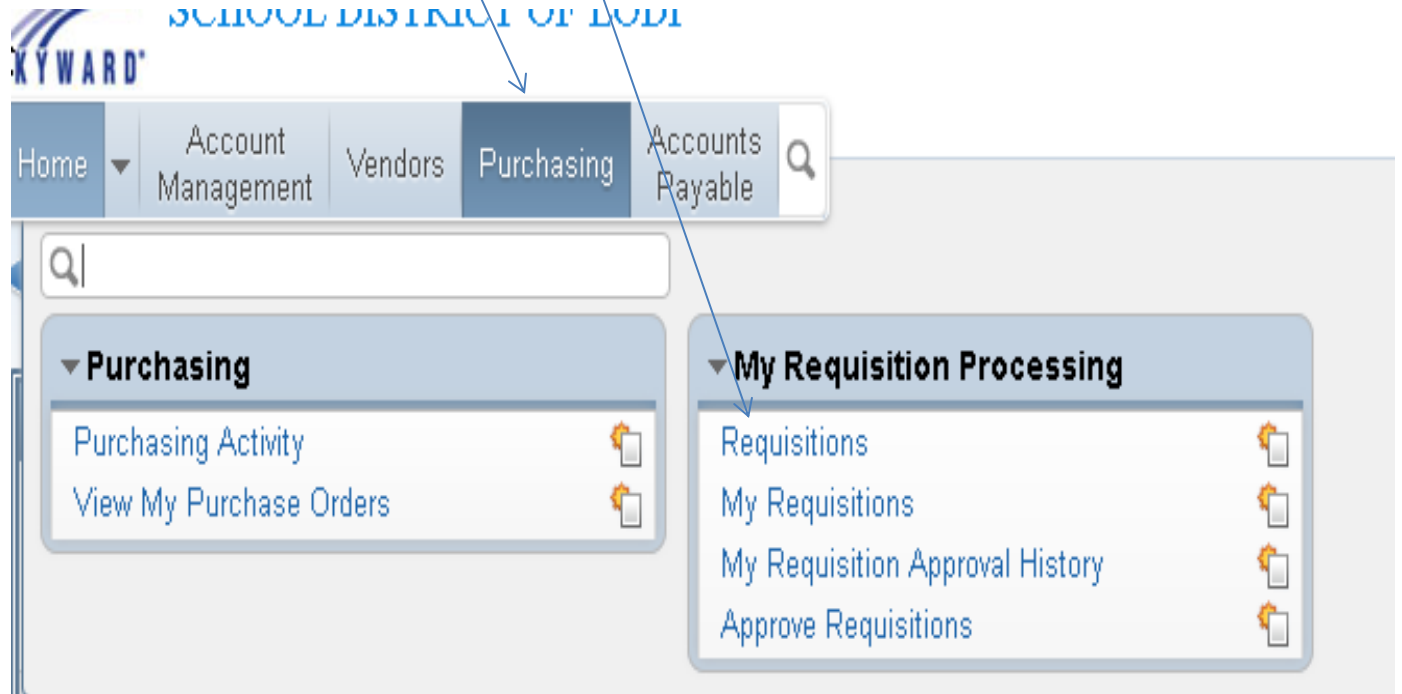
Go to the **Financial Management** system

The screenshot shows the Skyward Financial Management dashboard. At the top, there is a navigation bar with links for Home, Account Management, Vendors, Purchasing, and Accounts Payable. Below this is a secondary navigation bar with a 'Financial Management' icon and label. The dashboard is divided into several widgets:

- Jump to Other Dashboards:** Contains links for Calendar, Skyward User, Task Manager, and Reset Dashboards. A mouse cursor is pointing at the top-left corner of this widget.
- Task Manager:** Displays 'There are no tasks currently assigned to you.'
- District News:** Displays 'No news to display.'
- Online Forms to be Completed:** Displays 'No Online Forms to be Completed.'
- Weather:** Shows weather for Lodi, WI at 7:52 am CDT on 7/23/2014. Current conditions are 'Fair, 66 F'. The forecast includes: Wed - Mostly Sunny, High: 76 Low: 55; Thu - Mostly Sunny, High: 79 Low: 59; Fri - Thundershowers, High: 75 Low: 62; Sat - AM Clouds/PM Sun, High: 84 Low: 63; Sun - Scattered Thunderstorms, High: 75 Low: 54.
- Jump to Other Systems:** Contains links for Employee Access and Financial Management. A blue arrow points from the text 'Go to the Financial Management system' to the 'Financial Management' link in this widget.
- Notifications:** Displays 'You do not have any unread notifications.'
- Favorites:** Displays 'No favorites available.'

At the top right of the dashboard, there are utility icons for Favorites, New Window, and My Print Queue.

Go to the **Purchasing** tab
Under **My Requisition Processing**, hit "Requisitions"



At the next screen hit "Add"

SCHOOL DISTRICT OF LODI

E Z Rock Account Preferences Exit ?

Home Account Management Vendors **Purchasing** Accounts Payable

Requisitions

There are no records to display; check your filter settings.

Filter Options

- Print
- Add**
- View
- Edit
- Delete
- Clone
- Notes
- Attach
- Submit
- Approve
- Deny
- Remove Approval
- Add Expense Reimb Req
- Add from Online Catalog
- Clone from Purchase Order
- Mass Approve Requisitions

20 0 records displayed Requisition Number: ABC

Choose the **Requisition Group** you are purchasing for by hitting the down arrow

The screenshot shows a web browser window with the title "Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05.14.06.00.04 - Mozilla Firefox". The address bar shows the URL "https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodiwi/foreqmast001.w?isPopup=true". The page content includes a header "Requisition Master Information" and a sub-header "Requisition Master Information | Requisition Detail Lines/Accounting". The main form is divided into two sections: "Requisition Setup Information" and "Requisition Information".

Requisition Setup Information

Requisition Group: 101 - PRIMARY SCHOOL (dropdown menu with a down arrow pointing to it)

Fiscal Year: 2014 - 2015 July 1, 2014 - June 30, 2015 (dropdown menu)

Current Fiscal year not available for this group.

Account allocation by total requisition amount (YMA).

Account allocation by each requisition detail line (YDA).

Requisition Information

* Batch Number: 23

* Description: [Text area]

* Vendor: [Dropdown menu]

* Ship To: LODI PRIMARY SCHOOL 103 PLEASANT STREET LODI WI 53555 (dropdown menu)

Attention: E Z ROCK

* Due Date: 07/23/2014 Wednesday

Ship Date: 07/23/2014 Wednesday

Ship Via: [Text field]

Contract: [Dropdown menu]

Buttons on the right: Save and Add Detail, Save and Mass Add Detail, Back.

Asterisk (*) denotes a required field

Enter a detail **description** on what you will be purchasing. You will need to enter this in another place so highlight your description, right click, and copy. (This will allow you to paste the same description later instead of retyping it.)

Next choose the **Vendor** you are purchasing from.

Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05.14.06.00.04 - Mozilla Firefox
https://skyward.iscorp.com/scripts/wsisadll/WSservice=wsfinlodwif/foreqmast001.w?isPopup=true

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 101 - PRIMARY SCHOOL
Fiscal Year: 2014 - 2015 July 1, 2014 - June 30, 2015 Current Fiscal year not available for this group.
 Account allocation by total requisition amount (YMA).
 Account allocation by each requisition detail line (YDA).

Requisition Information

* Batch Number: 23
* Description: Constructions paper, pencils, math poster, extra glue sticks
* Vendor: ABC SCHOOL SUPPLY, INC. PO BOX 684069 MILWAUKEE WI 53268-4069
* Ship To: LODI PRIMARY SCHOOL 103 PLEASANT STREET LODI WI 53555
Attention: E Z ROCK
* Due Date: 07/23/2014 Wednesday
Ship Date: 07/23/2014 Wednesday
Ship Via:
Contract:

Asterisk (*) denotes a required field

Save and Add Detail
Save and Mass Add Detail
Back

Verify the Ship To address – should be coming directly to your school.

Change the dates if appropriate.

Click on **Save and Add Detail**

Enter the **Quantity** of 1

Enter **Unit Cost** (the amount you are planning to spend)

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.14.06.00.04 - Mozilla Firefox
https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodiwi/foreqdet001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 23
Requisition Number: 0000021461
Group: (101) PRIMARY SCHOOL
Fiscal Year: 2014 - 2015
Vendor: ABC SCHOOL SUPPLY, INC.
PO BOX 684069
MILWAUKEE WI 53268-4069

Accounting: Account allocation by total requisition amount.
Amount: 0.00
Ship To: LODI PRIMARY SCHOOL

Description: Constructions paper, pencils, math poster, extra glue sticks

Requisition Detail Lines

* Line Number: 100
Line Type: Merchandise
 Narrative
Catalog: [Dropdown]
* Quantity: 1
Unit of Measure: [Dropdown]
* Unit Cost: 250.00000
Total Amount: 250.00
* Description: Constructions paper, pencils, math poster, extra glue sticks

Asterisk (*) denotes a required field

Save
Back

Enter the **Description** (again.) If you copied the previous description, right click in the box and choose paste.

Save

Next click Add Requisition Accounts

Requisition Detail Lines/Accounting

[Requisition Master Information](#) | [Requisition Detail Lines/Accounting](#)
[Requisition Detail Lines/Accounting](#)

Requisition Master Information

Batch Number: **23**

Requisition Number: **0000021461**

Group: **(101) PRIMARY SCHOOL**

Fiscal Year: **2014 - 2015**

Vendor: **ABC SCHOOL SUPPLY, INC.
PO BOX 684069
MILWAUKEE WI 53268-4069**

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

Amount: **250.00**

Ship To: **LODI PRIMARY SCHOOL**

Description: **Constructions paper, pencils, math poster, extra glue sticks**

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	Comd Code
100		Constructions paper, pencils, math poster, extra glue sticks	1		250.00000	250.00	

Add

Edit

Delete

Mass Add Detail

Add Requisition Accounts

A list of **available accounts** for the Requisition Group you choose will show up here. Choose the appropriate account code by checking the box.

You will notice on the right side the Account Number Information comes up.

Account Distribution - 05.14.06.00.04 - Mozilla Firefox
https://skyward.iscorp.com/scripts/wsisisa.dll/WSservice=wsfinlodivi/facctmdist001.w?MenuIDOverride=0&isPopup=true

Account Distribution

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

Fnd	T	Loc	Obj	Func	Prj	Funds Available	Selected
10	E	100	310	110000	000	\$0.00	<input type="checkbox"/>
10	E	100	317	110000	000	\$0.00	<input type="checkbox"/>
10	E	100	342	110000	000	\$3,000.00	<input type="checkbox"/>
10	E	100	411	110000	000	\$8,780.00	<input checked="" type="checkbox"/>
10	E	100	417	110000	000	\$4,500.00	<input type="checkbox"/>
10	E	100	551	110000	000	\$2,000.00	<input type="checkbox"/>
10	E	100	942	110000	000	\$0.00	<input type="checkbox"/>

7 records displayed

Account Number:

Quick Key:

Account Level Description

Account Number Information

Code	Description
10	GENERAL FUND
100	PRIMARY SCHOOL
411	GENERAL SUPPLIES
110000	UNDIFFERENTIATED CURRICULUM

2014-2015 Available Funds By Individual Account

Total Amount to Distribute: **\$250.00 100.00%**
Total Distributed: **\$250.00 100.00%**
Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
10 E 100 411 110000 000	250.00	100.00

Remove
Remove All

Save Account Distrib
Back

Click on Save Account Distrib

Last, click on **Submit for Approval**

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.14.06.00.04 - Mozilla Firefox
https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinlodiwi/foreqacct002.w

Requisition Detail Lines/Accounting

[Requisition Master Information](#) | [Requisition Detail Lines/Accounting](#)
[Requisition Detail Lines/Accounting](#)

Requisition Master Information

Batch Number: **23**
Requisition Number: **0000021461** Accounting: **Account allocation by total requisition amount.** [Edit Master](#)
Group: **(101) PRIMARY SCHOOL** Amount: **250.00** [Notes](#)
Fiscal Year: **2014 - 2015** Ship To: **LODI PRIMARY SCHOOL** [Attachments](#)
Vendor: **ABC SCHOOL SUPPLY, INC.** Description: **Constructions paper, pencils, math poster, extra glue sticks**
PO BOX 684069
MILWAUKEE WI 53268-4069

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

Requisition Accounts

Requisition Accounting

Account Number	Account Amount	Account Percent	Over Budget
10.E.100.411.110000.000	\$250.00	100.00%	

[Update Account Distrib](#)
[View Requisition Detail Lines](#)

You will receive an email when the requisition is approved and becomes a PO. You will then need to make your purchase. Please see the tutorial **How to Retrieve Purchase Order** to print your Purchase Order.