

Entering Requisitions (Purchase Orders) with Skyward

Start on Iola-Scandinavia School Homepage - www.Iola.k12.wi.us
(Intranet page can also be used in school)

See bubbles on each page for directions

- 1. Click on the appropriate building along the top (hs, ms, elem)**
- 2. Click on Staff on the left-hand side and then Skyward Access**

If you do not know the vendor at this time, use yourself as the vendor. The vendor can be changed at a later date.

Online catalogs are provided for Staples Advantage and the School Specialty family. Click on order online when adding a requisition to get to these catalogs.

School Specialty includes Abilitations, Brodhead & Garrett, Childcraft, Frey Scientific, Integrations, Sax Arts & Crafts, Sax Family & Consumer Sciences, The Speech Bin and Sportime.

Also, Classroom Direct items can be ordered online by selecting School Specialty.

Shipping charges should be added as an individual line item at the end of the requisition. Include 10% or the actual charges if known. If shipping is free, please indicate this on a separate line.

You can add notes to the requisition by clicking the "Notes" tab on top of the main screen. Attachments can also be added to the requisition.



Iola-Scandinavia School District

Login with regular username and password

Login:
 Password:

[Change Password](#) [Forgot Login or Password?](#)

Version: 04.09.06.02.02

Web Browser: **Internet Explorer 8**
Operating System: **Windows XP**

[Add the Skyward Login page to your Favorites](#)

[Make the Skyward Login page your Home Page](#)

Click on Financial Management

[EDUCATOR ACCESS™ plus](#) [STUDENT MANAGEMENT](#) [FINANCIAL MANAGEMENT](#)

★Favorites ▾ | Notes | Preferences | Create New Window | Customer Access | Login History | Help

Iola-Scandinavia School District | User Name:

www.skyward.com®

SKYWARD®

 School Management System

 Windows XP / Internet Explorer 8

Skyward Financial Management: FM - 801W (04.08.10.00.03) - Windows Internet Explorer

https://sdobweb.bonduel.k12.wi.us/scripts/cgip.exe/WService=wsFin/sfmhom01.w

FINANCIAL MANAGEMENT EMPLOYEE ACCESS™

Exit

★ Favorites ▾ Notes Preferences Create New Window Login History Help My Print Queue

Account Master Vendor Purchasing

Click on "Purchasing"



www.skyward.com
SKYWARD[®]
School Management System

 Software made and supported in the U.S.A.

 SKYWARD
WINTER TREE SOFTWARE, INC.
1998-2000

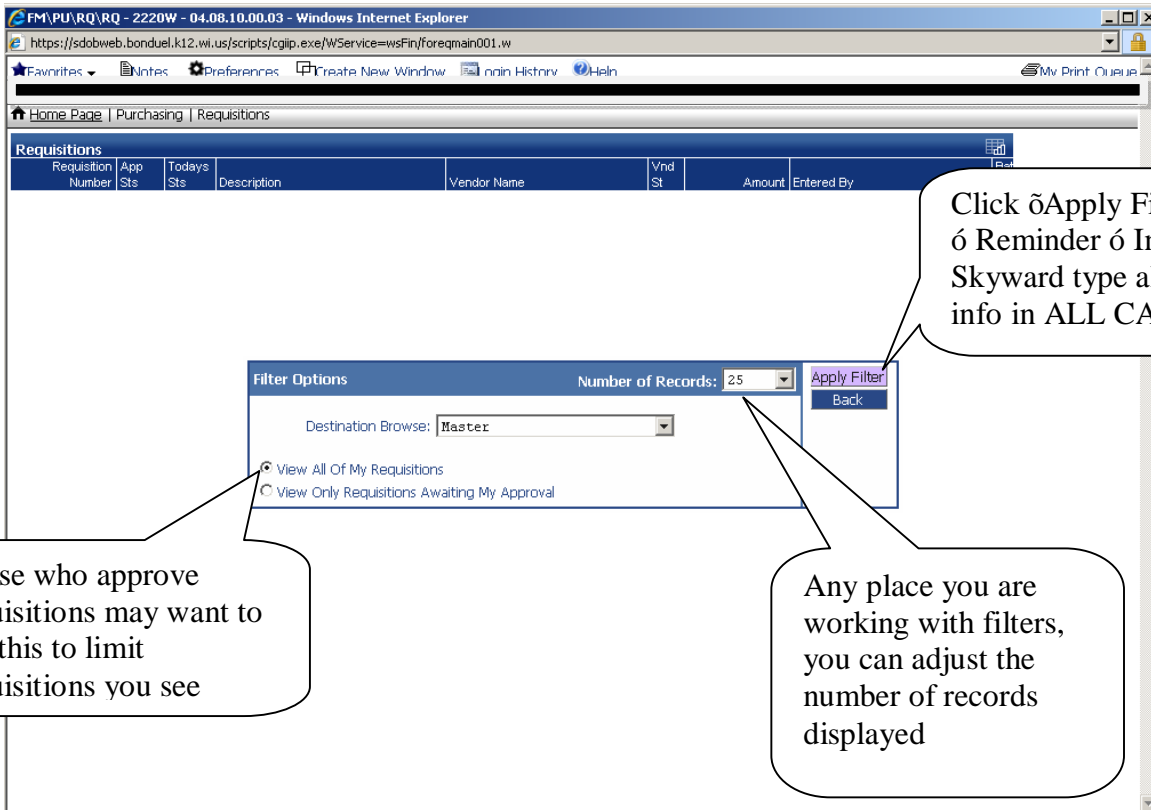
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Done Internet 100%



Click on Requisitions

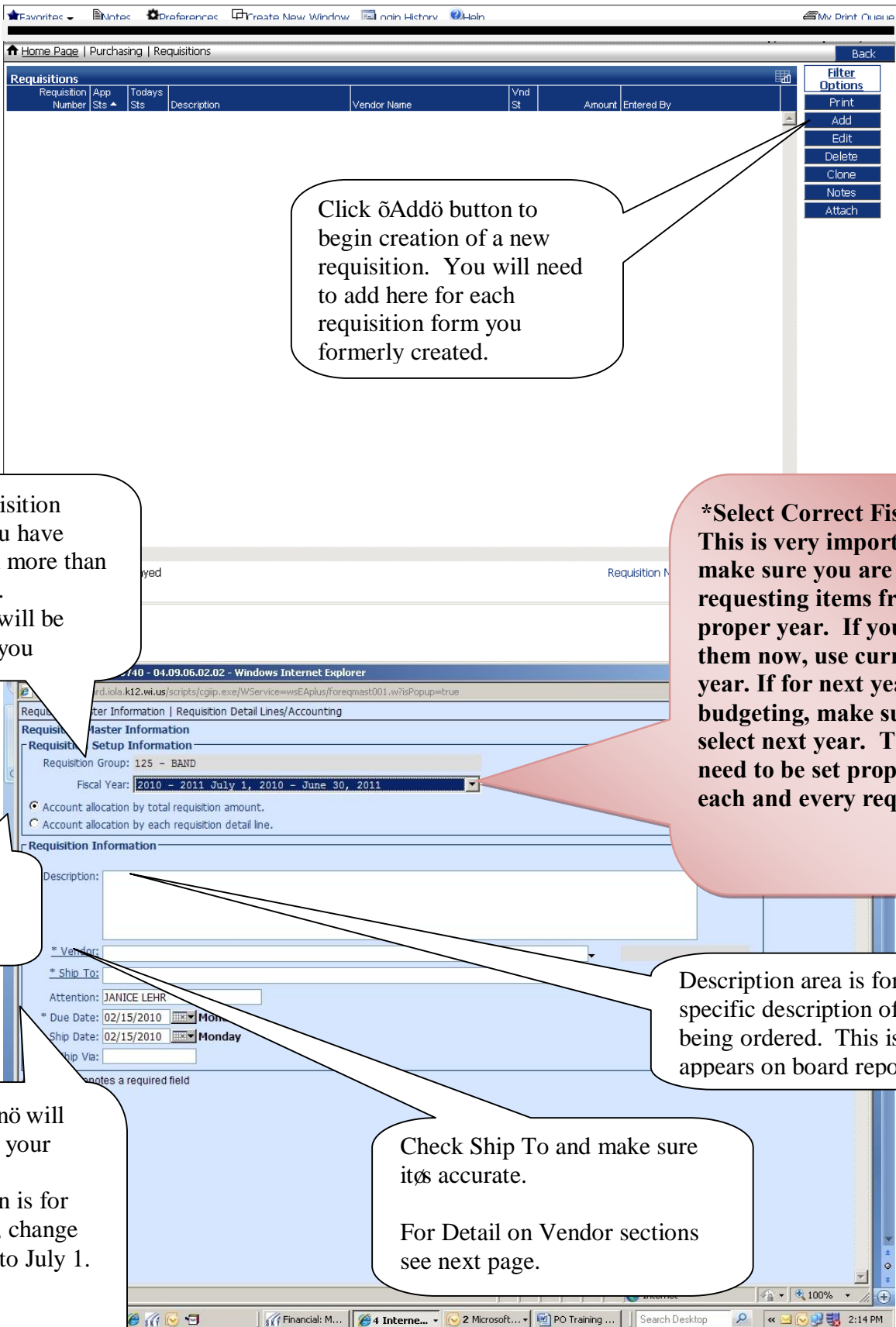
Explanations of these buttons will be at end of packet



Click Apply Filter or Reminder or In Skyward type all info in ALL CAPS

Those who approve requisitions may want to use this to limit requisitions you see

Any place you are working with filters, you can adjust the number of records displayed



Click "Add" button to begin creation of a new requisition. You will need to add here for each requisition form you formerly created.

Select requisition group if you have accounts in more than one budget. Otherwise will be locked for you

Select Correct Fiscal Year
This is very important so make sure you are requesting items from proper year. If you need them now, use current fiscal year. If for next year's budgeting, make sure and select next year. This will need to be set properly for each and every requisition!!

Leave top button selected

Description area is for brief, specific description of what's being ordered. This is what appears on board report.

"Attention" will default to your name. If requisition is for next year, change ship date to July 1.

Check Ship To and make sure it's accurate.
For Detail on Vendor sections see next page.

When you begin to type in ðVendorð box, a list of available Vendors will display. You can choose from this display. If desired Vendor is not available, email Jon at novakj@iola.k12.wi.us

Requisition Master Information | Requisition Detail
 Requisition Master Information
 Requisition Setup Information
 Requisition Group: 125 - BAND
 Fiscal Year: 2010 - 2011 July 1, 2010
 Account allocation by total requisition amount.
 Account allocation by each requisition detail line.
 Requisition Information
 * Description:
 * Vendor: JW
 * Ship To: JW PEPPE Order From Only [JW PEPPE000]
 PO BOX 5711
 HOPKINS MN 55343-5711
 Attention: J
 Due Date: 0
 Ship Date: 0
 Ship Via: JW PEPPE OF MINNEAPOLIS Order From/Remit to [JW PE 000]
 PO BOX 850
 VALLEY FORGE PA 19482
 (*) denotes JW QUALITY CABINETRY Order From/Remit to [JW QUALITY001]
 317 NORTH ST
 WAUPACA WI 54981

Notice multiple entries for the same company. It is very important to make sure address is an exact match to the current catalog. (If the addresses are exactly the same, use the first one listed.)

If you want to see all vendors listed with more detailed information, click Vendor and you'll see screen below

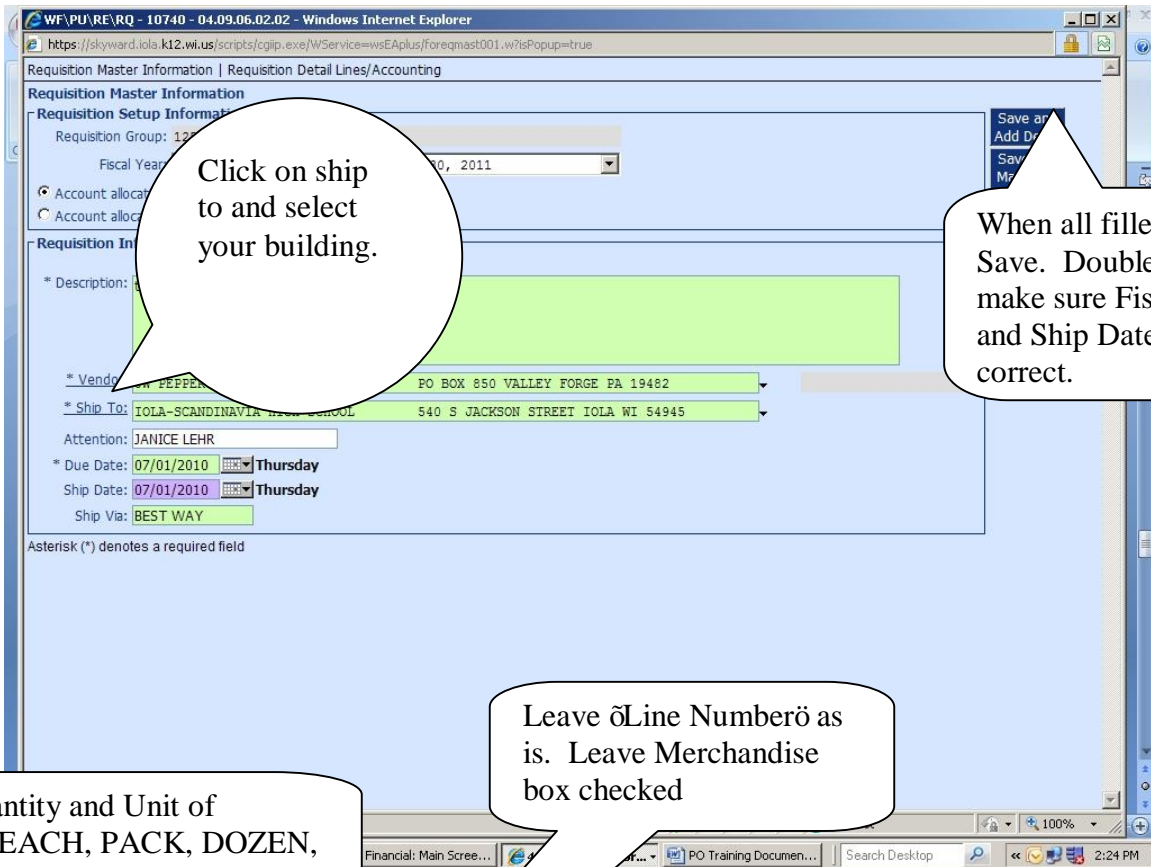
Name	Address	City	State	Zip	I	B
5 R PROCESSORS LTD	600 GATES AVENUE WEST	LADYSMITH	WI	54848	B	
A & E HOME VIDEO	PO BOX 2284	S. BURLINGTON	VT	05407	B	
A JAY'S DISC JOCKEY SERVICES	N3248 HWY 76	HORTONVILLE	WI	54944	B	
A P EXAMINATIONS	PO BOX 6671	PRINCETON,	NJ	08541-6671	I	
A&E HOME VIDEO	PO BOX 18753	NEWARK	NJ	07191-8753	B	
A-1 ELEVATOR SALES & SERVICE	2213 VELP AVE.	GREEN BAY	WI	54303	B	
AAC TECH CONNECT INC.	PO BOX 1944	EVERGREEN	CO	80437	B	
AAFCS 99TH ANNUAL CONFERENCE & EXPO	PO BOX 79377	BALTIMORE	MD	21279-0377	B	
AARON DEBAUCH						
ABBY TAUCHEN					B	
ABC SCHOOL SUPPLY INC.	PO BOX 101424	ATLANTA	GA	30392-1424	B	
ABC SUPPLY CO. INC.	PO BOX 44665	MADISON	WI	53744-4665	B	
ABC SUPPLY INC.	815 SOUTH PIONEER RD PO BOX 11	FOND DU LAC	WI	54935	B	
ABEE	39085 FOSTER DRIVE	OCONOMOWOC	WI	53066	B	
ABILITIES	MB UNIT # 67-3106	MILWAUKEE	WI	53268-3106	B	
ABILITIES INTEGRATIONS	PO BOX 922668	NORCROSS	GA	30010-2668	B	
ABLENET	2808 FAIRVIEW Ave.	ROSEVILLE	MN	55113-1308	B	
AC SUPPLY	PO BOX 1523	ST. CHARLES	MO	63302	B	
ACADEMIC	PO BOX 530100	ATLANTA	GA	30353-0100	B	
ACADEMIC BOOK SERVICES INC.	DRAWER NUMBER GA00307 PO BOX	ATLANTA	GA	30353-0100	B	

ALL 0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Name: _____

25 records displayed

This display allows you to see more info. This is especially useful if using a Vendor with multiple addresses.

You can type Vendor name in here to search as well. Again if Vendor is not available, contact Jon.



Click on ship to and select your building.

When all filled in, click Save. Double check to make sure Fiscal Year and Ship Date are correct.

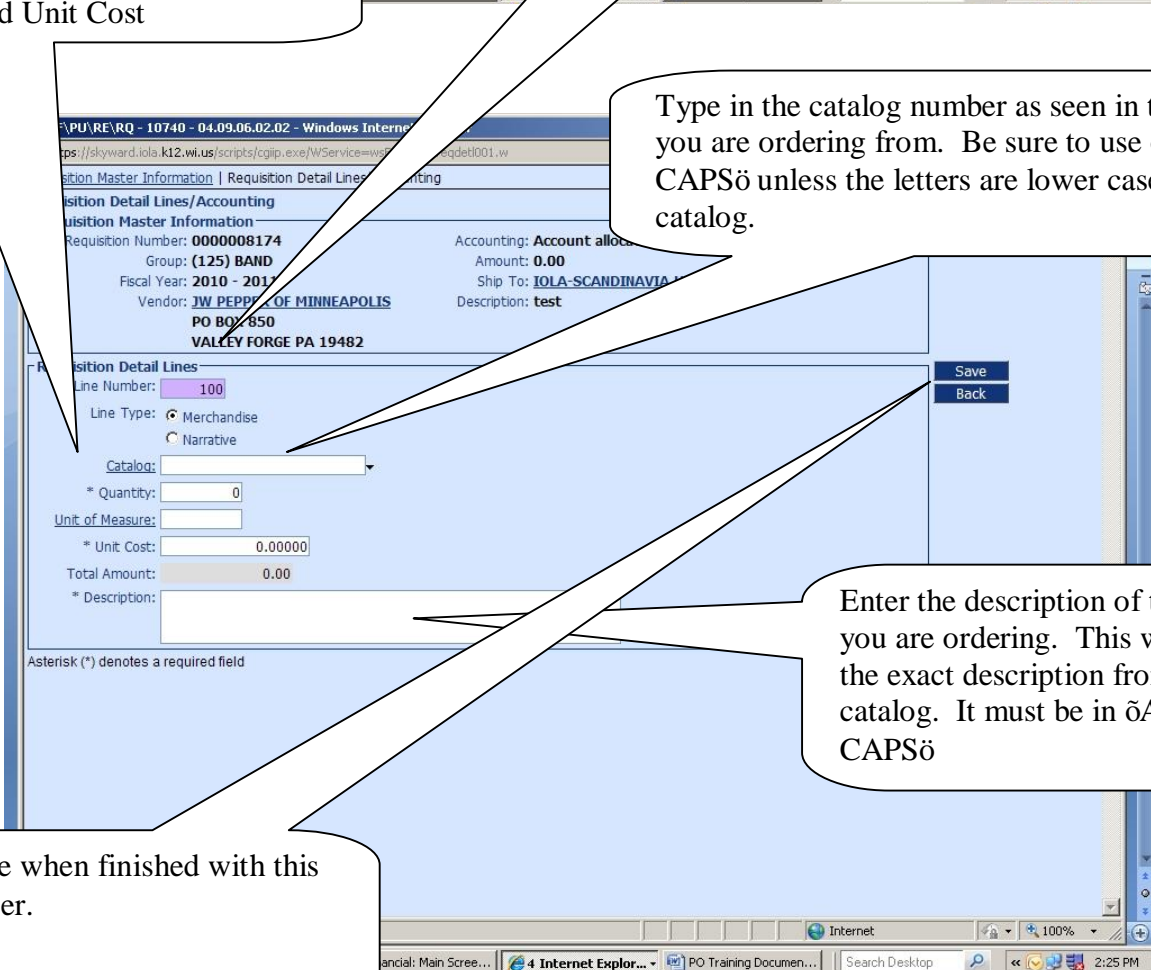
Leave "Line Number" as is. Leave Merchandise box checked

Enter Quantity and Unit of measure (EACH, PACK, DOZEN, ETC.), and Unit Cost

Type in the catalog number as seen in the catalog you are ordering from. Be sure to use "ALL CAPS" unless the letters are lower case in catalog.

Enter the description of the item you are ordering. This would be the exact description from the catalog. It must be in "ALL CAPS"

Click Save when finished with this line number.



If more items are desired from same vendor and from same budget category, click "add" to create another line. All items on a single requisition must come from the same budget code area. Also, any confirmation numbers or other information/special instructions that would have gone on requisition forms needs to be typed in as a separate line item.

Requisition Master Information
 Requisition Number: 000008174
 Group: (125) BAND
 Fiscal Year: 2010 - 2011
 Vendor: JW PEPPER OF MINNEAPOLIS
 PO BOX 850
 VALLEY FORGE PA 19482

Accounting: Account allocation by total requisition amount.
 Amount: 45.00
 Ship To: IOLA-SCANDINAVIA HIGH SCHOOL
 Description: test

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
100	10008982	CHECK YOUR SWING	1	EACH	45.00000	45.00	

Buttons: Add, Edit, Delete, Mass Add, Detail, Add Requisition Accounts

Click "Add Requisition Accounts" when finished entering all line items.

Listed are the different budget accounts in your name. Select the proper area for what you are ordering.

Available Accounts

Fnd	T	Loc	Obj	Func	Prj	Funds Available	Selected
10	E	400	310	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	342	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	411	125000	000	\$0.00	<input checked="" type="checkbox"/>
10	E	400	420	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	434	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	440	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	470	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	553	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	561	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	563	125000	000	\$0.00	<input type="checkbox"/>
10	E	400	941	125000	000	\$0.00	<input type="checkbox"/>

Buttons: Save Account Distrib, Back

Account Number Information:
 Code Description
 10 GENERAL Fund
 400 Senior High School
 411 GENERAL SUPPLIES
 125000 MUSIC

Total Amount to Distribute: \$45.00 100.00%
 Total Distributed: \$45.00 100.00%
 Amount Remaining: \$0.00 0.00%

Selected Accounts

Account Number	Amount	Percent
* 10 E 400 411 125000 000	45.00	100.00%

Click "Save Account Distrib" when done with this screen

When you select a line, you can see the info that corresponds to that budget code

You can have funds come from different accounts, but most staff should not as you don't have access to multiple accounts with the same code.

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Line	Catalog Code	Description	Quantity	U of M	Total Cost	Comm Code
100	10008982	CHECK YOUR SWING	1	EAS	45.00	

Buttons: Submit For Approval, Save and Finish Later, Add, Edit, Delete, Mass Add Detail, Add Requisition Account

Callout 1: Verify everything is correct and then click "SUBMIT FOR APPROVAL". You can enter multiple requisitions and submit them all when you are finished. Your requisition will then go through the approval chain, building principal then district admin. Upon final approval it will become a Purchase Order.

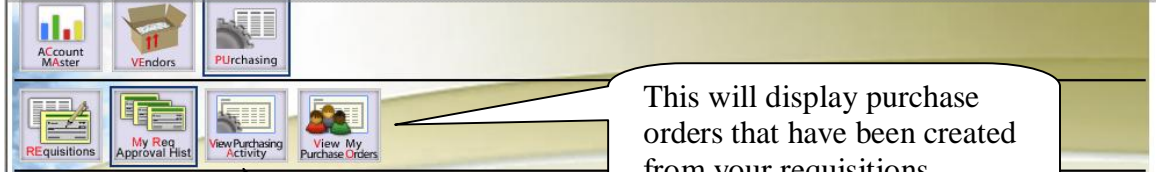
Callout 2: You can also save information to submit later by using the Save and Finish Later button

Requisitions

Requisition Number	App Sts	Today's Sts	Description	Vendor Name	Vnd St	Amount	Entered By
000008174	WFH		test	JW PEPPER OF MINNEAPOLIS	PA	45.00	LEHR, JANICE L

Filter Options: Print, Add, Edit, Delete, Clone, Notes, Attach

Callout: The requisition will show up in this window after you are done. If you place your mouse over the arrow, it will tell you the description status codes. This one is WFH which means "Waiting for Approval for a level above mine"



This will display purchase orders that have been created from your requisitions

This button will display your requisition history

This box will display all recent purchasing from your entity



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