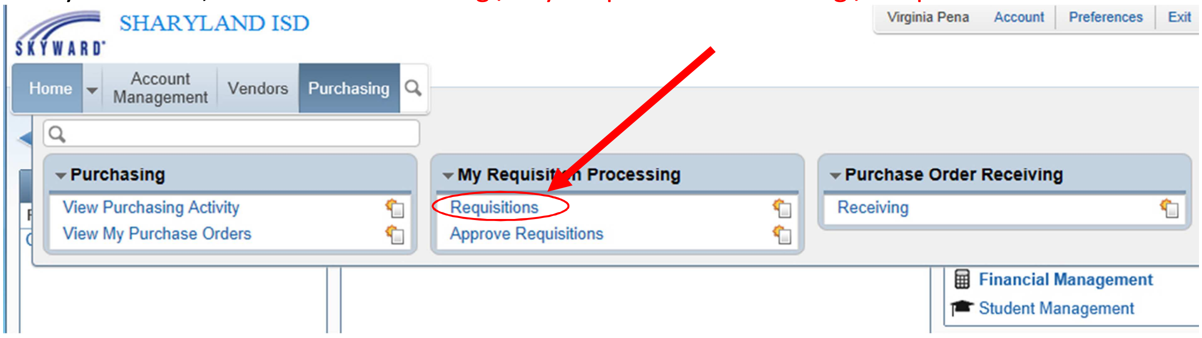
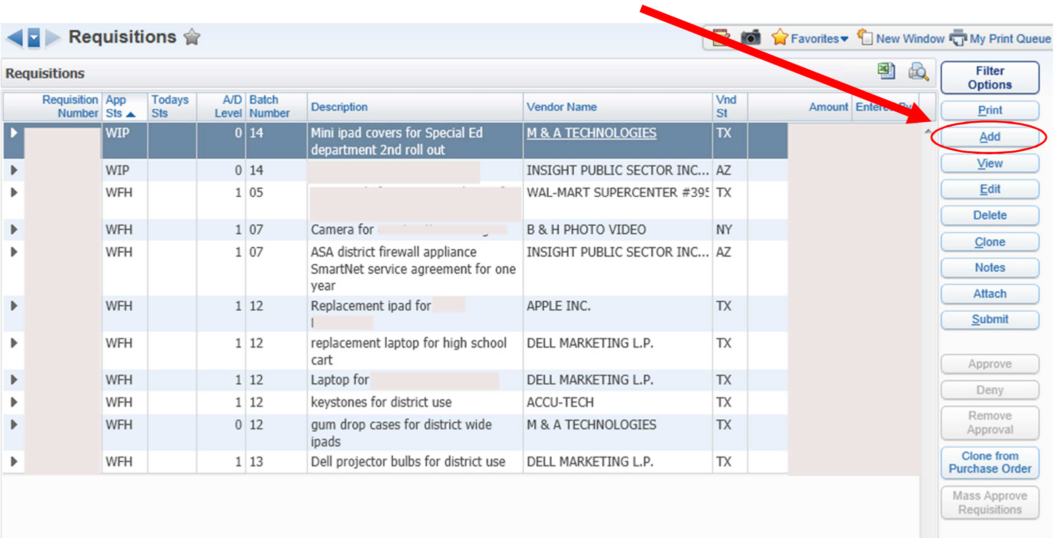
Skyward Web – Creating Purchase Orders

In Skyward web, browse to Purchasing / My Requisition Processing / Requisitions

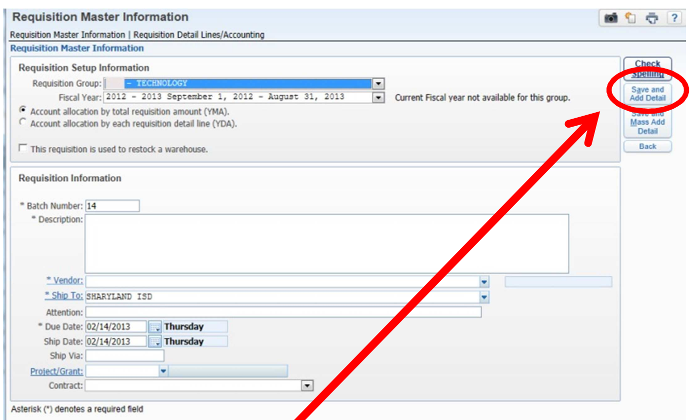


The Requisitions screen will display all of your current Requisitions.

To add a new Requisition, click the Add button:



The Requisition Master Information screen will appear.



- Verify your Requisition Group and Fiscal Year
- Batch number is auto-populated. *DO NOT* change unless directed to by Purchasing
- Enter your overall PO description (not line item description)
- Click the Vendor: link to bring up the vendor list (see below)
- (optional) fill in the Attention line
- Fill in dates and Ship via info
- If required, fill in Project/Grant and Contract fields
  - Clicking the Project/Grant: link brings up a listing

Click Save and Add Detail to save your info and continue

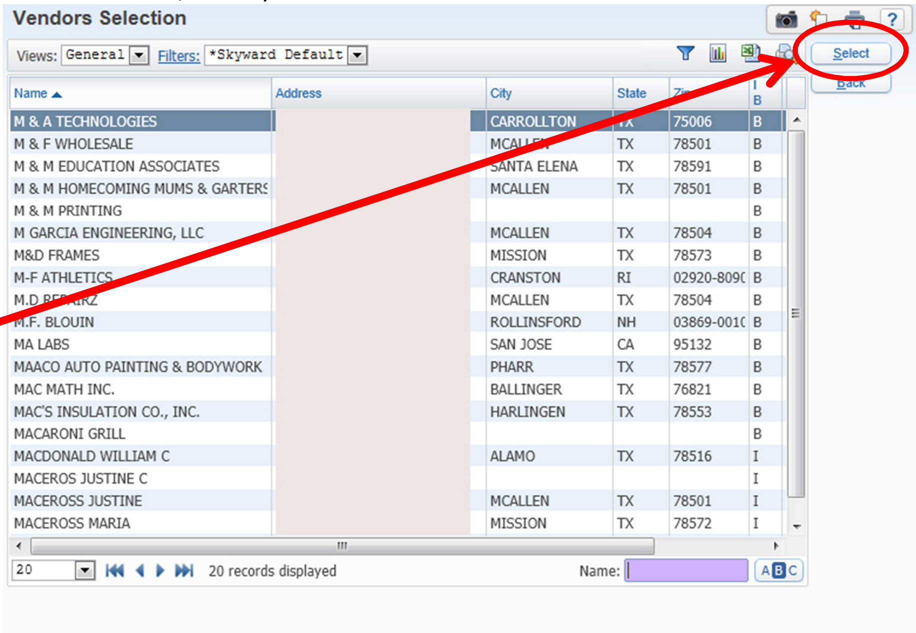
On all Web Screens, when you click a link (in this case Vendor:), Skyward will popup a selection window. Type in your search information in the lower right-hand corner box, and Skyward will search.

In this example, the search box is labeled "Name".

The search term entered was "M & A"

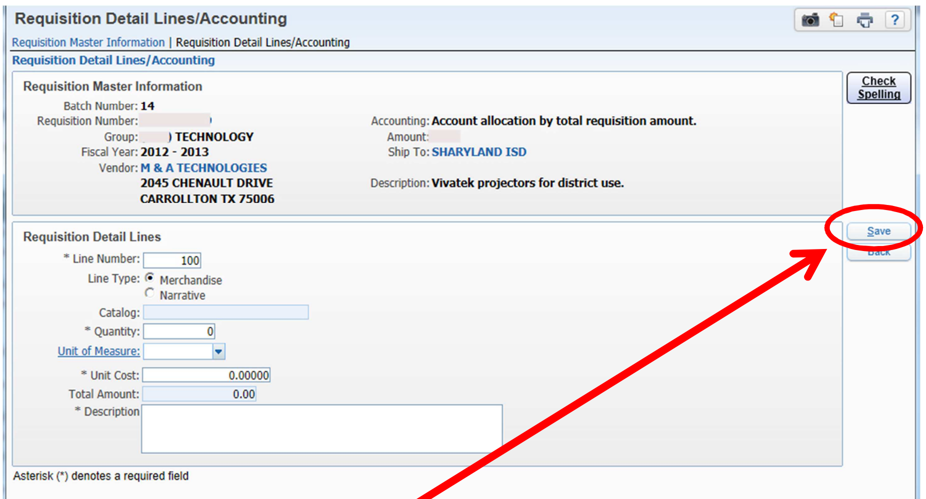
Skyward auto-highlighted M & A TECHNOLOGIES

Click "Select" to select this vendor.



The Requisition Detail Lines / Accounting screen will appear after one of the following:

- You clicked Save and Add Detail on the Requisition Master screen
- You clicked Add on the Requisition Detail Lines / Accounting screen



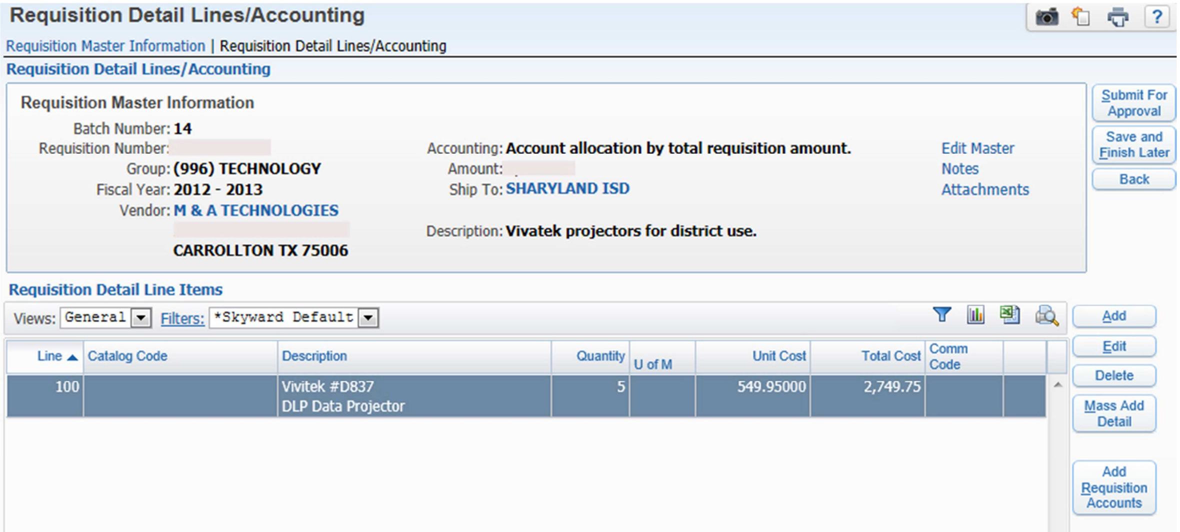
Fill in:

- Quantity
- Unit Cost
- Description

This process will need to be repeated for each line item on your PO

Click the Save button when you are complete

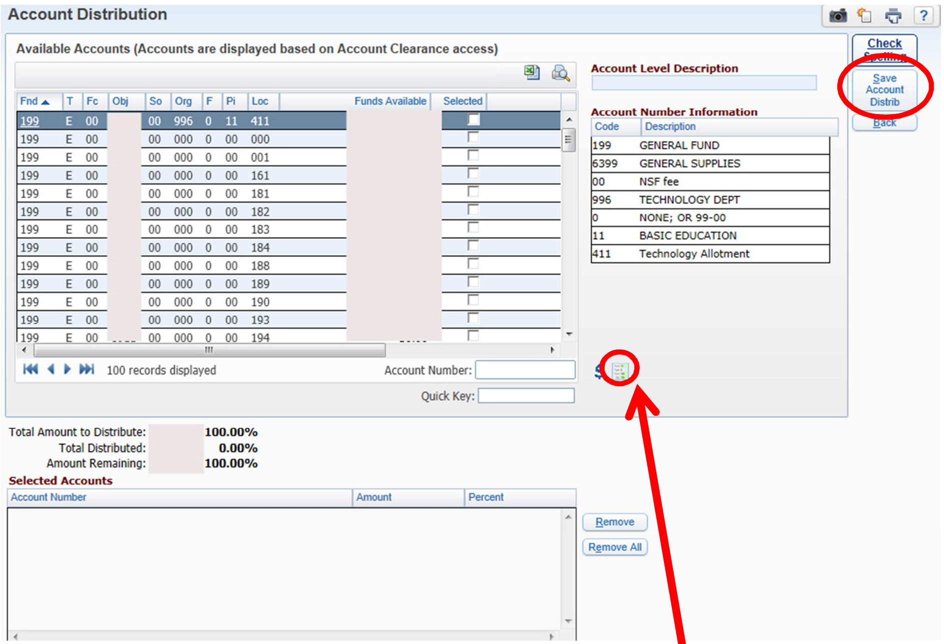
Each time that you save a Requisition Detail Line, the Requisition Detail Lines / Accounting screen will appear



- Use the Add, Edit, and Delete buttons to work with Requisition Detail Line Items.
- Click the Add Requisition Accounts button to add your account information to this Requisition. **(REQUIRED STEP!!!!)**
- Click the Save and Finish Later button to save your Requisition as a “Work In Progress” and come back to it later.
- Click the Submit For Approval button when you are complete and wish to submit the Requisition for approval.

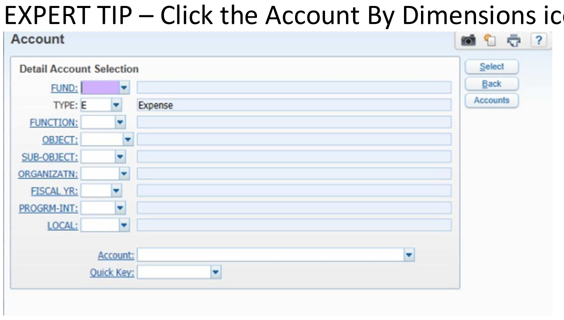
Once all Detail Lines are entered, you must click Add Requisition Accounts to enter your Account information

Clicking  brings up the Account Distribution screen



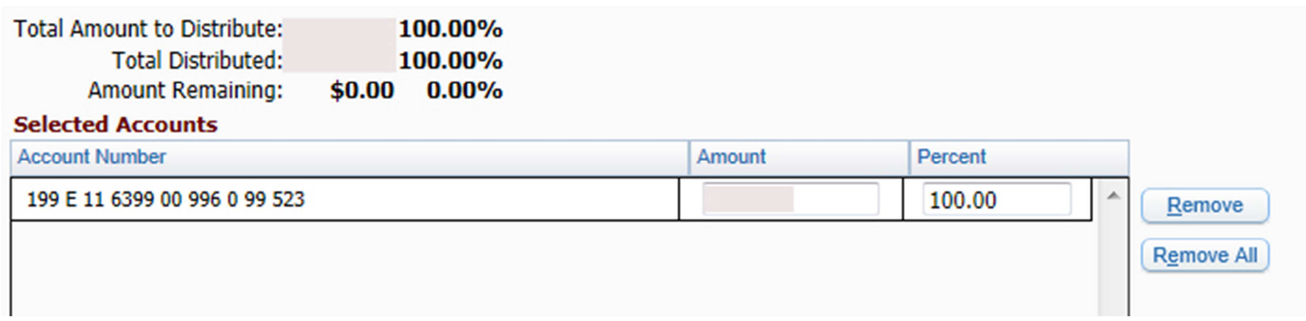
There are several methods to select an account:

- Use the slider bar to scroll through accounts
- Type in your account in the Account Number field
- Type account information in the Quick Key field
- EXPERT TIP – Click the Account By Dimensions icon  to enter account information the "old way".



NOTE – clicking "Select" in this window highlights the account. You still have to check the "Selected" box for the account to appear in the "Selected Accounts" window.

Check the "Selected" box for the account (or accounts) that you wish to use for this Requisition. All checked accounts will appear in the Selected Accounts window.



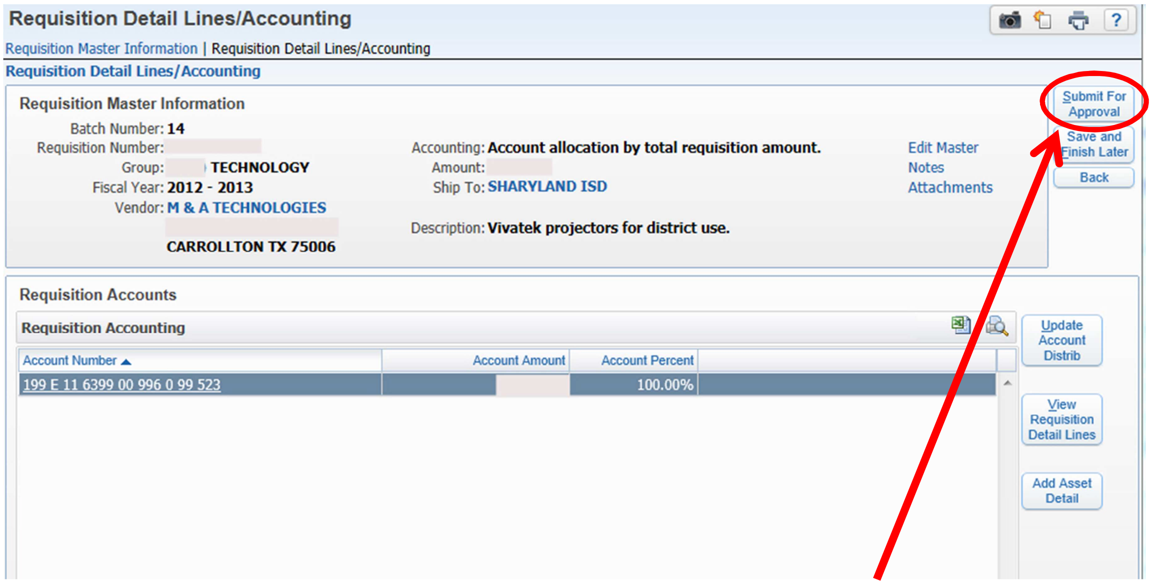
Account Distribution (continued):

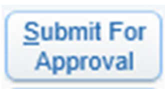
If you have multiple accounts, adjust the Percent for each account. Skyward will automatically update the Amount column.

- Or you can update the Amount column, and Skyward will automatically update the Percent

Click the 

button to save and return to the Requisition Detail Lines / Accounting screen



Verify your information, and if your Requisition is complete, click the 

button to submit.

Once you have saved your Requisition or Submitted your Requisition for Approval, it will appear on the main Requisitions screen (1st step). You can utilize the tools on that page (Add, View, Edit, Notes, Attach, etc) to continue to work on your Requisition. The main item for now is just to verify that it displays on that page. Below you see the line entry for this particular Requisition.

NOTE: Your Requisition number will remain a Requisition number until this entire process is complete. Once you have all data completed, and Submit for Approval, the Requisition Number will convert to a PO number.