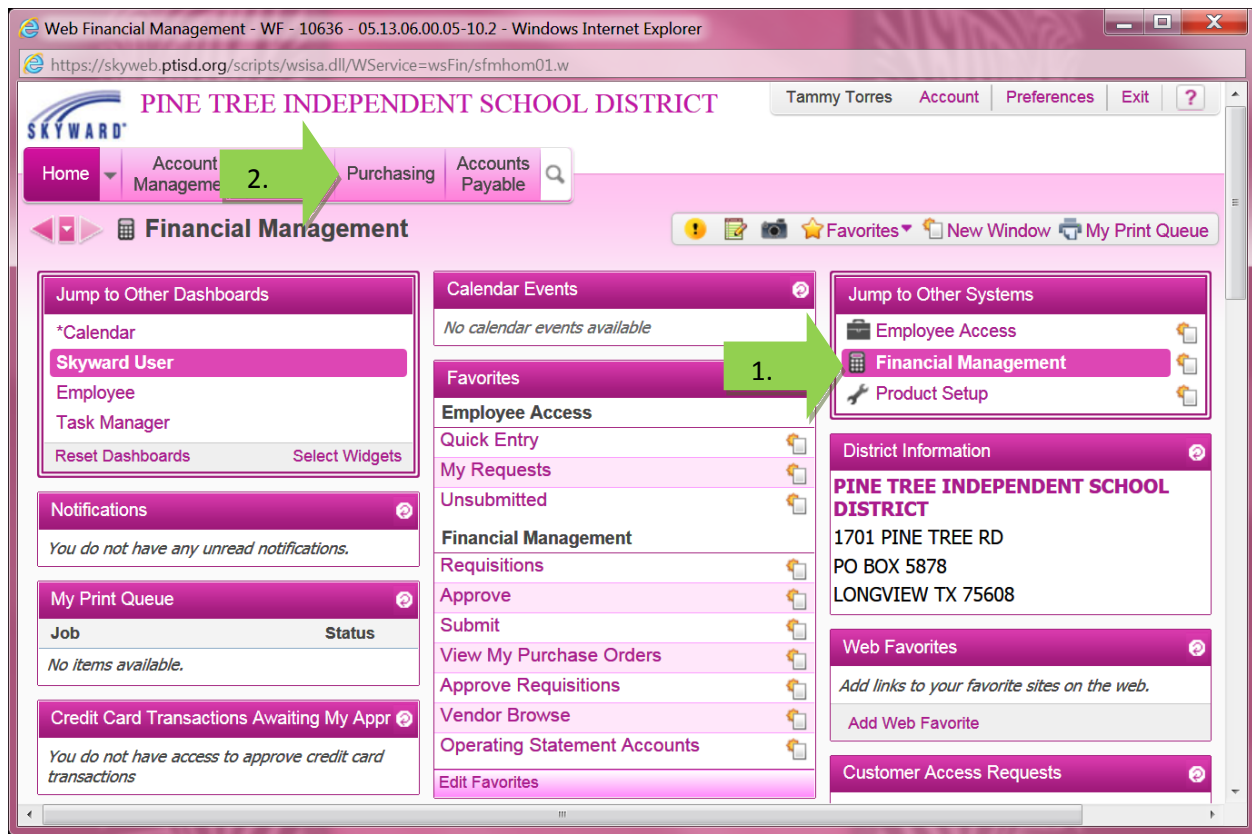




HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE



1.) FROM THE HOME SCREEN CLICK ON **FINANCIAL MANAGEMENT**.

2.) CLICK ON **PURCHASING**.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

Web Financial Management - WF - 10636 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/sfmhom01.w

PINE TREE INDEPENDENT SCHOOL DISTRICT

Tammy Torres Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Search

Purchasing Setup

- View Purchasing Activity
- View My Purchase Orders
- Email Purchase Orders
- eCommerce Ordering
- PowerTrack
- Reports

My Requisition Processing

- Requisitions
- My Requisitions
- My Requisition Approval History
- Approve Requisitions
- User Preferences

Purchase Order Receiving

- Receiving Reports

Notifications

You do not have any unread notifications.

My Print Queue

Job Status

No items available.

Credit Card Transactions Awaiting My Appr

You do not have access to approve credit card transactions

Unsubmitted

- Financial Management
- Requisitions
- Approve
- Submit
- View My Purchase Orders
- Approve Requisitions
- Vendor Browse
- Operating Statement Accounts
- Edit Favorites

PINE TREE INDEPENDENT SCHOOL DISTRICT

1701 PINE TREE RD
PO BOX 5878
LONGVIEW TX 75608

Web Favorites

Add links to your favorite sites on the web.

Add Web Favorite

Customer Access Requests

3.) CLICK ON **REQUISITIONS** UNDER MY REQUISITION PROCESSING.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

Requisitions - WF\PU\MR\REQ - 10740 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/foreqmain001.w

Requisitions

	Requisition Number	App Sts	Today's Sts	A/D Level	Batch Number	Description
1	0000022952	WIP		0	24	STAFF DEVELOPMENT
2	0000023050	WFM		3	02	CHEMICALS FOR KITCHEN F
3	0000023066	WFM		1	05	DISH MACHINE SOAP AND SA
4	0000023080	WFM		1	06	UPGRADE SECURITY RADIO S
5	0000023051	WFL		2	02	JH FOOTBALL HELMETS FOR
6	0000023072	WFL		0	05	SUPPLIES FOR CULINARY AR
7	0000023083	WFL		0	06	THREE YEAR RENEWAL OF C
8	0000023084	WFL		0	06	SOFTWARE
9	0000023052	WFH	APP	2	02	OPEN PO FOR ATHLETICS LA
10	0000023053	WFH	APP	2	02	OCTOBER 2013
11	0000023054	WFH		2	02	REMAINING ITEMS FOR PRO
12	0000023058	WFH	APP	2	05	UIL LIT/CRIT BOOKS FOR 20
13	0000023067	WFH	APP	2	05	UIL LIT/CRIT BOOKS FOR 20
14	0000023073	WFH	APP	2	05	FOOD/REFRESHMENTS FOR P
15	0000023077	WFH	APP	2	06	INTERMEDIATE RETREAT AT

200 15 records displayed

Requisition Number:

4.

Filter Options

Print

Add

View

Edit

Delete

Clone

Notes

Attach

Submit

Approve

Deny

Remove Approval

Add Expense Reimb Req

Clone from Purchase Order

Mass Approve Requisitions

Assign Special

4.) CLICK ON **ADD**.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

REQUISITION MASTER INFORMATION-

5.) REQUISITION GROUP SHOULD REFLECT THE CAMPUS/DEPT YOU ARE IN. FISCAL YEAR SHOULD REFLECT THE CORRECT FISCAL YEAR WE ARE IN.

6.) DESCRIPTION SHOULD BE A **SHORT SUMMARY** OF WHAT YOU ARE PURCHASING. THIS WILL COME OUT ON THE CHECK STUB.

START TYPING IN YOUR VENDOR. THE MORE LETTERS YOU PUT IN, THE NARROWER THE SEARCH WILL BECOME.

- **SHIP TO**- FIND YOUR AREA BY TYPING IN PINE TREE PRIMARY SCHOOL, MIDDLE SCHOOL, ETC. ALL AREAS WILL DEFAULT TO OUR SHIPPING/RECEIVING ADDRESS OF 1400 SILVER FALLS RD, LONGVIEW, TX, 75604.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

- NOTHING WILL BE ENTERED IN THE **INVOICE TO** FIELD.
- **ATTENTION** FIELD YOU MAY PUT ANY INFORMATION THAT WILL HELP AS REFERENCE ON THE PO.
- **DUE DATE** -WILL DEFAULT IN.
- **SHIP DATE** -WILL DEFAULT IN.
- **SHIP METHOD**- PUT BEST METHOD UNLESS YOU KNOW THE SPECIFIC SHIPPING INSTRUCTIONS.
- **PROJECT GRANT**- HERE YOU WILL SELECT THE FIRST PCARD FROM THE DROP DOWN BOX IF THIS IS A PCARD PURCHASE OR YOU WILL SELECT **CONTRACT, TERMS AND AGREEMENTS** IF THIS REQUISITION INVOLVES ONE OF THESE.
- YOU WILL DO NOTHING WITH **CONTRACT FIELD**.

7.) NEXT YOU HAVE TWO OPTIONS-

- **SAVE AND ADD DETAIL**
- **SAVE AND MASS ADD DETAIL**

SAVE AND ADD DETAIL- THIS GIVES YOU THE OPTION TO ENTER ONE LINE AND ONE BUDGET CODE AT A TIME.

SAVE AND MASS ADD DETAIL- THIS GIVES YOU THE OPTION TO ENTER UP TO FIVE LINES AT A TIME. PLEASE NOTE THAT IF YOU ARE DIVIDING BETWEEN BUDGETS AND YOU HAVE MORE THAN FOUR BUDGETS YOU ARE DIVIDING UP THEN YOU WILL HAVE TO USE THE SAVE AND ADD DETAIL OPTION .



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

Requisition Detail Lines/Accounting - WF\PU\MR\REQ - 10740 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/foreqdetl001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **06**
Requisition Number: **0000023086**
Group: **(750) BUSINESS OFFICE**
Fiscal Year: **2013 - 2014**
Vendor: **DELL MARKETING LP**
DEPT 0729 PO BOX 120001
DALLAS TX 75312-0729
Invoice To: **(Default)**

Accounting: **Account allocation by each requisition detail line.**
Amount: **0.00**
Ship To: **PINE TREE ISD BUSINESS OFFICE**
Blanket PO: **This is not a Blanket PO**
Description: **SPEAKERS FOR BUSINESS/TAX OFFICE**

Requisition Detail Lines

* Line Number:
Line Type: ☒ Merchandise
☐ Narrative
Catalog:
* Quantity:
Unit of Measure:
* Unit Cost:
Total Amount:
* Description:
Commodity Code:
Commodity Code:

Asterisk (*) denotes a required field

Save
Back

REQUISITION DETAIL LINES-

- 8.)
- **LINE NUMBER** YOU WILL LEAVE ALONE UNLESS YOU SKIP ENTERING A LINE BY MISTAKE AND WANT IT TO SHOW BEFORE THE ONE YOU JUST ENTERED.(EXAMPLE- YOU WOULD ENTER 099 IF YOU WANTED THE LINE TO SHOW BEFORE THE ONE ABOVE).
 - **LINE TYPE** -YOU HAVE TWO OPTIONS **MERCHANDISE** OR **NARRATIVE**. **MERCHANDISE** IS FOR ITEMS WHERE YOU WOULD HAVE A QUANTITY AND COST. **NARRATIVE** IS FOR WORDING THAT YOU WANT TO COME OUT ON THE PURCHASE ORDER. NO QUANTITY OR AMOUNT WILL BE ENTERED.



HOW TO ENTER A REQUISTION FROM SKYWARD WEB MODULE

- **CATALOG** YOU WILL LEAVE EMPTY.
- **QUANTITY** - HOW MANY ARE YOU ORDERING?
- **UNIT OF MEASURE** - SUCH AS EACH, BOX, CARTON, ETC.
- **UNIT COST**- HOW MUCH PER UNIT?
- **TOTAL AMOUNT** -WILL DEFAULT IN.
- **DESCRIPTION**- ENTER A VERY DETAILED DESCRIPTION.

*******BE VERY DESCRIPTIVE! WHO, WHAT , WHEN, WHERE?**

EVERYTHING MUST BE ITEMIZED WITH PART NUMBERS *****

- **COMMODITY CODE** YOU WILL LEAVE EMPTY.

9.) CLICK **SAVE**. YOU WILL DO THIS AS MANY TIMES AS YOU HAVE LINES IF YOU STARTED WITH ADD DETAIL LINES. IF YOU HIT MASS ADD DETAIL YOU WILL HAVE A SCREEN WITH FIVE LINES AVAILABLE AT A TIME.



HOW TO ENTER A REQUISTION FROM SKYWARD WEB MODULE

Account Distribution - WF\PU\MR\RE\RQ - 10740 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/facctmdist001.w?isPopup=true

Account Distribution

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

	Fnd	T	Fc	Obj	So	Org	F	Pi	Loc
1	161	A	00	1102	00	000	0	00	000
2	161	A	00	1109	00	000	0	00	000
3	161	A	00	1110	00	000	0	00	000
4	161	A	00	1261	00	000	0	00	000
5	161	A	00	1267	00	000	0	00	000
6	161	A	00	1299	00	000	0	00	000
7	161	A	00	1410	00	000	0	00	000
8	161	L	00	2110	00	000	0	00	000
9	161	L	00	2110	10	000	0	00	000
10	161	L	00	2110	22	000	0	00	000
11	161	L	00	2110	PY	000	0	00	000
12	161	L	00	2152	00	000	0	00	000

100 records displayed

Account Number:

Quick Key:

Total Amount to Distribute: **\$236.16 100.00%**
Total Distributed: **\$0.00 0.00%**
Amount Remaining: **\$236.16 100.00%**

Selected Accounts

Account Number	Amount	Percent
----------------	--------	---------

Remove
Remove All

Account Level Description
PETTY CASH

Account Number Information

Code	Description
161	ATHLETIC FUND
00	REVENUES
1102	PETTY CASH
00	GENERIC
000	UNDISTRIBUTED ORGANIZATION
00	UNASSIGNED

2013-2014 Available Funds By

Save Account Distrib
Back

150%

NEXT YOU WILL BE PROMPTED TO ENTER YOUR ACCOUNT CODES



HOW TO ENTER A REQUISTION FROM SKYWARD WEB MODULE

Account Distribution - WF\PU\MR\RE\RQ - 10740 - 05.13.06.00.05-10.2 - Windows Internet Explorer
https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/facctmdist001.w

Account Distribution

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

	Fnd	T	Fc	Obj	So	Org	F	Pi	Loc
1	199	E	41	6399	00	702	0	99	000
2	199	E	41	6399	00	703	0	99	000
3	199	E	41	6399	00	750	0	99	000
4	199	E	41	6399	00	750	0	99	P00
5	199	E	41	6399	00	750	0	99	S00
6	199	E	41	6399	00	999	0	99	000
7	199	E	41	6399	00	999	0	99	BUD
8	199	E	41	6399	01	703	0	99	000
9	199	E	41	6399	01	750	0	99	000
10	199	E	41	6399	01	750	0	99	P00
11	199	E	41	6399	02	750	0	99	000
12	199	E	41	6399	02	750	0	99	P00

100 records displayed

Account Number:
Quick Key:

Account Level Description
SUPPLIES - BUSINESS OFFICE

Account Number Information

Code	Description
199	GENERAL OPERATING FUND
41	GENERAL ADMINISTRATION
6399	SUPPLIES/MATERIALS
00	GENERIC
750	GENERAL ADMIN INDIRECT COSTS
99	UNDISTRIBUTED

2013-2014 Available Funds By Individual Account

Total Amount to Distribute: **\$236.16 100.00%**
Total Distributed: **\$236.16 100.00%**
Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
199 E 41 6399 00 750 0 99 000	236.16	100.00

Remove
Remove All

10.) BEGIN TYPING IN YOUR ACCOUNT NUMBER IN THE **ACCOUNT NUMBER FIELD**. THE MORE NUMBERS YOU PUT IN THE NARROWER THE SEARCH BECOMES. ONCE YOU FIND THE LINE YOU WANT (MAKE SURE ITS HIGHLIGHTED) YOU WILL DOUBLE CLICK ON IT AND IT WILL PULL IT DOWN TO THE **SELECTED ACCOUNTS** AT THE BOTTOM OF THE PAGE.

11.) IN THE **AMOUNT** FIELD YOU WILL ENTER THE AMOUNT YOU WANT TO CHARGE TO THIS ACCOUNT CODE. YOU MAY ALSO ADD MULTIPLE ACCOUNT CODES IF YOU ARE SPLITTING THE COST UP. JUST FOLLOW THE SAME STEPS AGAIN.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

Requisition Detail Lines/Accounting - WF\PU\MR\REQ - 10740 - 05.13.06.00.05-10.2 - Windows Internet Explorer


https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/foreqdet001.w

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **06**
Requisition Number: **0000023086**
Group: **(750) BUSINESS OFFICE**
Fiscal Year: **2013 - 2014**
Vendor: **DELL MARKETING LP**
Invoice To: **(Default)**

Accounting: **Account allocation by each requisition detail line.**
Amount: **236.16**
Ship To: **PINE TREE ISD BUSINESS OFFICE**
Blanket PO: **This is not a Blanket PO**
Description: **SPEAKERS FOR BUSINESS/TAX OFFICE**

12. 

Buttons: Edit Master, Notes, Attachments, Submit For Approval, Save and Finish Later, Back

Requisition Detail Line Items

Views: General Filters: Skyward Default Clone

Line	Catalog Code	Description	Quantity	U of M	Unit Cost
1	100	DELL AX510PA E SERIES FLAT PANEL STEREO SOUND BAR WITH POWER ADAPTER- QUOTE #1016334857690	9	EACH	26.24000

20 1 records displayed

Buttons: Add, Edit, Delete, Mass Add Detail

12. ADDING NOTES- CLICK ON THE NOTES BUTTON.

Notes - WF\PU\MR\REQ - 9271 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisa.dll/WSservice=wsFin/foreqnote001.w?MenuIDOverride=9271&isPopup=true

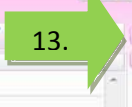
Notes

Requisition Notes

Views: General Filters: Skyward Default Clone

Enter Date Enter Time Category Note

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

13. 

Buttons: Add, Back

20 0 records displayed

13. CLICK ADD.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

Notes - WF\PU\MR\RE\NO - 9271 - 05.13.06.00.05-10.2 - Windows Internet Explorer

https://skyweb.ptisd.org/scripts/wsisa.dll/WService=wsFin/foreqnote001.w

Notes

Add/Edit Note for Requisition# 0000023086

* Note Category: REGION 7 COOP EXPIRATION DATE

Entered Date: 08/06/2013

Entered Time: 3:55 PM

Entered By: TORRES, TAMMY L

* Note: 8/16/13

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

Asterisk (*) denotes a required field

Save Back

14.) NOTE CATEGORY- YOU WILL CLICK ON THE DROP DOWN BOX AND CHOOSE WHAT YOUR NOTE IS GOING TO PERTAIN TO SUCH AS, REGION 7 COOP, COOP INFO, PURCHASING, ACCOUNTS PAYABLE, CRIMINAL BACKGROUND CHECK, ETC.

NOTE:- HERE IS WHERE YOU WILL PUT THE CONTENTS OF YOUR NOTE SUCH AS THE REGION VII COOP EXPIRATION DATE OR OTHER COOP INFO OR DATES. YOU MAY ALSO ENTER MESSAGES FOR ACCOUNTS PAYABLE OR PURCHASING. ANY MESSAGE YOU NEED TO PASS ON PUT IT HERE.

15.) CLICK SAVE.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **06**
Requisition Number: **0000023086**
Group: **(750) BUSINESS OFFICE**
Fiscal Year: **2013 - 2014**
Vendor: **DELL MARKETING LP**
Invoice To: **(Default)**

Accounting: **Account allocation by each requisition detail line.**
Amount: **236.16**
Ship To: **PINE TREE ISD BUSINESS OFFICE**
Blanket PO: **This is not a Blanket PO**
Description: **SPEAKERS FOR BUSINESS/TAX OFFICE**

Requisition Detail Line Items

Line	Quantity	U of M	Unit Cost
100	9	EACH	26.24000

1 records displayed

Buttons: Submit For Approval, Save and Finish Later, Back, Edit Master, **Notes, Attachments, Add, Edit, Delete, Mass Add Detail.

16.) CLICK ON **ATTACHMENTS**.

ADDING ATTACHMENTS-

Requisitions Attachments

Add Requisitions Attachment for Req Number 0000023086

* Type: Attachments PO
Entered Date: 08/06/2013
Entered Time: 3:57 PM
Entered By: TAMMY L TORRES
* Description: QUOTE
* Attached File: \\ptss\users\ltorres\My Document\ Browse...
☐ Email to Vendor with Purchase Order

Asterisk (*) denotes a required field

Buttons: Save, Back.

17.) **TYPE** -SHOULD READ ATTACHMENTS.

DESCRIPTION WILL BE WHAT YOUR ATTACHING.

ATTACHED FILE YOU WILL CLICK **BROWSE** AND LOCATE THE ATTACHMENT ON YOUR COMPUTER.



HOW TO ENTER A REQUISITION FROM SKYWARD WEB MODULE

18.) CLICK **SAVE**.

Requisition Master Information

Batch Number: **06**
Requisition Number: **0000023086**
Group: **(750) BUSINESS OFFICE**
Fiscal Year: **2013 - 2014**
Vendor: **DELL MARKETING LP**
DEPT 0729 PO BOX 120001
DALLAS TX 75312-0729
Invoice To: **(Default)**

Accounting: **Account allocation by each requisition detail line.**
Amount: **236.16**
Ship To: **PINE TREE ISD BUSINESS OFFICE**
Blanket PO: **This is not a Blanket PO**
Description: **SPEAKERS FOR BUSINESS/TAX OFFICE**

Buttons: Submit For Approval, Save and Finish Later, Back, Edit Master, **Notes, **Attachments

Requisition Detail Line Items

Views: General Filters: Skyward Default Clone

Line	Catalog Code	Description	Quantity	U of M	Unit Cost
1	100	DELL AX510PA E SERIES FLAT PANEL STEREO SOUND BAR WITH POWER ADAPTER- QUOTE #1016334857690	9	EACH	26.24000

Buttons: Add, Edit, Delete, Mass Add Detail

20 1 records displayed Line: 150%

19.) IF YOU HAVE SOMETHING FURTHER TO ADD TO YOUR REQUEST OR NEED TO SUBMIT IT AT A LATER DATE YOU MAY **SAVE AND FINISH LATER** AT ANY TIME.

IF YOU ARE READY TO SEND THIS REQUEST UP THE APPROVAL CHAIN CLICK ON **SUBMIT FOR APPROVAL**.

THIS CONCLUDES THE TUTORIAL ON HOW TO ENTER A PURCHASE REQUEST IN SKYWARD WEB MODULE.