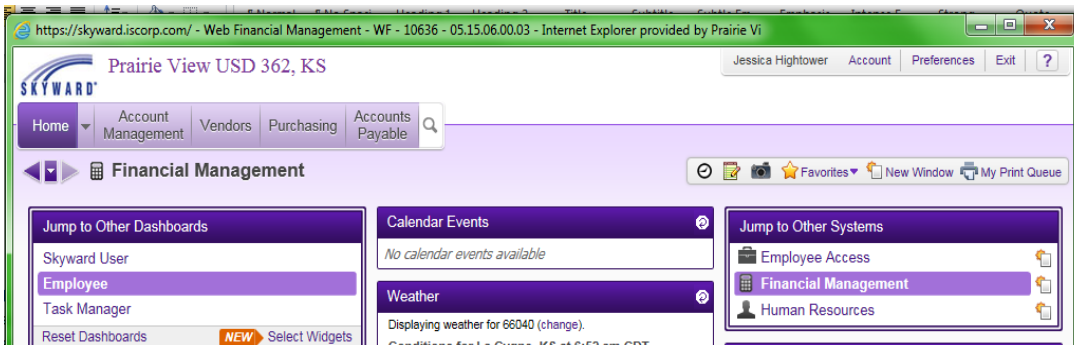
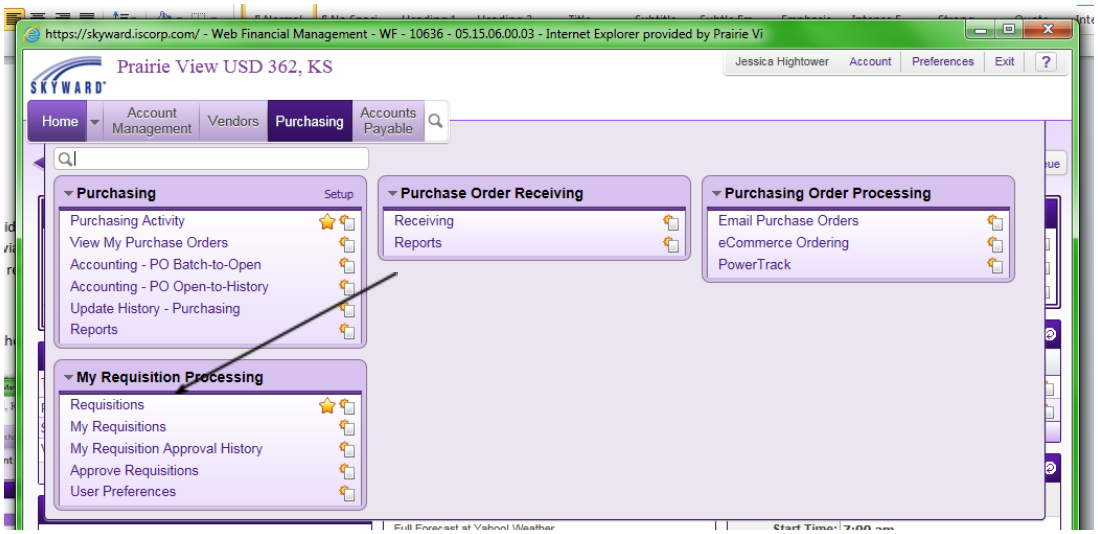
Submitting a Requisition

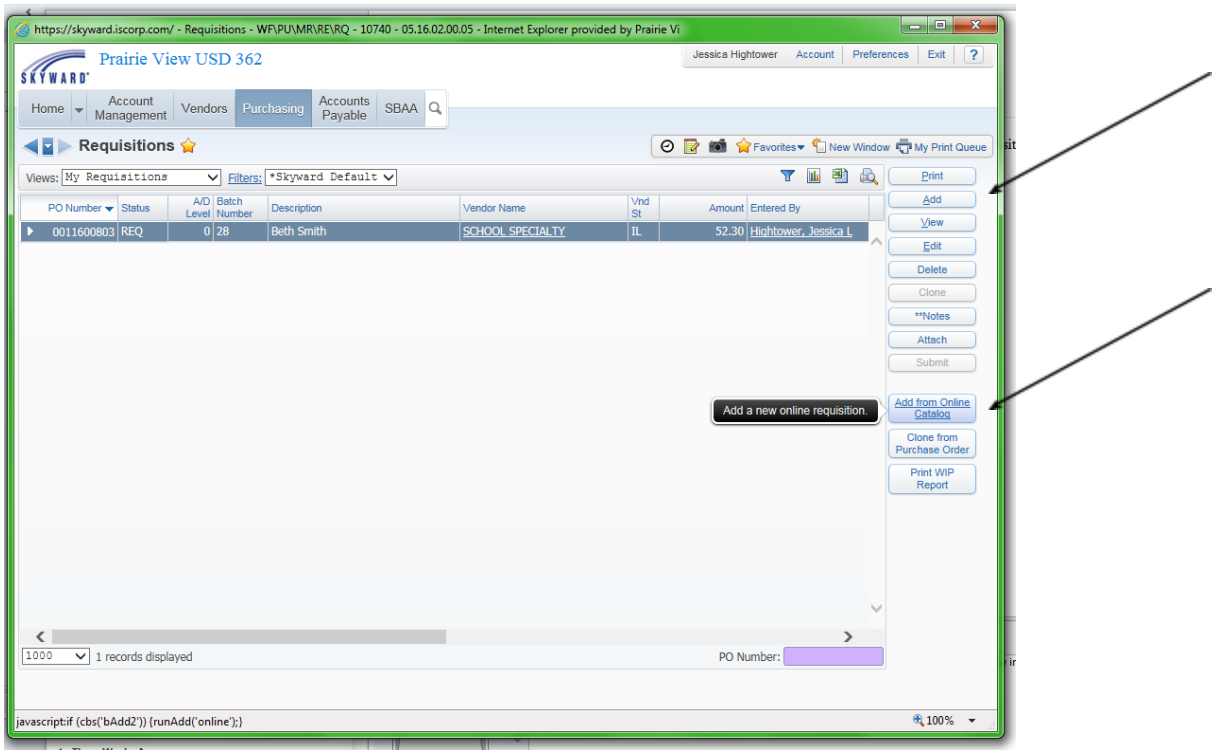
1. Sign in to Skyward Employee Access; go to the Financial Management tab.



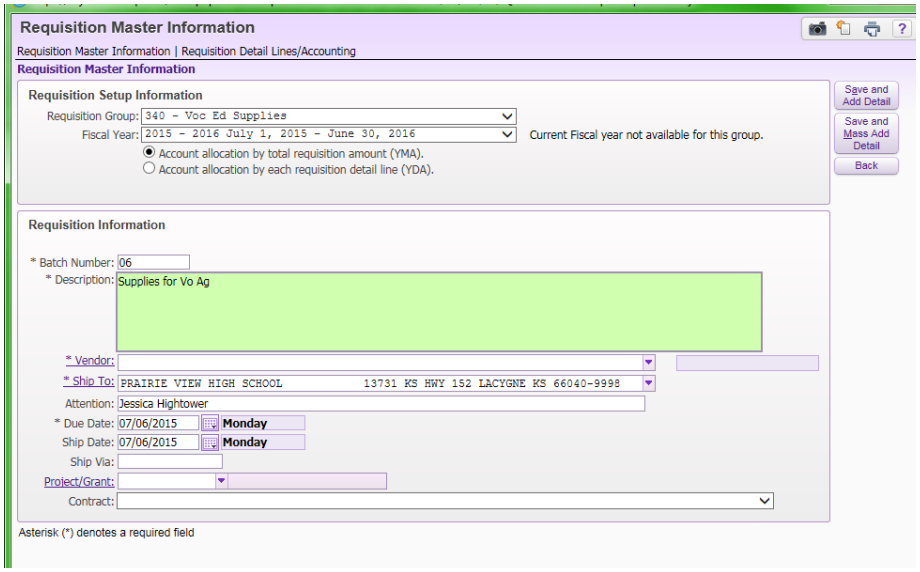
2. Click on Purchasing, then Requisitions.



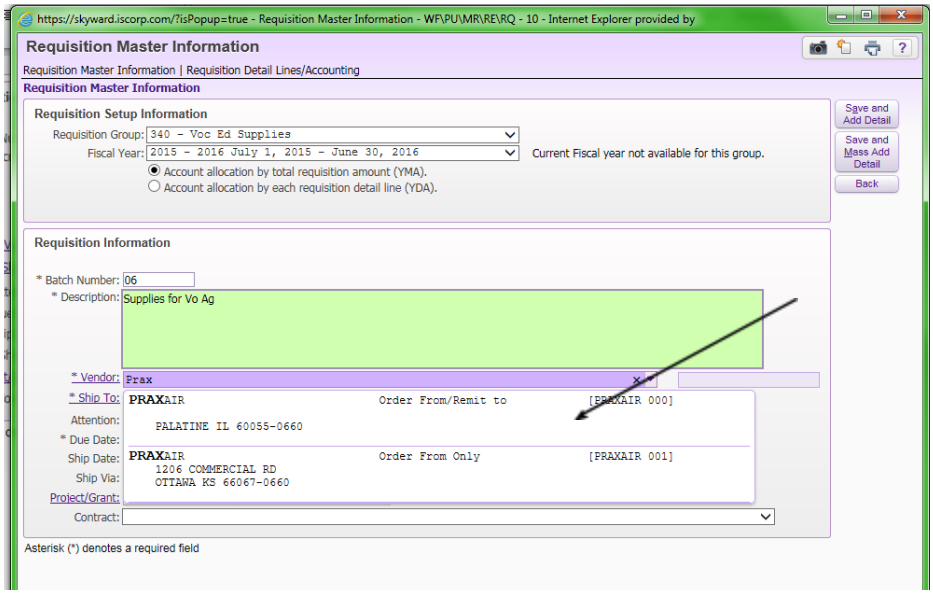
3. If you have any unsubmitted Requisitions, they will appear on this main Requisitions page. Click Add on the right hand side to start a new Requisition. If you are submitting an order from an online catalog, such as School Specialty, click Add From Online Catalog towards the bottom of the screen. You will then select your vendor from a list and continue with your requisition.



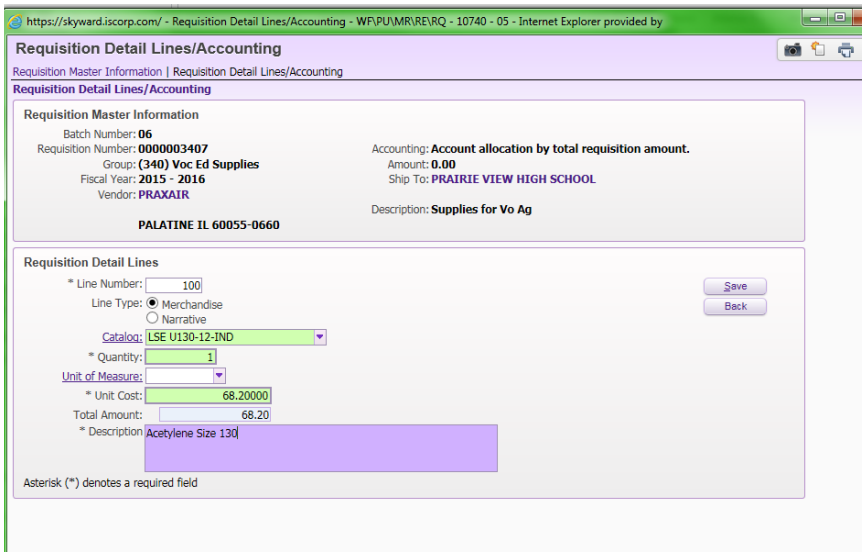
4. Click the drop down arrow next to Requisition Group and select the correct group for your order. If you think your order does not fit in a group that you have, contact Jessica Hightower. Enter a description for your order. Make sure the Ship To address is your school. Enter your name in the Attention box. If you are using Project or Grant money, select the correct one from the Project/Grant drop down box.



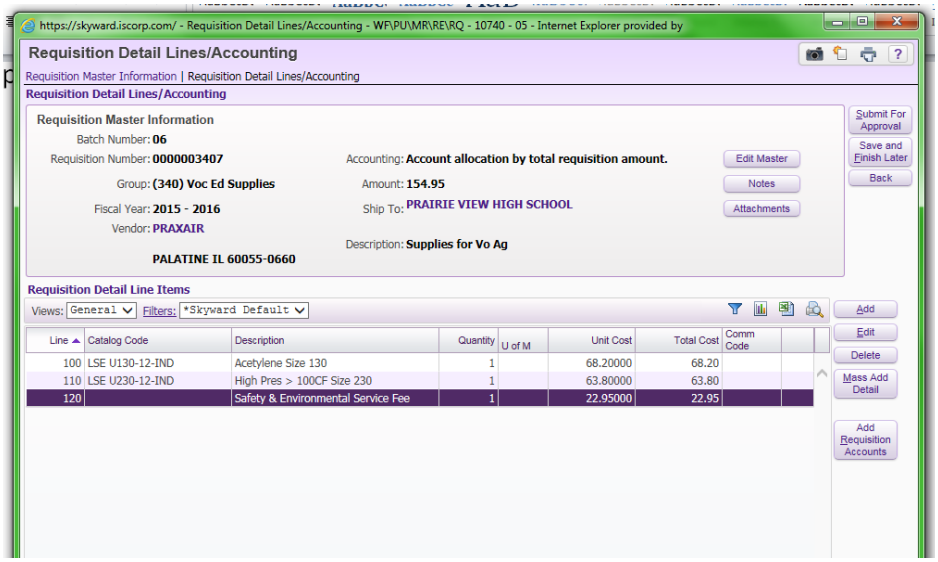
5. Begin typing your vendor name in the Vendor box. If it is in the system, it will come up in the list to pick from. **Make sure the vendor you pick says Order From/Remit To.** Choose the correct vendor. If you are submitting a Requisition to be reimbursed for something, you will be the vendor. Employees are listed last name first; to find yourself, start typing your last name in the Vendor box. Click Save and Add Detail on the right hand side when you've found the vendor.



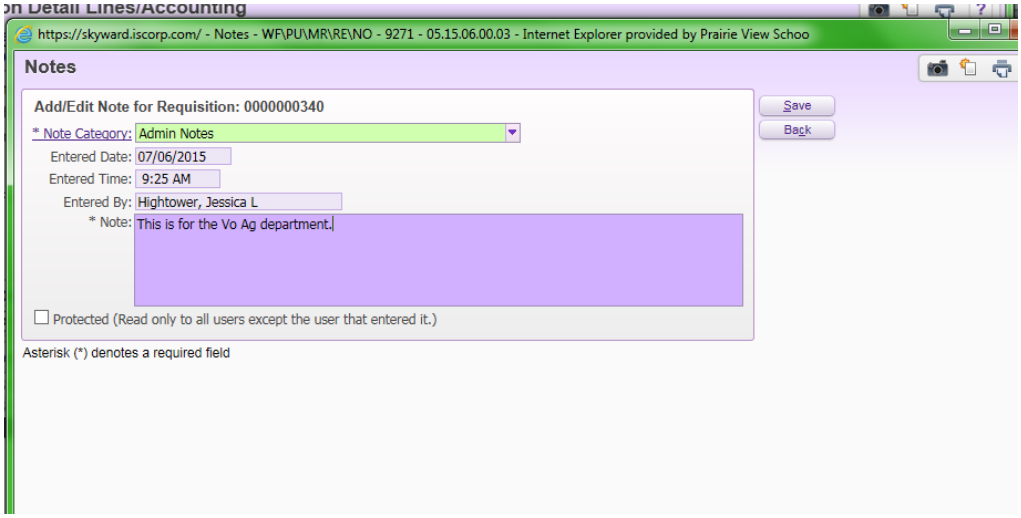
6. Enter your first line item. The Line Number populates automatically. If you have a Catalog number, enter it. Quantity, Unit Cost and Description are required fields. The Total Amount for this line item will populate automatically based on what you enter in the Quantity and Unit Cost boxes. When you have completed this line item, click Save. If you're working on an order from an online catalog, you'll go through the website and add things to your cart. It will look like you're shopping online. When you're done, you'll checkout and then transfer your items. It will pull your items into the requisition for you.



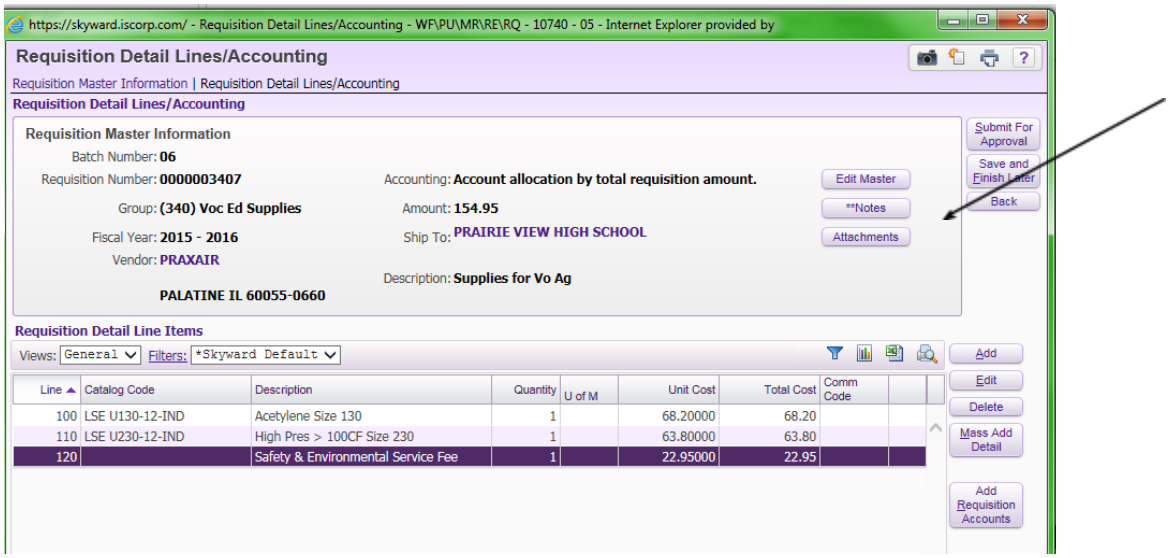
7. You will be taken to the Requisition information page. You will see your line items listed out as well as the Master information for this Requisition. To add another line item, click Add. Shipping and handling charges should be added as a separate line item. To Edit or Delete an existing line item, click the corresponding buttons. If you need to edit the Requisition Master information, click Edit Master. You will be taken back to the original screen and you can change you description, vendor, etc.



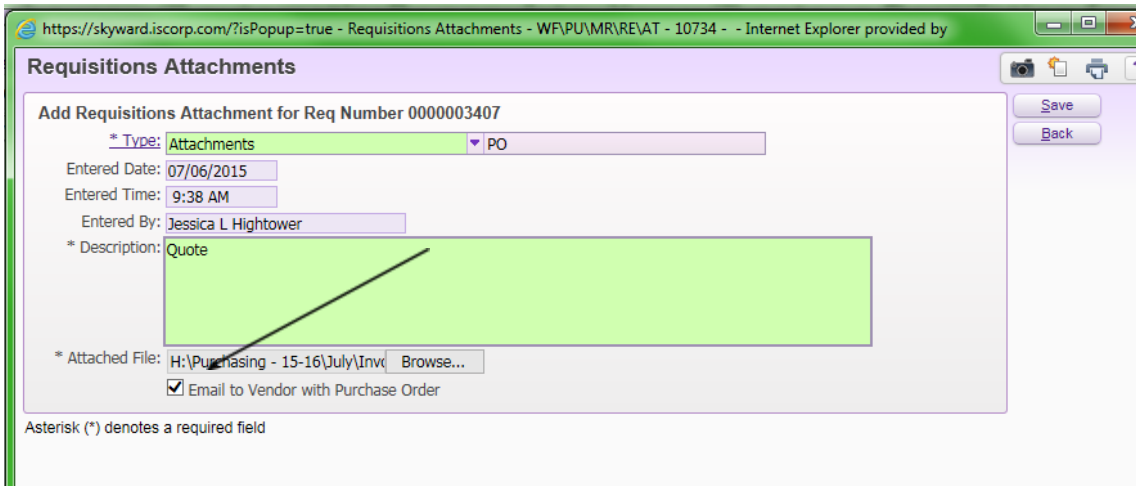
8. If you have any notes to go along with the Requisition, click Notes. The screen that comes up will be a list of all notes related to this Requisition. Click Add. Click the drop down box and select Admin Notes for the Note Category. Click Save. You will be taken back to the notes listing. Your note will show up in the list. Click Back. You will notice an asterisk on the Notes button. This allows your approvers to see that you have made a note on the Requisition.



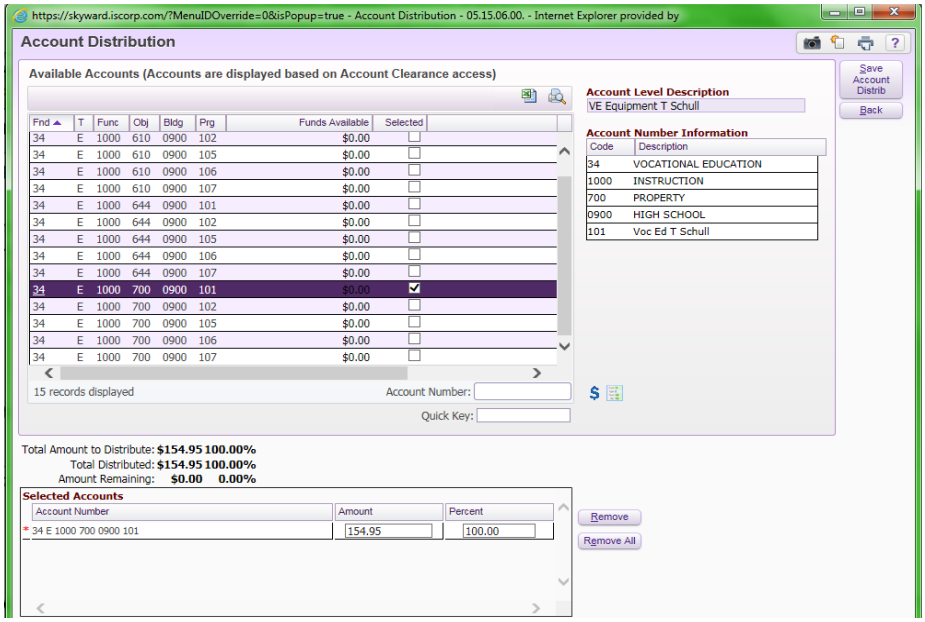
9. Each Requisition should have documentation supplied with it when it is submitted; i.e. a quote, travel reimbursement form, etc. Scan that documentation and save it electronically. Click Attachments. This does not apply to Online Catalog orders.



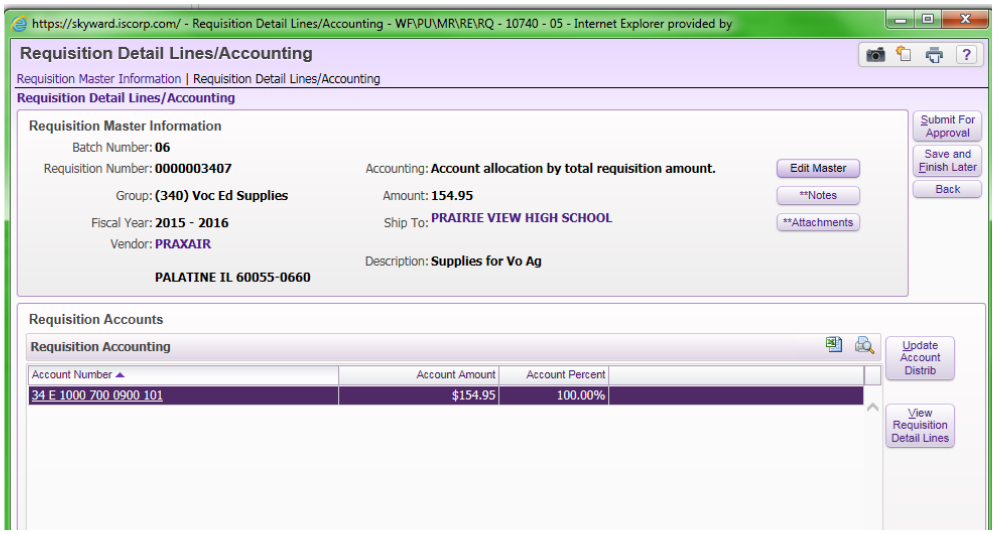
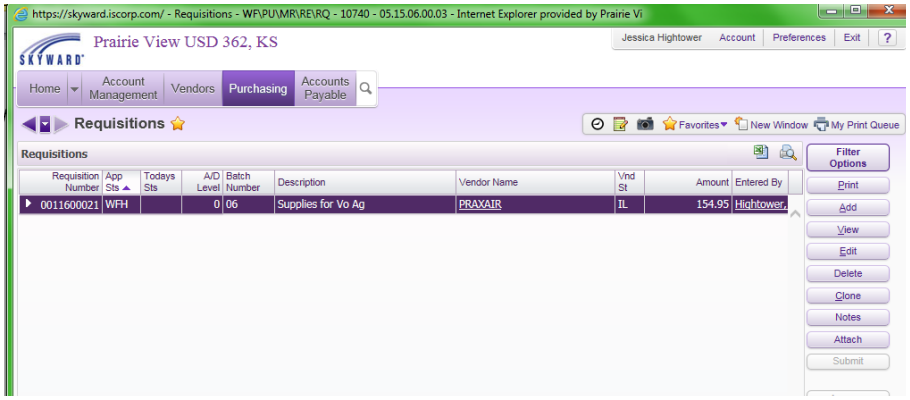
10. Click Add File. The Type will always be Attachments. The Entered Date, Entered Time and Entered By boxes will automatically populate. You will enter a Description for your attachment. It should not be detailed, simply enter what it is that you are attaching. Click Browse to find the electronic file. **Make sure the Email to Vendor with Purchase Order box is checked if you are placing an order.** Click Save. If you don't need to add any more attachments, click Back. You will notice an asterisk on the Attachments button indicating your attachment was uploaded successfully.



11. Click Add Requisition Accounts to pick which GL Account your order will be paid from. You will see a list of accounts associated with the Group you picked in the beginning. If you don't see the account you need, you will have to go back and pick a different Group. Find the correct account and check the box next to it. This will pull the account into the Selected Accounts box at the bottom of the screen. If you need to use more than one account, check all necessary boxes, then change the amount or percentage for each account as needed. When you're done selecting accounts, click Save Account Distribution.



12. Double check your Requisition to make sure you've entered everything needed. To see your line items again, click View Requisition Detail Lines. When satisfied that everything is correct, click **Submit for Approval**. If you need to wait to submit it, click Save and Finish Later. If you've decided not to submit it, click Back.



13. You will be taken back to the main Requisition page. To check on the status of your Requisition, hold your cursor over the App Sts column header for description definitions. When you can no longer find your Requisition on this screen, it has been approved by all parties and is now a Purchase Order.