

HOW TO ENTER A SKYWARD REQUISITION/AKA HOW TO ASK TO SPEND TAXPAYER FUNDS:

*Please Note: You must be an approved PO user (sponsor; coach; department head; supervisor) to enter a Requisition.
If you are not currently an approved PO user please contact your direct supervisor before proceeding.*

First, go to the district's homepage (www.dcsid.org) and hover over "Staff" and then select "Skyward Employee"



Next, enter in your:

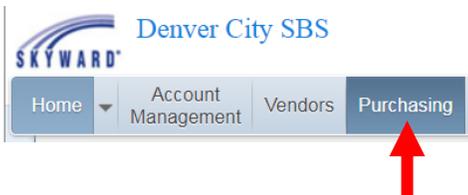
- (1) Login ID;
- (2) Password;
- (3) at the bottom, change the "Login Area" to "All Areas";
- (4) then click "Sign in" (if you don't do #3 you will have to Log out and start over).

Don't forget to change this to "All Areas" **BEFORE** signing in

After logging in, click the dropdown arrow, next to "Home," and select the "Financial Management" link



Next, click the "Purchasing" tab at the top toolbar



Then, click "Requisitions" in the "My Requisition Processing" box



Next, click the  button toward the right of the screen

Then, the "Requisition Master Information" screen will open (*this creates the Auditor's Report*):

- 1) Ensure your "Requisition Group" is correct (if you're the sponsor/coach/department head for multiple activities)
- 2) Ensure the "Fiscal Year" is correct (district's fiscal year starts September 1st, so August transactions have to be coded to the prior fiscal year - estimated August purchases are entered before the May cutoff date to encumber the funds).

Requisition Master Information

Requisition Setup Information

Requisition Group: 990 - DISTRICTWIDE

Fiscal Year: 2020 - 2021 September 1, 2020 - August 31, 2021

Account allocation by total requisition amount (YMA).

Account allocation by each requisition detail line (YDA).

This is a Blanket Requisition/Purchase Order.

Timesaver Tip:

If you make frequent transactions at a specific vendor (Thriftway; Staples; Athletic Supply) and want to have one PO# to use multiple times throughout the year, select the box by "This is a Blanket Requisition/Purchase Order." Just make sure you allocate enough funds so you don't have to enter a NEW requisition!

Afterwards, go down to the "Description" box and type the details of your purchase in **ALL CAPS!** Include quote numbers, date ranges, staff names, and other details that will be useful in identifying what and who the purchase is for.

* Description: DON'T FORGET TO HIT "CAPS LOCK" BEFORE TYPING YOUR DESCRIPTION! [IT KEEPS OUR AUDITORS HAPPY:]

Then, start typing the * Vendor: name into the system (can't find your vendor, email the vendor's information to accounts.payable@dcisd.org & lachrisa.rains@dcisd.org to setup)

*You can also add a "receiving" name to the Attention: box if desired.



Now, it's time to click at the top, right.

Next, the "Requisition Detail Lines/Accounting" screen will open (*this creates the PO*):

Requisition Detail Lines

* Line Number: 100

Line Type: Merchandise
 Narrative

Catalog:

* Quantity: 0

Unit of Measure:

* Unit Cost: 0.00000

Total Amount: 0.00

* Description: AGAIN, DON'T FORGET TO HIT 'CAPS LOCK' BEFORE TYPING

Choice Time:

You can either enter per unit information or total amount information. (i.e. Quantity 10 at a Unit Cost of \$5 OR Quantity 1 at a Unit Cost of \$50)

No matter what you choose, on this screen you ONLY have to enter a:

1. "Quantity"
2. "Unit Cost"
3. "Description" (to save time, you can highlight & drag the description from the Requisition Master Information box)

Make sure when you are done to click Save at the top right

*On the following screen, you can click Add to enter in additional info (i.e. estimated shipping/freight; additional quotes)

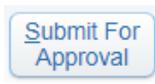
**NOTE: We all love a discount/coupon! If you have one, enter that amount in as a negative number to reduce the cost.



Next, click to assign account code(s). You can "check" multiple accounts and then allocate as appropriate by altering the amount/percent at the bottom of the screen. Just make sure you see: Amount Remaining: \$0.00 0.00%



Then, click



Finally, click

How to add a PDF attachment:

Attachments ; Add File ;

change the "Type" to "Attachments" and drag and drop the PDF to Choose File ;

edit description as needed and click Save

(NOTE: each invoice/receipt needs to be an individual PDF)

Pro Tips:

- If the Requisition "Status" is WIP (Work In Progress) that means it hasn't been submitted to your supervisor for approval.
- Quote → Requisition → Purchase Order → Invoice → Check Payment
- Once your Requisition/REQ is approved you will receive a Skyward email which contains your PO# - use this number when placing orders (do not use the requisition number)
- Traveling sponsors: Enter 1 REQ in for student meals for the year by using the "Restaurant" vendor and a season travel meal amount
- Once product is received, email the PO# & receipt/invoice to accounts.payable@dcisd.org to pay