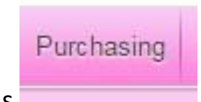
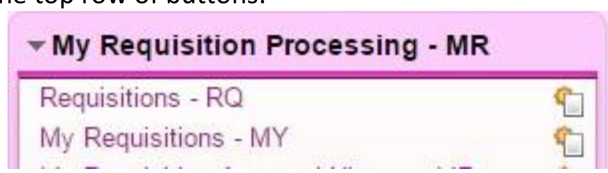
Lopez Island SD Purchase Order Process

1. Sign in to Skyward.
2. Click on Financial Management in the Jump to Other Systems Box.



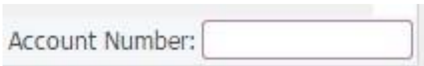
3. Click on the Purchasing Tab on the top row of buttons.



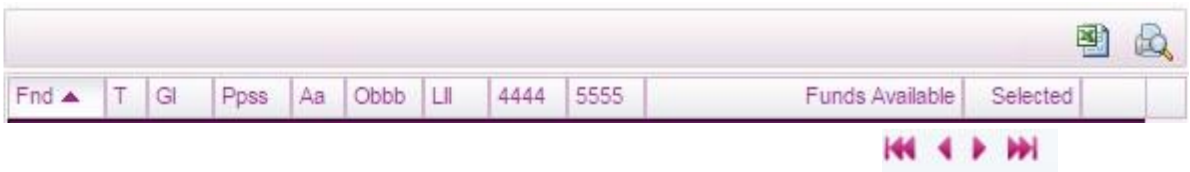
4. Click on the My Requisitions link.
5. Click “Add” button on the right hand side.
6. The following fields are ones you need to worry about in the order they appear on the screen:
    a. “Requisition Group”: Please change this if necessary depending on for who you are ordering.
    b. “Fiscal Year”: Double check to make sure it shows the year you want.
    c. “Description”: Enter a description for your purchase; this one can be more general. Just something so that we know what it is for, but this does not print on the PO.
    d. “Vendor”: Please choose your vendor; if it is not available please see Jennifer Norvelle.
    e. “Ship To”: Select the school.
7. Click “Save & Add Detail” Button on the right hand side.
8. The following fields are ones you need to worry about in the order they appear on the screen:
    a. “Quantity”: Please send the quantity of this specific item you want.
    b. “Unit of Measure”: Please choose one of the following-
        i. Amount- Use this if you are creating an open PO.
        ii. Each- Use this is if there is a cost associated by item (most common choice!).
        iii. Hr- Use if you are putting a PO in for a personal service contract that charges by the hour.
    c. “Unit Cost”: Enter the cost per unit or the total amount for an Open PO.
    d. “Description”: This needs to be the description for the item and it will print on the PO.
9. Click “Save”.

10. If you have more items to enter for your order click “Add” on the right hand side of the screen and repeat Steps 8 & 9 above. If not, continue to Step 11.
11. Click the “Add Requisition Accounts” Button on the right hand side. 

12. 12. If you know your account number you can type it in the search box.



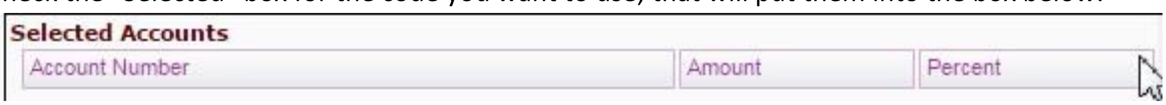
    a. General Fund codes start with 10E530
    b. ASB codes start with 40E530
13. If not you can scroll for it in the box that looks like the following:



There is a scroll bar on the right and page advance buttons on the bottom.

*****Please notice that your balance shows in “Funds Available” column*****

14. Check the “Selected” box for the code you want to use; that will put them into the box below:



If you need to use multiple codes on the order please either change the “Percent” OR “Amount” for each code listed. The system will warn you if you are under or over 100%.
If you have selected an incorrect code simply either uncheck the “Selected” box or highlight it in the box in Step 14 and click the remove button.

15. Once you have selected the codes you want use, click the “Save Account Distrib” button.
16. This will take you back to the main PO screen, from here you can do the following:
    a. “Update Account Distrib”: To change the account codes or the distribution of funds.
    b. “View Requisition Detail Lines”: To Add, Edit, or Delete items from your order.
    c. “Submit for Approval”: This sends the PO through the proper steps of approval.
    d. “Save and Finish Later”: This saves the PO in the “My Requisitions” area from Step 4 so you can finish now and complete editing at another time before you submit.
    e. “Edit Master”: Change information you entered in Step 6.

Please contact Jennifer Norvelle if you have further questions!