



Texas Skyward User Group Conference

# Purchasing: Requisitions & Purchase Orders

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# Purchasing: Requisitions & Purchase Orders



This session will demonstrate how to enter purchasing requisitions and process them through the system. This session includes the approval and notification process for the standard requisition and a brief discussion on the eCommerce requisition.

- Requisition/Purchase Order Groups
- Requisition Notification Options
- User Preferences
- Requisition Entry
- Requisition Approval Process
- Purchase Order Entry
- Batch Activity and Update Process
- eCommerce Vendors for Purchasing

## Requisition/Purchase Order Groups

Req/PO Groups - Req/PO Group Information - WF\PU\PS\CF\RP - 8797 - 05.17.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/fpurchsetp001.w?isPopup=true

### Req/PO Groups - Req/PO Group Information

Views: Req/PO Group Information Filters: \*Skyward Default

Req/PO Group	Group Description	2016-2017 Next Req/PO #	2017-2018 Next Req/PO #	Account Clearance Group	Allow Chk Rqst	Blanket POs?	Status
002	WEST HIGH SCHOOL				Y	Y	
013	0130 SCRAMBLED PO GROUP						
022	0140 SCRAMBLED PO GROUP						
023	0150 SCRAMBLED PO GROUP					Y	
024	0160 SCRAMBLED PO GROUP					Y	
025	0170 SCRAMBLED PO GROUP					Y	
024	0180 SCRAMBLED PO GROUP					Y	

20 records displayed

Req/PO Group:



## Requisition Entry Options/Data Retention on Add

Requisition Entry Options / Data Retention on Add - WF\PU\MR\UP\RE - 30657 - 05.17.02.00.11 - Google Chrome
Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/fpercent008.w?hSource=requisition&isPopup=true>

### Requisition Entry Options / Data Retention on Add

Save  
Back

#### Requisition Entry Options

Assign Batch Number:  Warning:  
Saving will overwrite the default Batch Number  
for Purchase Order Data Retention on Add

Default Value:

#### Data Retention on Add for Requisitions and Purchase Orders

Retain or Default Values

Layout:  or Detail Items:  Yes  No

Accounting Allocation:  Master  Detail

Type of Allocation:  Amount  Quantity

Description:  or

Vendor:  or

Ship To:  or

Attention To:  or

Ship Date:  or

Ship Via:  or

Narrative:  or

# Requisition Entry


Requisition Master Information - WF\PU\MR\REQ - 10740 - 05.17.02.00.11 - Google Chrome

⚠ Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/foreqmast001.w?isPopup=true>

### Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

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#### Requisition Master Information

##### Requisition Setup Information

Requisition Group:  ▼

Fiscal Year:  ▼

Account allocation by total requisition amount (YMA).

Account allocation by each requisition detail line (YDA).

This is a Blanket Requisition/Purchase Order.

This requisition is used to restock a warehouse.

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##### Requisition Information

\* Batch Number:

\* Description:

\* Vendor:  ▼

\* Ship To:

Invoice To:

Attention:

\* Due Date:

Ship Date:

Ship Via:

Project/Grant:

Contract:

Bid Ref:

Asterisk (\*) denotes a required field

## Requisition Approval

Approve Requisitions - W:\PU\MR\AR\AR - 29487 - 05.17.02.00.11 - Google Chrome

Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/fporqbrws011.w>

Sam P Account Preferences Exit ?

**Skyward School District**

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Approve Requisitions

# of Requisitions Approved: 0 Total Amount Approved: \$0.00  
 # of Requisitions Denied: 0 Total Amount Denied: \$0.00

Submit Approvals & Denials

Views: General Filters: \*Skyward Default

Requisition Number	Approve	Deny	Vendor Name	Vnd St	Description	Amount	Entered By
There are no records to display; check your filter settings.							

20 0 records displayed Requisition Number:

Requisition

Assign Special Group

Awaiting Next Level

Awaiting Lower Level

# Purchase Order Entry

Purchase Order Entry - WF\PU\PD\PO - 31511 - 05.17.02.00.11 - Google Chrome

Not secure | https://pbroker1/scripts/cgiip.exe/WService=11509web/foreqbrws008.w

Skyward School District

Sam P Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Purchase Order Entry

Status: All Fiscal Year: All Fiscal Years

Views: All Groups Filters: \*Skyward Default

PO Number	Req Number	Vendor Name	Status	Description	Amount	Batch Number	En
▶ 0001000002	0000003006	Camp forktrail creekscr	HIS	SCRAMBLE DATA 3006	21,798.61	SW1	Jat
▶ 0010000001	0000029216	Abc supply co inc/south ...	Open	Office Supplies	273.75	cme	Ak
▶ 0011400002	0000029200	School specialty incscr	HIS	Office Supplies	73.24	12	Sm
▶ 0011400003	0000029201	Xaos tools incscr	HIS	Shop Supplies	305.40	12	Sm
▶ 0011500001	0000029209	Sky Community Bank	HIS	Texas User Group Conference (HN)	200.00	HN-Oct	Ab
▶ 0011500002	0000029210	Xaos tools incscr	HIS	Shop Supplies	305.40	12	Sm
▶ 0011500003	0000029211	Abc school supply incscr	HIS	PRINTER	15,000.00	15	Sm
▶ 0011500004	0000029212	Xaos tools incscr	HIS	Shop Supplies	6,554.00	12	Sm
▶ 0011500005	0000029215	Xaos tools incscr	HIS	Shop Supplies	22,225.00	12	Sm
▶ 0011600002	0000029221	Multiprintscr	Open	Music supplies	250.00	cme	Ak
▶ 0020000001	0000019503	Indo gulf pest controlsc...	HIS	SCRAMBLE DATA 19503	1,028.00	04	Eir
▶ 0020000002	0000019504	National junior honor so...	HIS	SCRAMBLE DATA 19504	607.50	04	Eir
▶ 0020000003	0000019509	Perennial springs pvt. l...	HIS	SCRAMBLE DATA 19509	1,461.04	04	Eir
▶ 0020000004	0000019517	Hanuman marble sales cor...	HIS	SCRAMBLE DATA 19517	1,000.00	04	Eir
▶ 0020000005	0000019534	Different roads to learn...	HIS	SCRAMBLE DATA 19534	4,000.00	04	Eir
▶ 0020900001	0000000005	Yamaha corporation of am...	HIS	SCRAMBLE DATA 5	1,828.00	17	Va
▶ 0020900002	0000000002	Yamaha corporation of am...	HIS	SCRAMBLE DATA 2	1,005.00	17	Ru
▶ 0020900004	0000000010	Yamaha corporation of am...	HIS	SCRAMBLE DATA 10	1,988.40	010509	Jat
▶ 0020900005	0000000011	Yamaha corporation of am...	HIS	SCRAMBLE DATA 11	2,565.00	010509	Jat

20 records displayed

PO Number:

Requisition Number:





## eCommerce Vendors for Purchasing

eCommerce - WF\PU\PS\CF\EC - 8800 - 05.17.02.00.11 - Google Chrome

Not secure | <https://pbroker1/scripts/cgiip.exe/WService=11509web/foreqecst001.w?isPopup=true>

### eCommerce

Connection Setup

Webspeed Service:


































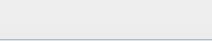
Proxy Information:

eCommerce XML Files:

- Retain eCommerce XML Files - **Debug Use Only**
- Use Work Directory  ?
- Use UNC Path  ?

UNC Path (\\servername\directory):

Click on an image to go into the setup for the eCommerce Site





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**THANK YOU FOR ATTENDING!**

