



PURCHASE ORDER ENTRY

Using SKYWARD

Effective January 2020

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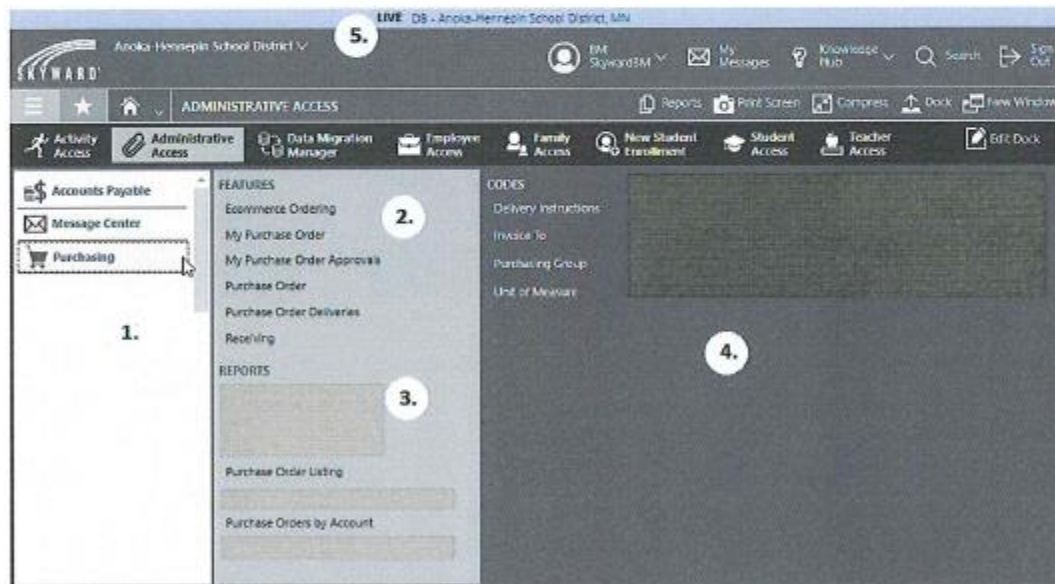
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Administrative Access Options

Within the **HOME** icon , select **ADMINISTRATIVE ACCESS**



Next, pick the **MENU** icon  to view the applications you will have access to...



*Note *Above is only a reflection of what can be listed under an Application* Your view may be different.*

1. Application Menu
2. Features of the selected Application- mainly List & Entry forms
3. Reports associated with the Application
4. Codes

ENTERING A PURCHASE ORDER USING THE REGULAR/MANUAL METHOD

There are 3 different types of PO entry:

1. **Regular/Manual** – Used when **all** order details need to be entered into Skyward to create a PO Request. No vendor, item #, &/or product description information will be auto-filled in Skyward.
2. Punch-Out (Shop Online/eCommerce)
3. Catalog Download

The screenshot shows the Skyward Administrative Access interface for Anoka-Hennepin School District. The 'Administrative Access' menu is open, showing various tabs. The 'Purchasing' tab is highlighted with a red circle. Below it, the 'My Purchase Order' option is also highlighted with a red circle. A red box contains the following instructions:

1. From the Administrative Menu
Click on the Purchasing Tab
Click on My Purchase Order

The screenshot shows the Skyward 'MY PURCHASE ORDERS' page. The 'Add Purchase Order' button is highlighted with a red box and a red arrow. The page displays a search bar, view options, and a table of purchase orders. A red box contains the following instruction:

2. Click on Add Purchase Order

Add Purchase Order

Enter Purchase Order Details

Save & Add Detail Save Cancel

PURCHASE ORDER DETAILS

*Purchasing Group 11610 Wilson Elementary


*Fiscal Year 2019-2020

Blanket

Shop Online

*Vendor REALL

*Description View: Skyward Default Filter: Skyward Default

	Full Name	Vendor Number	Federal EIN	Full Order From Address
*Batch 	Really Good Stuff Llc	066377	06-0957692	PO Box 1111 Shelton, CT 06484-1110

3. Vendor - Enter the name of the company

4. Click **Select** on the appropriate vendor

Shop Online

*Vendor Really Good Stuff Llc PO Box 1111 Shelton, CT 06484-1110

*Description 3RD Grade Reading/Writing

5. Description - Enter information for internal reference. This information will **not** be printed on the Purchase Order & will **not** be conveyed to the vendor.

*Batch 20190925

*Ship To Anoka-Hennepin School District 2727 Ferry ST N Education Service Center Anoka, MN 55303

Delivery Instruction DELIVER TO WILSON ELEM

Attention To Secretary Name/Staff Name

Commodity

Due Date 09/25/2019 Wednesday

Contract PURSUANT TO CONTRACT CPC 16.16

Ship Date 09/25/2019 Wednesday

6. Delivery Instruction – Use the drop down arrow to find and select your site/location or the location of where the order should be delivered to.

7. Attention To – Let this field remain your name or change the name to reflect who the order should be delivered to.

**Please let all other remaining fields default with system auto-filled information*

Add Purchase Order

Enter Purchase Order Details

Save & Add Detail Save Cancel

PURCHASE ORDER DETAILS

8. Click on **Save & Add Detail** to begin entering the rest of the necessary order information

PURCHASE ORDER DETAIL DETAILS

Purchase Order Total (\$)

Purchase Order Detail Type

M - Merchandise

Catalog Item

165276

*Description

View: Skyward Default (Modified) Filter: Skyward

Commodity

No records to display

9. Catalog Item – Enter the SKU or Item # for the product being ordered
(Disregard the “No records to display” message that will pop up)

Catalog Item

165276

*Description

Print Cursive Zaner-Bloser Self-Adhesive Vinyl Desktop Helpers With 120 Grid

Commodity

*Quantity

2.00000

Unit of Measure

EACH

EACH

*Unit Cost (\$)

32.99000

Entry Amount (\$)

65.98

Project

Grant

10. Description – Enter a complete description of the product that is being ordered

11. Quantity – Enter the quantity being ordered

12. Unit of Measure – Select the appropriate UOM

13. Unit Cost – Enter the price of the product being ordered

ACCOUNT DISTRIBUTION

*Account

*Amount

Percent

01 E 116 203 000 401 000

65.98

100.00

Remove Account Distribution

14. Account – Enter & select the appropriate Budget Code to be encumbered

Add Purchase Order Detail

Enter Purchase Order Detail Details

Save & Submit

Save & Add Another

Save

15. Click the desired Save option

- **Save & Submit** if all information has been entered
- **Save & Add Another** if more detail lines are needed

- **Save** if you want to retain the information entered but need to come back to the order

PURCHASE ORDER DETAIL DETAILS

ENTERING A PURCHASE ORDER USING THE PUNCH-OUT (SHOP ONLINE) METHOD

There are 3 different types of PO entry:

- 1. Regular/Manual
- 2. **Punch-Out (Shop Online/eCommerce)** – The type of order which will allow the user to exit Skyward and enter into the vendor website to find and select needed items. The item information will then be auto-transferred into the Skyward PO Request
- 3. Catalog Download

Available eCommerce vendors are shown below:

*Ecommerce Vendor	*Description	*Batch	*Ship To	Delivery Instruction	Attention To
	View: Skyward Default Filter: Skyward Default				

Anoka-Hennepin School District

SKYWARD

ADMINISTRATIVE ACCESS

Administrative Access Employee Access

Account

Accounts Payable

Employee

Message Center

Payroll

Purchasing

Reporting

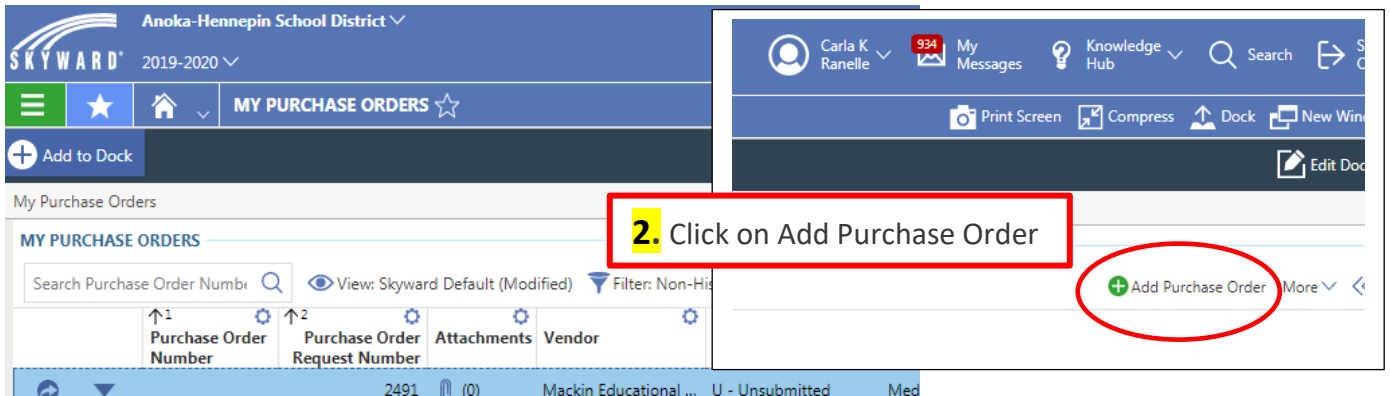
Vendor

Warehouse

FEATURES

- Ecommerce Ordering
- My Purchase Order**
- My Purchase Order Approvals
- Purchase Order
- Purchase Order Deliveries
- Receiving

1. From the Administrative Access Menu
Click on the Purchasing Tab
Click on My Purchase Order



2. Click on Add Purchase Order

Add Purchase Order
Enter Purchase Order Details

PURCHASE ORDER DETAILS

*Purchasing Group: 07558 DW Finance

*Fiscal Year: 2019-2020

Shop Online

*Ecommerce Vendor: Staples Business Advantage 1233 West Co Rd E PO Box

*Description: Office Supplies

*Batch: 20190918

*Ship To: Anoka-Hennepin School District 2727 Ferry ST N Education Service Center Anoka, MN 55202

Delivery Instruction: DELIVER TO MORRIS BYE

Attention To: HENDERSON/ART DEPT

Commodity: [dropdown]

Due Date: 09/18/2019 Wednesday

Contract: [empty]

Ship Date: 09/18/2019 Wednesday

3. Select the **Shop Online** option

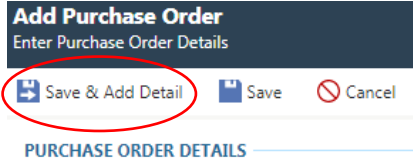
4. Select the **eCommerce Vendor** from the drop down list

5. **Description** - Enter information for internal reference. This information will **not** be printed on the Purchase Order & will **not** be conveyed to the vendor.

6. **Delivery Instruction** – Use the arrow to find and select your site/location or the location of where the order should be delivered to.

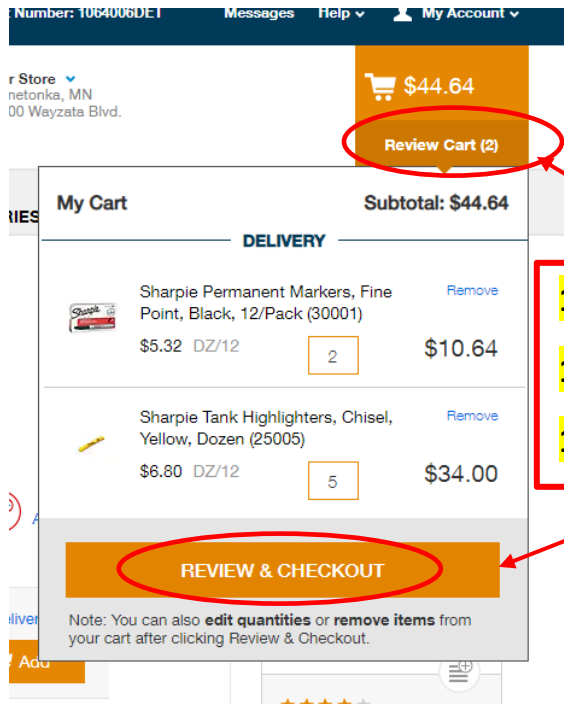
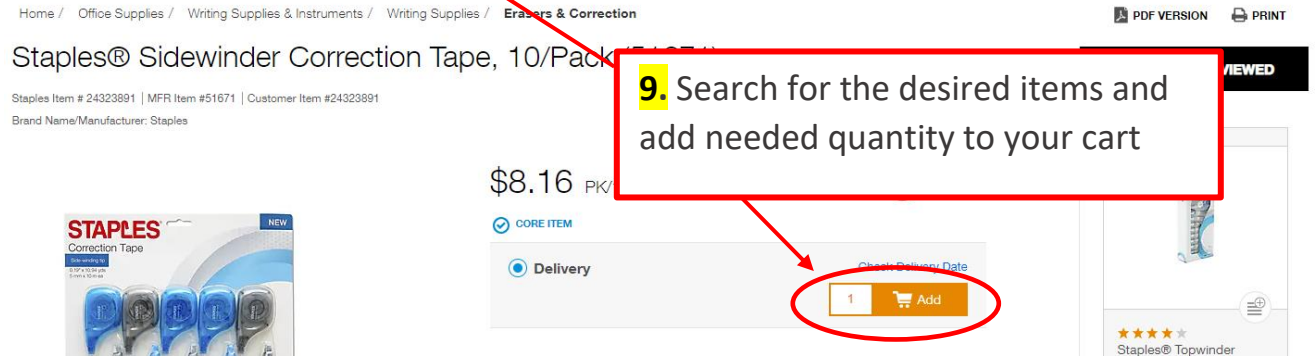
7. **Attention To** – Let this field remain your name or change the name to reflect who the order should be delivered to.

**Please let all other remaining fields default with system auto-filled information*



8. Click on **Save & Add Detail** to be directed to the eCommerce vendor website
THERE WILL BE A PAUSE...WAIT...

There will be a pause & you will be back on a Skyward screen but... wait & you will be directed to the website for the selected eCommerce Vendor



Assign Purchase Order Accountings to this Purchase Order

Enter Account Distribution

Save & Submit Save Cancel

PURCHASE ORDER DETAILS

PURCHASE ORDER ACCOUNT DISTRIBUTION

Account

Percent

01 E 005 001 000 401 000

100.00

+ Add Account Distribution

14. Add your Budget Code to the **Account** Field

15. Click **Save & Submit**

Sometimes Skyward will log you off after you have Submitted your cart. If that is the case, you can sign back in so that you can add your Budget Code and then Save/Submit your order.



ANOKA-HENNEPIN
SCHOOLS
A future without limit

Anoka-Hennepin School District

i This session terminated because a sign in was detected from a different window or computer. Please verify that you are not signed in multiple times.

Enter the same Username & Password you use when logging into the AH District Lock & Key

Username

First_Last

Password

Sign In >

[Forgot your Username or Password?](#)

OR

**Sign In with
AHConnect**

FYI - Sometimes just clicking this box will sign you back in without having to enter your Username/Password

Anoka-Hennepin School District
SKYWARD 2019-2020
MY PURCHASE ORDERS

My Purchase Orders

MY PURCHASE ORDERS

Search Purchase Order Number

View: Skyward Default (Modified)

Purchase Order Number	Purchase Order Request Number	Attachments	Vendor
2491	(0)	(0)	Mac
2588	(0)	(0)	Tun
3473	(0)	(0)	Stap
3765	(0)	(0)	Staples Business Ad... U - Unsubmitted

Go back to your Purchase Order list (**MY** Purchase Order)

Find the eCommerce order you just entered

Go into the order by clicking the **Circle/Arrow**

SKYWARD 2019-2020
MY PURCHASE ORDER DETAILS

My Purchase Orders > My Purchase Order Details

Purchasing Group: 07558 - DW Finance
Purchase Order Request Number: 3765
PO Number: [Empty]
Vendor: Staples

General
Purchase Order Details
Account Summary
Receivings
Approvals
Invoices
Deliveries

ACCOUNT SUMMARY

No records to display

Click on the **Account Summary** Tab on the left of your screen

Assign Purchase Order Accountings to this Purchase Order
Enter Account Distribution

Save & Submit Save Cancel

PURCHASE ORDER DETAILS

PURCHASE ORDER ACCOUNT DISTRIBUTION

Account	Percent
01 E 005 001 000 401 000	100.00

+ Add Account Distribution

Add your Budget Code to the **Account Field**

Click **Save & Submit**

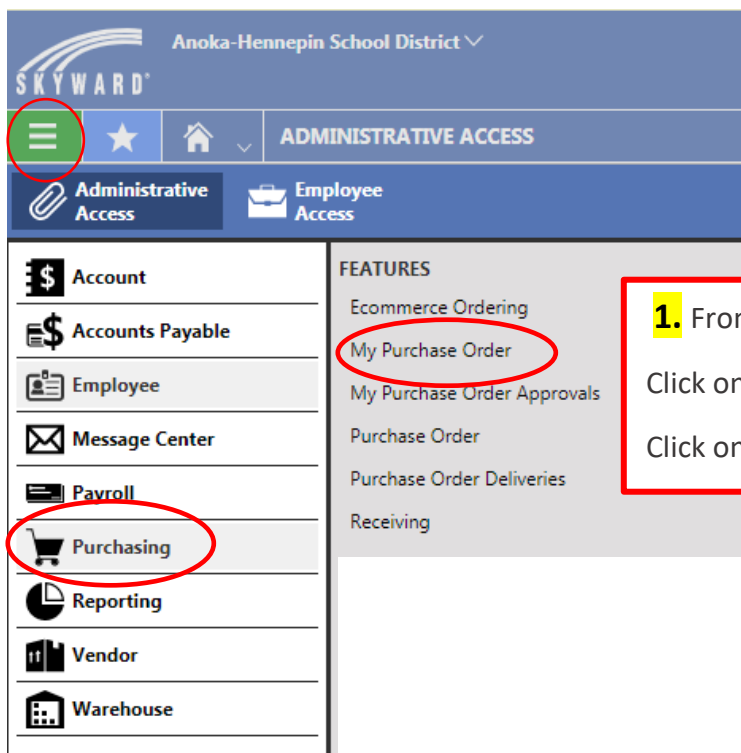
ENTERING A PURCHASE ORDER USING THE CATALOG DOWNLOAD METHOD

There are 3 different types of PO entry:

1. Regular/Manual
2. Punch-Out (Shop Online/eCommerce)
3. **Catalog Download** - The type of order that utilizes a pre-loaded catalog of items in Skyward. Limited information such as Item # & Quantity are entered when completing the PO Request & then Unit Cost (Price), Unit of Measure (UOM), & Item Description are auto-filled by Skyward.

Available Catalog Downloads are shown below:

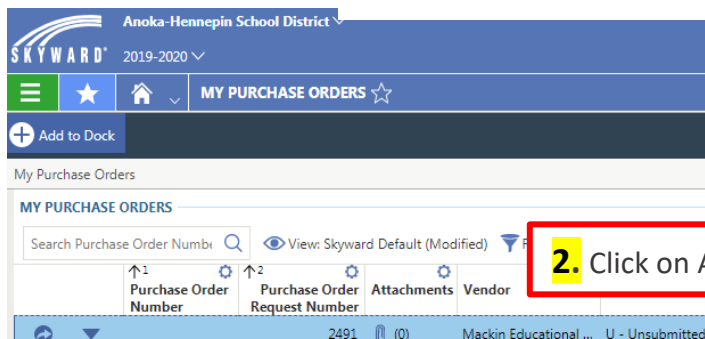
- 1. Continental Clay**
- 2. Loffler (Toner)**
- 3. School Health**



1. From the Administrative Access Menu

Click on the Purchasing Tab

Click on My Purchase Order



2. Click on Add Purchase Order

+ Add Purchase Order

Add Purchase Order

Enter Purchase Order Details

 Save & Add Detail  Save  Cancel

PURCHASE ORDER DETAILS

*Purchasing Group

*Fiscal Year

Blanket

Shop Online

> *Vendor

> *Description **5. Description** - Enter information for internal reference. This information will **not** be printed on the Purchase Order & will **not** be conveyed to the vendor.


*Batch

*Ship To


> Delivery Instruction

> Attention To

Commodity

Due Date 

Contract

Ship Date 

6. Delivery Instruction – Use the arrow to find and select your site/location or the location of where the order should be delivered to.

7. Attention To – Let this field remain your name or change the name to reflect who the order should be delivered to.

**Please let all other remaining fields default with system auto-filled information*

Add Purchase Order

Enter Purchase Order Details

 Save & Add Detail  Save  Cancel

PURCHASE ORDER DETAILS

8. Click on **Save & Add Detail** to begin entering the rest of the necessary information

Add Purchase Order Detail
Enter Purchase Order Detail Details

Save & Submit Save & Add Another Save Cancel

Purchase Order Request Number: 4879
Purchase Order Number: []
Vendor: Loffler Companies Inc
Status: U - Unsubmitted

PURCHASE ORDER DETAIL DETAILS

Purchase Order Total (\$) []

Purchase Order Detail Type: M - Merchandise

Catalog Item: hp20

*Description: View: Skyward Default (Modified) Filter: Skyward Default

	Catalog Item Number	Catalog Effective Date	Catalog Description
Commodity	Select HP201X CF400XC	09/18/2019	Loffler Catalog rev. 9
*Quantity	Select HP201X CF400XC	08/29/2019	DNU: Loffler Catalog
	Select HP201X CF401XC	09/18/2019	Loffler Catalog rev. 9
Unit of Measure	Select HP201X CF401XC	08/29/2019	DNU: Loffler Catalog e...
*Unit Cost (\$)	Select HP201X CF402XC	09/18/2019	Loffler Catalog rev. 92...

9. Catalog Item – Enter the **Item #** for the product being ordered. **Select** the correct item from the list. The number must be correct for the catalog download to work (If the “No records to display” message pops up then either the Item # provided was incorrectly typed or the item is not available in the download & the remaining information will not auto-fill. Please proceed then to complete the **Description, UOM & Unit Cost** fields manually.)

DNU = Do Not Use/Select

PURCHASE ORDER DETAIL DETAILS

Purchase Order Total (\$) 108.88

Purchase Order Detail Type: M - Merchandise

Catalog Item: HP201X CF401XC

*Description: CLR LaserJet Pro M252 MFP M2 High Yield Cyan OEM LaserJet Toner Y

Commodity: []

*Quantity: 1.00000

Unit of Measure: EACH

*Unit Cost (\$): 108.88

Entry Amount (\$) 108.88

Project: []

Grant: []

Description – This field will auto-fill with pre-loaded catalog information

10. Quantity – Enter the quantity being ordered

Unit of Measure & Unit Cost – These fields will auto-fill with pre-loaded catalog information

ACCOUNT DISTRIBUTION

*Account: 01 E 112 050 291 401 000

11. Account – Enter & select the appropriate Budget Code to be encumbered

Add Purchase Order Detail
Enter Purchase Order Detail Details

Save & Submit Save & Add Another Save

12. Click the desired **Save** option

- **Save & Submit** if all information has been entered
- **Save & Add Another** if more detail lines are needed
- **Save** if you want to retain the information entered but need to come back to the order

ENTERING A BLANKET PURCHASE ORDER

- Open PO's
- One Time Pick-Up PO's
- PO's for services (for example repairs)
- Book Orders when there are over 10 different titles being ordered (must attach a quote with these kinds of book orders)

Anoka-Hennepin School District

SKYWARD

ADMINISTRATIVE ACCESS

Administrative Access Employee Access

Account

Accounts Payable

Employee

Message Center

Payroll

Purchasing

Reporting

Vendor

Warehouse

FEATURES

Ecommerce Ordering

My Purchase Order

1. From the Administrative Menu
Click on the Purchasing Tab
Click on My Purchase Order

Anoka-Hennepin School District

SKYWARD

2019-2020

MY PURCHASE ORDERS

Print Screen Compress Dock New Window

Edit Dock

My Purchase Orders

MY PURCHASE ORDERS

Search Purchase Order Number

View: Skyward Default (Modified) Filter: Non-Hi

Purchase Order Purchase Order Attachments Vendor

+ Add Purchase Order More

2. Click on Add Purchase Order

Add Purchase Order

Enter Purchase Order Details

Save & Add Detail Save Cancel

PURCHASE ORDER DETAILS

*Purchasing Group 11610 Wilson Elementary

*Fiscal Year 2019-2020

Blanket

3. Select the **Blanket** option

Shop Online

*Vendor REALL

4. **Vendor** - Enter the name of the company

*Description View: Skyward Default Filter: Skyward Default

5. Click **Select** on the appropriate vendor

	Full Name			
*Batch	Really Good Stuff Llc	066377	06-0957692	PO Box 1111 Shelton, CT 06484-1110

Shop Online

*Vendor Really Good Stuff Llc PO Box 1111 Shelton, CT 06484-1110

*Description Open PO for Science Supplies

6. **Description** - Enter information for internal reference. This information will **not** be printed on the Purchase Order & will **not** be conveyed to the vendor.

*Batch 20190925

*Ship To Anoka-Hennepin School District 2727 Ferry ST N Education Service Center Anoka, MN 55303

Delivery Instruction DELIVER TO WILSON ELEM

7. **Delivery Instruction** – Use the drop down arrow to find and select your site/location or the location of where the staff member(s) using the PO are located.

Attention To Secretary Name/Staff Name

Commodity

Due Date 09/25/2019 Wednesday 31

Contract PURSUANT TO CONTRACT CPC 16.16

Ship Date 09/25/2019 Wednesday 31

8. **Attention To** – Let this field remain your name or change the name to reflect who the order should be delivered to.

**Please let all other remaining fields default with system auto-filled information*

Add Purchase Order

Enter Purchase Order Details

Save & Add Detail Save Cancel

PURCHASE ORDER DETAILS

9. Click on **Save & Add Detail** to begin entering the rest of the necessary order information

Add Purchase Order Detail

Enter Blanket Purchase Order Detail Details

Save & Submit Save & Add Another Save Cancel

BLANKET PURCHASE ORDER DETAIL DETAILS

Purchase Order Total (\$) 250.00

Purchase Order Detail Type M - Merchandise

***Description** Open PO for Beakers, Marbles, Beads, etc.
Authorized Users: Pam Smith, Dale Johnson
Valid until 06/10/2020

Commodity

***Unit Cost (\$)** 250.00000

Entry Amount (\$) 250.00

Project

Grant

10. Description – Enter a description of some of the items or types of items that will be purchased with the PO & who is authorized to use the PO to make purchases. Include an expiration date of the PO as well.

11. Unit Cost – Enter the maximum dollar amount that can be spent on the purchases needed

ACCOUNT DISTRIBUTION

*Account	*Amount	Percent
01 E 005 813 000 401 000	250.00	100.00

12. Account – Enter & select the appropriate Budget Code to be encumbered

Add Purchase Order Detail

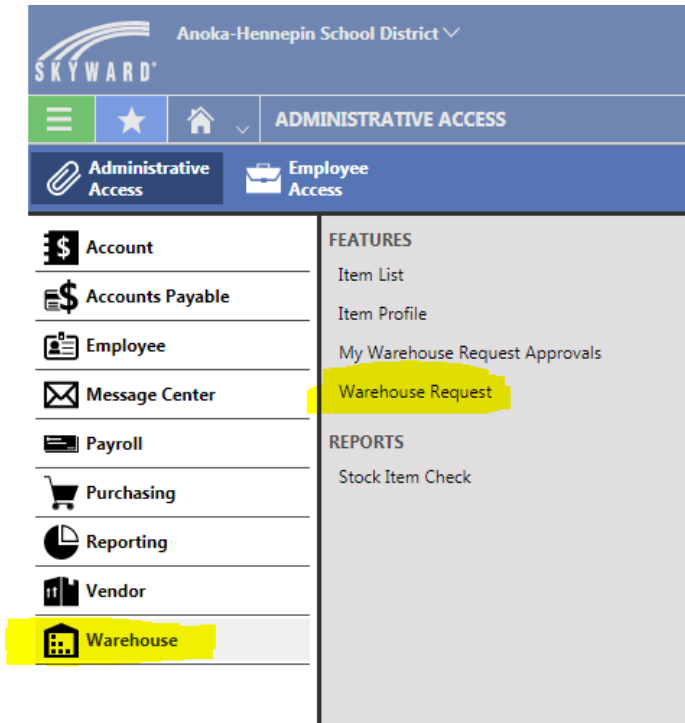
Enter Purchase Order Detail Details

Save & Submit Save & Add Another Save

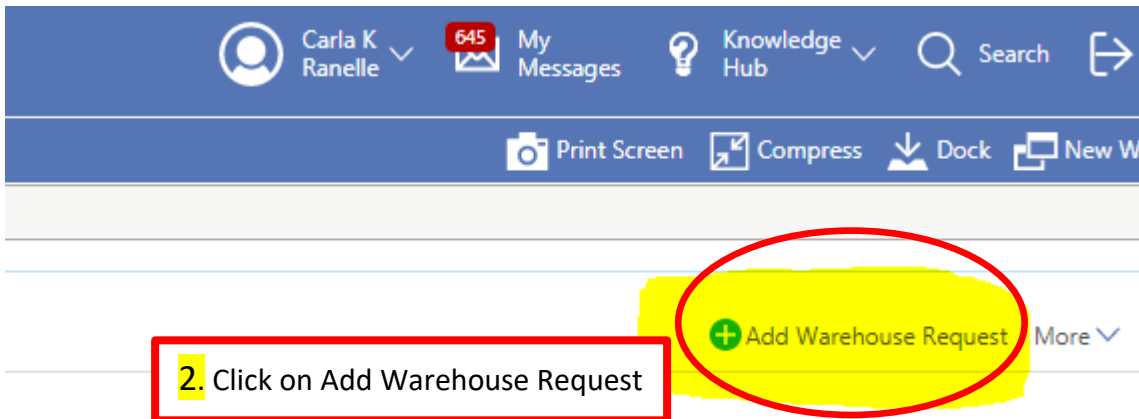
PURCHASE ORDER DETAIL DETAILS

13. Click the desired Save option
- **Save & Submit** if all information has been entered
- **Save & Add Another** if more detail lines are needed
- **Save** if you want to retain the information entered but need to come back to the order

ENTERING A WAREHOUSE REQUEST



1. From the Administrative Menu
Click on the **Warehouse** Tab
Click on **Warehouse Request**



2. Click on Add Warehouse Request

Add Warehouse Request
Enter Warehouse Request Details

Save & Add Detail Save Cancel

WAREHOUSE REQUEST DETAILS

*Warehouse Request Group 30610 Anoka-Hennepin Re

*Fiscal Year 2019-2020

*Delivery Instructions DELIVER TO ANOKA REGIONAL HS

*Requested For Johnson, Jane

*Request Date 09/12/2019 Thursday

3. DELIVERY INSTRUCTIONS -
Please enter the location of where your WHSE Request should be delivered to. *(You can also include a staff member's name if you would like)*

4. Click Save & Detail

Do NOT change these fields!

Add Warehouse Request Detail
Enter Warehouse Request Detail Details

Save & Submit Save & Add Another Save Cancel

Warehouse Request Number 1162 Requested For Ranelle, Carla K Request Date 09/12/2019 Status U - Unsubmitte

WAREHOUSE REQUEST DETAIL DETAILS

Warehouse Request Total 1.18

*Item 21G005 - CONST. PAPER, BLACK, 12X18, 50 SHTS/PK

Stock Unit of Measure PK PACKAGE

*Stock Quantity 1.00000

*Unit Cost 1.18448

*Amount 1.18

ACCOUNT DISTRIBUTION

*Account Amount

01 E 005 001 000 401 000

Add Account Distribution

5. Enter the Stock Item # needing to be ordered (this field is also searchable by item name)

6. Enter the Quantity that is needed

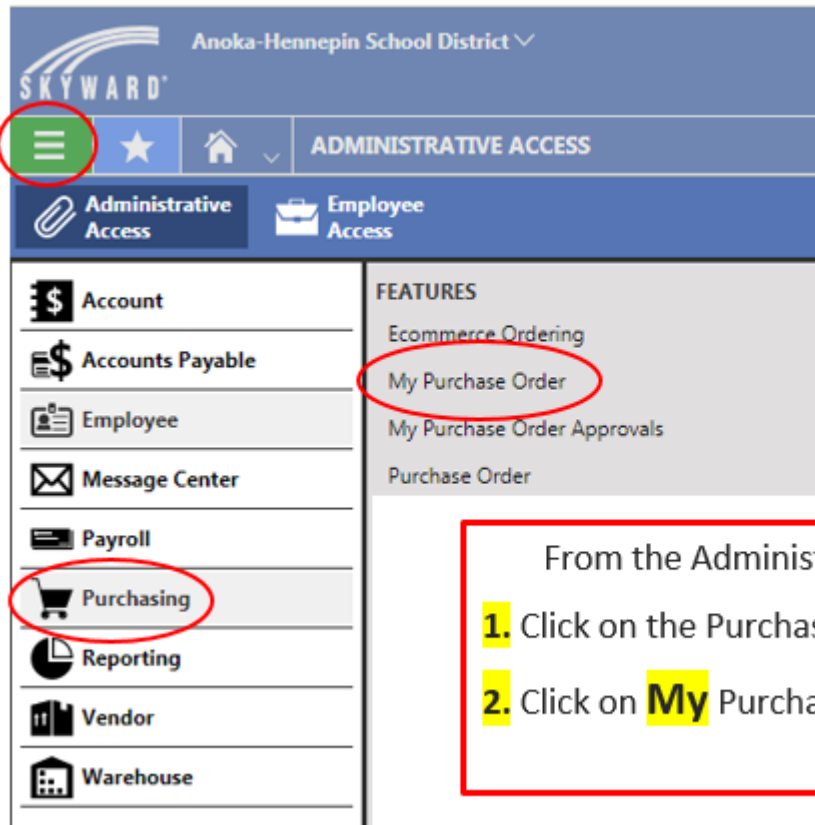
** The Unit Cost & Amount will auto-fill for you **

7. Account - Enter the Budget Code to be charged

8. Click Save & Add Another if more items are to be entered or **Save & Submit** when all items have been entered

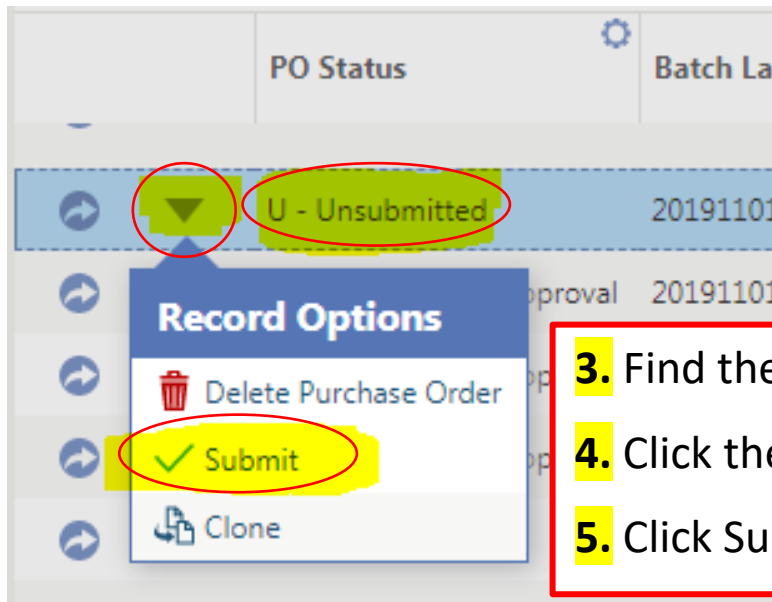
Submitting an Unsubmitted but Saved Purchase Order Request

Sometimes a PO request needs to be entered but can't be submitted for various reasons. The request can be saved and then submitted at a later time. These steps walk through the process of submitting a saved request that shows a status of U- Unsubmitted.



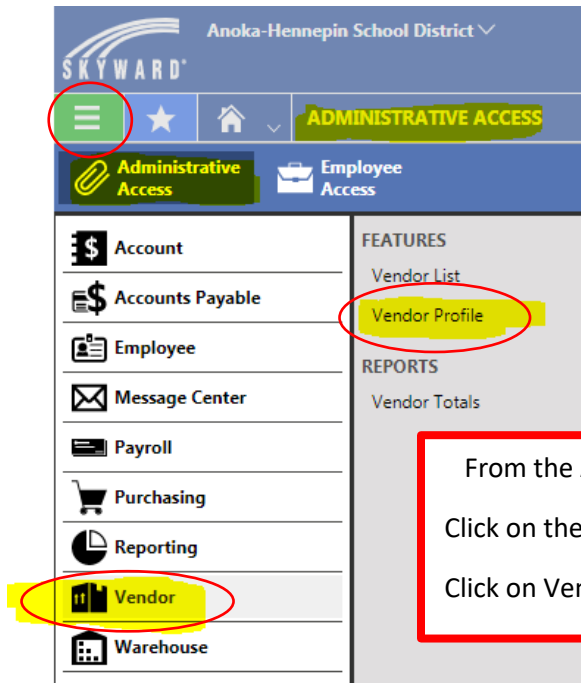
From the Administrative Menu

1. Click on the Purchasing Tab
2. Click on **My** Purchase Order

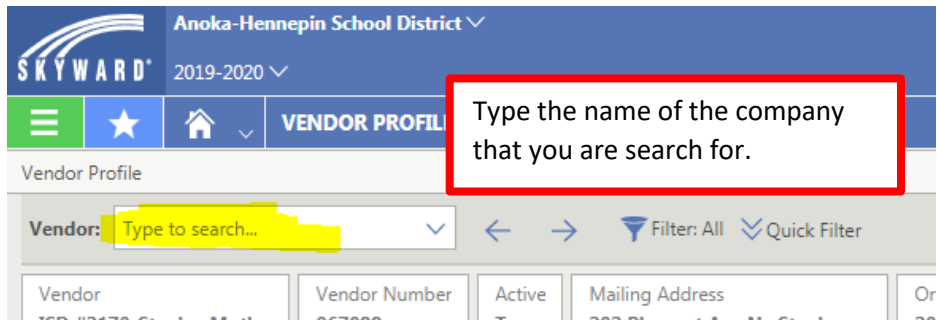


3. Find the Unsubmitted Request
4. Click the upside down triangle
5. Click Submit

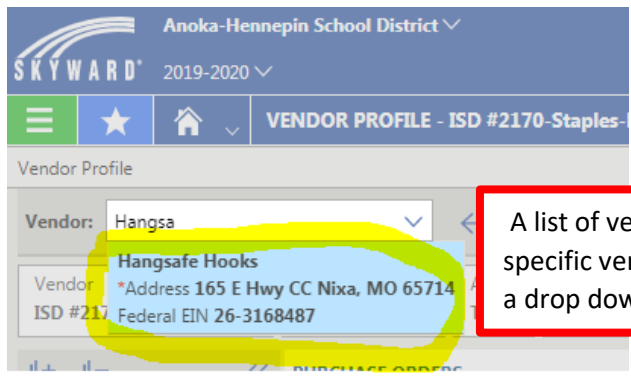
Searching for a Skyward Vendor



From the Administrative Access Menu
Click on the Vendor Tab
Click on Vendor Profile



Type the name of the company
that you are search for.



A list of vendors or just the
specific vendor will show as
a drop down result.

If your vendor is shown, then you
may proceed back to the
Administrative Access Menu and
enter a Purchase Order Request.

RECEIVED ORDER INQUIRY

Most orders are received first in the ESC Warehouse and then from there they are delivered to your location. If you are wanting to find out when items were received at the Warehouse you can easily look up the information in Skyward.

(If you find that the items have been received at the Warehouse but still have not been delivered to your site you can contact the Warehouse and request an ETA)

	PO Status	Purchase Order Number	PO Request Number	Batch Label	Amount	Attachments	Vendor	General Header Description
	O - Open	105102000004	1694	20190821	115.49	(0)	Staples Business Advantage	Office supplies
	O - Open	105102000005	1749	20190822	174.59	(0)	Staples Business Advantage	Office supplies Please ship to Linco
	O - Open	105102000006	2023	20190828	136.48	(0)	Staples Business Advantage	Office supplies
	H - History	105102000007	2035	20190828	167.25	(0)	Staples Business Advantage	Curriculum supplies grade 4
	H - History	105102000008	2295	20190903	11.57	(0)	Staples Business Advantage	Office supplies
	O - Open	105102000009	2330	20190904	813.95	(0)	School Specialty Inc	Art supplies
	O - Open							ce supplies
	O - Open							supplies
	O - Open							n PO printer repair
	O - Open							ce supplies
	B - Batch							ce supplies

Go to your MY Purchase Order list
Find the order you are needing to look at
Go into the order by clicking the Circle/Arrow

Atoka-Hennepin School District
SKYWARD 2019-2020
PURCHASING : PURCHASE ORDER DETAILS
Purchase Order List > Purchase Order Details
Purchasing Group: 10510 - Lincoln Elementary
Purchase Order Request Number: 2330
PO Number: 105102000009
Purchase Order Details
Purchase Order Request Number: 2330
Purchase Order Number: 105102000009
Vendor: School Specialty Inc
Commodity: [dropdown]
Due Date: 09/04/2019 Wednesda
Contract: [input]
Description: Art supplies

Click on the Receivings Tab

← PURCHASE ORDER DETAIL

Search Display Order View: Skyward Default (Modified) Filter: Skyward Default Quick Filter

Display Order	Catalog Item	Description	Quantity Ordered	Quantity Received	Receivable
1	1428979	PAINT CRAYOLA PREMIER TEMPERA FLUOR ASST PINT SET OF 6	1.00000	0.00000	☑
2	007704	PAINT TEMPERA WASH CRAYOLA ARTISITA II BLACK QUART	1.00000	1.00000	☑
3	007707	PAINT TEMPERA WASH CRAYOLA ARTISITA II BLUE QUART	1.00000	1.00000	☑
4	007710	PAINT TEMPERA WASH CRAYOLA ARTISITA II BROWN QUART	1.00000	1.00000	☑
5	007716	PAINT TEMPERA WASH CRAYOLA ARTISITA II GREEN QUART	1.00000	1.00000	☑
6	007722	PAINT TEMPERA WASH CRAYOLA ARTISITA II PURPLE QUART	1.00000	1.00000	☑
7	007725	PAINT TEMPERA WASH CRAYOLA ARTISITA II RED QUART	1.00000	1.00000	☑
8	007860	PAINT TEMPERA CRAYOLA PREMIER TURQUOISE PINT	1.00000	1.00000	☑

RECEIVING

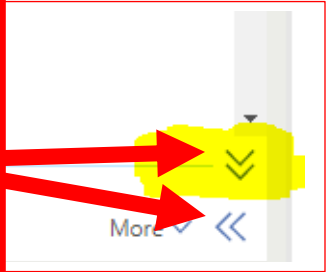
MM/DD/YYYY View: Skyward Default Filter: Skyward Default

Received Date	Received By	Quantity Received
09/11/2019 13:08 PM	McLaughlin, Anita L	1.00000

You will now be able to see which line items have been Received at the Warehouse.

To see the date items were Received at the Warehouse you will need to Toggle up the bottom portion of your screen.

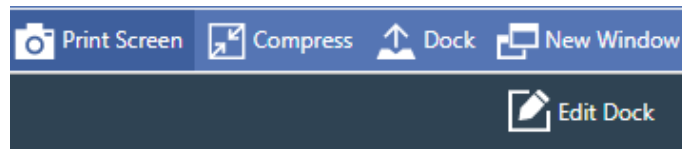
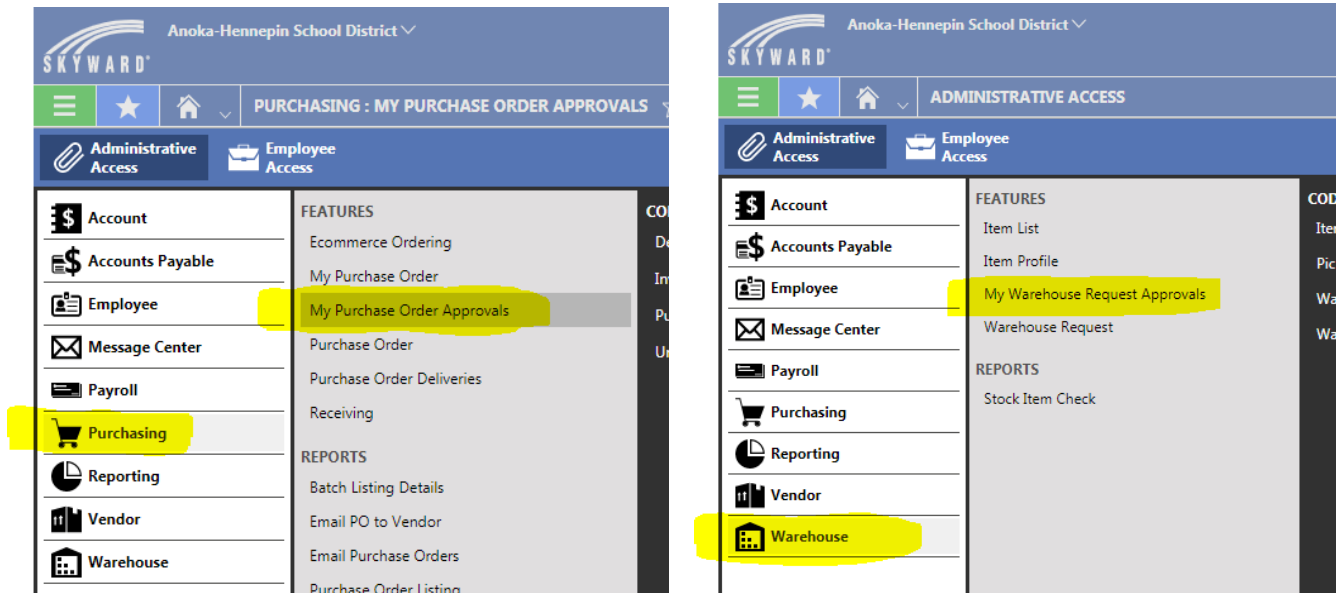
Look over to the right side of your screen & Click the Double Carrots.
 (Double Carrots = Toggle Up/Down or Right/Left)



Approving Multiple Purchase Order Requests & Multiple Warehouse Requests

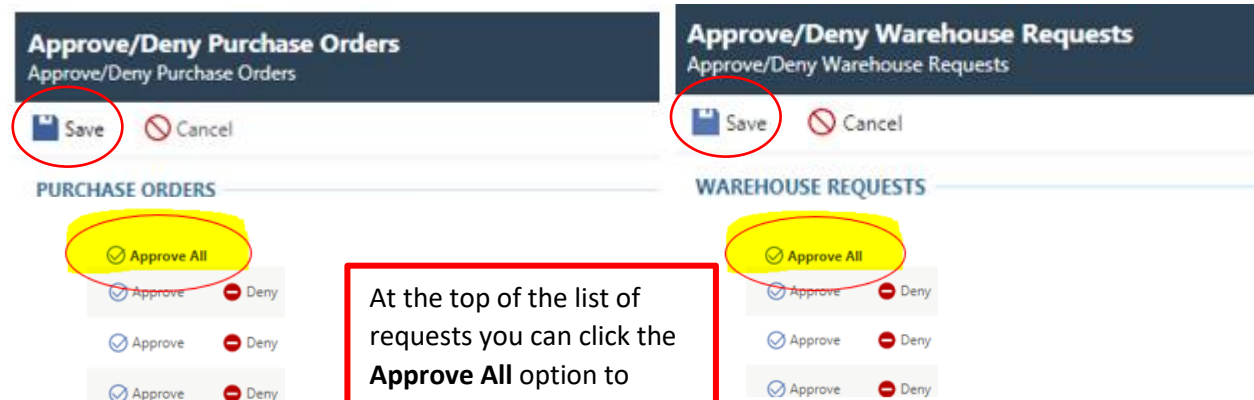
If you have approval responsibilities for Skyward orders you may find it easier to approve multiple requests all at once instead of approving each request individually.

1. Purchase Orders must be approved via the Purchasing Tab > My Purchase Order Approvals
2. Warehouse Orders must be approved via the Warehouse Tab > My Warehouse Request Approvals



Look to the right of your screen and click the **Mass Approve/Deny** option

Mass Approve/Deny More



At the top of the list of requests you can click the **Approve All** option to approve all of the entries.

Click **Save** to complete the approval action

ATTACHING DOCUMENTS TO A PURCHASE ORDER

1. Go to MY PURCHASE ORDERS & from your list find the order that requires an attachment.
Click the **Paper Clip** icon

2. Click on + Add Attachment

Attachments MUST be in PDF format!!!!

3. Click on Select Files and then choose the needed document to attach

	Attachment Type Code	Attachment Type Description
Select	Default	Default
Select	Internal	Internal Use Only (AH)
Select	Send To	Send To Vendor w/PO

4. Select the appropriate Attachment Type. (It will typically be "Send to Vendor" but it may be "Internal Use Only" for docs that are NOT needed by the vendor.)

5. Click Save or Save & Add Another if there are more attachments to be added.

“Why does it take so long to get my order?”

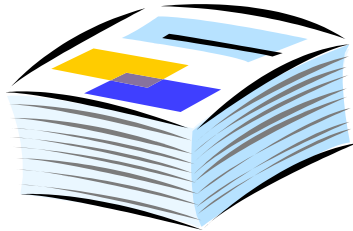
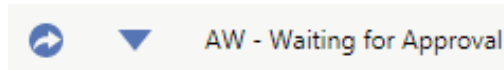
Have you ever been asked that question? (Have you ever asked that question yourself?) Orders can take anywhere from 1-6 weeks to be received by a requesting staff member because there are many steps in the process of getting what is needed. Here is a (very simplified) example of what steps are taken when an order is placed.

The Amazing Life Cycle of an Order



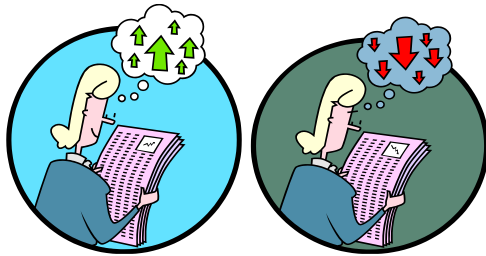
Step One: An order is taken and a PO Request is created

- 1) A Secretary is given an order request from a staff member.
- 2) The order request goes through the appropriate channels to obtain the authorization of the expenditure.
- 3) The Secretary enters the information into Skyward and a Request # is generated. *(Hopefully all the necessary information has been provided by the requesting staff member in order to enter the order accurately)*
- 4) The Request is approved at the school/department level.



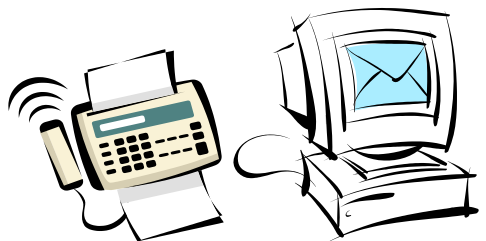
Step Two: The PO Request is Approved & a PO # is issued

- 1) The next business day after the Request is approved the Purchasing Dept. does a second Approval so that the PO Request can be processed.
- 2) The Request is assigned a Purchase Order #.
- 3) Each PO Request is printed out.



Step Three: The order is reviewed

- 1) Each order is reviewed for accuracy and completeness by the Purchasing Dept. Each line is reviewed to determine if further information and/or approvals are needed.
- 2) Budget codes are reviewed to determine if the expenditure is coded correctly.
- 3) The order is put on HOLD if needed and corrections are made as necessary.
- 4) Information such as Quotes/Special Order instructions are collected as necessary.



Step Four: A Purchase Order is printed and the order is Delivered

- 1) Each reviewed and approved Purchase Order is Delivered to the corresponding vendor either by email or fax.





Step Five: The Purchase Order is processed by the vendor

- 1) Each vendor will process the Purchase Order they have received by our school district according to their own internal processes.
- 2) If a vendor has a question on an order or needs further information/clarification they will contact the Purchasing Dept. (*Most vendors are good at this, but not all.*)
- 3) If further information is requested the Purchasing Dept. will contact the requesting district employee to collect the needed information and relay that back to the vendor.

  O - Open



Step Six: The order is shipped

- 1) Each vendor will ship the order according to their policies or per any special instructions provided.
- 2) Shipment times are determined by the method of shipment (*freight vs ground vs USPS etc.*) and location from where the order is shipping from.

  O - Open



Step Seven: The order is received in the Distribution Center

- 1) Orders arrive at the District Office Distribution Center (*Warehouse*).
- 2) Each shipment is sorted and matched to the appropriate Purchase Order.
- 3) Each item is compared to the Purchase Order by Distribution Center staff to determine what has been received and what is on back order. (*This information is entered into Skyward by the Purchasing Dept.*)
- 4) Orders are then distributed to individual departments and schools according to the Distribution Center shipping schedule.

  H - History



Step Eight: The school/department receives the order

- 1) The requesting school or department receives the order that was placed according to the delivery schedule established by the Distribution Center.
- 2) The items are reviewed and distributed accordingly.
- 3) Any invoices received by the vendor can now be paid.

  H - History

One Last Interesting Tidbit:

In 2019 the Purchasing Department processed & sent out approximately **14,000** Purchase Orders & that number is expected to rise each year.