Skyward Purchasing Requisition Manual

Skyward School Business Suite, Purchasing

Prepared for
Escambia County School District

Date: January 24, 2018
Version 3.0

DOCUMENT CONTROL

Author	Skyward Configuration Management Team
Title	Skyward School Business Suite: Purchasing
File Name	Skyward Training-Purchasing_v3.0.docx
Milestone	Configuration Management
Last Edited	1/24/18
Number of Pages	40

Version	Revision Date	Revision Comments	Author
1.0	06/10/2012	Created Document	PMO
2.0	08/22/2014	Modifications/Corrections	ADK
3.0	01/24/2018	Updates	CJD

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Chapter 1. Requisitions

This chapter describes how to create requisitions using the Requisitions Main Screen from the SKYWARD web client. Access to create requisitions is limited to the Bookkeeper or other designated staff.

What is Requisition Entry?

Requisition Entry allows users to enter requests for items that they would like to have purchased. These requests follow an approval chain, eventually turning fully approved requisitions into Purchase Orders.

What should I know before entering a Requisition?

*Purchasing Cards should be used when the total purchase is below $3,499 and the item being purchased is not on the prohibited list for Purchasing Card Purchases. You can obtain approval to purchase via a Purchasing Card for orders totaling over $3,499 by: sending an email request to the Director of Purchasing and indicating if Federal Funds will be used. If Federal Funds are used, then: obtain three written quotes, or, if applicable, obtain a Sole Source Letter, or use a bid/cooperative. Also tagged capital items can be purchased using a Purchasing Card if approved via email request to the Director of Purchasing.

*All purchases over $50,000 must be approved by the School Board. For all requisitions requiring Board approval, allow up to ten weeks for the requisitions to be processed.

*Three written quotes must be obtained for all purchases over $7,500.

*For all requisitions using Federal Funds totaling $3,500 and above: three written quotes, use of a bid/cooperative or, if applicable, a Sole Source Letter is required.

*When requisitioning Professional Services, a Professional Services Agreement must be completed, and attached to the requisition, as a Word document. Use this link for "Steps for Processing a Professional Services Agreement (PSA)": http://ecsd-fl.schoolloop.com/file/1400654021508/1400654019591/903170382170695214.pdf

Overview

The high-level processes required to create a requisition are outlined below.

Step 1: Navigate to the Requisitions Main Screen
Step 2: Add a New Requisition
Step 3: Enter Master Requisition Information
Step 4: Enter Requisition Information
Step 5: Add Requisition Detail Lines
Step 6: Add an Attachment
Step 7: Add Requisition Accounts Distribution
Step 8: Add an Attachment
Step 9: Submit for Approval

Chapter 2. Logging into Skyward

The Skyward Web application is accessible via the Escambia County Schools Home Page by clicking on "Staff", scrolling down and clicking on "Skyward" or via a desktop icon. Double-click the icon to launch the Skyward Web application.

The URL is
https://skyward.iscorp.com/scripts/wsisa.dll/WService=wsfinescambiafl/seplog01.w

<table>
<tr><td colspan="2">The following login screen will appear. Enter your Skyward Login ID and Password.</td></tr>
<tr><td>The Skyward Login ID is the same as your Novell User ID.
First Initial and Last Name e.g. AKlinginsmith</td><td rowspan="3">
</td></tr>
<tr><td>The Skyward Password is the same as your Novell Network Password.</td></tr>
<tr><td>If you require assistance logging in, contact the IT Help Desk, (850) 462-9493.</td></tr>
</table>

The Main Screen will open, displaying modules that you have access to.

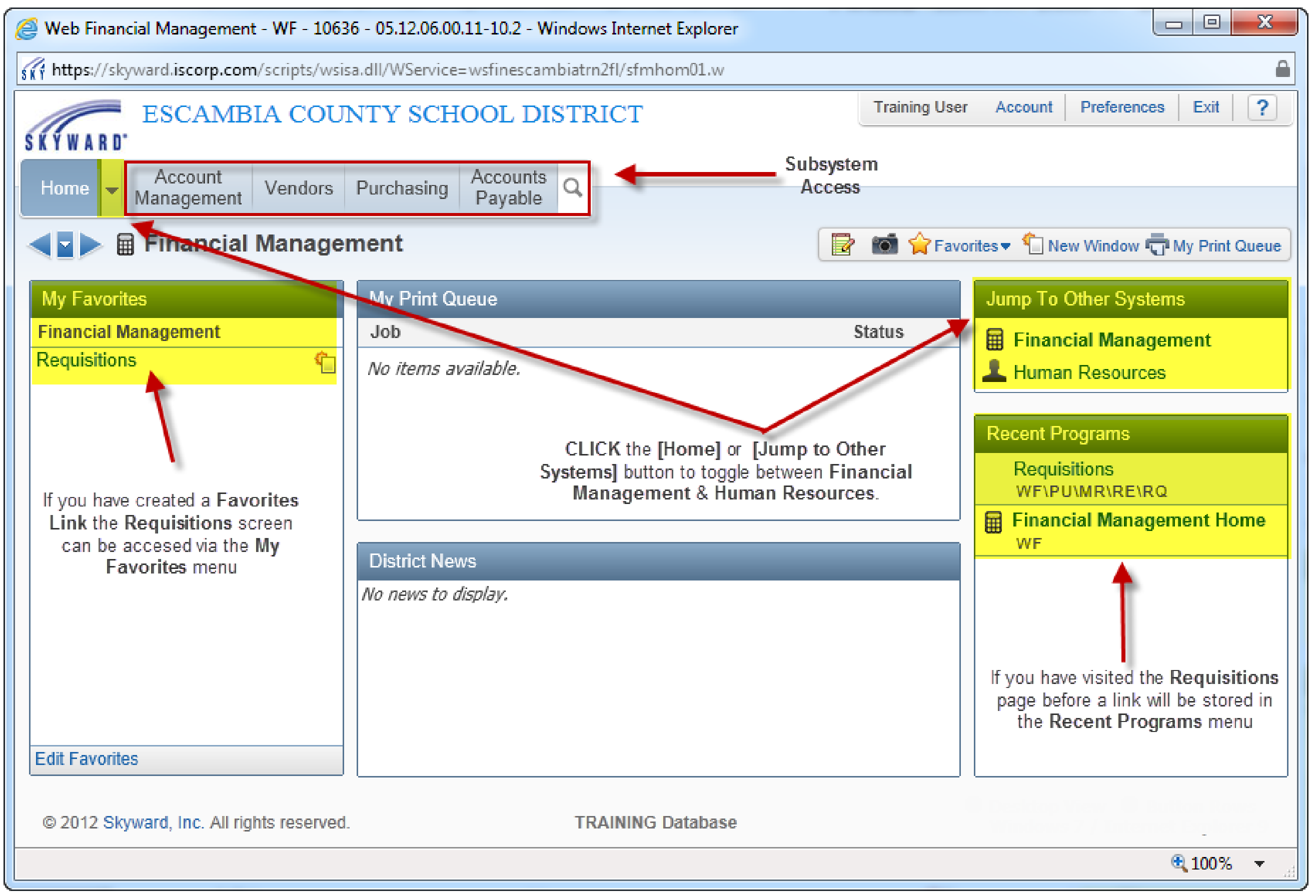
Chapter 3. Enter a Requisition

The following is the Desktop view of the web version of Skyward. To navigate to the Financial Management or Human Resources Module, select the appropriate system in the "**Jump to Other Systems"** panel or click the **[Home]** button and select the appropriate system.

Step 1: Navigate to the Financial Management System

Requisitions are entered under the Financial Management Module. Verify that you are in the Financial Management Module. Your screen may differ from the example below.

From the Main Screen	
3.1.1	Click ON ***JUMP TO OTHER SYSTEMS:*** **Financial Management** or
3.1.2	Click the  Button and select **Financial Management** from the selection of systems

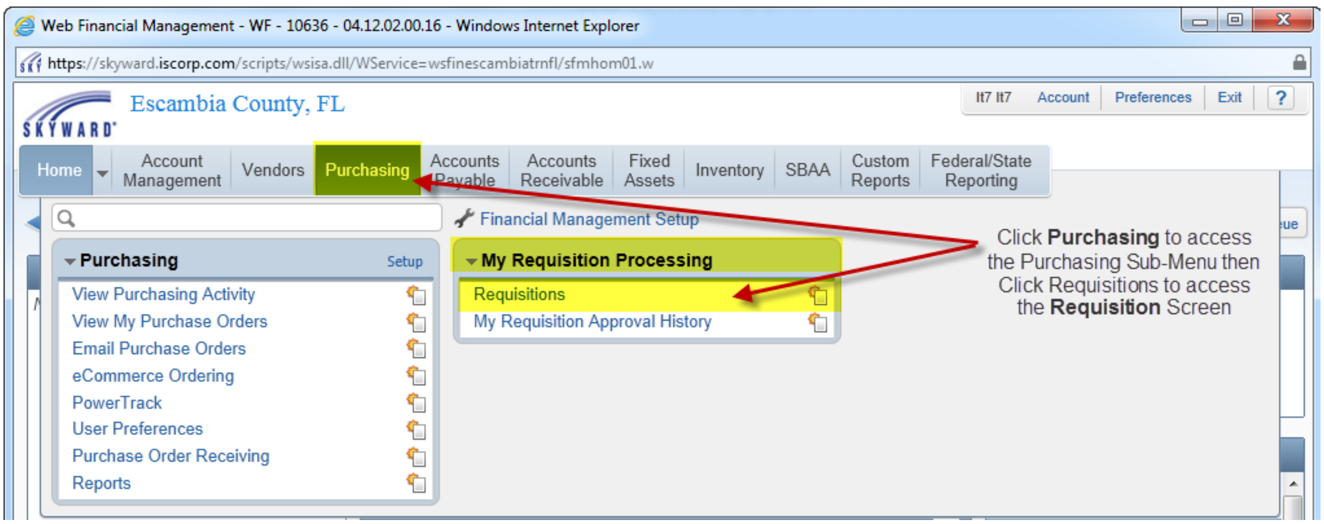


Step 2: Navigate to Requisitions Main Screen

Requisitions are entered under the Financial Management Module. Verify that you are in the Financial Management Module.

From the Financial Management System Main Screen

3.2.1	Select Purchasing from the Financial Main Menu,
3.2.2	Select *MY REQUISITION PROCESSING*: Requisitions

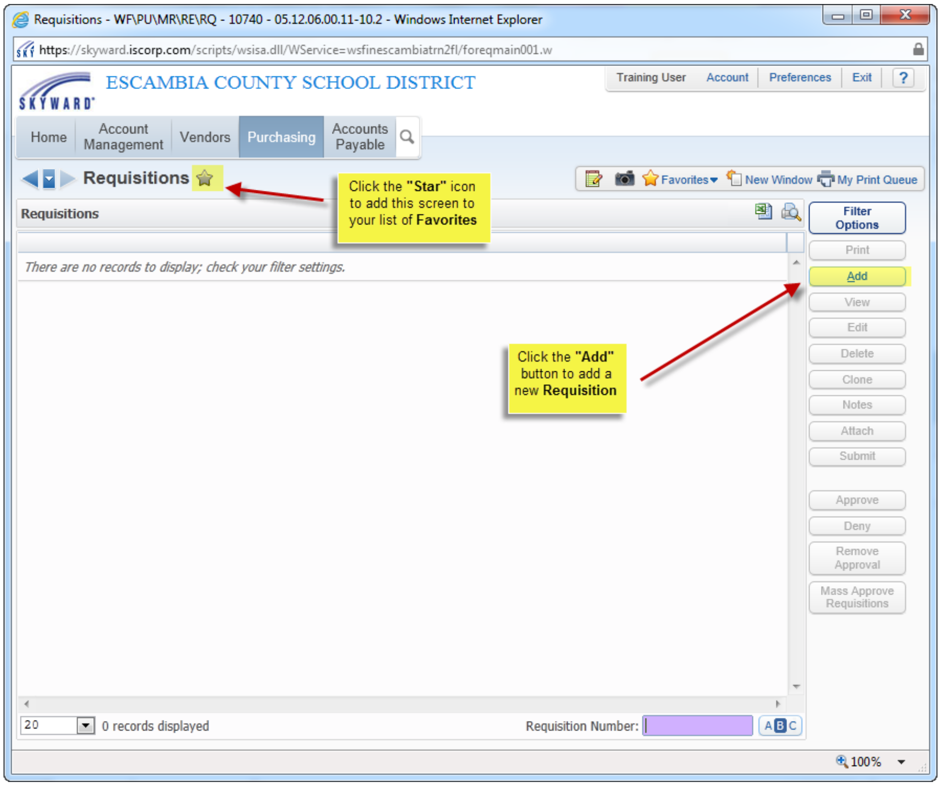


The **Requisitions Main** screen opens

Step 3: Add a New Requisition

From the Requisitions Main Screen:

3.3.1 Click the Add button.

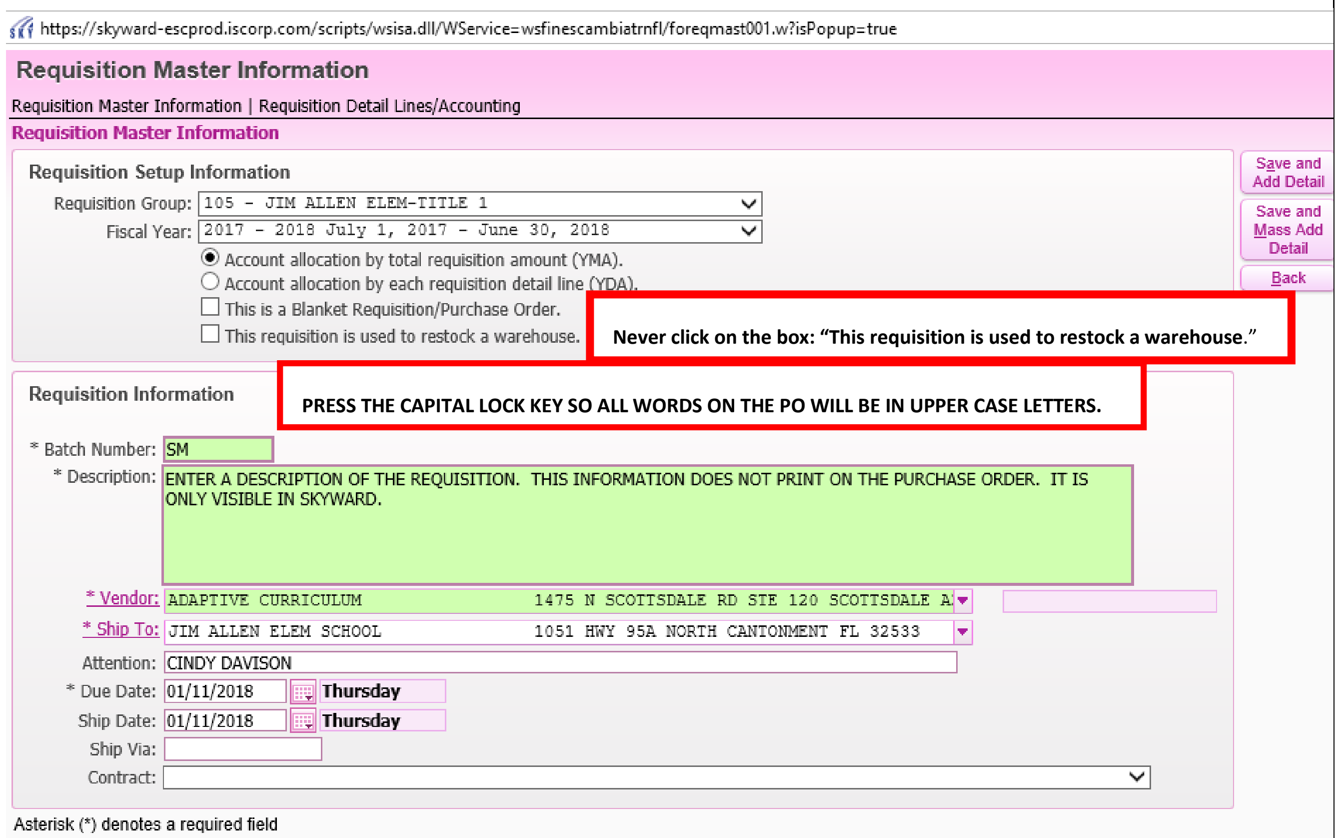


The **Requisition Master Information** screen opens.

Step 4: Enter Requisition Master Information

The Requisition Master Information Screen is used to enter the Purchase Order header information.

3.4.1	Enter Requisition Master Information



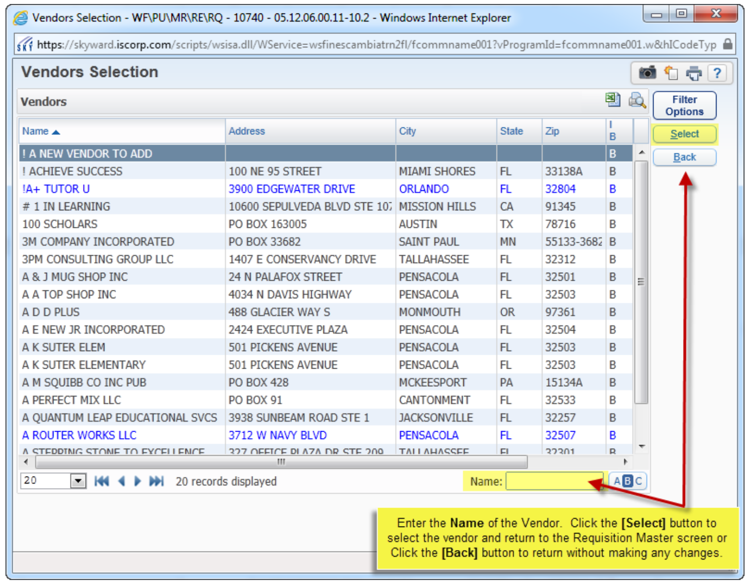
REQUISITION SETUP INFORMATION

Requisition Group	The drop down list contains a list of all Cost Centers* that you have rights to create requisitions for. *All Cost Centers have at least one group for GENERAL funds. If you are a Title I school, then you will have separate group labeled TI to be used if any item on the requisition is purchased using partial or total Title I funding. If you choose the wrong group, this can't be changed as you proceed. Do not use the Title I group if you are not using any Title I funds. Instead use the general funds group.
Fiscal Year	Defaults to the current Fiscal Year

Account allocation by total requisition amount (YMA)	Click in the circle if only one budget account will be used to pay for all the line items on this Purchase Order. If you choose the wrong account allocation, this can't be changed as you proceed. You will add the budget account after all requisition lines have been entered.
Account allocation by each requisition detail line (YDA)	Click in the circle if more than one budget account will be used to pay for the items on this Purchase Order. Each line will require the accounting to be added for each item purchased. If you choose the wrong account allocation, this can't be changed as you proceed.
Blanket Requisition / Purchase Order	If this is a blanket PO, click the box above. This is required for a purchase that will have multiple invoices such as a Landrum temp, textbook orders, or elevator inspections. If this is a blanket PO and you forget to click on the box, this can't be changed as you proceed. DO NOT USE when you are ordering goods or for services that have a defined quote and will be paid on one invoice.
Restock the Warehouse	Never click on this button. This is for use of the Central Warehouse staff only.
REQUISITION INFORMATION	
Capital Lock	Press the capital lock key so all words printed on the Purchase Order will all be upper case letters.
Batch Number	The purpose of entering a code in the Batch Number field is to assign requisitions to the proper Purchasing Agent. Failure to enter a batch code could result in a delay in processing your requisition. Click on the link for the updated list of "Batch Codes". If you do not select a batch code, the system will default to the day of the month. http://ecsd-fl.schoolloop.com/file/1400654021508/1486198533892/6727935800366710369.pdf
Description	Generic description describing the contents of the requisition. Note: This Description displays on the screen only. It does not print on the PO.
Vendor	Enter a vendor. 1. Begin typing the name of the vendor and the system will display refined matches as you type or 2. Click the *Vendor hyperlink to open a new window "Vendors Selection" a. Enter the name of the vendor

b. Click the Select button to select vendor and return to the Requisition Master Screen or

c. Click the Back button to return to Requisition Master Screen without making a selection.



If the vendor does not exist

- Select the vendor "! A NEW VENDOR TO ADD"
- Add a new Note "NEW NOTE" – See Chapter 8

Ship To	Click the drop down to select a location to ship to if you have access to more than one location. Otherwise, it will be set to default to your Cost Center location.
Attention	Defaults to the name of the person entering the requisition. This can be changed to reflect a location in a school or the name of the requester.
Due Date	Change to the date the item is needed by, allowing a minimum of three weeks. The system defaults to today's date.
Ship Date	Change to a future date of at least one week. The system defaults to today's date.
Ship Via	N/A
Contract	N/A

IF YOU ARE ENTERING A BLANKET REQUISITION, STOP!

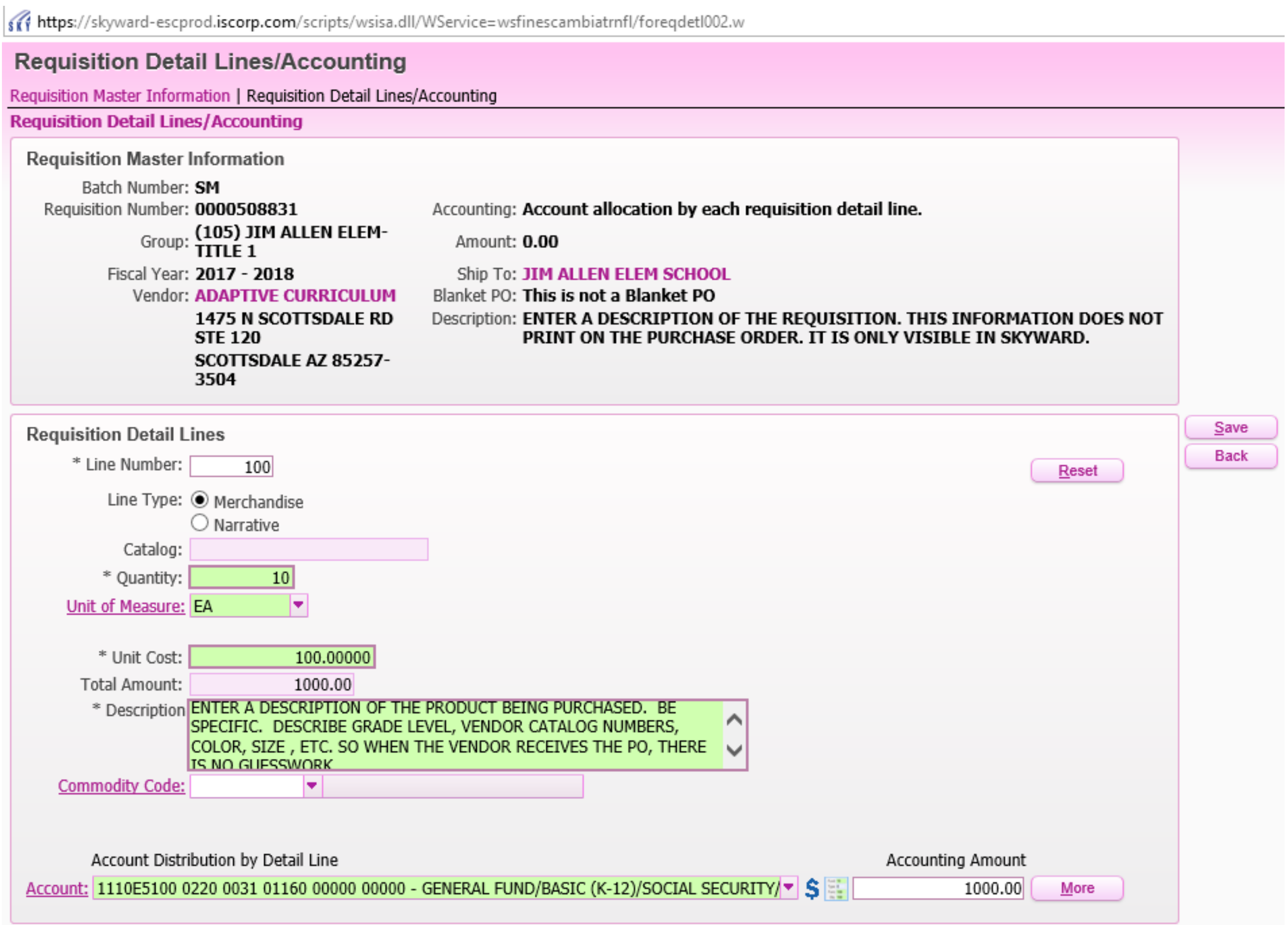
PROCEED TO CHAPTER 4 BLANKET PURCHASE ORDERS ON PAGE 20.

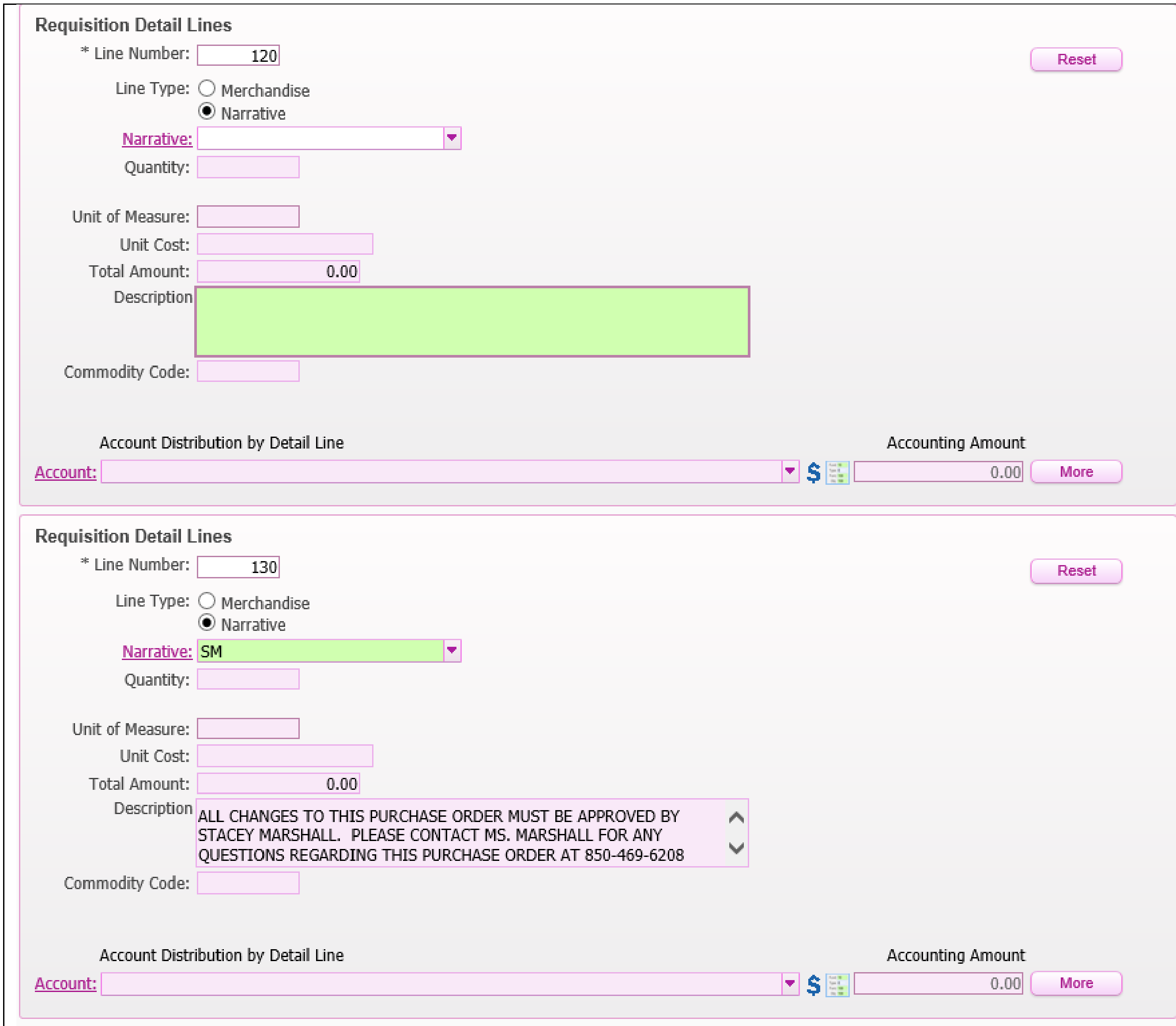
Step 5: Add Requisition Detail Lines

The Requisition Detail Lines/Accounting screen is used to enter specific line item quantities and costs to the requisition.

Once all information is entered in the Requisition Master:

3.5.1	Click the Save and Mass Add Detail to add line items. Groups of five lines at a time will be added to the requisition. If more than five lines are needed, click the Save and Mass Add Detail to add five more lines.





3.5.2	Enter the following information on Requisition Detail Lines section

REQUISITION DETAIL LINES ENTRY

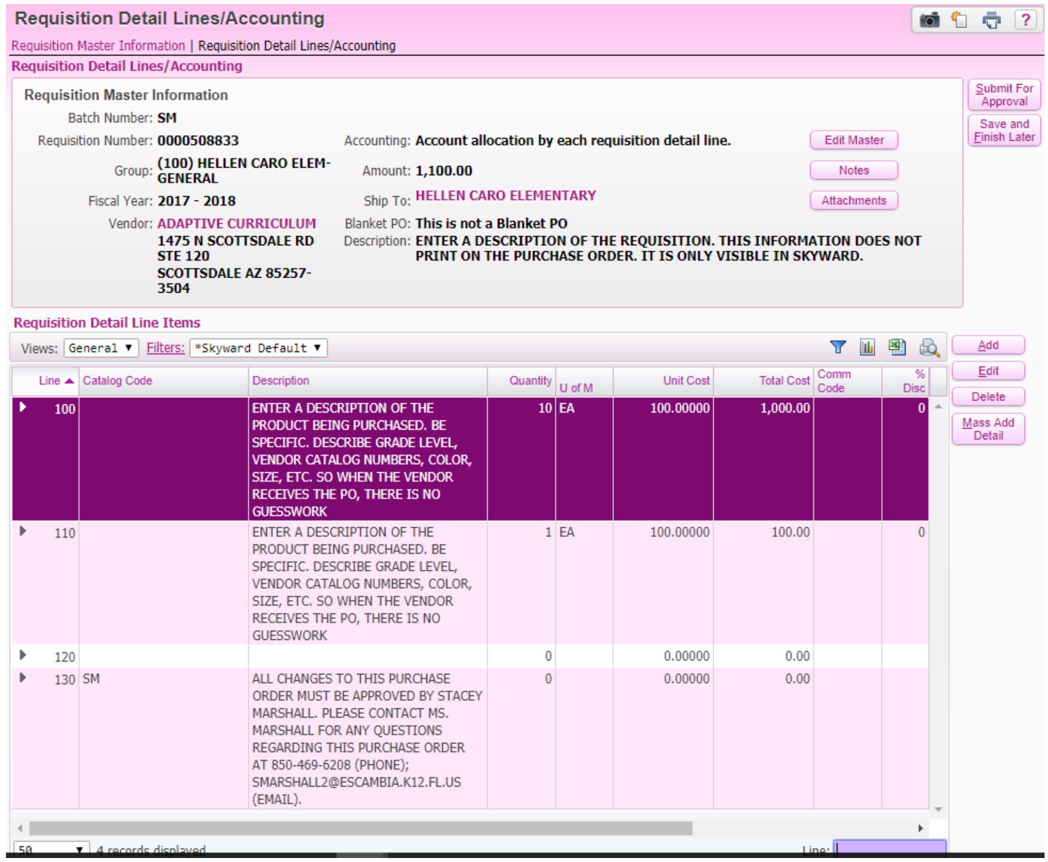
FIELD	FIELD DESCRIPTION
Line Number	Default begins with 100.
Line Type	Choose either: Merchandise – An item that you are ordering.

	Narrative: 1. A text line that will print on the Purchase Order. Most commonly used to provide quote or delivery information, or 2. A blank line to divide the items ordered from a line containing information, or 3. To populate a line with the Purchasing Agent's contact information.
Catalog	N\A
Quantity	Total number ordered
Unit of Measure	Can be entered or selected from a lookup table; HRS, BOX, LBS, etc.
Unit Cost	Cost per unit of measure
Total Amount	Amount calculated by the system based on Quantity x Unit Cost
Description	1. Line Item Description inclusive of vendor item number and short description, or 2. Leave blank if this is a blank line dividing the items ordered and information for the vendor, or 3. This will populate with the Purchasing Agent's contact information when you select the batch code from the drop down menu on the "Narrative".

3.5.3	Click the Save button after entering all the lines.

The information is added to the Requisition Detail Lines/Accounting screen as depicted below. Once you have added all the merchandise lines, enter a blank narrative line (to separate the merchandise lines from the narrative lines). Next enter a narrative line to add the Purchasing Agent's contact information. Do this by entering the batch code in the narrative box and click on the highlighted batch code. This will populate the description box with the Purchasing Agent's contact information and will print on the Purchase Order.

Click the Add button to add more line items 1 at a time	
Click the Edit button to edit the selected line item	

Click the Delete button to delete the selected line item	
Click the Mass Add Detail button to add more lines in groups of 5 at a time	
Click the Save and Finish Later button to save your work to be completed at a later time	

Step 6: Add an Attachment

3.6.1	Add attachments. Examples of attachments: quotes, vendor line-of-sight forms, Professional Services Agreements. Go to Chapter 7, page 35, for instructions on how to attach a file document to your requisition.

Step 7: Add an Note

3.7.1	Add a note. Notes are intended for information that you want to share with the Purchasing Agents. Note information does not appear on the P.O. Examples of Notes: new vendor contact information. Go to Chapter 7, Step 2 on page 39.

Step 8: Add Account Distribution (if a YDA requisition)

The Account Distribution: Available Accounts section displays all accounts that you have access to. Select the appropriate account to allocate funds on each requisition line.

- More than one account can be selected if this is a “YDA” requisition.

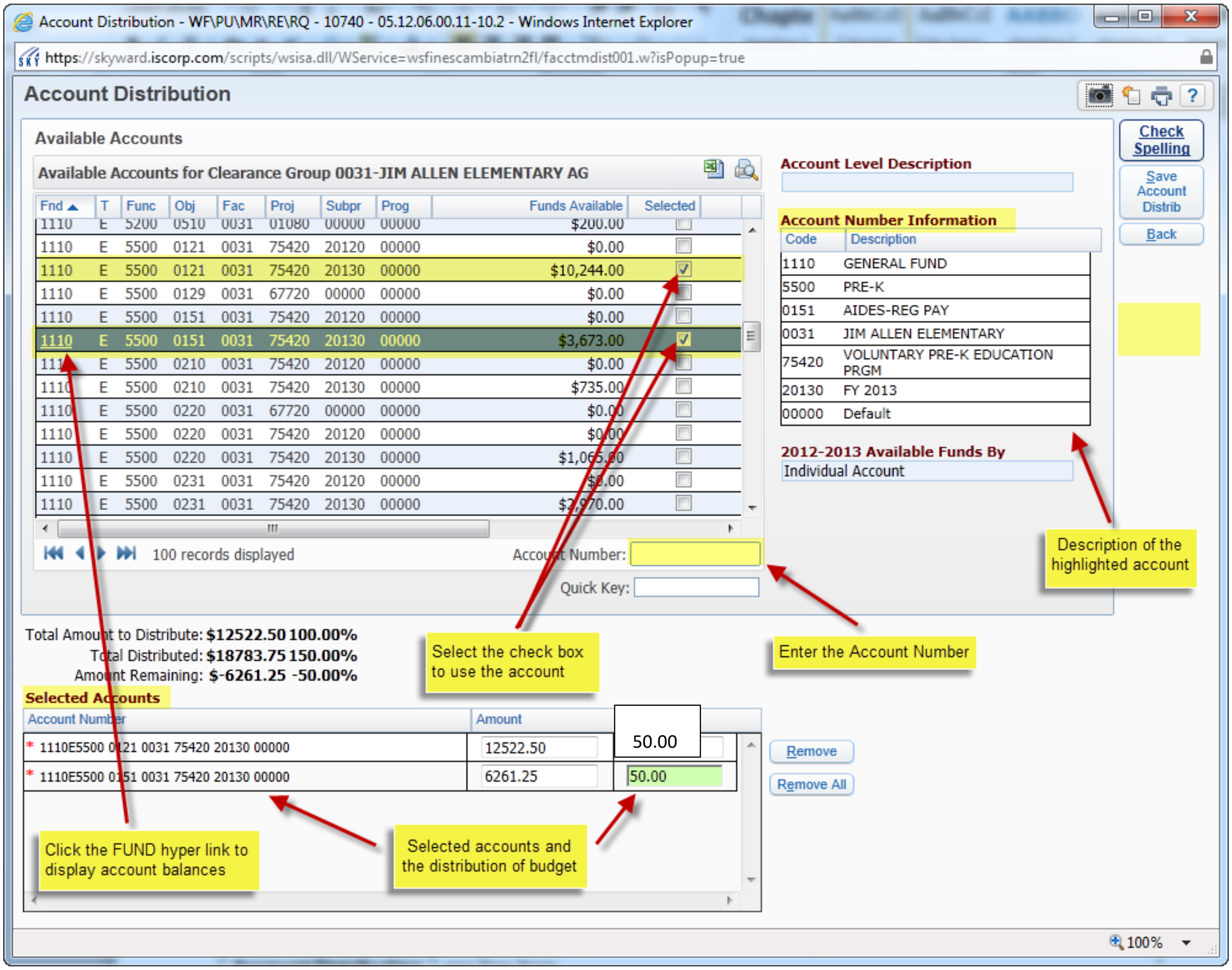
The Account Number Information Section displays accounting information about the selected account.

The account can be distributed by amount across all selected accounts.

- The percentage must equal 100, or the total amount allocated across the selected accounts must equal the requisition amount.

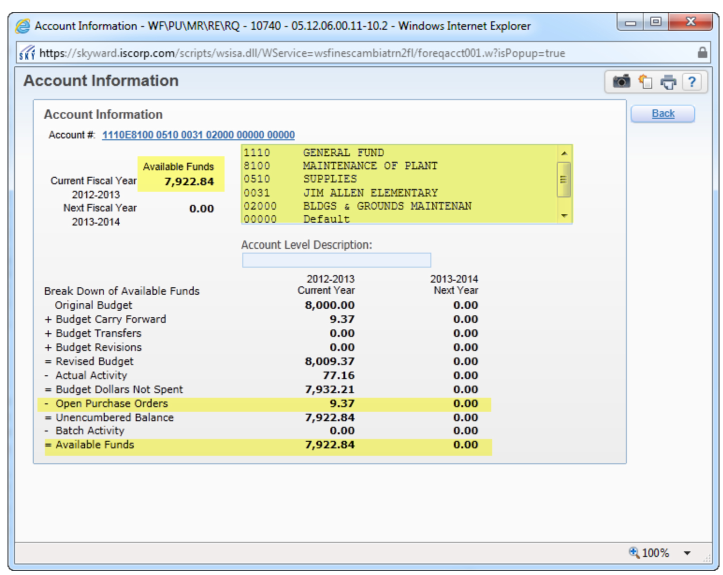
ACCOUNT DISTRIBUTION	
3.8.1	Click the Add Requisition Accounts button to add account details to the requisition if this requisition is a YMA. **<u>Do not select more than one budget account for a “YMA” requisition.</u>**

The Account Distribution screen opens as depicted below



To view Account Balance information, Click the FUND hyperlink for any account or Click account in the Select Accounts section.

Click the Back button to return to the Account Distribution screen.



3.8.2 Click the Save Account Distrib button to save the account distribution and return to the Requisition Detail Lines/Accounting screen shown below.

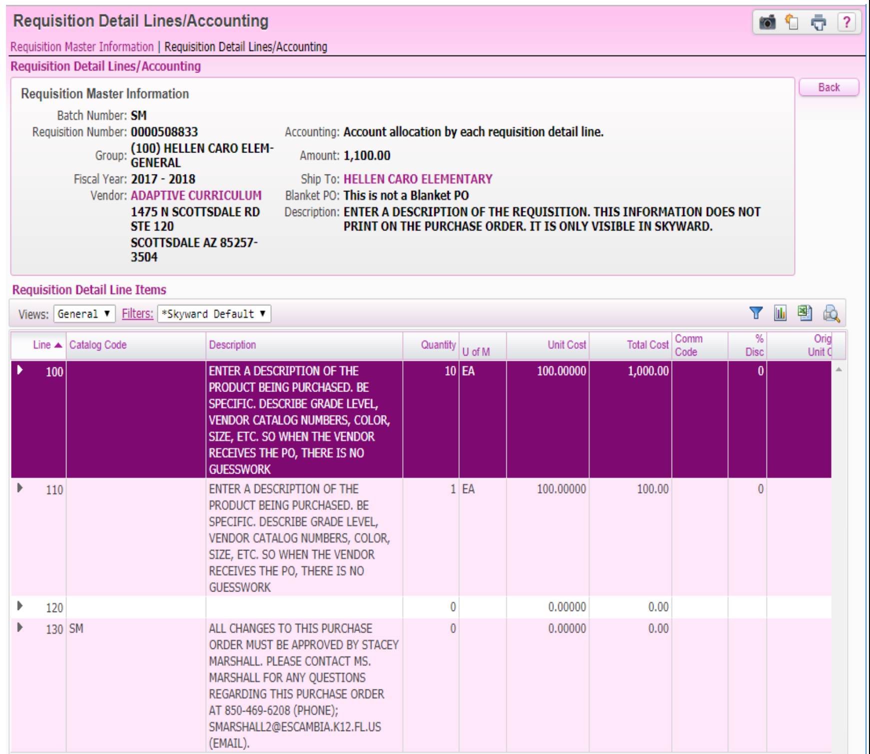
Before clicking submit, proof read the requisition for errors.

Proof requisition for misspellings and mistakes.

Click the Save and Finish Later button to save the requisition w/out Submitting.

Click the Update Account Distrib button to return to the Account Distribution screen to modify the distribution of funds

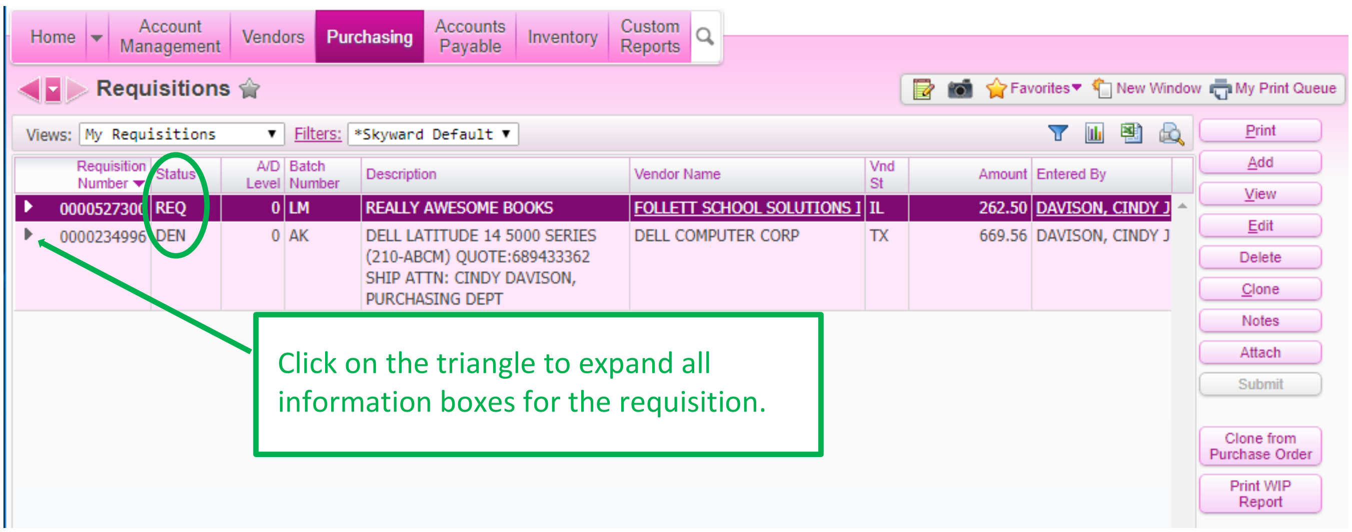
Click the View Requisition Detail Lines button to toggle to the **Requisition Detail Line Items** section to modify/view the line items entered on the requisition. Check for misspellings. If you need to edit, click the back button and then click on the edit button. Any changes in total amount of the requisition will require you to modify the Account Distribution.



3.8.3 Click the Submit For Approval button to submit the requisition for approval

You will be returned to the Requisitions Main screen which now shows the requisition with a status of "REQ"- Requisition. You will can view the status of "REQ" when you change the view from "All WIP Requisitions" to "My Requisitions".

- If you decide to click the Save and Finish Later button you will be returned to the Requisitions Main screen and the requisition would have a status of WIP – **Work in Progress**.
- <u>If you make changes or add attachments after submitting the requisition for approval, the status of the requisition then becomes a WIP and must be resubmitted for approval</u>.
- See the full list of status codes explained later in this section.



You role is now complete until the requisition is approved and becomes a Purchase Order.

The following is a list of the various Requisition Approval Codes

Code Values for approval status:	
WIP	Work in progress-Requisition has not been submitted for approval
WFM	Waiting for my approval
WFL	Waiting for approval at a level below mine
REQ	Requisition, Waiting for approval at a level above mine
APP	Requisition has been approved
DEN	Requisition has been denied

Important: If you make changes (edit) after you have submitted the requisition for approval, the requisition status will reset to WIP and you must resubmit the requisition. Failure to resubmit your requisition will result in the requisition staying in a WIP status and not allow approval by a higher level.

Chapter 4. Blanket Purchase Orders

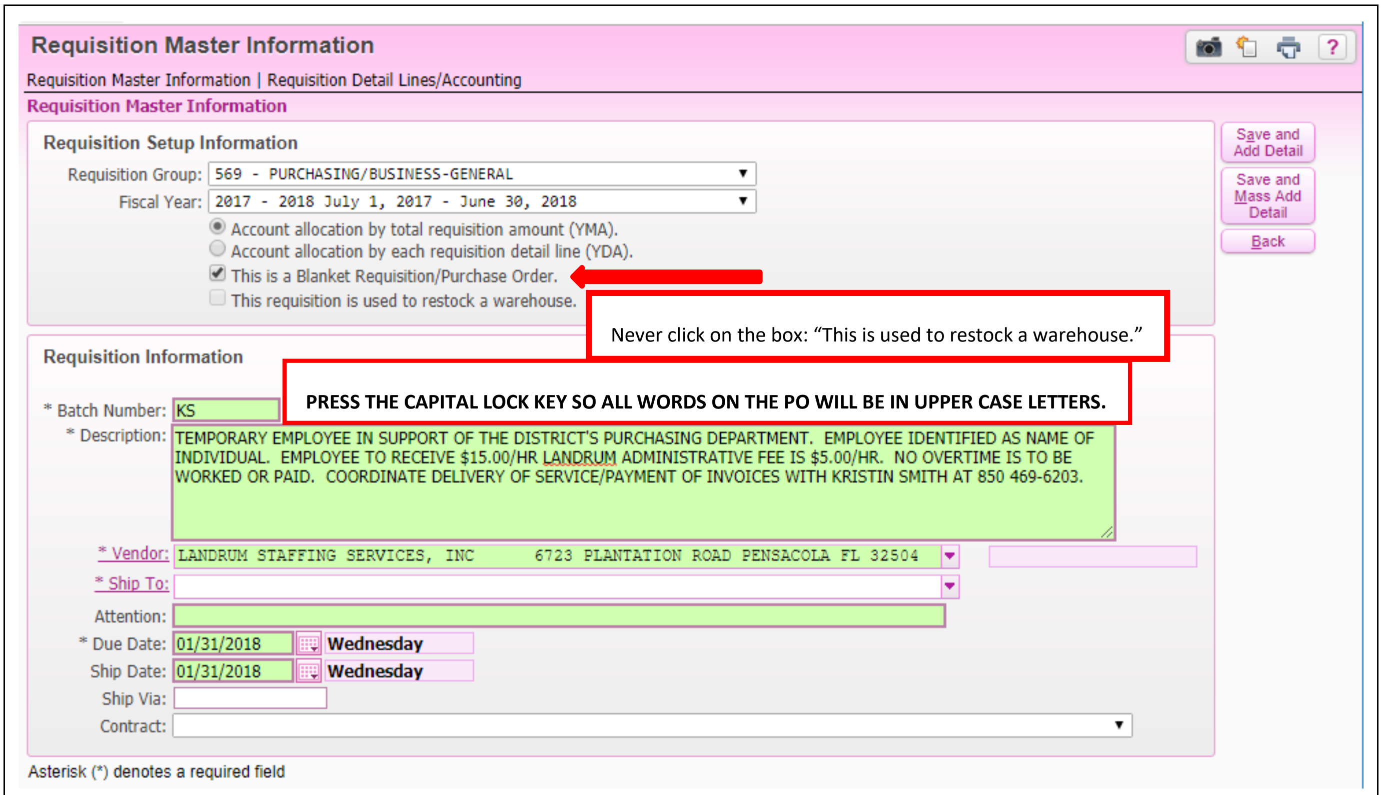
*A Blanket Purchase Order in Skyward a*llows you to enter a dollar amount that when sent to the vendor, will act as a credit that future purchases are charged against.

Use a Blanket PO if an on-going or "as needed" service will be invoiced at varying amounts over a period of time.

- DO NOT USE when you are ordering merchandise. Or for services that have a defined quote and will be paid on one invoice.

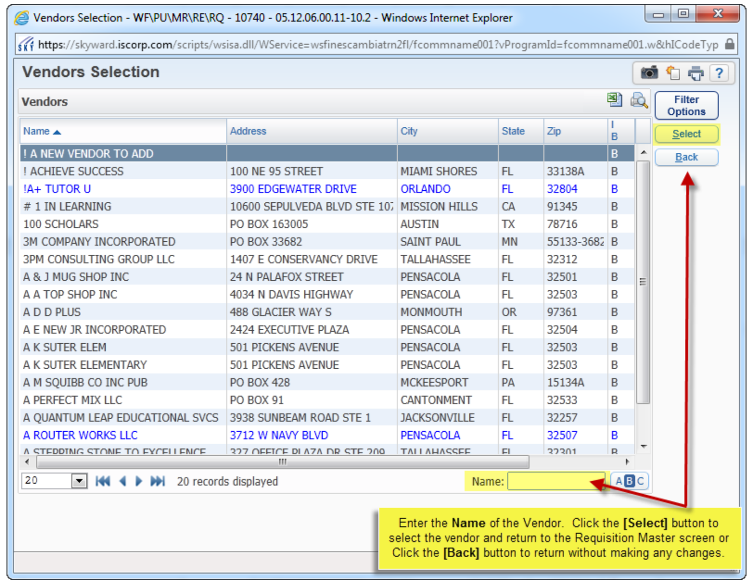
Step 1: The procedure for entering a Blanket PO in Skyward follows (continued from Page 11)

4.1.1	Add Requisition Master Information



REQUISITION SETUP INFORMATION	
FIELD	**FIELD DESCRIPTION**
Requisition Group	The drop down list contains a list of all Cost Centers* that you have rights to create *requisitions for.

	*All Cost Centers have at least one group labeled GENERAL. If you are a Title I school then you will have a separate group labeled TI to be used if any item on the requisition is purchased using Title I funds.
Fiscal Year	Defaults to the current Fiscal Year
Account allocation by total requisition amount (YMA)	Indicates that only one account will be used to pay for all items on this Purchase Order.
Account allocation by each requisition detail line (YDA)	Indicates that more than one accounting will be used to pay for the items on this Purchase Order. Each line will require the accounting to be added for each item purchased.
This is a Blanket Requisition/Purchase Order	Select this option to create a Blanket Purchase Order. If this box is selected and the Purchasing Agent determines that the requisition submitted does not meet the criteria for a Blanket PO as defined above, it will be denied and will need to be reentered correctly.
This Requisition is Used to Restock A Warehouse	THIS BUTTON IS **NOT** TO BE SELECTED. If selected, it will cause problems with the requisition that will usually end with it being denied and having to be reentered.
REQUISITION INFORMATION	
FIELD	**FIELD DESCRIPTION**
Batch Number	The purpose of entering a code in the Batch Number field is for assigning requisitions to the proper Purchasing Agent*. Click on the link for the updated list of "Batch Codes". If you do not select a batch code, the system will default to the day of the month. http://ecsd-fl.schoolloop.com/file/1400654021508/1486198533892/6727935800366710369.pdf
Description	Generic description describing the contents of the requisition Note: This Description displays on the screen only. It does not print on the PO.
Vendor	Enter a vendor. 1. Begin typing the name of the vendor and the system will display refined matches as you type or 2. Click the *Vendor hyperlink to open a new window "Vendors Selection" a. Enter the name of the vendor b. Click the Select button to select vendor and return to the Requisition Master Screen or c. Click the Back button to return to Requisition Master Screen without making a selection.



- If the vendor does not exist
  - Select the vendor "! A NEW VENDOR TO ADD"
  - Add a new Note "NEW NOTE" – See Chapter 8

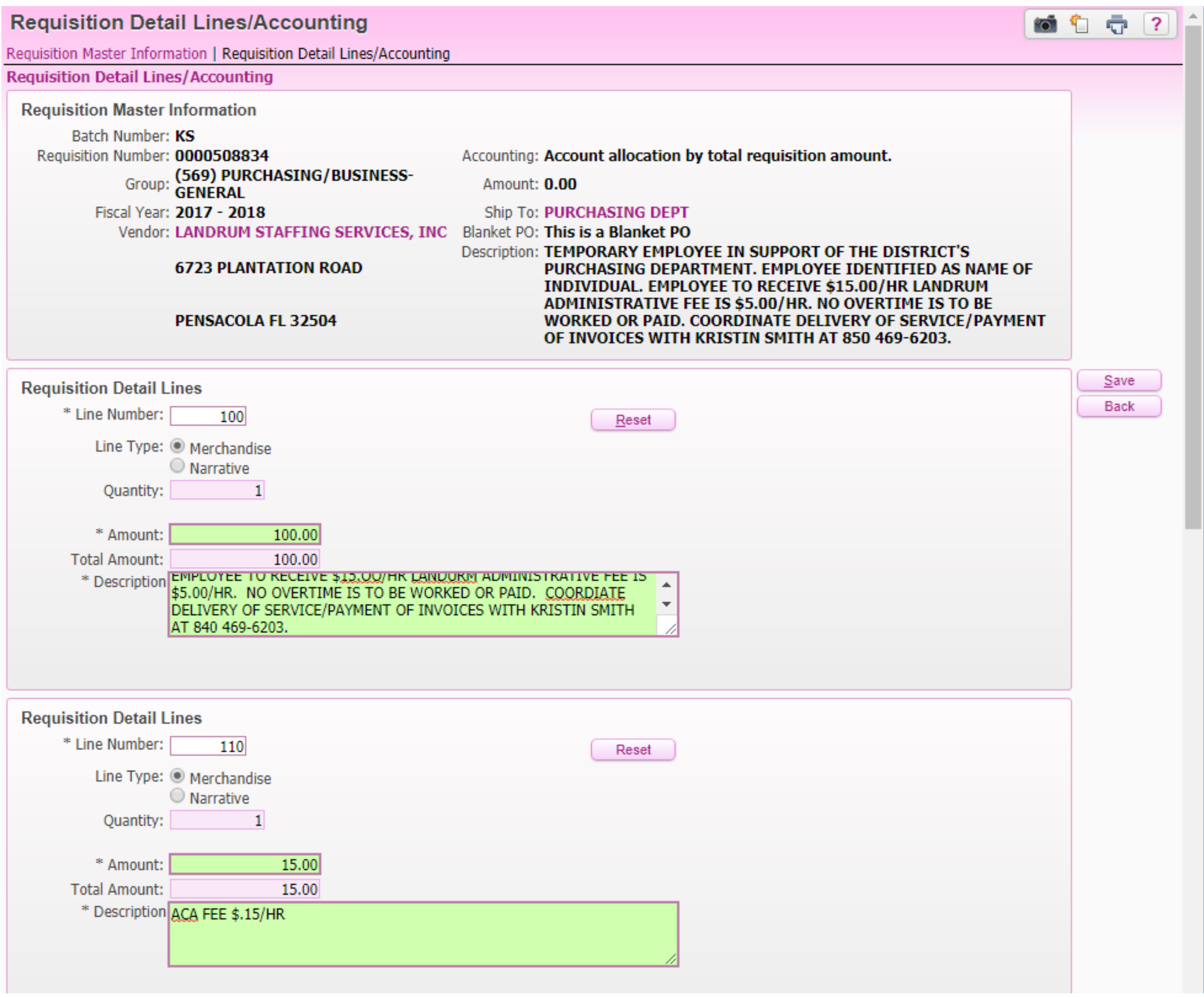
Ship To	Click the drop down to select a location to ship to if you have access to more than one location. Otherwise, it will be set to default to your Cost Center location.
Attention	Defaults to name of the person entering the requisition.
Due Date	Defaults to today's date, change to the date the item is needed by, allowing a minimum of three weeks.
Ship Date	Defaults to today's date, change to a future date.
Ship Via	N/A
Contract	N/A

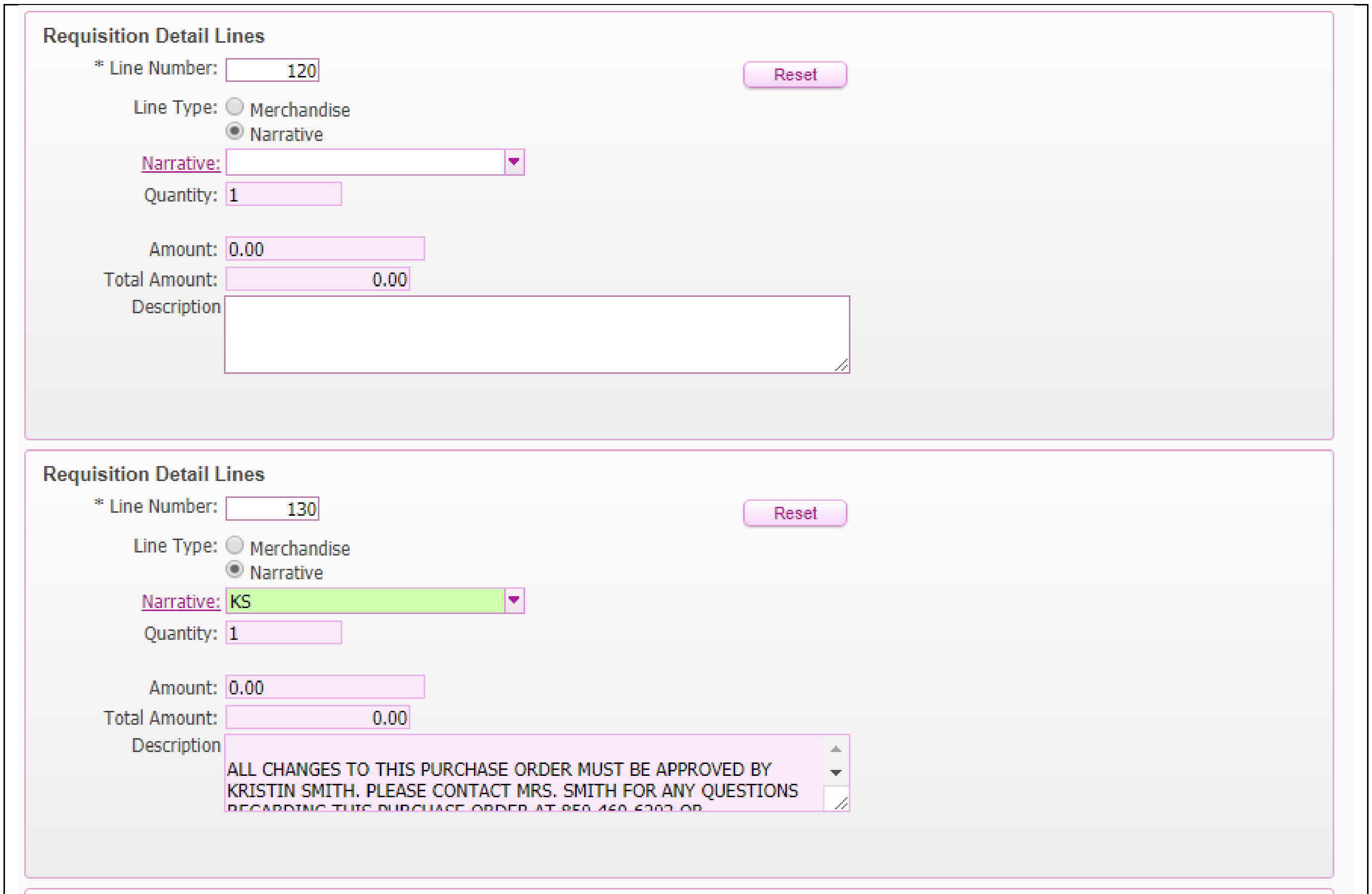
Step 2: Add Requisition Detail Lines

The Requisition Detail Lines/Accounting screen is used to enter specific line item quantities and cost to the requisition. When a blanket PO is selected, Skyward will place a "1" as quantity. The quantity can not be changed.

Once all pertinent information is entered:

4.2.1	Click the  to add line items in groups of five at a time to the requisition.

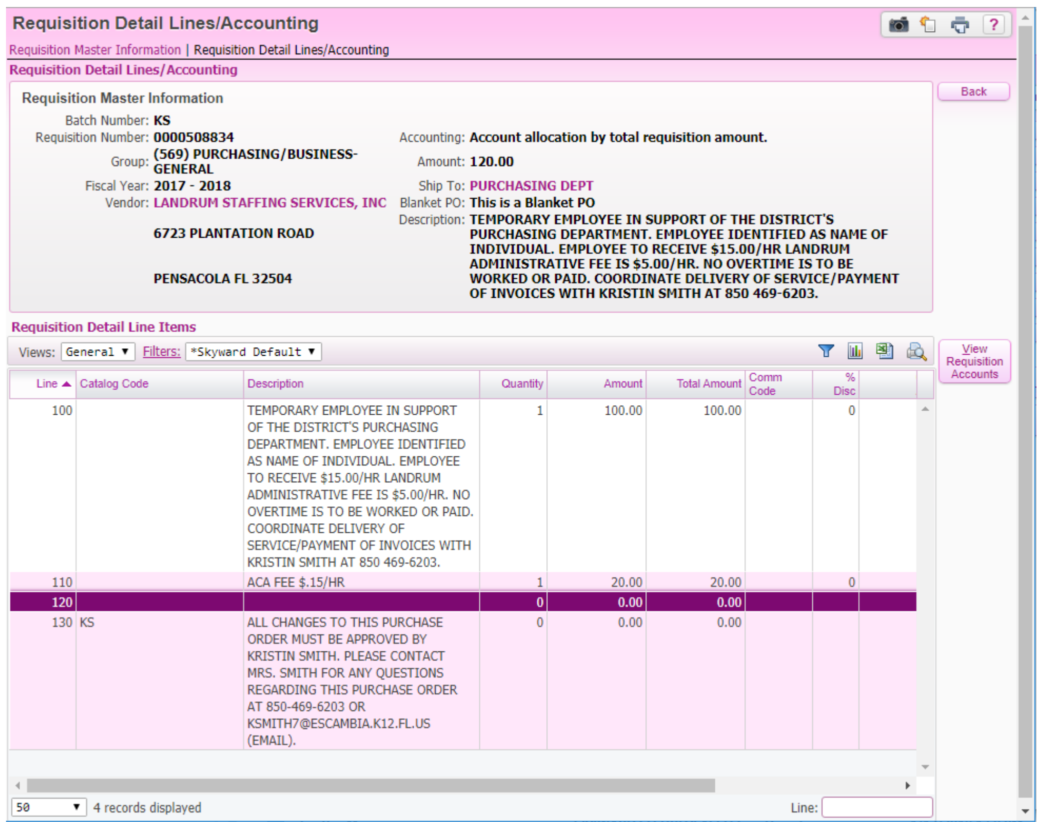




4.2.2	Enter the following information on Requisition Detail Lines section

REQUISITION DETAIL LINES ENTRY

FIELD	FIELD DESCRIPTION
Line Number	Defaults to 100.
Line Type	Choose either: Merchandise – An item that you are ordering. Narrative: 1. A text line that will print on the Purchase Order. Most commonly used to provide quote or delivery information, or 2. A blank line to divide the items ordered from a line containing information for the vendor, or 3. To populate a line with the Purchasing Agent’s contact information.
Quantity	Defaults to 1 for Blanket Purchase Orders

<table>
<tr><td>Amount</td><td colspan="2">Enter the total dollar amount of the Purchase Order.</td></tr>
<tr><td>Total Amount</td><td colspan="2">Defaults to the value entered in the Amount field</td></tr>
<tr><td>Description</td><td colspan="2">Line Item Description</td></tr>
<tr><td>4.2.3</td><td colspan="2">Click the Save button to add the line item</td></tr>
<tr><td colspan="3">The information is added to the Requisition Detail Lines/Accounting screen as depicted below.</td></tr>
<tr><td colspan="2">Before clicking submit, proof read the requisition for errors.</td><td rowspan="5">
</td></tr>
<tr><td colspan="2">Click the Edit button to edit the selected line item</td></tr>
<tr><td colspan="2">Click the Delete button to delete the selected line item</td></tr>
<tr><td colspan="2">Click the Mass Add Detail button to add more lines in groups of 5 at a time</td></tr>
<tr><td colspan="2">Click the Save and Finish Later button to save your work to be completed at a later time</td></tr>
</table>

Step 3: Add an Attachment

4.3.1 Add attachments. Examples of attachments: quotes, vendor line-of-sight forms, Professional Services Agreements. Go to Chapter 7, page 35 for instructions on how to attach a file document to your requisition.

Step 4: Add an Note

4.4.1 Add a note. Notes are intended for information that you want to share with the Purchasing Agents. Note information does not appear on the P.O. Examples of Notes: new vendor contact information

Step 5: Add Account Distribution

Once all line items are entered, accounting information can be entered.

4.5.1 Click the 

button to add account details to the requisition.

The Account Distribution screen opens as depicted below.

The Account Distribution: Available Accounts section displays all accounts that you have access to. Select the appropriate account to allocate funds.

- More than one account can be selected.

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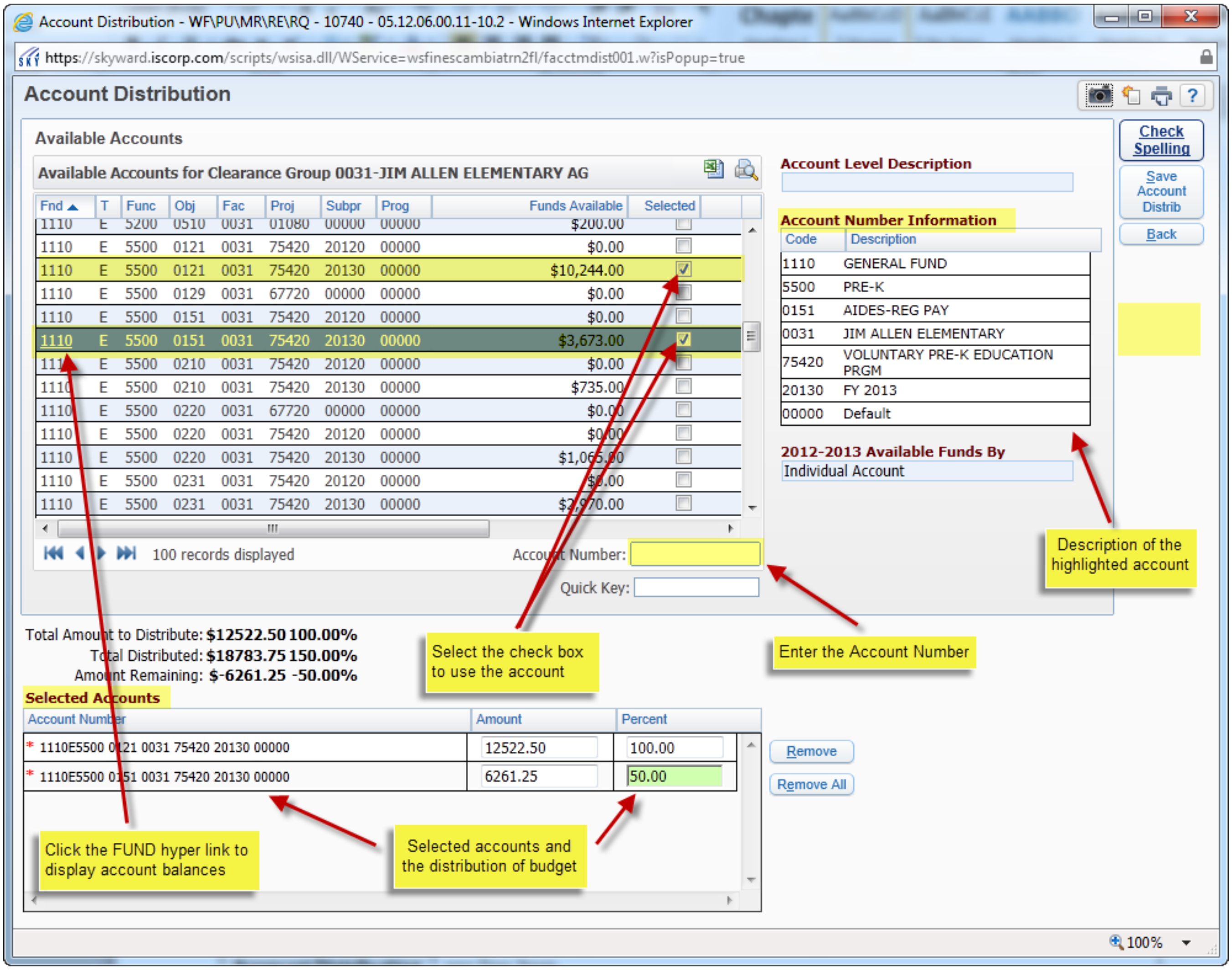
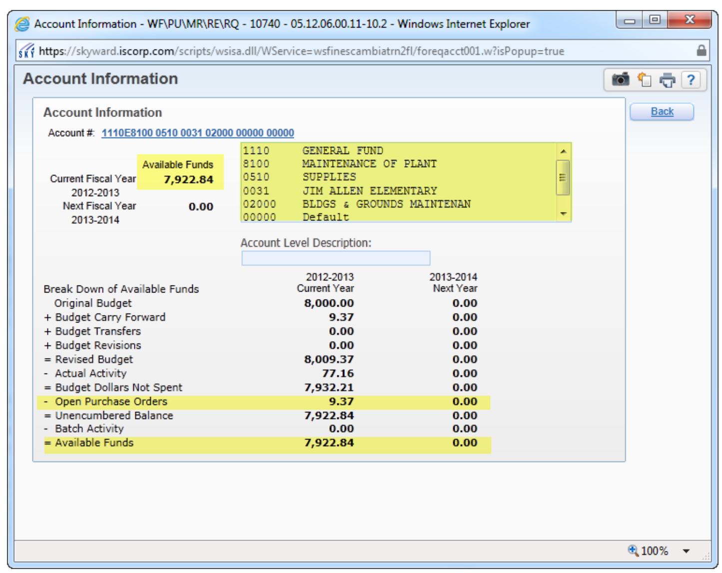
- The percentage must equal 100, or the total amount allocated across the selected accounts must equal the requisition amount.

ACCOUNT DISTRIBUTION





To view Account Balance information, Click the FUND hyperlink for any account or Click account in the Select Accounts section.

Click the Back button to return to the Account Distribution screen.

4.5.2 Click the Save Account Distrib button to save the account distribution and return to the Requisition Detail Lines/Accounting screen shown below.

Click the Submit For Approval button to Submit the Requisition for Approval

Click the Save and Finish Later button to save the requisition w/out Submitting.

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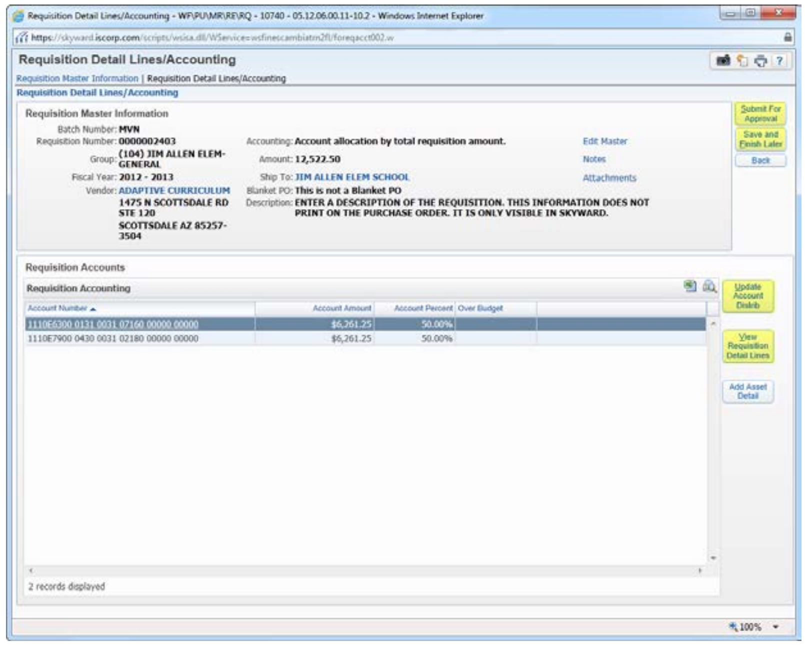

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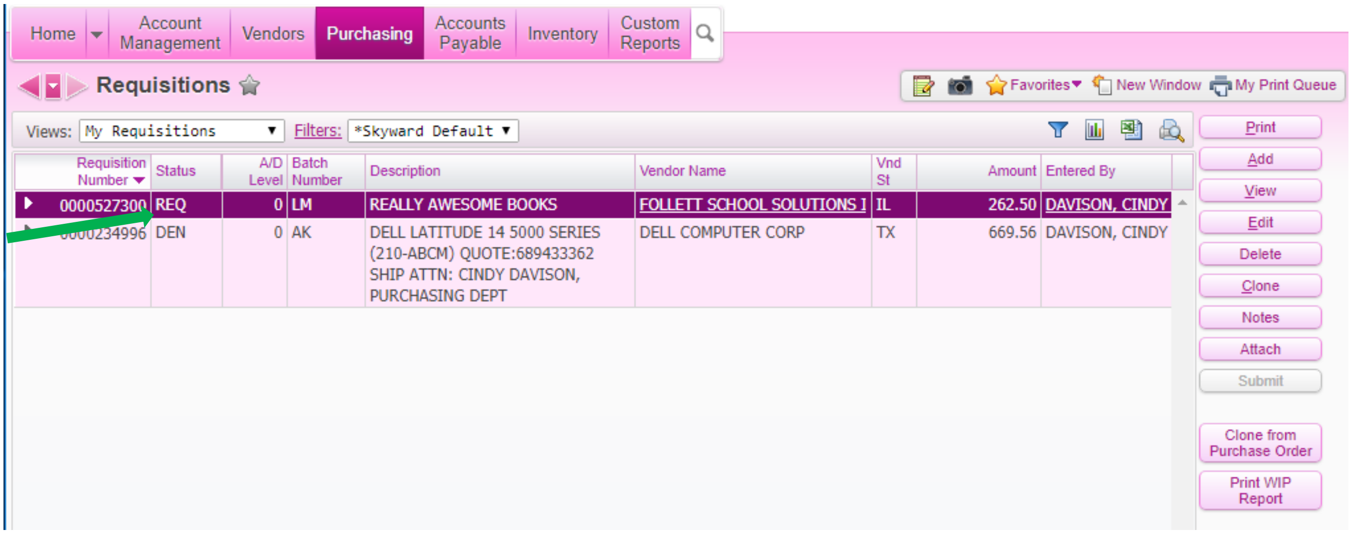
- If you decide to click the Save and Finish Later button you will be returned to the Requisitions Main screen and the requisition would have a status of WIP – **Work in Progress**.
- <u>If you make changes or add attachments after submitting the requisition for approval, the status of the requisition then becomes a WIP and must be resubmitted for approval</u>.
- See the full list of status codes explained later in this section.



Your role is now complete until the requisition is approved and becomes a Purchase Order.

The following is a list of the various Requisition Approval Codes

Code Values for approval status:	
WIP	Work in progress, has not been approved
WFM	Waiting for my approval
WFL	Waiting for approval at a level below mine
REQ	Requisition, Waiting for approval at a level above mine
APP	Requisition has been approved
DEN	Requisition has been denied

Important: If you make changes (edit) after you have submitted the requisition for approval, the requisition status will reset to WIP and you must resubmit the requisition. Failure to resubmit your requisition will result in the requisition staying in a WIP status and not allow approval by a higher level.

Chapter 5. Approving a Requisition

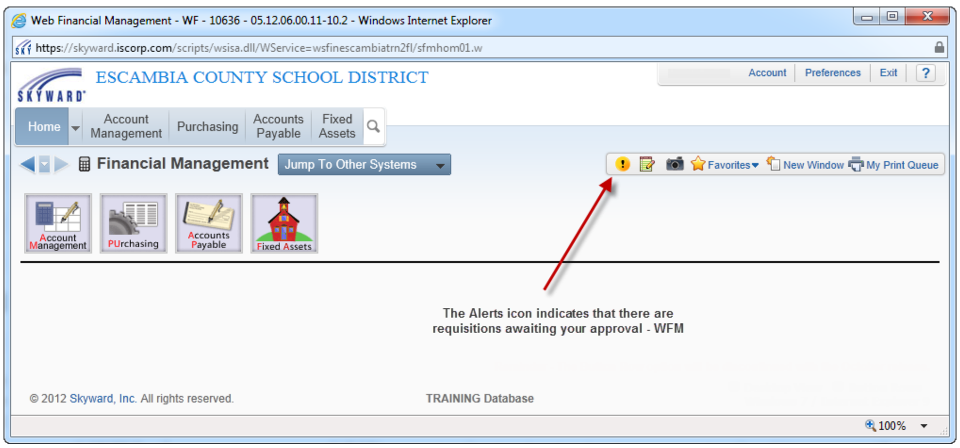
The approval process in Skyward is multifaceted. Individual User Preferences can be set to notify approvers via email when requisitions are waiting for their approval. Also the alerts icon on the Skyward Main Screen indicates that there are requisitions awaiting your approval. The **Requisitions Main** Screen displays the current status of any requisition that you are a part of the approval workflow.

Step 1: Alerts Icon

If there are Requisitions awaiting your approval then the Alerts icon will be visible on the Home Page.

From the Main Screen

5.1.1 Click the icon from the Skyward Home Page.

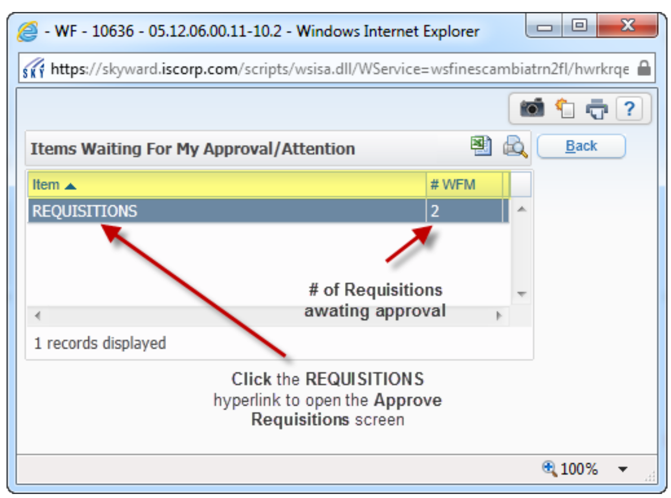


The **Items Awaiting My Attention/Approval** screen opens

Items Awaiting My Attention /Approval

5.1.2 Click the Requisitions line to open the "**Requisitions Main"** Screen.

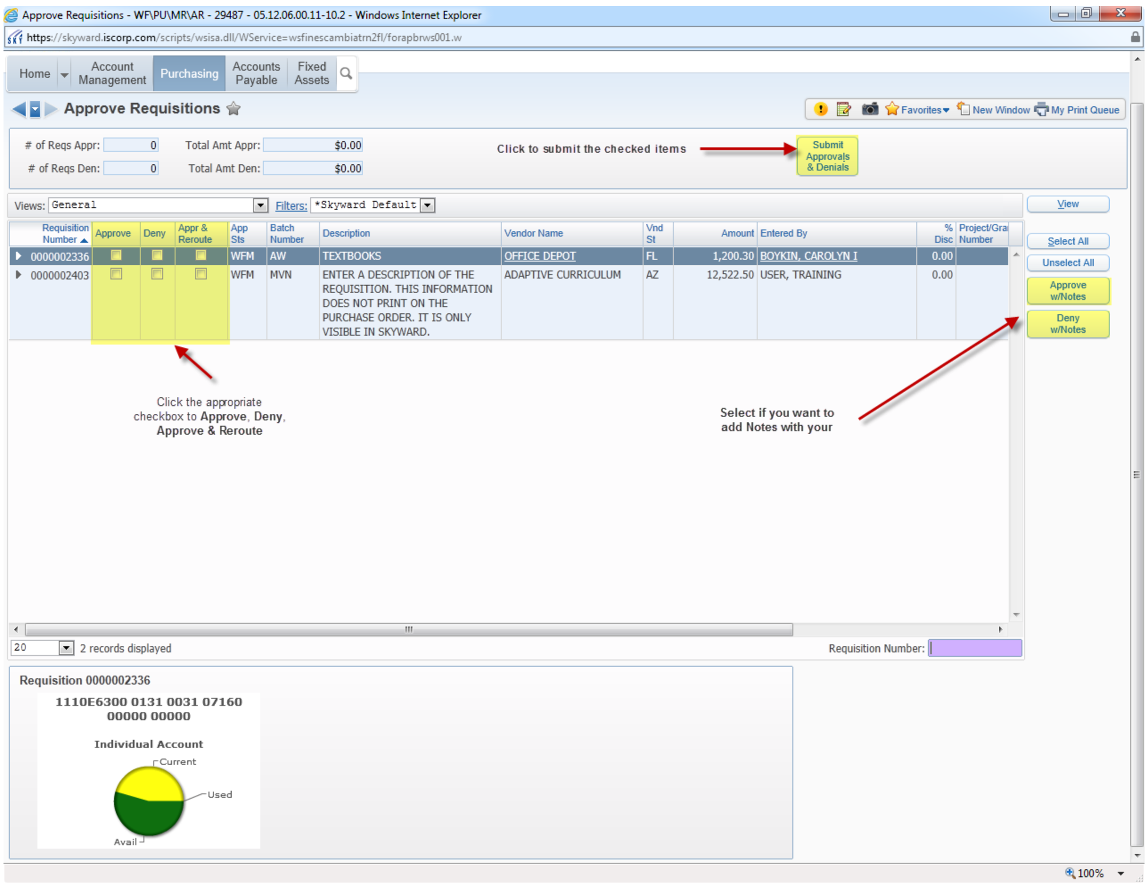
- Note the status "WFM" and the count of requisitions awaiting approval.



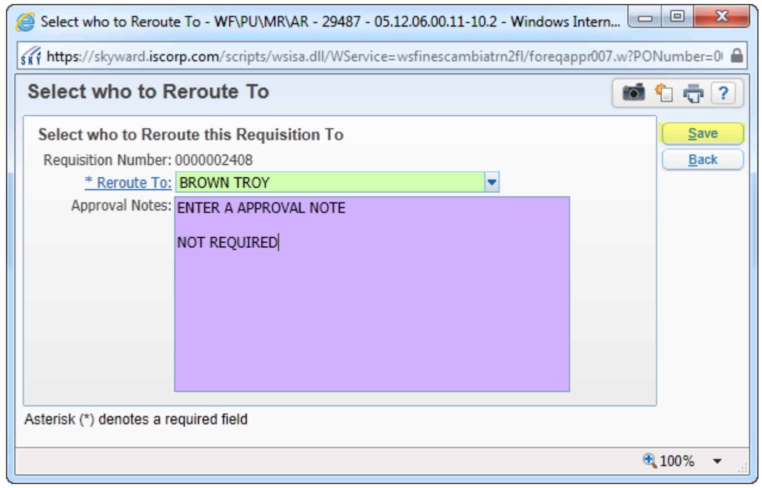
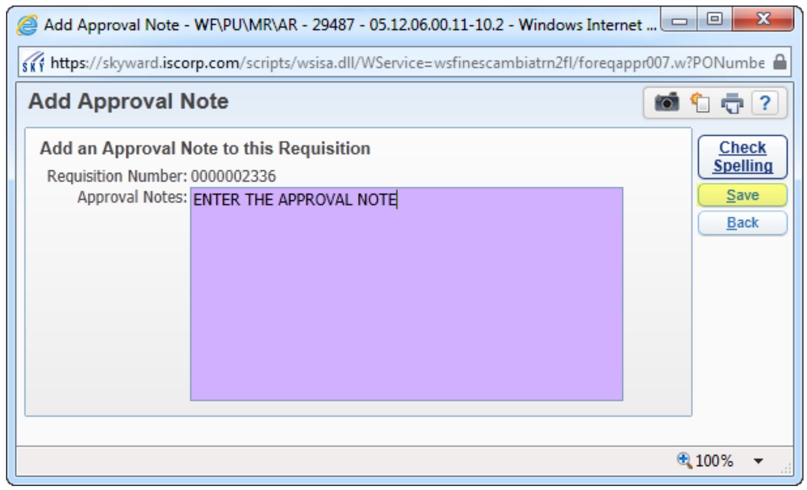
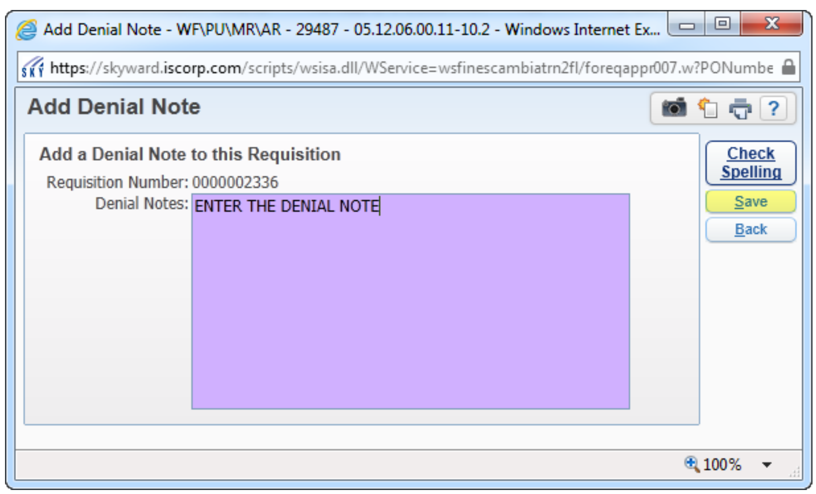
The **Approve Requisitions** screen opens

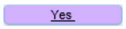
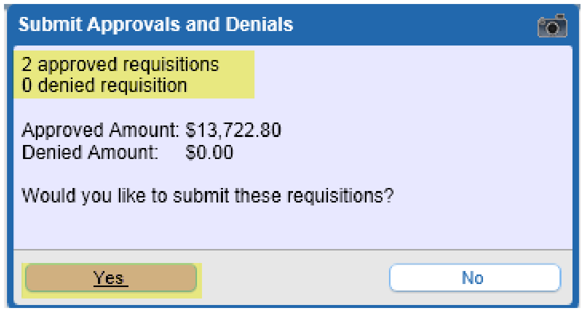
Step 2: Approve/Deny Requisitions

Approve Requisitions



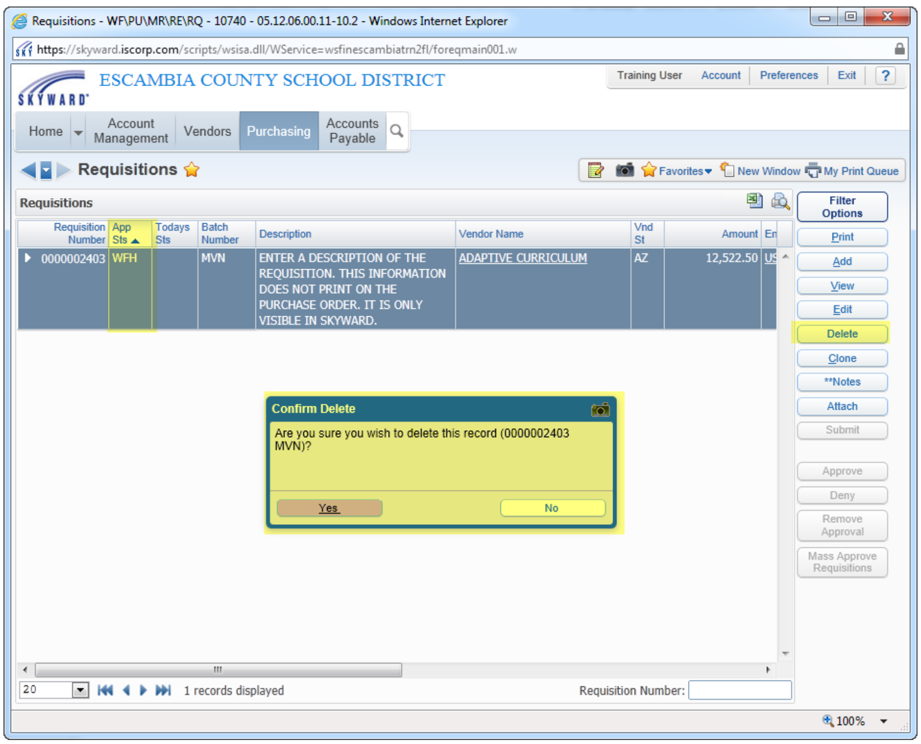
5.2.1	Click the the Approve or Deny checkbox or Reroute.

5.2.2	Click the Appr & Reroute checkbox. The **Select Who to Reroute To** screen opens. Select the user to reroute the requistion to. The person routed to is inserted in the approval process. or	
5.2.3	Click the Approve w/Notes button to approve the Requisition and add an approval note. The **Add Approval Note** screen opens or	
5.2.4	Click the Deny w/Notes button to deny the Requisition and add a denial note. The **Add Denial Note** screen opens	

5.2.5	Once Selections are made click the  button to process the selections Click the  button to submit the requisitions to the next approver.	

Chapter 6. Delete a Requisition

A requisition can be deleted by the requestor at any time prior to the requisition receiving final approval to become a Purchase Order. At that time, only Purchasing can delete the requisition because upon final approval the requisition is assigned a Purchase Order Number.

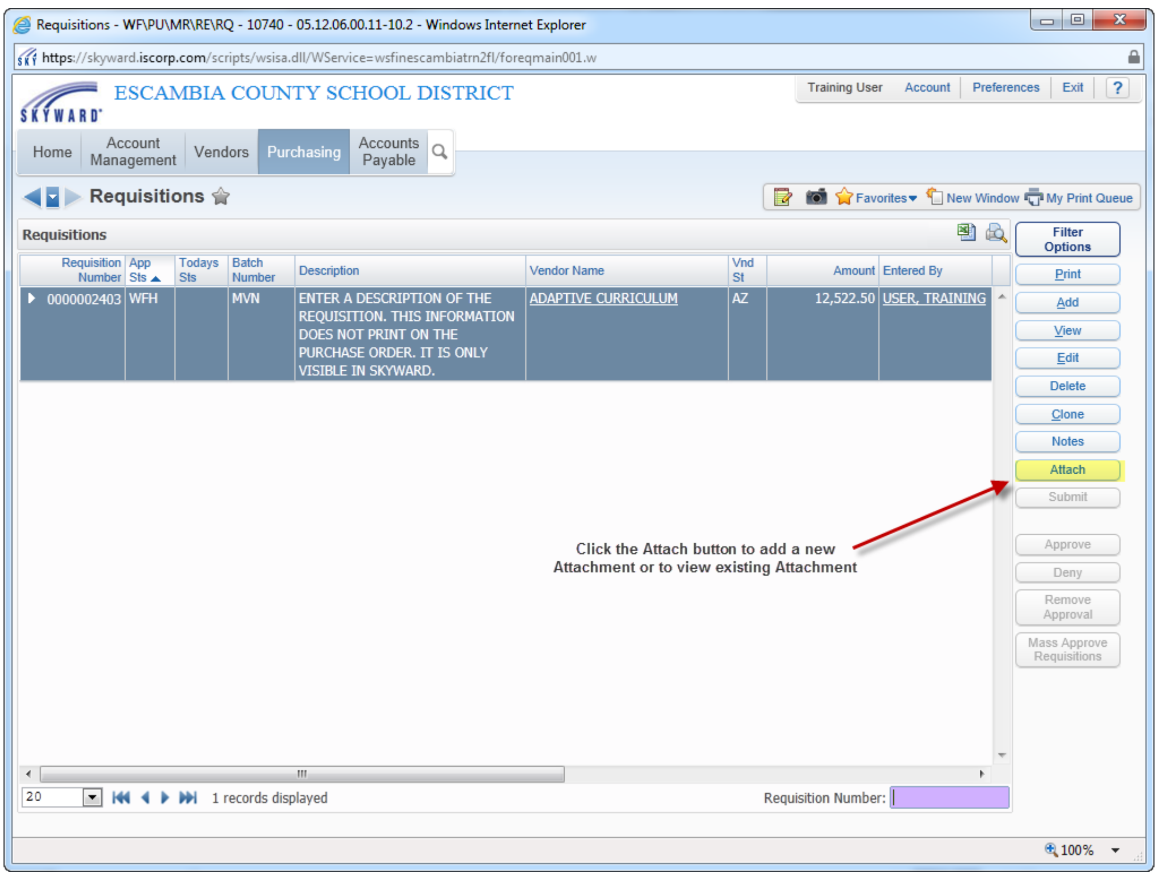
Step 1: Delete a Requisition	
6.1.1	Navigate to the Main Requisitions screen.
6.1.2	Select the requisition you want to delete. Click the Delete to remove the requisition and confirm the deletion.
	
6.1.3	Click the Yes button to confirm deletion.

Chapter 7. Attachments

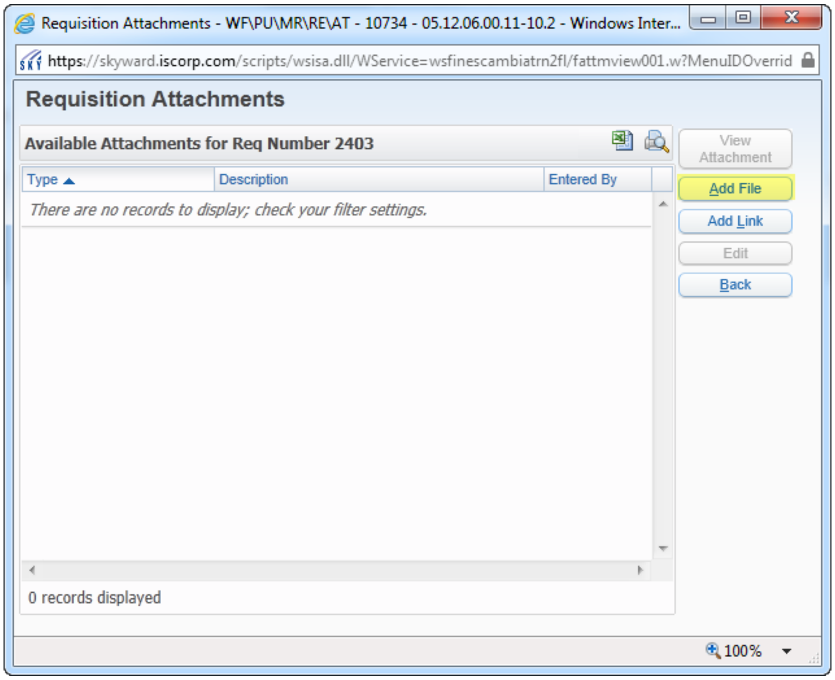
An attachment can be quotes, a Professional Services Agreement, or other pertinent information used to aid the Purchasing Agent in processing the requisition. Any user with appropriate access to create or approve a requisition can add an attachment to a requisition at any time during the approval process. Attachments, once added, are visible to all users and approvers of the requisition. The attachment is also a part of the permanent record and is also available for viewing once the requisition becomes a Purchase Order.

If you have already submitted the requisition for approval, you can add an attachment without clicking the "EDIT" button. If you click the "EDIT" button, the requisition will return to "WIP" and must be resubmitted for approval.

Step 1: Click Attach button.	
7.1.1	Click the  button.



The **Requisition Attachments** screen opens.

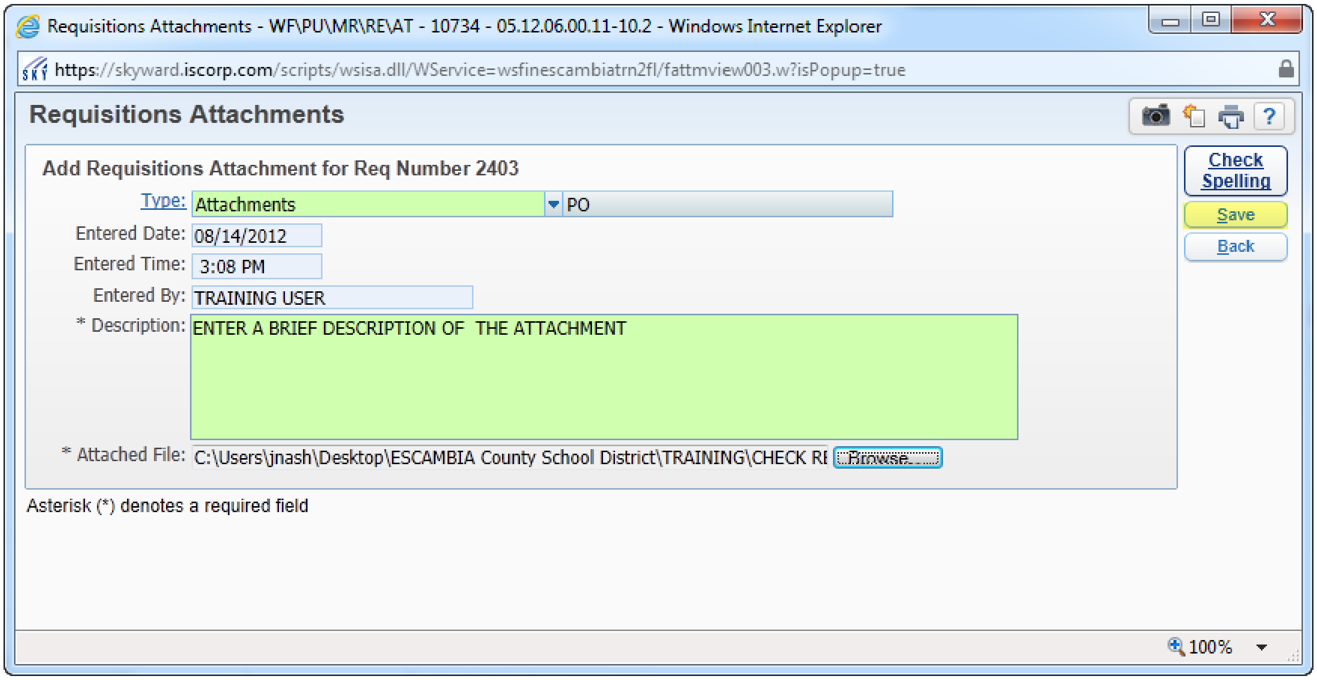


Step 2: Add a New Attachment

The Add Requisition Attachments Screen is used to add a new Attachment or view existing Attachments

7.2.1	Click the Add File button. The Add Requistions Attachment screen opens

Add Requisitions Attachment



REQUISITION SETUP INFORMATION

FIELD	FIELD DESCRIPTION
***Type**	The drop down list contains a list of all valid Attachment Types. Valid Attachment Types are • AGREEMENTS • ATTACHMENTS • INVOICES • QUOTES • SERVICE AGREEMENT
Entered Date	Defaults to the current Date. Cannot be changed
Entered Time	Defaults to the current Time. Cannot be changed
Enter By	Defaults to the user logged in. Cannot be changed
***Description**	Enter a description of the attachment

7.2.2	Click the Save button

You will be returned to the Requisitions Main Screen where the **Attach button will now contain ** indicating the presence of an Attachment for the Requisition.

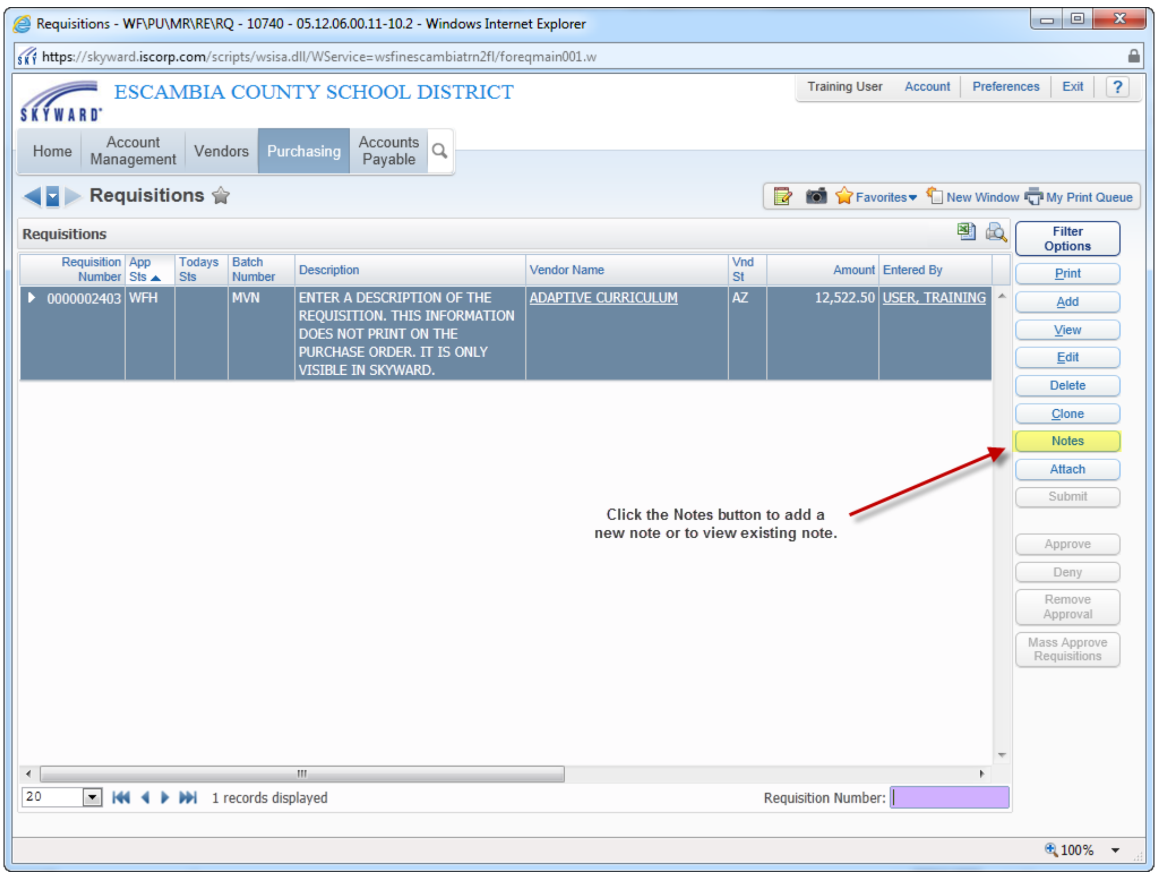
Chapter 8. Attach a Note to a Requisition

Any user with appropriate access to create or approve a requisition can add a note to a requisition at any time during the approval process. Notes, once added, are visible to all users and approvers of the requisition. The Note is also a part of the permanent record and is also available for viewing once the requisition becomes a Purchase Order.

Step 1: Attach a Note

From the Requisitions Main Screen:

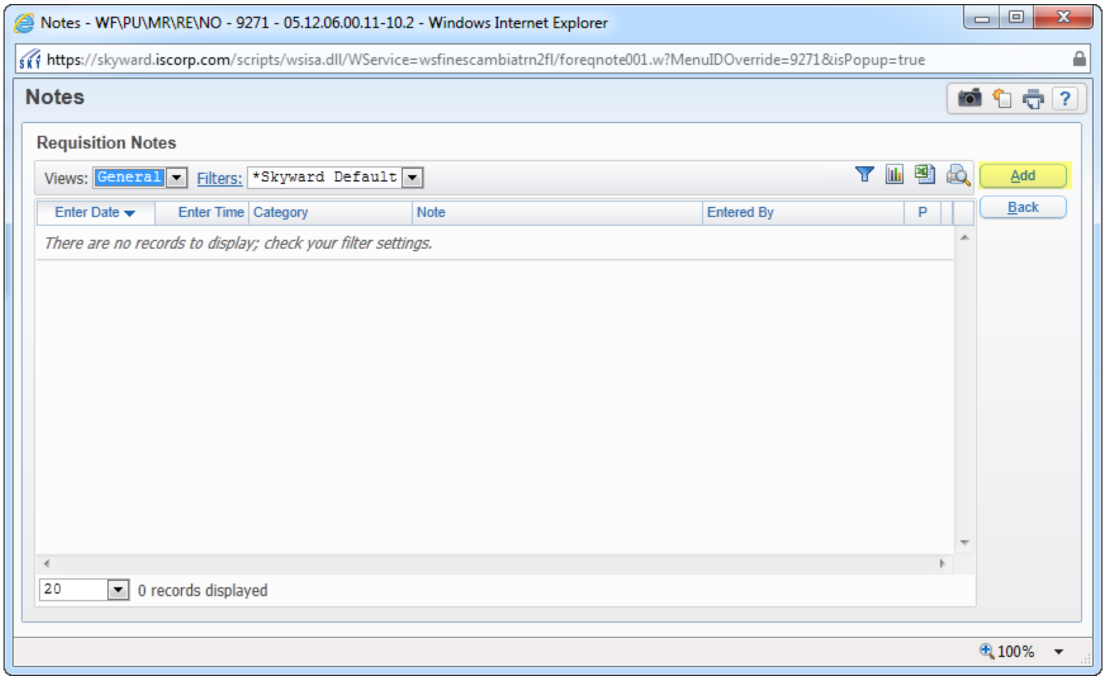
8.1.1	Click the Notes button.



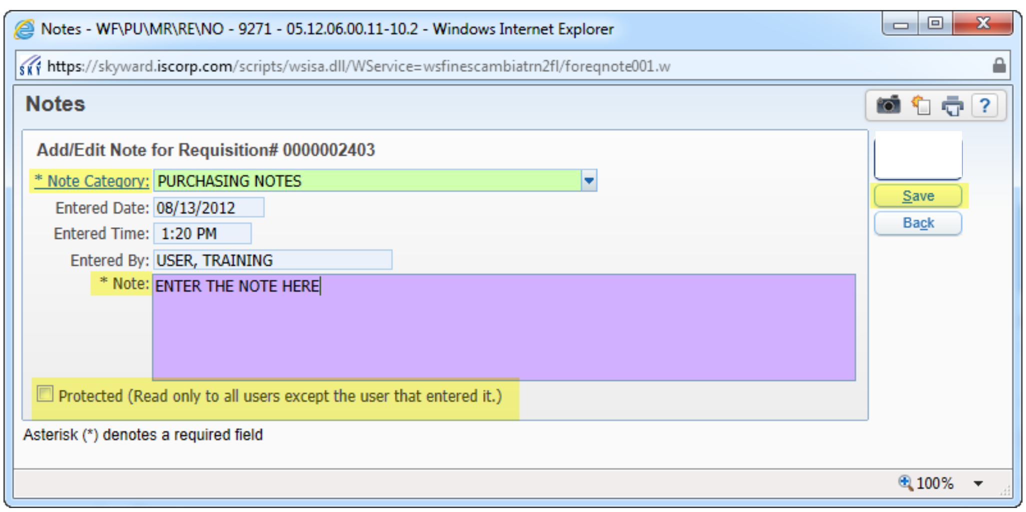
The **Notes** screen opens.

Step 2: Add a New Note

The Notes Screen is used to add a new Note or view existing Notes.



8.1.2	Click the Add button
8.1.3	**Add\Edit Note Informaton**



REQUISITION SETUP INFORMATION

FIELD	FIELD DESCRIPTION
***Note Category**	The drop down list contains a list of all valid Note Categories. Valid Note Categories are • CPO REQUISITION NUMBER

	• NEW VENDOR • NO VENDOR FOUND - PROVIDE INFORMATION BELOW • NOTES • PURCHASING NOTES • RECEIVING • REQ • SEE ATTACHED
Entered Date	Defaults to the current Date. Cannot be changed
Entered Time	Defaults to the current Time. Cannot be changed
Enter By	Defaults to the user logged in. Cannot be changed
***Note**	Enter the Note
Protected	Select the protect option to prevent anyone from modifying the Note once it is saved.

8.1.4	Click the Save button

You will be returned to the Requisitions Main Screen where the **Notes button will now contain ** indicating the presence of a Note for the Requisition.