

# Skyward User's Manual

## Skyward School Business Suite, Inventory

Prepared for  
Hernando County School  
District

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*Version 1.0*



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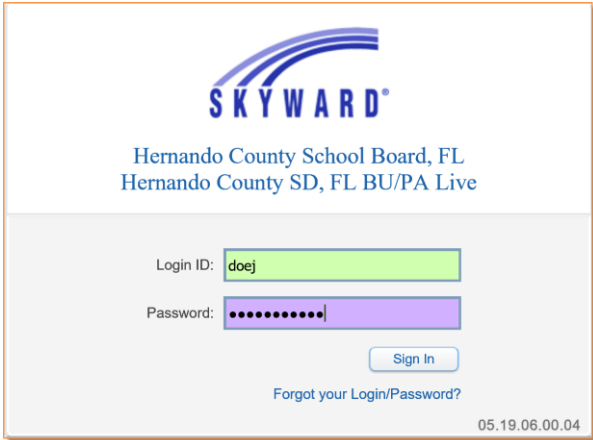
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## Chapter 1. Logging into Skyward

<p>💡 If you do not have a short cut to the Skyward application on your desktop open Internet Explorer, Edge or Firefox</p> <p>💡 Enter the URL and save to your Favorites</p>	<p><a href="https://skyward.iscorp.com/scripts/wsisd.dll/WService=wsfinhernandocofl/seplog01.w">https://skyward.iscorp.com/scripts/wsisd.dll/WService=wsfinhernandocofl/seplog01.w</a></p>
<p>💡 The Skyward Login ID is the same as your Novell Network ID Last Name and First Initial Name e.g. John Doe (doej).</p>	
<p>If you require assistance logging in please contact TIS.</p>	

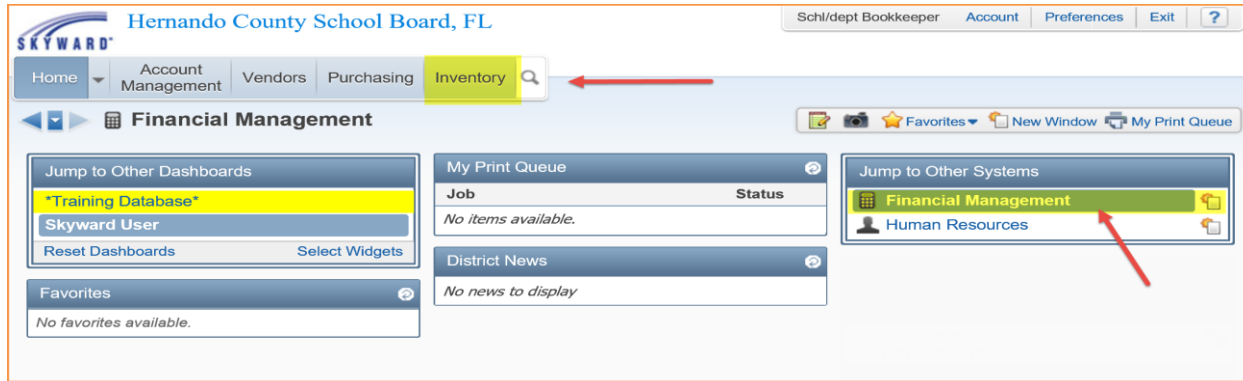
The Main Skyward Screen will open, displaying modules that you have access to.

## Chapter 2. Creating a Warehouse Requisition

### Step 1: Navigate to the Financial Management System

Click ON **JUMP TO OTHER SYSTEMS: Financial Management** or

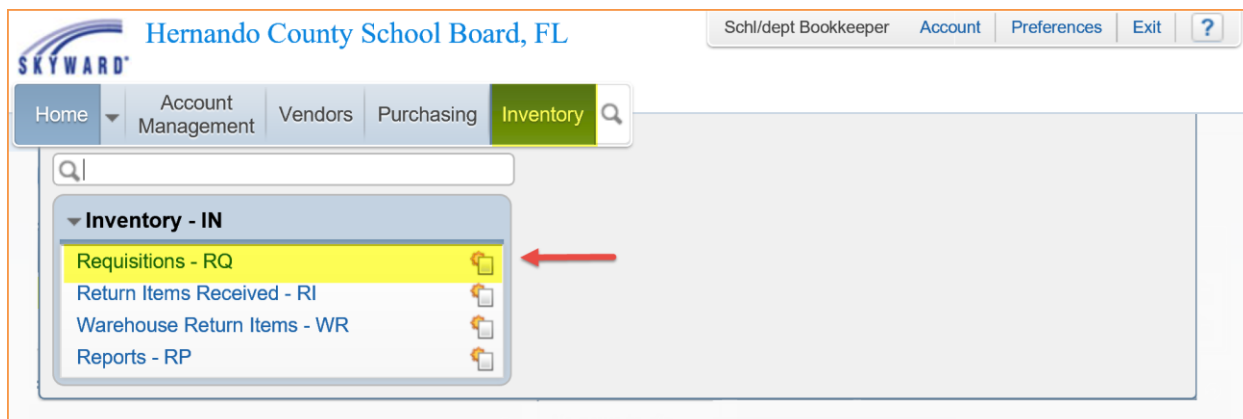
Click the Home Button and select **Financial Management** from the selection of systems



### Step 2: Navigate to Inventory Main Screen

Select Inventory from the Financial Main Menu,

Select **INVENTORY: Requisitions**



The **Requisitions** screen opens;

### Step 3: Add a New Warehouse Request

Click the [Add](#) button to add a new e an order for the Warehouse.

The screenshot displays the 'Requisitions' screen in the Skyward School Business Suite. The top navigation bar includes 'Home', 'Account Management', 'Vendors', 'Purchasing', and 'Inventory'. The 'Inventory' tab is selected. Below the navigation bar, the 'Requisitions' section is visible. The 'Views' dropdown is set to 'Master Information' and the 'Filters' dropdown is set to '\*Skyward Default'. A red arrow points to the 'Add' button in the right-hand toolbar. The main content area is empty, displaying the message 'There are no records to display; check your filter settings.' The bottom of the screen shows a pagination bar with '20' records per page and '0 records displayed'. The 'Requisition Number' field is empty, and the 'ABC' button is visible.

The **Inventory Requisition Master Information** screen opens.

## Step 4: Inventory Master Information

The Inventory Requisition Master Information screen is used to enter the Delivery Instructions and location for the inventory requisition.

**Inventory Requisition Master Information**

Inventory Requisition Master Information | Inventory Requisition Detail Lines/Accounting

**Inventory Requisition Master Information**

**Inventory Requisition Setup Information**

Requisition Group: 701 - FACILITY - WHSE

Fiscal Year: 2019 - 2020 July 1, 2019 - June 30, 2020

**Requisition Information**

Delivery Instructions: \*\*ENTER ANY SHIPPING OR ORDER SPECIFIC DETAILS\*\*

\*\*CAFE MANAGERS ENTER "CAFE"\*\*

Requestor: BOOKSCH000 BOOKKEEPER SCHL/DEPT LEE

\* Building: 0051 SCHL/DEPT/CAFE

Asterisk (\*) denotes a required field

Select your Requisition Group from the drop down. The drop down list contains a list of all groups authorized to purchase from the Warehouse. If more than one is listed it is important that you choose the right requisition group as it is tied to funding sources.

**SELECT THE REQUISITION GROUP THAT BEGINS 7## AND ENDS WITH "WHSE"**

**FOOD & NUTRITION USE THE GROUP BEGINNING WITH 8## AND ENDS WITH "F&N"**

Provide Delivery Instructions

You can create individual requisitions for each order at your location or bulk add everything to one order and distribute locally after delivery. If you create individual requisitions the Warehouse staff will deliver each requisition as a separate bundle.

Select the building that you would like the items delivered to. All Cost Centers are displayed so take care to choose your location. All supplies will be delivered to the front desk or the Cafeteria

Click the  button

The Requisition Detail Line Items Screen opens

## Step 5: Requisition Detail Lines

The Detail Lines lists all items in the Materials Warehouse available for purchase.

**Requisition Detail Line Items**

Available Items

Select Items By Item Code ← Display Items from Warehouse: HCSB WAREHOUSE

Views: General Filters: \*Skyward Default

Item Code	Item Description	Item Class	Unit Of Measure	WHSE QTY On Hand	Unit Value	Qty Comm	Qty BackOrd	Sel
010763	BANDAGE, ADHESIVE 3/4"	01	BOX	175	5.87000	0	0	<input type="checkbox"/>
010766	BANDAGE, ADHESIVE, 4"	01	PKG	82	6.49000	0	0	<input type="checkbox"/>
020000	BRUSH, TOILET BOWL 14"	02	EA	48	1.12000	0	0	<input type="checkbox"/>
020001	NIFTY NABBER 36"	02	EA	19	10.26000	0	0	<input type="checkbox"/>
020002	GLOVES, VINYL, XLARGE	02	BX	1,415	2.05000	0	0	<input checked="" type="checkbox"/>
020004	MOP, FINISH	02	EA	0	0.00000	0	0	<input type="checkbox"/>
020005	REFILL, DUST MOP 24"-MICR	02	EA	43	4.32000	0	0	<input type="checkbox"/>
020007	DUST MOP REFILL 36" MICRO	02	EA	42	5.02000	0	0	<input checked="" type="checkbox"/>
020008	DUSTER, COB WEB, EXT. 50-	02	EA	48	5.30000	0	0	<input type="checkbox"/>
020009	BROOM, PUSH 24" FOR POLIS	02	EA	2	6.73000	0	0	<input type="checkbox"/>

20 records displayed

Item Code:  ABC

**Selected Items**

Code	Item Description	Class	U Of M	Order Qty	Unit Value	Extended Cost
010002	MARKERS, DRY ERASE-BULLET	01	SET	10	1.89000	18.90
020002	GLOVES, VINYL, XLARGE	02	BX	20	2.05000	41.00
020007	DUST MOP REFILL 36" MICRO	02	EA	5	5.02000	25.10

Remove Remove All

### 5.1

Select the item you would like to order from the Warehouse by clicking the select box or double clicking the row. Select each item then enter the requested quantity. If the requested quantity exceeds the quantity on hand the row will display a red asterisk next to it. This does not prevent you from ordering the item. Items can be found by item code or item description.

- 💡 Select the Change Item by... to toggle between "Select Item by Item Code" and "Select Item by Item Description".

In the item code search box enter the item code prefix to jump to a specific commodity i.e. "01", "02"

- 01 - OFFICE/CLASSROOM
- 02 - CUSTODIAL
- 06 - CAFETERIA
- 08 - COLORED PAPER & MISC
- 10 - FOOD ITEMS (RESTRICTED ORDERIN
- MISC - MISCELLANEOUS SUPPLIES

Enter the Order Qty in the Selected Items area and repeat until all items have been selected and then click the Save Item Selection Info Button.

The Inventory Requisition Detail Line Items Accounting Screen opens;

## Step 6: Inventory Requisition Detail Line Items Accounting

Review the order totals for the requisition including requested, backordered and cost totals.

**Inventory Requisition Detail Lines/Accounting**

Inventory Requisition Master Information | Inventory Requisition Detail Lines/Accounting

**Inventory Requisition Master Information**

Requisition Number: 0000000125 [Edit Master](#)

Group: (701) FACILITY - WHSE [Notes](#)

Fiscal Year: 2019 - 2020 [Attachments](#)

Requestor: SCHL/DEPT LEE BOOKKEEPER

Building: SCHOOL/DEPARTMENT/CAFETERIA

Delivery Instructions: \*\*ENTER ANY SHIPPING OR ORDER SPECIFIC DETAILS\*\* \*\*CAFE MANAGERS ENTER "CAFE"\*\*

[Submit For Approval](#)

[Save and Finish Later](#)

[Back](#)

**Inventory Requisition Detail Lines**

Views: General Filters: \*Skyward Default [Update Line Items](#)

Item Code	Description	Requested	Delivered	Backordered	Canceled	Current Cost	Total Cost
010002	MARKERS, DRY ERASE-BULLET	10	0	0	0	\$1.89000	\$18.90000
020002	GLOVES, VINYL, XLARGE	20	0	0	0	\$2.05000	\$41.00000
020007	DUST MOP REFILL 36" MICRO	5	0	0	0	\$5.02000	\$25.10000

< 20 3 records displayed Item Code:  [ABC](#)

200%

[Add Requisition Accounting](#)

Click the [Add Requisition Accounting](#) button to add accounting information for the purchase.

The Account Distribution screen opens;



## Step 7: Account Distribution

The Account Distribution screen is used to enter accounting information for the purchase. Only authorized warehouse fund sources are displayed. These include budgeted fund sources with the following restrictions

- Funds – All Funds except 4110 (Food & Nutrition, Café Managers 4110 only)
- Object – 5100 (Supplies) and 5110 (Print Charges) only
- Facility – Cost Center
- Project - All Projects except (00100)

**Account Distribution**

Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Func	Obj	Fac	Proj	Subpr	Prog	Funds Available	Selected
1100	A	1150	0000	0051	00100	00000	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	13600	13020	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	40100	00000	00000	\$20,886.00	<input type="checkbox"/>
1100	E	5100	5100	0051	44400	00000	00000	\$8,207.08	<input checked="" type="checkbox"/>
1100	E	5100	5100	0051	44400	44440	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	44400	44450	00000	\$299.28	<input type="checkbox"/>
1100	E	5100	5100	0051	44500	00000	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	47800	00000	00000	\$125.51	<input type="checkbox"/>
1100	E	5100	5100	0051	49500	04000	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	49500	13000	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	49500	13020	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	49500	13030	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	50400	20100	00000	\$0.00	<input type="checkbox"/>
1100	E	5100	5100	0051	50400	51130	00000	\$0.00	<input type="checkbox"/>

49 records displayed

Account Number:

Quick Key:

Total Amount to Distribute: **\$85.00 100.00%**  
 Total Distributed: **\$85.00 100.00%**  
 Amount Remaining: **0.00 0.00%**

**Selected Accounts**

Account Number	Amount	Percent
1100E5100 5100 0051 44400 00000 00000	85.00	100.00

Remove  
Remove All

**Account Level Description**

**Account Number Information**

Code	Description
1100	GENERAL FUND
5100	BASIC EDUCATION
5100	SUPPLIES
0051	HERNANDO HIGH SCHOOL
44400	LOTTERY (SAC)- CARRY FORWARD

**2019-2020 Available Funds By**  
Individual Account

Save Account Distrib  
Back

Select an account that contains sufficient funding to cover the purchase.

Select the  button

The Requisition Detail Lines\Accounting Screen opens

## Step 8: Submit the Order

Review the order.

**Requisition Detail Lines/Accounting**

Inventory Requisition Master Information | Inventory Requisition Detail Lines/Accounting

**Requisition Detail Lines/Accounting**

**Inventory Requisition Master Information**

Requisition Number: **0000000125**  
 Group: **(701) FACILITY - WHSE**  
 Fiscal Year: **2019 - 2020**  
 Requestor: **SCHL/DEPT LEE BOOKKEEPER**  
 Building: **SCHOOL/DEPARTMENT/CAFETERIA**  
 Delivery Instructions: **\*\*ENTER ANY SHIPPING OR ORDER SPECIFIC DETAILS\*\* \*\*CAFE MANAGERS ENTER "CAFE"\*\*\***

**Requisition Accounts**

Views: General Filters: \*Skyward Default

Account Number	Amount	Percentage	Over Budget
1100E5100 5100 0051 44400 00000 00000	85.00	100.00	

20 1 records displayed

Buttons: Submit For Approval, Save and Finish Later, Back, Update Account Distrib, View Requisition Detail Lines

Click the [Submit For Approval](#) button. You will be returned the Main **Requisition** Screen.

**The order is transmitted automatically to the Warehouse with a status of approved.**

**Hernando County School Board, FL**

Schl/dept Bookkeeper Account Preferences Exit ?

Home Account Management Vendors Purchasing Inventory

**Requisitions**

Views: Master Information Filters: \*Skyward Default

Requisition Number	Original Reg Number	App Sts	Today's Sts	Entered By	Bldg	Date Entered	Fiscal Year	Delivery Instructions	# L	# A
7012000001		APP		BOOKKEEPER SCHL/DEPT LEE	0051	08/06/2019	2019 - 2020	**ENTER ANY SHIPPING OR	3	1

Buttons: Print, Add, View, Edit, Submit

Group View My Approved Inventory Reqs

20 1 records displayed Requisition Number:

## Order Status

To view the status of the order click the [View My Approved Inventory Reqs](#) button. The view changes. Note the status column now displays the status of the order

- NFL – No part of the inventory requisition filled. The order has been received but the warehouse has not yet processed the order for delivery.
- PFL – Inventory requisition is partially filled. This generally occurs if items are on backorder
- FFL – Inventory requisition is fully filled and closed

**Hernando County School Board, FL**

Sch/dept Bookkeeper Account Preferences Exit ?

Home Account Management Vendors Purchasing Inventory

Code values for approval status:  
NFL - No part of inventory requisition filled  
PFL - Inventory requisition partially filled  
FFL - Inventory requisition fully filled

Views: Ma Default

Requisition Number	Original Req Number	Req Sts	Today's Sts	Entered By	Bldg	Date Entered	Fiscal Year	Delivery Instructions	# L	# A	# A
7012000001	0000000125	NFL		BOOKKEEPER SCHL/DEPT LEE	0051	08/06/2019	2019 - 2020	**ENTER ANY SHIPPING OR	3	1	

1 records displayed

Requisition Number:

Buttons: Add, View, Edit, Submit, Notes, Attach, Approve, Deny, Remove Approval, Assign Special Group, Master Information

Click the [Master Information](#) button to toggle back the Master Information screen. You cannot enter requisitions from the "Approved Requisitions" screen as the "Add" button is not available.