

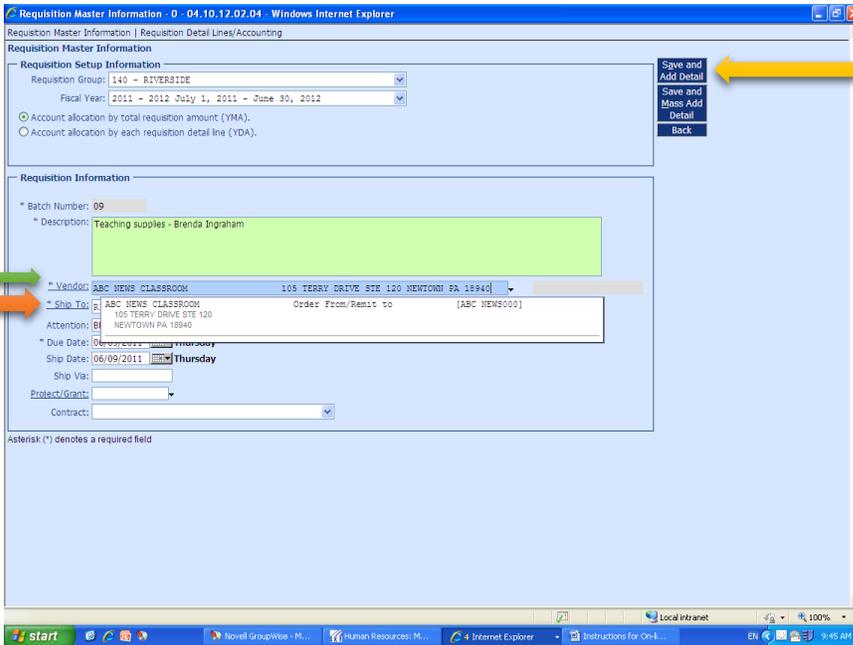


USING EMPLOYEE ACCESS TO CREATE REQUISITIONS

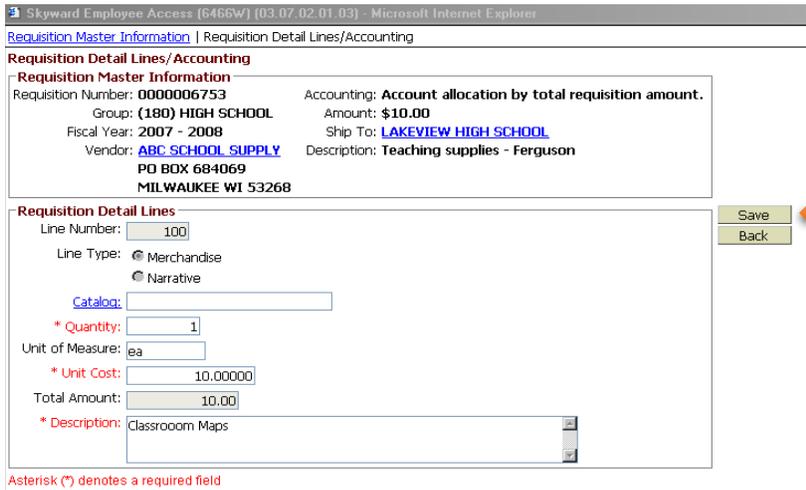
1. Log into Employee Access.
2. Click on the *Financial Management*.
3. Click the *Purchasing* button; then click *Requisitions* button. (See picture)



4. Click on either *Add* or *Add from Online Catalog* on the right hand side of your screen. There are separate instructions for entering School Specialty orders or any online catalog company orders. These are found at the end of this document.
5. Fill in a *brief description* of your order, i.e., Teaching Supplies + your name. Including your name makes it readily identifiable for your secretary and principal. (See picture below)
6. Click on the *Vendor* button and choose your Vendor. (If your vendor is not on the list, please see additional information below to request that a vendor be added.)
7. Enter Ship Date. **Click the *Save and Add Detail* button.**



1. Begin with the first line and enter the item numbers/quantities of the items you wish to order. **Click Save**



9. Continue to add items to your requisition. Each item ordered requires a separate line on the requisition. Hit save.

10. When you have completed entering the items you wish to order, click on the *Add Requisition Accounts* (right side of screen)

Skyward Employee Access [6466W] [03.07.02.01.03] - Microsoft Internet Explorer

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Number: 0000006753 Accounting: Account allocation by total requisition amount. [Edit Master](#)

Group: (180) HIGH SCHOOL Amount: \$10.00 [Notes](#)

Fiscal Year: 2007 - 2008 Ship To: LAKEVIEW HIGH SCHOOL [Attachments](#)

Vendor: ABC SCHOOL SUPPLY Description: Teaching supplies - Ferguson

PO BOX 684069
MILWAUKEE WI 53268

Submit For Approval
Save and Finish Later
Back

Requisition Detail Line Items

Line	Catalog Code	Description	Unit of Measure	Quantity	Unit Cost	Total Cost
100		Classroom Maps	ea	1	\$10.00000	\$10.00

Add
Edit
Delete
Add Requisition
Add accounting to requisition



11. Find the account number you need (if you have several account numbers, see direction #11 below). You will probably need to use the MIDDLE TWO ARROW KEYS at the bottom (see picture below) to scroll through the accounts. There is a description of the account number in the upper right hand corner of the screen to make it easier for you to identify the correct number. Check the box and click **Save Account Distribution**. If you get an over budget warning, just click on “OK” as the new year budget information has not been loaded.

Skyward Employee Access [6466W] [03.07.02.01.03] - Microsoft Internet Explorer

Account Distribution

Available Accounts

Fund	Proc	Obj	Func	Proj	Subj	Code	Funds Available	Selected
11	E	113	4120	02106	502	0000 0000	\$250.00	<input type="checkbox"/>
11	E	113	4120	02106	512	0000 0000	\$250.00	<input type="checkbox"/>
11	E	113	4120	02106	513	0000 0000	\$500.00	<input type="checkbox"/>
11	E	113	4120	02106	522	0000 0000	\$477.00	<input type="checkbox"/>
11	E	113	4123	02106	000	0000 0000	\$-14,703.05	<input type="checkbox"/>
11	E	113	4125	02106	000	0000 0000	\$24.48	<input type="checkbox"/>
11	E	113	4220	02106	000	0000 0000	\$20,646.25	<input type="checkbox"/>
11	E	113	4910	02106	000	0000 0000	\$0.00	<input type="checkbox"/>
11	E	113	5111	02106	000	0000 0000	\$250.00	<input checked="" type="checkbox"/>
11	E	113	5112	02106	000	0000 0000	\$3,200.00	<input type="checkbox"/>
11	E	113	5113	02106	000	0000 0000	\$105.30	<input type="checkbox"/>
11	E	113	5115	02106	000	0000 0000	\$-1,957.00	<input type="checkbox"/>
11	E	113	5116	02106	000	0000 0000	\$1,570.00	<input type="checkbox"/>
11	E	113	5117	02106	000	0000 0000	\$3,198.60	<input type="checkbox"/>

Account Number Information

Code	Description
11	GENERAL
113	HIGH SCHOOL
5111	SOCIAL STUDIES
02106	LHS

Save Account Distrib
Back

25 records displayed

Account Number: []

Total amount to Distribute: \$10.00 100.00%
Total Distributed: \$10.00 100.00%
Amount Remaining: \$0.00 0.00%

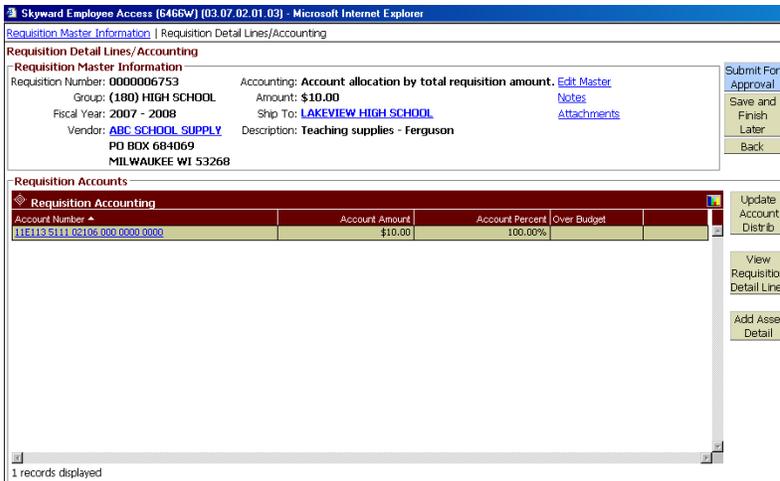
Acc	Number	Amount	Percent
11	5111 02106 000 0000 0000	10.00	100.00

Remove
Remove All



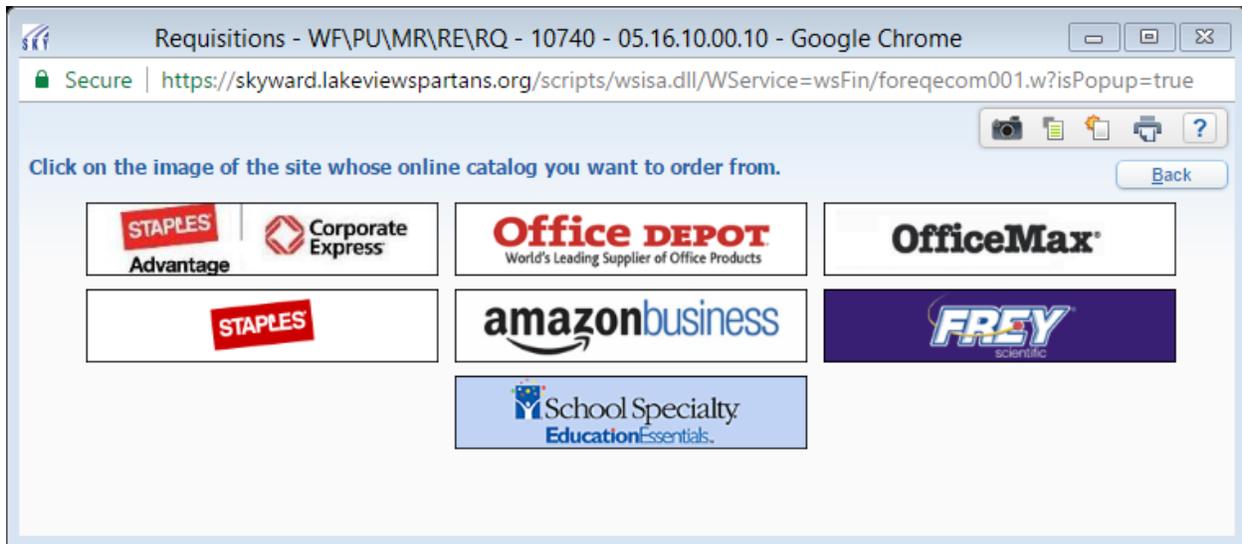
12. If you need to split your order between two different account numbers, check the boxes for both numbers. The box below will expand to show each account number. You can choose to enter a dollar amount or a percentage. Then click Save Account Distribution.

13. Saving takes you back to the previous screen. Click **Submit for Approval**. It will go to the office for approval. You will receive an e-mail notification when the requisition has been approved.



TO CREATE A SCHOOL SPECIALTY or Online Catalog orders

1. **Log into** Employee Access.
2. Click the **Purchasing** button; then click **Requisitions** button below.
3. Click **Add from Online Catalog** (on right side of screen).
4. Click the **catalog of the companies** available for online purchasing.



5. Fill in a description of your order (e.g., Teaching Supplies XX-XX year) and ship to address using the pull down.
6. Make sure the **Fiscal Year is for the correct year, i.e. 2016-17.** (See picture.)
7. Enter **Ship Date** (See picture). **Click Save.**

Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05.16.10.00.10 - Google Chrome

Secure | https://skyward.lakeviewspartans.org/scripts/wsisa.dll/WService=wsFin/foreqmast001.w

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 252 - BUSINESS OFFICE

Fiscal Year: 2016 - 2017 July 1, 2016 - June 30, 2017

Account allocation by total requisition amount (YMA).
 Account allocation by each requisition detail line (YDA).

Save and Add Detail
Back

Requisition Information

* Batch Number: 08

* Description: Add description here!

Vendor: OFFICE DEPOT ****Ecommerce Vendor****

* Ship To:

Attention: LUCINDA LUNDBERG

* Due Date: 02/08/2017 Wednesday

Ship Date: 02/08/2017 Wednesday

Ship Via:

Project/Grant:

Contract:

Asterisk (*) denotes a required field

- 8 The School Specialty or company website order form will load. You may get a Security Warning, if so, just say “NO” and it will let you continue. Begin entering the item numbers/quantities of the items you wish to order. You can browse for products or enter the product number if known. You can change or delete items after they have been added into your cart.
9. When you are finished (even if you want to add items later), go to your shopping cart and review your order, if correct then click checkout.
10. You will then be directed back to Skyward Employee Access.
11. You may click “Save and Finish Later” if you aren’t ready to submit your order or if you need to add/delete items. Clicking “Edit” will take you back to the appropriate ordering website catalog, where you can add/delete items. Go back to step #9 after all your items are in. You may continue adding items until you submit your order for approval.

https://skyward_bc-lakeview.k12.mi.us/scripts/cgip.exe/WService=wstin/foreqdet1001.w - Microsoft Internet Explorer

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Number: 000006777 Accounting: Account allocation by total requisition amount. [Edit Master](#)

Group: (170) LAKEVIEW MIDDLE SCH Amount: \$29.74 [Notes](#)

Fiscal Year: 2007 - 2008 Ship To: LAKEVIEW MIDDLE SCHOOL [Attachments](#)

Vendor: [SCHDOL SPECIALTY](#) Description: Notebook

MB UNIT #68-9541

MILWAUKEE WI 53268

Submit For Approval
Save and Finish Later
Back

Requisition Detail Line Items

Line	Catalog Code	Description	Unit of Measure	Quantity	Unit Cost	Total Cost
100	30087094	Classroom Keepers®#8482, Mail Box	EA	1	\$29.74000	\$29.74

Add
Edit
Delete
View Requisition Accounts



12. Click on **Add Requisition Accounts** (right side of screen). Then this screen pops up.

Account Distribution - 05.16.10.00.10 - Google Chrome

Secure | https://skyward.lakeviewspartans.org/scripts/wsisa.dll/WService=wsFin/facctmdist001.w?MenuIDOverride=0&isPopup=true

Account Distribution

Available Accounts

Fnd	T	Fnc	Obj	Fac	Prg	S-fy	Othr	Funds Available	Selected
11	A	101	0000	00000	001	0000	0001	\$1,214,781.66	<input type="checkbox"/>
11	A	101	0000	00000	001	0000	0002	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	001	0000	0003	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	001	0000	0010	\$5,313.23	<input type="checkbox"/>
11	A	101	0000	00000	003	0000	0001	\$1,158,441.69	<input type="checkbox"/>
11	A	101	0000	00000	003	0000	0003	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	015	0000	0002	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	024	0000	0001	\$28,148.71	<input type="checkbox"/>
11	A	101	0000	00000	024	0000	0003	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	024	0001	0001	\$15,209.40	<input type="checkbox"/>
11	A	101	0000	00000	025	0000	0001	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	034	0000	0000	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	034	0000	0001	\$26,730.15	<input type="checkbox"/>
11	A	101	0000	00000	034	0000	0003	\$0.00	<input type="checkbox"/>

100 records displayed

Account Number:

Quick Key:

Account Level Description

Account Number Information

Code	Description
11	GENERAL
101	BANK ACCOUNT
00000	.
001	MAIN BANK ACCOUNT
0000	.
0001	PNC

2016-2017 Available Funds By

Total Amount to Distribute: **\$181.77 100.00%**
 Total Distributed: **\$0.00 0.00%**
 Amount Remaining: **\$181.77 100.00%**

Account Number	Amount	Percent

13. Find the account number that you need (if you have 2 account numbers, see direction #6). You will probably need to use the **MIDDLE TWO ARROW KEYS** at the bottom (see picture below) to scroll through the accounts. Check the box and click **Save Account Distrib.**

14. If you need to split your order between two different account numbers, check the boxes for both numbers. The box below will expand to show each account number. You can choose to enter a dollar amount or a percentage. Then click Save Account Distribution.

Account Distribution - 05.16.10.00.10 - Google Chrome

Secure | https://skyward.lakeviewspartans.org/scripts/wsisa.dll/WService=wsFin/facctmdist001.w?MenuIDOverride=0&isPopup=true

Account Distribution

Available Accounts

Fnd	T	Fnc	Obj	Fac	Prg	S-fy	Othr	Funds Available	Selected
11	A	101	0000	00000	001	0000	0001	\$1,214,781.66	<input type="checkbox"/>
11	A	101	0000	00000	001	0000	0002	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	001	0000	0003	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	001	0000	0010	\$5,313.23	<input type="checkbox"/>
11	A	101	0000	00000	003	0000	0001	\$1,158,441.69	<input type="checkbox"/>
11	A	101	0000	00000	003	0000	0003	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	015	0000	0002	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	024	0000	0001	\$28,148.71	<input type="checkbox"/>
11	A	101	0000	00000	024	0000	0003	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	024	0001	0001	\$15,209.40	<input checked="" type="checkbox"/>
11	A	101	0000	00000	025	0000	0001	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	034	0000	0000	\$0.00	<input type="checkbox"/>
11	A	101	0000	00000	034	0000	0001	\$26,730.15	<input checked="" type="checkbox"/>
11	A	101	0000	00000	034	0000	0003	\$0.00	<input type="checkbox"/>

100 records displayed

Account Level Description

Account Number Information

Code	Description
11	GENERAL
101	BANK ACCOUNT
00000	.
034	PAYROLL
0000	.
0001	PNC

2016-2017 Available Funds By

Total Amount to Distribute: **\$181.77 100.00%**
 Total Distributed: **\$181.77 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Account Number	Amount	Percent
11A101 0000 00000 024 0001 0001	181.77	100.00
11A101 0000 00000 034 0000 0001	0.00	0.00

[Remove](#)

[Remove All](#)

- Saving takes you back to the previous screen. Click **Submit for Approval**. You will be notified when the requisition has been approved.

Requisition (Main Screen) - FM\PU\RQ\RQ - 2220 - 05.16.10.00.10 - Google Chrome

Secure | https://skyward.lakeviewspartans.org/scripts/wsisa.dll/WService=wsFin/foreqacct002.w

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **08**

Requisition Number: **0000029824** Accounting: **Account allocation by total requisition amount.** [Edit Master](#)

Group: **(252) BUSINESS OFFICE** Amount: **181.77** [Notes](#)

Fiscal Year: **2016 - 2017** Ship To: **LAKEVIEW SCHOOL DISTRICT** [Attachments](#)

Vendor: **OFFICE DEPOT** Description: **test**

PO BOX 633211

CINCINNATI OH 45263-3211

***** This is an Ecommerce Requisition *****

[Submit For Approval](#) ←

[Save and Finish Later](#)

[Back](#)

Requisition Accounts

Requisition Accounting

Account Number ▲	Account Amount	Account Percent	Over Budget
11A101 0000 00000 024 0001 0001	\$181.77	100.00%	
11A101 0000 00000 034 0000 0001	\$0.00	0.00%	

[Update Account Distrib](#)

[View Requisition Detail Lines](#)

[Add Asset Detail](#)

2 records displayed

- Do not fax or call in your School Specialty or online catalog company orders. These orders are submitted electronically directly to the vendor.***