

Slide 1 - Slide 1

The screenshot shows the Skyward Financial Management web application interface. At the top, the browser title is "Skyward Financial Management - WF - 10636 - 04.11.10.00.11 - Windows Internet Explorer". The navigation bar includes tabs for "EDUCATOR ACCESS™ plus", "PRODUCT SETUP", "STUDENT MANAGEMENT", "HUMAN RESOURCES", and "FINANCIAL MANAGEMENT". A "Print this tutorial" button is visible in the top right. The main header displays "Skyward School District", "User Name: Maria Zuchowskiscr", and "Tuesday, December 20th, 2011". A grid of icons represents various system functions, including "Product Setup", "Account Management", "VEndors", "PURchasing", "Accounts Payable", "Accounts Receivable", "Fixed Assets", "INventory", "School Based ACtivity Acct", "Custom Reports", "Federal/State Reporting", "Bid Management", "My Req Approval Hist", "View Purchasing Activity", "View My Purchase Orders", "E-mail POs", "ECommerce Ordering", "ECommerce Order Tracking", "Power Track", "User Preferences", "PO Receiving", and "Purchase ReReports".

Adding a Requisition


Click Financial Management, Purchasing, Requisitions.


Who, What, When, Why?

Requisitions are requests for purchases that can go through an approval process before actually being ordered or purchased. This process can help distribute the entry task to a larger group of people.

Users that enter requisitions will be responsible for entering that information correctly and timely. When Requisitions are fully approved, they become Batch Status Purchase Orders.

Windows 7 / Internet Explorer 7

 Software made and supported in the USA



Skyward® is a registered trademark of Skyward, Inc. All other brands and product names are copyrights, trademarks, or registered trademarks of their respective owners.

[Account Information](#) | [Change Password](#) | [Login History](#)

Slide 2 - Slide 2

Requisitions - WF\PU\RE\RQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer

Skyward School District User Name: Maria Zuchowskiscr Examples Tuesday, December 20th, 2011

Home Page | Purchasing | Requisitions (175) Back

Requisitions

No records available

Click Add to add a new requisition.

Filter Options

Add

Add from Online Catalog

Print WIP Report

ALL 0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Requisition Number:

0 records displayed

Slide 3 - Slide 3

Requisition Master Information - WF\PU\RE\RQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 200 - MIDDLE SCHOOL

Fiscal Year: 2011 - 2012 July 1, 2011 - June 30, 2012

Account allocation by total requisition amount (YMA).

Account allocation by each requisition detail line (YDA).

This requisition is used to restock a warehouse.

* Batch Number: 20

* Description:

* Vendor:

* Ship To:

Attention: Maria Zuchowskiscr

* Due Date: 12/20/2011 Tuesday

Ship Date: 12/20/2011 Tuesday

Ship Via:

Project/Grant:

Contract:

Asterisk (*) denotes a required field

Save and Add Detail

Save and Mass Add Detail

Back

Select the **Requisition Group** and the **Fiscal Year** to use for this requisition.

Select the **Account allocation** for this requisition.

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

If this requisition is being used to **restock a warehouse**, select the option accordingly.

100%

Slide 4 - Slide 4

The screenshot shows a web browser window titled "Requisition Master Information - WF\PU\RE\RQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer". The page content is divided into two main sections: "Requisition Setup Information" and "Requisition Information".

Requisition Setup Information:

- Requisition Group: 200 - MIDDLE SCHOOL
- Fiscal Year: 2011 - 2012 July 1, 2011 - June 30, 2012
- Account allocation by total requisition amount (YMA) is selected.
- Account allocation by each requisition detail line (YDA) is unselected.
- There is a checkbox for "This requisition is used to" which is currently unchecked.

Requisition Information:

- * Batch Number: 20
- * Description: Notebooks
- * Vendor: Kda web services ltdscr
- * Ship To: Nolleyscr Brian A, 14 Scramble avenue PO BOX 1256 Scramble WV
- Attention: Maria Zuchowskiscr
- * Due Date: 12/20/2011 Tuesday
- Ship Date: 12/20/2011 Tuesday
- Ship Via: (empty)
- Project/Grant: (empty)
- Contract: (empty)

Buttons on the right side of the page include "Save and Add Detail", "Save and Mass Add Detail", and "Back".

Instructional Callouts:

- Callout 1:** "1. Enter the Batch Number, and the Description." (points to the Batch Number and Description fields)
- Callout 2:** "2. Begin typing the Vendor Name and select from the list that will automatically display in the drop-down. Or, click the Vendor link to select from the Vendor Master. Select the Ship To address for this order as well as a Due Date and a Ship Date. Note: Fields flagged with an asterisk are required. The rest of the fields are optional and can be used as needed." (points to the Vendor, Ship To, Due Date, and Ship Date fields)
- Callout 3:** "3. Click Save and Add Detail to add one line of merchandise. Click Save and Mass Add Detail to easily add multiple lines of merchandise." (points to the "Save and Add Detail" and "Save and Mass Add Detail" buttons)

A footer note states: "Asterisk (*) denotes a required field".

Slide 5 - Slide 5

Requisition Detail Lines/Accounting - WF\PU\RE\REQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer

[Requisition Master Information](#) | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **20**
Requisition Number: **0000000883**
Group: **(200) MIDDLE SCHOOL**
Fiscal Year: **2011 - 2012**
Vendor: [Kda web services ltdscr](#)

Accounting: **Account allocation by total requisition amount.**
Amount: **0.00**
Ship To: [Brian A Nolleyscr](#)
Description: **Notebooks**

Requisition Detail Lines

* Line Number:
Line Type: Merchandise
 Narrative
Catalog:
* Quantity:
Unit of Measure:
* Unit Cost:
Total Amount:
* Description:

sterisk (*) denotes a required field

2. Click Save.

1. Select whether the detail line item type is Merchandise or Narrative.
If Merchandise is chosen then select the following details:
• Catalog - Use the link or the drop-down
• Quantity
• Unit of Measure - Use the link or type in the field
• Unit Cost
• Description
If Narrative is chosen, select the Narrative and Description details.

Save
Back

Slide 6 - Slide 6

Requisition Detail Lines/Accounting - WF\PU\REQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer

[Requisition Master Information](#) | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **20**

Requisition Number: **0000000883** Accounting: **Account allocation by total requisition amount.** [Edit Master](#)

Group: **(200) MIDDLE SCHOOL** Amount: **9.74** [Notes](#)

Fiscal Year: **2011 - 2012** Ship To: **Brian A Nolleyscr** [Attachments](#)

Vendor: **Kda web services ltdscr** Description: **Notebooks**

Submit For Approval
Save and Finish Later
Back

Save and Finish Later may be used to pause the entry process.

Requisition Detail Line Items

Requisition Detail Line Items

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
100		Spiral Bound Notebook	1		3.99000	3.99	
110		Loose Leaf Notebook and filler...	1		5.75000	5.75	

Add
Edit
Delete
Mass Add Detail
Add Requisition Accounts

When all of the line items have been added, click **Add Requisition Accounts** to select the accounts.

2 records displayed Line:

Slide 7 - Slide 7

Account Distribution - WF\PU\RE\REQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer

Home Page | Requisitions | Requisition Master Information | Requisition Detail Lines/Accounting | Account Distribution (3663)

Available Accounts

Fnd	T	Loc	Func	Obj	Sj	Source	Funds Available	Selected
10	E	100	2140	2130	00	000000	\$0.00	<input type="checkbox"/>
10	E	100	2140	2140	00	000000	\$2,898.00	<input checked="" type="checkbox"/>
10	E	100	2140	2180	00	000000	\$0.00	<input type="checkbox"/>
10	E	100	2140	2230	00	000000	\$0.00	<input type="checkbox"/>
10	E	100	2410	1000	00	000000	\$0.00	<input type="checkbox"/>
10	E	100	2560	1100	00	000000	\$0.00	<input type="checkbox"/>
10	E	200	1110	1000	00	000000	\$0.00	<input type="checkbox"/>
10	E	200	1120	1000	00	000000	\$127,010.00	<input type="checkbox"/>
10	E	200	1120	1200	00	000000	\$0.00	<input type="checkbox"/>
10	E	200	1120	1270	00	000000	\$19,102.00	<input checked="" type="checkbox"/>
10	E	200	1120	2110	00	000000	\$0.00	<input type="checkbox"/>

100 records displayed

Total Amount to Distribute: **\$9.74 100.00%**
 Total Distributed: **\$9.74 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
10E000 1110 1000 00 000000	9.74	100.00
10E000 1110 2110 00 000000	0.00	0.00
10E000 1110 2230 00 000000	0.00	0.00
10E100 1110 1000 00 000000	0.00	0.00
10E100 2140 2140 00 000000	0.00	0.00

Account Level Description

10	GENERAL EDUCATION FUND
200	MIDDLE SCHOOL
1120	MIDDLE SCHOOL
1270	SUB
000000	NON-CATEGORICAL

Buttons: Save Account Distrib, Back

3. Click **Save Account Distribution**.

1. Select the appropriate accounts to expense the order to.

2. Information from the account selected in the top part of the screen and the distribution will populate into the bottom window. The Amount or Percent for each selected account can be modified. Remove and Remove All can de-select accounts.

Slide 8 - Slide 8

Requisition Detail Lines/Accounting - WF\PU\RE\REQ - 10740 - 04.11.10.00.11 - Windows Internet Explorer

[Requisition Master Information](#) | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting We value your feedback

Requisition Master Information

Batch Number: **20**

Requisition Number: **0000000883** Accounting: **Account allocation by total requisition amount.** [Edit Master](#)

Group: **(200) MIDDLE SCHOOL** Amount: **9.74** [Notes](#)

Fiscal Year: **2011 - 2012** Ship To: **Brian A Nolleyscr** [Attachments](#)

Vendor: **Kda web services ltdscr** Description: **Notebooks**

Requisition Accounts

Account Number	Account Amount	Acc
10E000 1110 1000 00 000000	\$9.74	
10E000 1110 2110 00 000000	\$0.00	
10E000 1110 2230 00 000000	\$0.00	
10E100 1110 1000 00 000000	\$0.00	0.00%
10E100 2140 2140 00 000000	\$0.00	0.00%
10E200 1120 1270 00 000000	\$0.00	0.00%

6 records displayed

When the entry is complete, click **Submit for Approval**.

If the entry is not complete, click **Save and Finish Later** which will create a **WIP** status requisition that can be edited and submitted at a later date.

[This concludes the tutorial.](#)

[Submit For Approval](#)
[Save and Finish Later](#)
[Back](#)
[Add Asset Detail](#)