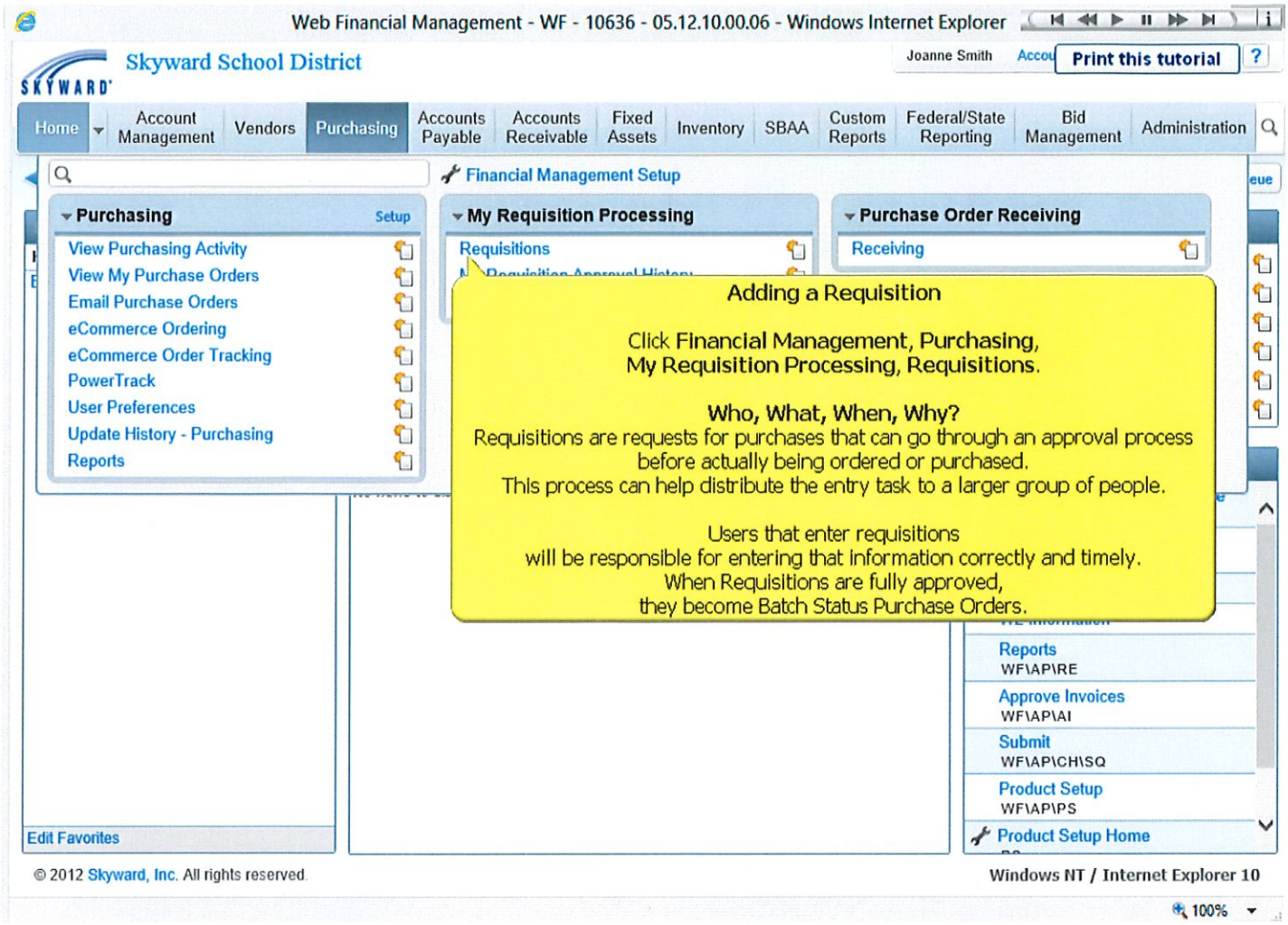

Web Financial Management - WF - 10636 - 05.12.10.00.06 - Windows Internet Explorer
Skyward School District
Joanne Smith
Print this tutorial
Home
Account Management
Vendors
Purchasing
Accounts Payable
Accounts Receivable
Fixed Assets
Inventory
SBAA
Custom Reports
Federal/State Reporting
Bid Management
Administration
Financial Management Setup
Purchasing
Setup
View Purchasing Activity
View My Purchase Orders
Email Purchase Orders
eCommerce Ordering
eCommerce Order Tracking
PowerTrack
User Preferences
Update History - Purchasing
Reports
My Requisition Processing
Requisitions
Purchase Order Receiving
Receiving
Adding a Requisition
Click Financial Management, Purchasing, My Requisition Processing, 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.
Reports
WF\AP\RE
Approve Invoices
WF\AP\AI
Submit
WF\AP\CH\SQ
Product Setup
WF\AP\PS
Product Setup Home
Edit Favorites
© 2012 Skyward, Inc. All rights reserved.
Windows NT / Internet Explorer 10
100%

Requisitions - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Internet Explorer

Skyward School District

Joanne Smith | Account | Preferences | Exit | ?

Home | Account Management | Vendors | Purchasing | Accounts Payable | Accounts Receivable | Fixed Assets | Inventory | SBAA | Custom Reports | Federal/State Reporting | Bid Management | Administration

Requisitions

Favorites | New Window | My Print Queue

Requisitions

Requisition Number	App Sts	Todays Sts	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By
0000040592	WIP		WEBREQ	Testing narrative descriptions	H & b supply incscr	IL	12.50	smith, joanne
0000040600	WIP		WEBREQ	This is a test to see what prints	A. t. tradersscr	IL	450.00	smith, joanne
0000039345	WFM		24	test #1 - PaC entered req	A & d housemovers inc.scr	IL	1,0	
0000039346	WFM		WEBREQ	test #2 - Web entered req	B & b athletic supply llc...	IL		
0000040586	WFM		WEBREQ	communications system	A.k.agenciesscr	IL	50,000.00	Smith, Nancy
0000040589	WFM		WEBREQ	Master Record:	R & a kumarscr	IL	1,150.00	smith, anna
0000040595	WFM		WEBREQ	Testing - Blanket Req	H & b supply incscr	IL	450.00	Alequinscr, Jona (
0000040598	PEN		WEBREQ	test	D & g business machinessc...	IL	1.00	Rexrodescr, Victo

Click Add to add a new requisition.

Filter Options | Print | Add | Delete | Clone | Notes | Attach | Submit | Approve | Deny | Remove Approval | Add from Online Catalog | Clone from Purchase Order | Mass Approve Requisitions | Assign Special Group

100 | 8 records displayed | Requisition Number:

100%

Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Interne

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 001 - MR PO/RQ

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 is a Blanket Requisition/Purchase Order
- [ ] This requisition is used to restock a warehouse.

Save and Add Detail #3

Save and Mass Add Detail

Back

#1

Requisition Information

Enter the requisition **Description**.

* Description: To purchase party supplies for the homecoming festivities.

* Vendor: Glacier marketing networksor 886 Scramble avenue PO BOX 846367 Skyward

* Ship To: IL 5555

Attention

* Due Date

Begin typing the **Vendor** name and **select** from the drop-down list or, click the **Vendor** link to select from the **Vendor Master**.

#2

Ship Date: 11/02/2012 Friday

Ship Via:

Project/Grant:

Contract:

You are the Vendor so put your name for reimbursement

Asterisk (*) denotes a required field

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Intern

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**
Requisition Number: **0000040601**
Group: **(001) MR PO/RQ**
Fiscal Year: **2011 - 2012**
Vendor: **Glacier marketing networkscr**
886 Scramble avenue PO BOX 846367
Skyward City IL 55555-6367

Accounting: **Account allocation by total requisition amount.**
Amount: **0.00**
Ship To: **Skyward school districtscr**
Blanket PO: **This is not a Blanket PO**
Description: **To purchase party supplies for the homecoming festivi**

2. Click **Save**.

Save
Back

Requisition Detail Lines

* Line Number: 100
Line Type: (•) Merchandise ( ) Narrative
Catalog:
* Quantity: 15
Unit of Measure: EACH
* Unit Cost: 25.00000
Total Amount: 375.00
* Description: Decorations and Parade Float items

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**

Asterisk (*) denotes a required field

100%

Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Interne

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**
Requisition Number: **0000040601**
Group: **(001) MR PO/RQ**
Fiscal Year: **2011 - 2012**
Vendor: **Glacier marketing networkscr**
886 Scramble avenue PO BOX 846367
Skyward City IL 55555-6367

Accounting: **Account allocation by total requisition amount.**
Amount: **1,925.00**
Ship To: **Skyward school distric**
Blanket PO: **This is not a Blanket P**
Description: **To purchase party sup**

Edit Master Notes

Submit For Approval
Save and Finish Later
Back

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

Requisition Detail Line Items

Views: General Filters: *Skyward Default

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
100		Decorations and Parade Float items	15	EACH	25.00000	375.00	
110		Party Favors	100	BX	15.50000	1,550.00	
120	Delivery	Please deliver items to the main office in the district building.	0		0.00000	0.00	

Add
Edit
Delete
Mass Add Detail
Add Requisition Accounts

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

20 3 records displayed Line:

100%

Account Distribution - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Internet Expl

Account Distribution

Save Account Distrib

Back

Available Accounts

Available Accounts for Clearance Group MR Accounts

Fnd	T	Loc	Func	Obj	Sj	Source	Funds Available	Selected
10	E	000	1100	1300	00	410002	$0.00	☐
10	E	000	1100	1300	00	410003	$0.00	☐
10	E	000	1100	1300	00	441501	$0.00	☐
10	E	000	1100	1300				
10	E	000	1100	1300				
10	E	000	1100	1300				
10	E	000	1100	1300	00	493203	$0.00	☐
10	E	000	1100	1300	00	499906	$0.00	☐
10	E	000	1100	1300	00	499907	$1,364.00	☐
10	E	000	1100	1300	00	499908	$9,176.00	☑
10	E	000	1100	1300	00	499909	$0.00	☐
10	E	000	1100	2110	00	000000	$1,616.	
10	E	000	1100	2110	00	220002	$0.	

100 records displayed

1. Select the appropriate account(s) to expense the order to.

2. Information from the account selected in the top portion 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.

3. Click **Save Account Distribution**.

Account Level Description

10	EDUCATION FUND
1100	REGULAR PROGRAMS
1300	OVERTIME SALARIES/EXTRA PAY
499908	ADVANCED PLACEMENT GRANT '08

2011-2012 Available Funds By

Individual Account

Total Amount to Distribute: **$1925.00 100.00%**

Total Distributed: **$1925.00 100.00%**

Amount Remaining: **$0.00 0.00%**

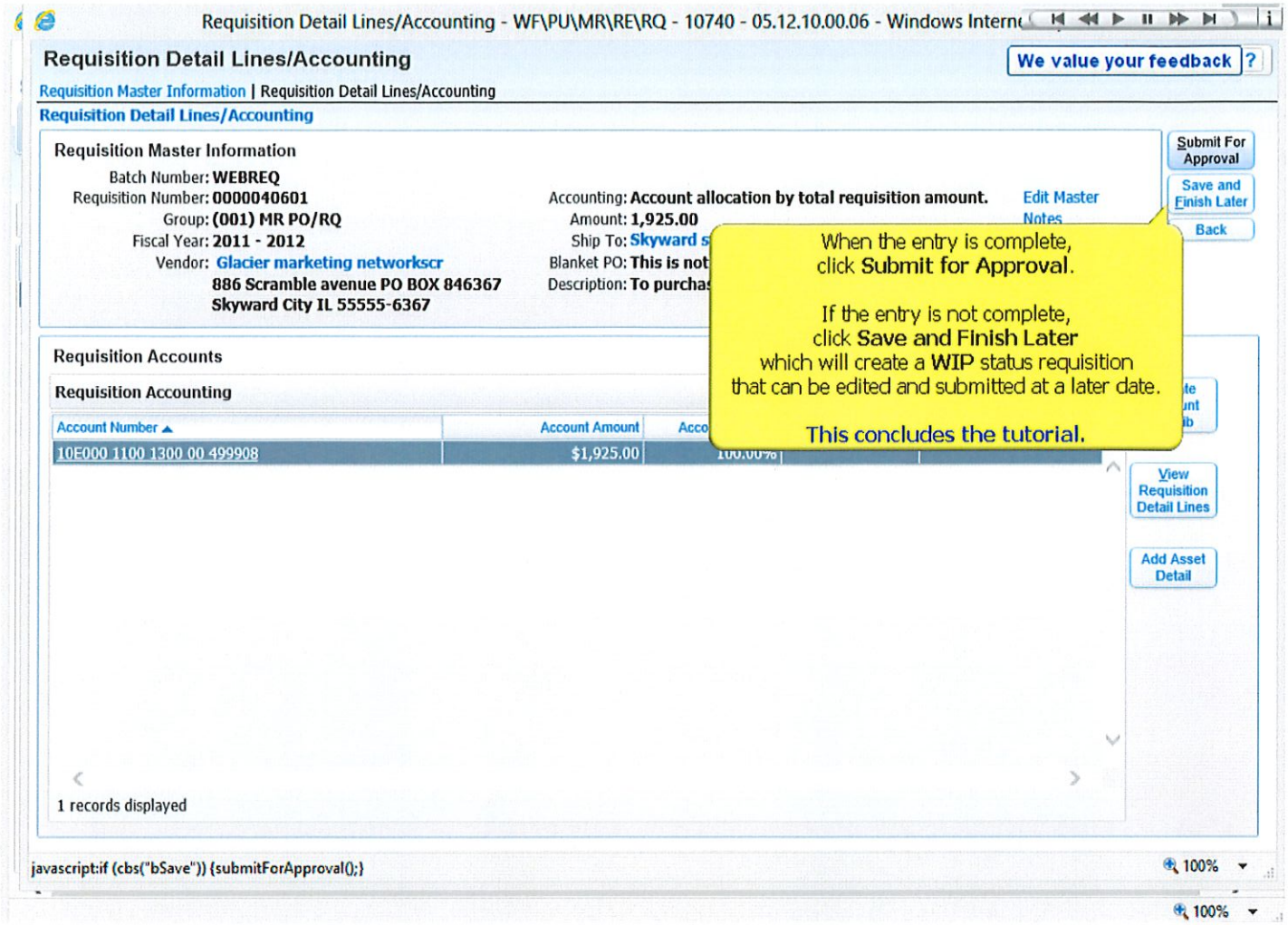
Selected Accounts

Account Number	Amount	Percent
10E000 1100 1300 00 499908	1925.00	100.00

Remove

Remove All

Tuition Reimbursement is a "500" Account #


Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Intern
Requisition Detail Lines/Accounting
We value your feedback
Requisition Master Information | Requisition Detail Lines/Accounting
Requisition Detail Lines/Accounting
Requisition Master Information
Batch Number: WEBREQ
Requisition Number: 0000040601
Group: (001) MR PO/RQ
Fiscal Year: 2011 - 2012
Vendor: Glacier marketing networkscr
886 Scramble avenue PO BOX 846367
Skyward City IL 55555-6367
Accounting: Account allocation by total requisition amount.
Amount: 1,925.00
Ship To: Skyward s
Blanket PO: This is not
Description: To purchas
Edit Master
Notes
Submit For Approval
Save and Finish Later
Back
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.
Requisition Accounts
Requisition Accounting
Account Number
Account Amount
10E000 1100 1300 00 499908
$1,925.00
View Requisition Detail Lines
Add Asset Detail
1 records displayed
javascript:if (cbs("bSave")) {submitForApproval();}
100%