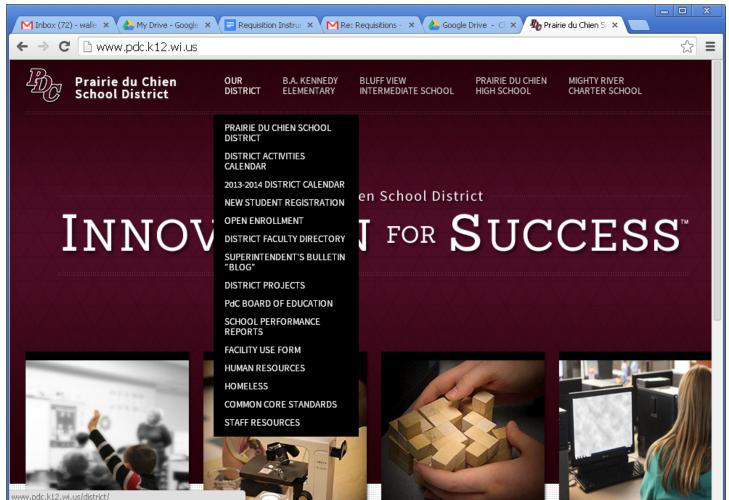
Go to the school website, click on Our District, Staff Resources, Skyward Financial

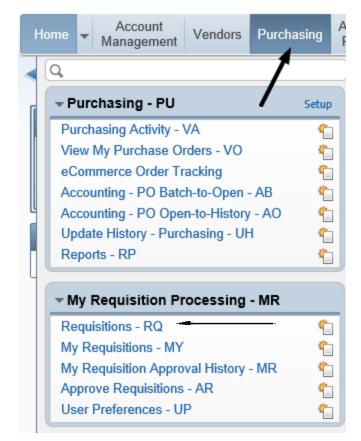


Change Login Area to Employee Access.

Login ID is the first 8 letters of your last name plus the first 2 letters of your first name. Password - the first time you login will be password. The system will prompt you to change it.

1) Web Financial Management/Purchasing/Requisitions (or My Requisitions)

Requisition Process – Purchase Order – Invoicing – Cut Checks



3)

2) On the Requisitions screen, click the Add button to Add a new Requisition

· F	lome 👻	Accou Manager		Vendors	Purchasir	Accounts Payable	Accounts Receivable	Fixed Assets	Inventory	SBAA	Custom Reports		al/State orting	Bid Management	Adm	ninistration	Q,
Requisitions (7975)														My Print	Queue		
Re	quisitior	S												N	۵ (Filter Options	
		ition App nber Sts	Today Sts		Batch Number	Description		Ver	ndor Name		Vnd St		Amoun	t Entered By	\square	Print	5
Þ		204 WIP		0	AJ	Testing		<u>Car</u>	otive broadcas	st limited	<u>.</u> IL		0.00	0 <u>Jolliffescr, Abra</u>	<u>al</u> ^ (Add	
Þ	0000068	205 WIP		0	AJ	TESTING FOR PF	ROCESSING	Cap	otive broadcas	st limited	. IL			0 Jolliffescr, Abra		View	
I b		210 WTP				testinn			ntive hroadca		TI		0.00	η Inlliffescr Δhr	ał 🚽		_
Cho	ose th	e corre	ect <u>R</u>	<u>equisit</u>	ion Gro	oup to ent	er in the	Requi	sition fo	or							
Rec	uisiti	on Mas	ter In	nformat	tion (14	67)									1	1	?
Requi	sition Ma	ster Inform	nation	Requisitio	n Detail Lir	es/Accounting											
Requ	isition N	laster Inf	ormat	ion													
Re	quisitio	n Setup In	nforma	ation												Save and	
	Requisiti	on Group:	000 -	Distri	ct Wide				•							Save and	
	Fi	scal Year:	2013	- 2014 (July 1, 2	2013 - June	30, 2014		•							Mass Add	
			*		amount (ו											Detail	
					n detail line	(YDA).										Back	
		Blanket Re isition is us	•														
	i nis requ	ISITION IS US	sed to r	estock a v	varenouse.												
Requisition Information																	
* Batch Number: 09																	
* Description: enter in a general description here. If you were buying pens, pencils, erasers, etc, enter in Miscellaneous School Supplies You can be specific on Details once Detail Lines are chosen on the next screen.																	
	* Ver	ndor: Dicl	ks Spo	orting G	oods		1415 MAIN	ST STEV	ENS POINT	WI 544	81	-					
	* Shij	<mark>ο Το:</mark> R ε	k ele	ectronic	s limite	d t/a	1614 Scram	ble Ave	enue Scram	ble IL	55555	-					

a) The first three numbers (000) for the Requisition Group will predicate the Purchase Order Number when

approved

- b) Choose the correct Fiscal Year for the Requisition
- c) More often than not choose YDA for a layout
 - i) This will allow accounts to be charged PER DETAIL LINE, as well as a mass total of the order
- d) Enter in your Batch Number (010914) for example.
 - i) This will group transactions/records together for later processing
 - (1) Batch Update, Open PO Update, Invoice Updating, Check Register, Reports
- e) Enter in a useful Description. (See above for example)
- f) Choose the Vendor by clicking the *Vendor button, or start entering in the name of the Vendor and select when it populates in the browse
 - i) Do the same with the Ship to for the Vendor as well
- g) Click Save and Add Detail

4)

- i) If you know there are going to be more than 1 Detail Line, choose Save and Mass Add Detail
- Here is where you enter in the Detail Lines for the Requisition

Requisition Detai			ing		
Requisition Master Informa Requisition Detail Lines		Lines/Account	ung		
Requisition Master In	formation				
Batch Number: 0	9				
Requisition Number: 0	000068277	Accounting	Account allocation by each r	equisition detail line.	
	000) District Wide	Amount			
Fiscal Year: 2			R & k electronics limited t/a	l	
	icks Sporting Goods		This is not a Blanket PO		
	415 MAIN ST TEVENS POINT WI	Description	enter in a general descriptio enter in Miscellaneous Scho		
_	4481		Lines are chosen on the next		come on becaus once becau
Invoice To:	Default)				
	100 Merchandise Narrative				<u>S</u> ave Back
Catalog:		•			
* Quantity:	10				
Unit of Measure:	Each <				
* Unit Cost:	1.0000	0			
Total Amount:	10.0	0			
* Description	PENS				
Commodity Code:	•				
Commodity Code:					

- a) The Line Number defaults to 100
 - i) You can always change this to 001 if you desire
 - ii) The point of it starting at 100 is to be able to enter in a Detail Line above it for aesthetics on the PO/Req when it is finally printed
- b) Enter in the Quantity, choose the Unit of Measure, Enter in a useful Description. Click Save when finished
- 5) Click on Add Requisition Accounts on the bottom right of your screen. On the Account Distribution Screen, choose the Account(s) that will be charged
 - a) Click the box to choose the Account
 - b) When needing 2 or more Accounts, check multiple boxes and change the Amount/Percent below on the following screen. Click Save Account Distribution when finished

🗿 Αςςοι	int Dis	stribut	ion - W	F\PU\M	1R\RE	\RQ - 1074	0 - 05.13.10.00.09-10.2 - Windo	ws Interr	net Explorer						x
Acco	unt	Dist	ributi	ion (4	1966	5)							1	0 🕁 🤇	?
Availa	able A	Accou	unts											Save	
									3		Account	Level Description		Accou	
E-1	-		Func	l ou:	01	Source	Funds Available	Selecte		~				<u>B</u> ack	¢
Fnd 🔺		_								- 1	Account	Number Information			
<u>9</u> 7	A	000	1930	0000	00	000000	\$9,930.11		-	1	Code	Description			
07	L	000	4020	0000	00	000000	\$0.00		-	=	07	Fixed Assets			
07	L	000	4510	0000	00	000000	\$0.00		-	_	1930	EQUIPMENT SALES			
07	L	000	4520	0000	00	000000	\$0.00		-						
07	L	000	4530	0000	00	000000	\$0.00			_	2013-20)14 Available Funds By			
07	L	000	4540	0000	00	000000	\$0.00		-						
07	L	000	4550	0000	00	000000	\$0.00		-	_					
07	L	000	4560	0000	00	000000	\$0.00		-	_					
07	L	000	4565	0000	00	000000	\$-50.00		-						
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144	• •	•••	100 rec	ords dis			Accou	nt Numb	er:		\$ 🚟				
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Fotal An / Selecte	Tota Amour	al Dist nt Ren	ributed: naining:	\$10.0	0 1 0 0	.00%									
Account	Numb	er					Amount		Percent						
07A000	1930	0000 0	0 00000	0			10.00		100.00	-	Remov	•			

At this time, do not be alarmed if it indicates that the account is over budget, as I do not have all of the budgets loaded in yet. The system gives this to you only as a warning and will allow you to continue.

6) This screen shows a summary of the Requisition. Click Submit for Approval to submit to your Approver that is designated by the Req/PO Group setup.

Requisition Detail Lines/Ac	counti	ng (715)						0	1	?
Requisition Master Information Requisition		Lines/Accounting								
Requisition Detail Lines/Accounting Requisition Master Information										Submit For
Batch Number: 09										Approval Save and
Requisition Number: 0000068277		Accounting: Account allocation by each requisition detail line.								
Group: (000) District	Wide	Amount: 10.00 Notes								Back
Fiscal Year: 2013 - 2014		Ship To: R & k electronics limited t/a Attachments								
Vendor: Dicks Sporting 1415 MAIN ST STEVENS POII 54481 Invoice To: (Default)	r	Blanket PO: This is not a Blan Description: enter in a genera enter in Miscellar Lines are chosen	l descripti neous Scho	ol Suppli	ies You can be s					
Requisition Detail Line Items										
Views: General 💌 Filters: *Skywar	d Defau	lt 🔻					T 🔟	B	Ð,	<u>A</u> dd
Line 🔺 Catalog Code	Descriptio	n	Quantity	U of M	Unit Cost	Total Cost	Comm Code			<u>E</u> dit
▶ 100	PENS		10	Each	1.00000	10.00				Delete
									-	Mass Add Detail

- 7) Once Submit for Approval is clicked, you will be brought back to your Requisition screen
 - a) The Requisition will be in **WFH** status (Waiting for Higher Approval)
 - i) To see who is waiting for your Requisition, click the > Arrow next to the Requisition Number and then

click the > Arrow next to the Approvers Heading.

- (1) If there are any Approvals, it will show the time and date of the Approval, and who else is needed
- b) If needed, highlight your Requisition and click the Edit button to make necessary changes. Click Submit for Approval again when you are finished Editing.

F	lome -	Accour anager	1/4	endors	Purchasi	ng Accounts Payable	Accounts Receivable	Fixed Assets	Inventory	SBAA	Custom Reports	Federal/State Reporting	Bid Management	Adm	ninistration Q
Requisitions 😭 (8412)														My Print Queu	
Requisitions														Filter Options	
	Requisition Number		Todays Sts		Batch Number	Description		Ven	dor Name		Vnd St	Amoun	Entered By		Print
₽	0000068204	WIP		0	AJ	Testing		Cap	Captive broadcast limited		. IL	IL 0.00 Jolliffescr, Abra		^ (Add
₽	0000068205	WIP		0	AJ	TESTING FOR PR	OCESSING	Cap	Captive broadcast limited		. IL	0.00	Jolliffescr, Abral	6	View
₽	0000068210	WIP		0	AJ	testing		Cap	Captive broadcast limited		. IL	0.00	Jolliffescr, Abral		Edit
₽	0000068245	WIP		0	WEBREQ	7th Grade Suppli	es	Ict	Ict solutions is a single		IL	718.29	Jolliffescr, Abral		
₽	0001300015	WFH		0	WEBREQ	account group ap	provals	Ict	solutions is a	single	IL	120.00	Jolliffescr, Abral		Delete
Þ	0001300018	WFH		0	09	enter in a genera			ks Sporting G	oods	WI	10.00	Jolliffescr, Abral	(Clone
						If you were buyir									Notes
						erasers, etc, ente School Supplies Y								(Attach
						on Details once D chosen on the ne)etail Lines are							C	Submit