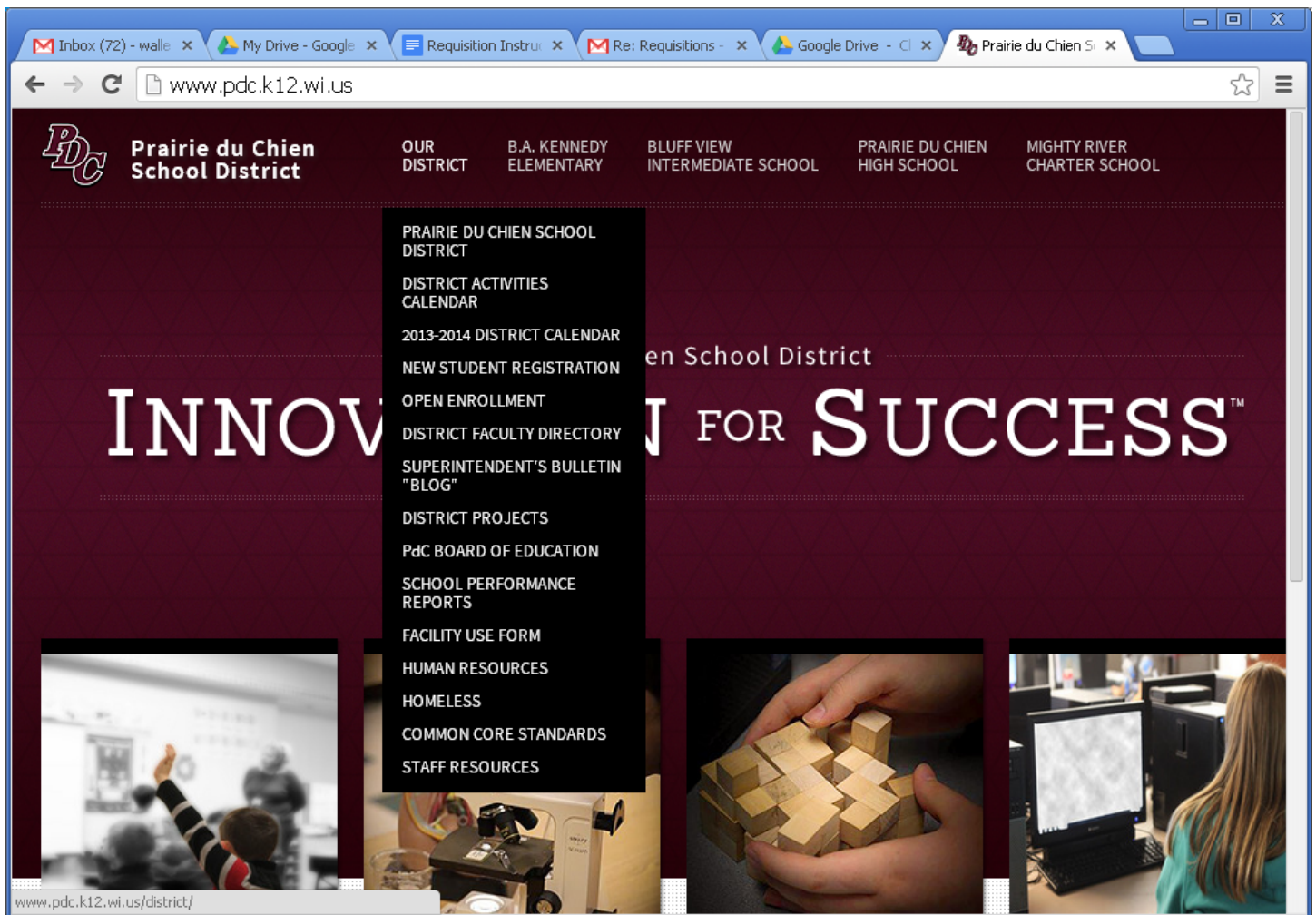


Go to the school website, click on Our District, Staff Resources, Skyward Financial

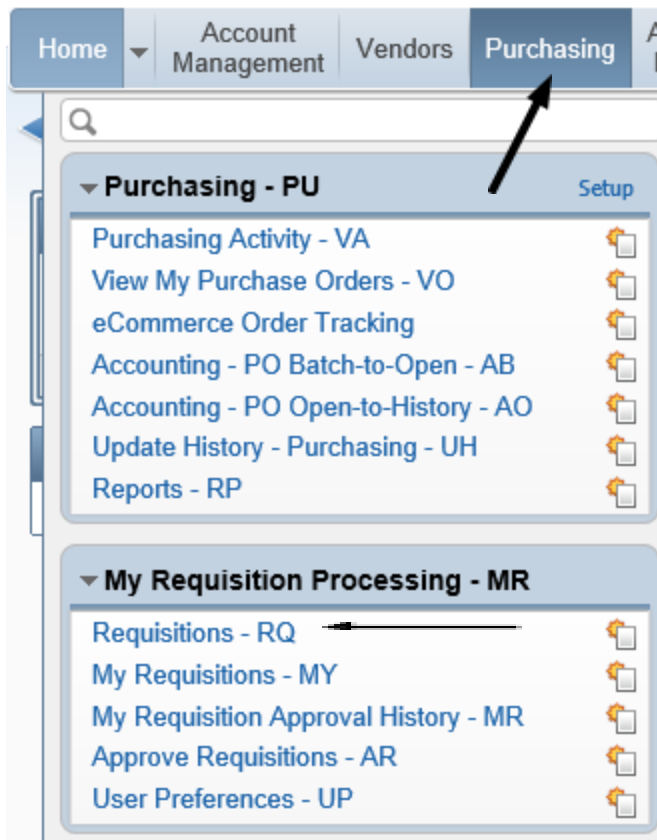


Change Login Area to Employee Access.

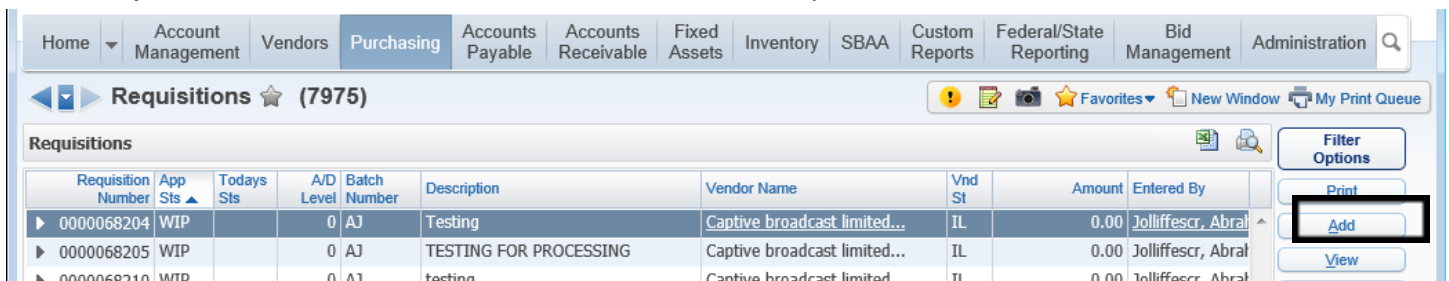
Login ID is the first 8 letters of your last name plus the first 2 letters of your first name.

Password - the first time you login will be password. The system will prompt you to change it.

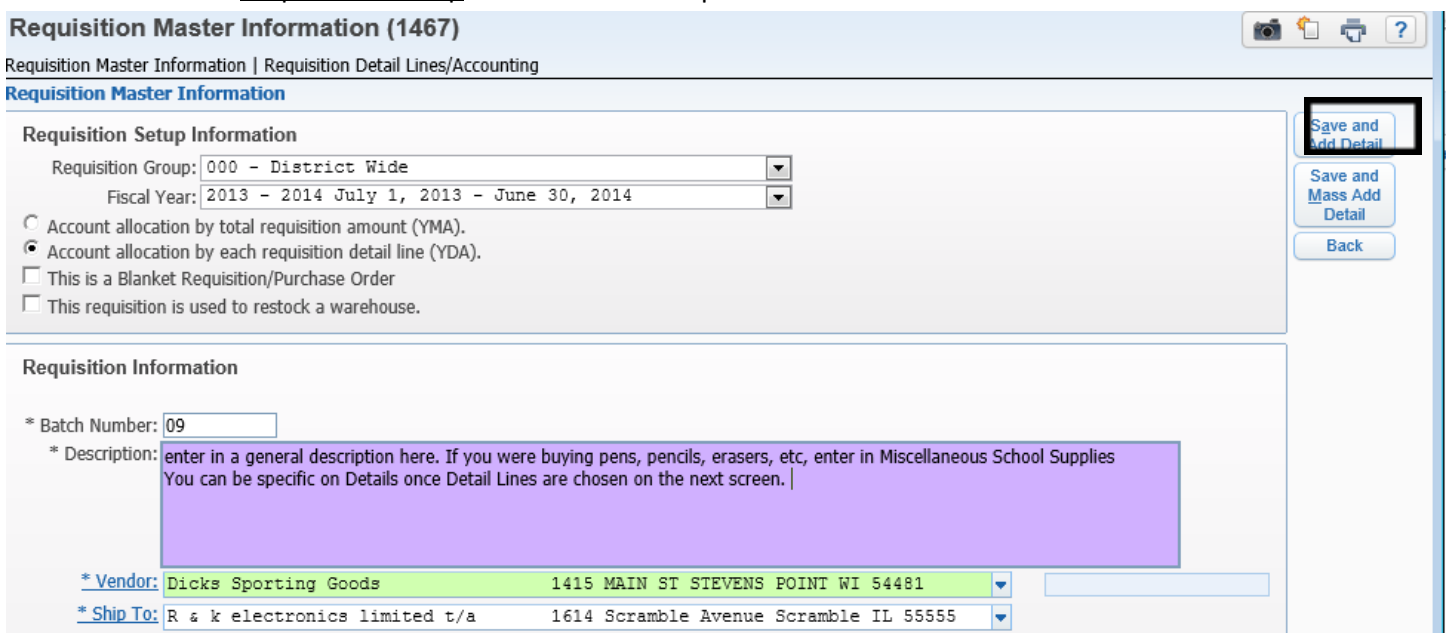
1) Web Financial Management/ Purchasing/ Requisitions ( or My Requisitions )



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



3) Choose the correct Requisition Group to enter in the Requisition for



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
  - i) If you know there are going to be more than 1 Detail Line, choose Save and Mass Add Detail

4) Here is where you enter in the Detail Lines for the Requisition

### Requisition Detail Lines/Accounting (625)

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

**Requisition Detail Lines/Accounting**

---

**Requisition Master Information**

Batch Number: <b>09</b> Requisition Number: <b>0000068277</b> Group: <b>(000) District Wide</b> Fiscal Year: <b>2013 - 2014</b> Vendor: <b>Dicks Sporting Goods</b> <b>1415 MAIN ST</b> <b>STEVENS POINT WI</b> <b>54481</b> Invoice To: <b>(Default)</b>	Accounting: <b>Account allocation by each requisition detail line.</b> Amount: <b>0.00</b> Ship To: <b>R &amp; k electronics limited t/a</b> Blanket PO: <b>This is not a Blanket PO</b> Description: <b>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.</b>
---	--

---

**Requisition Detail Lines**

\* Line Number:

Line Type:  Merchandise  Narrative

Catalog:

\* Quantity:

Unit of Measure:

\* Unit Cost:

Total Amount:

\* Description:

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

**Account Distribution (4966)**

Fund	T	Loc	Func	Obj	Si	Source	Funds Available	Selected
07	A	000	1930	0000	00	000000	\$9,930.11	<input checked="" type="checkbox"/>
07	L	000	4020	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4510	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4520	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4530	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4540	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4550	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4560	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4565	0000	00	000000	\$-50.00	<input type="checkbox"/>
07	L	000	4566	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4570	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4580	0000	00	000000	\$0.00	<input type="checkbox"/>
07	L	000	4590	0000	00	000000	\$-100.00	<input type="checkbox"/>

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

Account Number	Amount	Percent
07A000 1930 0000 00 000000	10.00	100.00

**Account Level Description**

Code	Description
07	Fixed Assets
1930	EQUIPMENT SALES

**2013-2014 Available Funds By**

Account Number:   
 Quick Key:

**Save Account Distrib**

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/Accounting (715)**

Requisition Master Information

Batch Number: **09**  
 Requisition Number: **0000068277**  
 Group: **(000) District Wide**  
 Fiscal Year: **2013 - 2014**  
 Vendor: **Dicks Sporting Goods**  
 1415 MAIN ST  
 STEVENS POINT WI  
 54481  
 Invoice To: **(Default)**

Accounting: **Account allocation by each requisition detail line.**  
 Amount: **10.00**  
 Ship To: **R & k electronics limited t/a**  
 Blanket PO: **This is not a Blanket PO**  
 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.**

**Submit For Approval**

Save and Finish Later  
 Back

Requisition Detail Line Items

Views: **General** Filters: **\*Skyward Default**

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code
▶ 100		PENS	10	Each	1.00000	10.00	

**Add**  
**Edit**  
**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.

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

Requisitions (8412) Favorites New Window My Print Queue

Requisitions Filter Options

Requisition Number	App Sts	Todays Sts	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By
▶ 0000068204	WIP		0	AJ	Testing	Captive broadcast limited...	IL	0.00	Jolliffescr, Abra
▶ 0000068205	WIP		0	AJ	TESTING FOR PROCESSING	Captive broadcast limited...	IL	0.00	Jolliffescr, Abra
▶ 0000068210	WIP		0	AJ	testing	Captive broadcast limited...	IL	0.00	Jolliffescr, Abra
▶ 0000068245	WIP		0	WEBREQ	7th Grade Supplies	Ict solutions is a single...	IL	718.29	Jolliffescr, Abra
▶ 0001300015	WFH		0	WEBREQ	account group approvals	Ict solutions is a single...	IL	120.00	Jolliffescr, Abra
▶ 0001300018	WFH		0	09	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.	Dicks Sporting Goods	WI	10.00	Jolliffescr, Abra

Print Add View Edit Delete Clone Notes Attach Submit