

Slide 1 - Slide 1

The screenshot shows the Skyward School District Web Financial Management interface. The browser title is "Web Financial Management - WF - 10636 - 05.12.10.00.06 - Windows Internet Explorer". The user is logged in as Joanne Smith. The navigation menu includes Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The "Purchasing" menu is expanded, showing options like View Purchasing Activity, View My Purchase Orders, Email Purchase Orders, eCommerce Ordering, eCommerce Order Tracking, PowerTrack, User Preferences, Update History - Purchasing, and Reports. The "My Requisition Processing" menu is also expanded, showing Requisitions and Requisition Approval History. A yellow tutorial box is overlaid on the screen with the following text:

**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.

The interface also shows a sidebar with links for Reports (WFVAPIRE), Approve Invoices (WFVAPIAI), Submit (WFVAPICHISQ), Product Setup (WFVAPIPS), and Product Setup Home. The footer includes the copyright notice "© 2012 Skyward, Inc. All rights reserved." and the system information "Windows NT / Internet Explorer 10".

Slide 2 - Slide 2

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 ☆

Filter Options

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.

Print Add 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%

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

### 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

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

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

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

\* Description:

\* Vendor:

\* Ship To:

Attention:

\* Due Date: 11/02/2012 Friday  
Ship Date: 11/02/2012 Friday  
Ship Via:

Project/Grant:

Contract:

Save and Add Detail  
Save and Mass Add Detail  
Back

Asterisk (\*) denotes a required field

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

### 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**  
**Save and Mass Add Detail**  
**Back**

Check if **This is a Blanket Requisition/Purchase Order** or if **The requisition is used to restock a warehouse.**

\* Description:

\* Vendor:

\* Ship To:

Attention:

\* Due Date: **11/02/2012**  **Friday**

Ship Date: **11/02/2012**  **Friday**

Ship Via:

Project/Grant:

Contract:

Asterisk (\*) denotes a required field

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

### 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.

**Requisition Information**

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

\* Vendor: Glacier marketing networkscr 886 Scramble avenue PO BOX 846367 Skyward  
\* Ship To: 886 Scramble avenue PO BOX 846367 Skyward IL 5555  
Attention:   
\* Due Date:   
Ship Date: 11/02/2012 Friday  
Ship Via:   
Project/Grant:   
Contract:

Asterisk (\*) denotes a required field

Buttons: Save and Add Detail, Save and Mass Add Detail, Back

Annotations:  
- Enter the requisition Description.  
- Begin typing the Vendor name and select from the drop-down list or, click the Vendor link to select from the Vendor Master.

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

### 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.

**Requisition Information**

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

\* Vendor: Glacier marketing networkscr 886 Scramble avenue PO BOX 846367 Skyward  
\* Ship To: Skyward school districtscr 8849 Scramble avenue Skyward City IL 5555  
Attention: Joanne Smith  
\* Due Date: 11/02/2012 Friday  
Ship Date: 11/02/2012 Friday  
Ship Via:  
Project/Grant:  
Contract:

Save and Add Detail  
Save and Mass Add Detail  
Back

Select the **Ship To** address and **Attention** information for this order as well as the **Due Date** and **Ship Date** if necessary.  
If applicable, enter the **Via** method for this shipment.

Asterisk (\*) denotes a required field

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The screenshot shows a web browser window titled "Requisition Master Information - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Internet Explorer". The page content is as follows:

- Requisition Master Information** (Page Title)
- Requisition Master Information | Requisition Detail Lines/Accounting (Breadcrumbs)
- Requisition Master Information** (Section Header)
- 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.
- Requisition Information**
  - \* Description: To purchase party supplies for the homecoming festivities.
  - \* Vendor: Glacier marketing networkscr 886 Scramble avenue PO BOX 846367 Skyward
  - \* Ship To: Skyward school districtscr 8849 Scramble avenue Skyward City IL 5555
  - Attention: Joanne Smith
  - \* Due Date: 11/02/2012 Fri
  - Ship Date: 11/02/2012 Fri
  - Ship Via: [Empty]
  - Project/Grant: [Empty]
  - Contract: [Empty]

Callout 1: "1. If the requisition is tied to a particular Project/Grant it can be selected here as well as the type of Contract." (Points to Project/Grant field)

Callout 2: "2. Click Save and Add Detail to add one line of merchandise or click Save and Mass Add Detail to easily add multiple lines of merchandise." (Points to Save and Add Detail / Save and Mass Add Detail buttons)

Buttons: Save and Add Detail, Save and Mass Add Detail, Back

Asterisk (\*) denotes a required field

Slide 8 - Slide 8

The screenshot shows a web browser window titled "Requisition Detail Lines/Accounting - WF\PU\MR\REQ - 10740 - 05.12.10.00.06 - Windows Internet Explorer". The page content is divided into two main sections: "Requisition Master Information" and "Requisition Detail Lines".

**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 festival**

**Requisition Detail Lines:**

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

Asterisk (\*) denotes a required field

**Callout 1:** "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"

**Callout 2:** "2. Click Save."

Buttons: Save, Back



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

### 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 districtscr**  
Blanket PO: **This is not a Blanket PO**  
Description: **To purchase party supplies for the homecoming festivities.**

[Edit Master Notes](#)  
[Attachments](#)

[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		Decorations and Parade Float items	15	EACH	25.00000	375.00	
110		Party Favors	100	BX	15.50000	1,550.00	

[Add](#)  
[Edit](#)  
[Delete](#)  
[Mass Add Detail](#)  
[Add Requisition Accounts](#)

20 2 records displayed Line:

100% 100%

Click Add.

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

### Requisition Detail Lines/Accounting

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

#### Requisition Detail Lines/Accounting

**Requisition Master Information**

Batch Number: <b>WEBREQ</b>	Accounting: <b>Account allocation by total requisition amount.</b>
Requisition Number: <b>0000040601</b>	Amount: <b>1,925.00</b>
Group: <b>(001) MR PO/RQ</b>	Ship To: <b>Skyward school districtscr</b>
Fiscal Year: <b>2011 - 2012</b>	Blanket PO: <b>This is not a Blanket PO</b>
Vendor: <b>Glacier marketing networkscr</b>	Description: <b>To purchase party supplies for the homecoming festivities.</b>
<b>886 Scramble avenue PO BOX 846367</b>	
<b>Skyward City IL 55555-6367</b>	

**Requisition Detail Lines**

\* Line Number:

Line Type:  Merchandise  
 Narrative

**Narrative:** Delivery

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description:

Save

Back

If Narrative is chosen, select the Narrative and Description details.

Asterisk (\*) denotes a required field

100%

100%

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

### 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 district**  
Blanket PO: **This is not a Blanket PO**  
Description: **To purchase party supplies**

[Submit For Approval](#)  
[Save and Finish Later](#)  
[Back](#)  
[Edit Master Notes](#)

**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% 100%

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

### Account Distribution

**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	<input type="checkbox"/>
10	E	000	1100	1300	00	410003	\$0.00	<input type="checkbox"/>
10	E	000	1100	1300	00	441501	\$0.00	<input type="checkbox"/>
10	E	000	1100	1300				<input type="checkbox"/>
10	E	000	1100	1300				<input type="checkbox"/>
10	E	000	1100	1300				<input type="checkbox"/>
10	E	000	1100	1300	00	493203	\$0.00	<input type="checkbox"/>
10	E	000	1100	1300	00	499906	\$0.00	<input type="checkbox"/>
10	E	000	1100	1300	00	499907	\$1,364.00	<input type="checkbox"/>
10	E	000	1100	1300	00	499908	\$9,176.00	<input checked="" type="checkbox"/>
10	E	000	1100	1300	00	499909	\$0.00	<input type="checkbox"/>
10	E	000	1100	2110	00	000000	\$1,616.00	<input type="checkbox"/>
10	E	000	1100	2110	00	220002	\$0.00	<input type="checkbox"/>

100 records displayed

**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

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

3. Click Save Account Distribution.

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.

Slide 13 - Slide 13

The screenshot shows a web browser window titled "Requisition Detail Lines/Accounting - WF\PU\MR\RE\RQ - 10740 - 05.12.10.00.06 - Windows Internet Explorer". The page content includes:

- 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**

Buttons on the right side include: "Submit For Approval", "Save and Finish Later", "Back", "View Requisition Detail Lines", and "Add Asset Detail".

A yellow callout box contains the following text:

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.**

Below the callout box is a table titled "Requisition Accounting":

Account Number	Account Amount	Acco
10E000 1100 1300 00 499908	\$1,925.00	100.00%

At the bottom left of the table area, it says "1 records displayed".

At the bottom of the browser window, there is a JavaScript snippet: `javascript:if (cbs("bSave")) {submitForApproval();}`