

Slide 1 - Slide 1

The screenshot shows the Skyward School District Employee Access web application. The browser title is "Employee Access - 05.12.10.00.00 - Windows Internet Explorer". The user is logged in as "Edward Iwamoto". A "Print this tutorial" button is visible in the top right. The navigation menu includes: Home, Employee Information, Time Off, True Time, FastTrack Open Positions, Work Requests, Account Master, Budget Management, **Purchasing**, Inventory Requisitions, Employee Review, Expense Reimbursement, and Online Open Enrollment. The "Purchasing" menu is expanded, showing "Requisitions", "My Requisitions", and "Approval History". A yellow callout box is overlaid on the page with the following text:

Requisition Entry

Navigate to **Employee Access, Purchasing, Purchasing, Requisitions.**

Who, What, When, Why?

Requisition Entry allows users to enter requests for items they would like to have purchased. These requests follow an approval chain, eventually turning fully approved Requisitions into Purchase Orders.

This area would be used whenever you need an item purchased that requires approval.

On the right side of the page, there is a "Recent Programs" section with links to "Employee Access Home", "Requisitions", "Calendar", "My Requests", "Activity", "Approve", "Submit Request", and "Financial Management Home WF".

At the bottom of the page, there is a footer with the text: "© 2013 Skyward, Inc. All rights reserved. CSUGIndiana 2012 User Group - Finance Windows XP / Internet Explorer 8". The browser's address bar shows "Local intranet" and the zoom level is set to 100%.

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Requisitions - 05.12.10.00.00 - Windows Internet Explorer

Skyward School District

Edward Iwamotoscr Account Preferences Exit ?

Home Employee Information Time Off True Time FastTrack Open Positions Work Requests Account Master Budget Management Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enrollment

Requisitions

There are no records to display; check your filter settings.

Filter Options

Print

Add

View

Edit

Delete

Clone

Notes

Attach

Submit

Approve

Deny

Remove Approval

Clone from Purchase Order

Mass Approve Requisitions

Assign Special Group

20 0 records displayed Requisition Number: ABC

Local intranet 100%

Slide 3 - Slide 3

The screenshot shows a web browser window titled "Requisition Master Information - 05.12.10.00.00 - Windows Internet Explorer". The main content area is a form with the following sections:

- Requisition Master Information**: Includes "Requisition Master Information | Requisition Detail Lines/Accounting" and "Requisition Master Information".
- Requisition Setup Information**: Contains fields for "Requisition Group: 200 - MIDDLE SCHOOL" and "Fiscal Year: 2012 January 1, 2012 - December". It has two radio buttons: "Account allocation by total requisition amount (YMA)" (selected) and "Account allocation by each requisition detail line (YDA)". There is also a checkbox "This requisition is used to restock a warehouse.".
- Requisition Information**: Contains fields for "* Batch Number: 14", "* Description: Office Supplies", "* Vendor: A & g computers ltdscr", "* Ship To: EMP 1 - Skyward Test School Di", "Attention:", "* Due Date: 03/14/2013 Thursday", "Ship Date: 03/14/2013 Thursday", "Ship Via:", "Project/Grant:", and "Contract:". Asterisks (*) denote required fields.

Two yellow callout boxes provide additional information:

- Requisition Setup Information**:
 - Select the **Requisition Group** to create the requisition for.
 - Choose which **Fiscal Year** to account for the requisition in.
 - Choose the **Accounting** - Account for all items in total or account for each line item separately.

This requisition is used to restock a warehouse is an inventory requisition option.
- Requisition Information**:
 - **Description** - A generic description describing the contents of the requisition.
 - **Vendor** - Indicates where items are being purchased.
 - **Ship To** - Where shipped items should be directed to at the district.
 - **Invoice To** - Indicates who to invoice to (if the district has more than one invoicing location set up).
 - **Attention** - Who the package should be delivered to.
 - **Ship Date** - Automatically today's date, but can be modified.
 - **Ship Via** - Indicates the vendor used to ship the items (ex: USPS, FedEx).
 - **Project/Grant** - Links a requisition to a current Project/Grant code.
 - **Contract** - Links a requisition to a current Contract code.

Note: Required Fields are marked with an asterisk *.

Click **Save** when finished.

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

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

Slide 4 - Slide 4

The screenshot shows a web browser window titled "Requisition Detail Lines/Accounting - 05.12.10.00.00 - Windows Internet Explorer". The page content is divided into two main sections: "Requisition Master Information" and "Requisition Detail Lines".

Requisition Master Information:

- Batch Number: 14
- Requisition Number: 0000000121
- Group: (200) MIDDLE SCHOOL
- Fiscal Year: 2012
- Vendor: A & g computers ltdscr

Requisition Detail Lines:

- * Line Number: 100
- Line Type: Merchandise, Narrative
- Catalog: [empty]
- * Quantity: 10
- Unit of Measure: [dropdown]
- * Unit Cost: 10.00000
- Total Amount: 100.00
- * Description: Swingline Staplers

A yellow callout box titled "Requisition Detail Lines" is overlaid on the form, containing the following text:

Enter specific information for an item you are purchasing.

- **Line Number:** Determines the order the items display in.
 - **Line Type:** Choose Merchandise or Narrative.
Merchandise - an item that you are purchasing.
Narrative - a text line you want to print on the P.O.
- **Unit of Measure:** Indicates the unit of measure for the item (ex: dozen, each).
- * **Unit Cost:** The cost for one unit of the item.
- * **Description:** Text that describes what the item is.

Click Save.

Buttons for "Save" and "Back" are visible on the right side of the form.

Asterisk (*) denotes a required field

At the bottom of the browser window, the status bar shows "Local intranet" and "100%" zoom level.

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Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **14**
Requisition Number: **0000000121**
Group: **(200) MIDDLE SCHOOL**
Fiscal Year: **2012**
Vendor: **A & g computers ltdscr**

Accounting: **Account allocation by total requisition amount.**
Amount: **100.00**
Ship To: **EMP 1 - Skyward Test School District**
Description: **Office Supplies**

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 |
|------|--------------|--------------------|
| 100 | | Swingline Staplers |

20 1 records displayed Line:

Local intranet 100%

- To add more line items, click **Add**.
- To complete this requisition at a later time, click **Save and Finish Later**.
- To complete accounting for line items, click **Add Requisition Accounts**.

For this example, click **Add Requisition Accounts**.

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Account Distribution - FM\PU\RQRQ - 2220 - 05.12.10.00.00 - Windows Internet Explorer

Account Distribution

Available Accounts

| Fnd | T | Account | Obj | Cst | Prj | Funds Available | Selected |
|------|---|---------|------|-----|-----|-----------------|-------------------------------------|
| 0100 | E | 1100000 | 2220 | 100 | 100 | \$9,999,996.80 | <input type="checkbox"/> |
| 0100 | E | 1100000 | 2230 | 100 | 100 | \$999,996.32 | <input type="checkbox"/> |
| 0100 | E | 1100000 | 6110 | 001 | 000 | \$999,900.00 | <input type="checkbox"/> |
| 0100 | E | 1100000 | 6110 | 002 | 000 | \$999,970.00 | <input type="checkbox"/> |
| 0100 | E | 1100000 | 6540 | 000 | 000 | \$999,900.00 | <input checked="" type="checkbox"/> |
| 0100 | E | 1110000 | 1100 | 004 | 000 | \$820,705.01 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 1200 | 004 | 000 | \$-52,838.72 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 1400 | 004 | 000 | \$94,974.12 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 2120 | 004 | 000 | \$981,560.56 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 2140 | 004 | 000 | \$991,732.94 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 2150 | 004 | 000 | \$95,195.72 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 2160 | 004 | 000 | \$997,320.47 | <input type="checkbox"/> |
| 0100 | E | 1110000 | 2190 | 004 | 000 | \$98,343.60 | <input type="checkbox"/> |

100 records displayed

Account Level Description

Account Number Information

| Code | Description |
|---------|------------------|
| 0100 | GENERAL FUND |
| 1100000 | REGULAR PROGRAMS |

2012 Available Funds By Individual Account

Accounts listed above may be limited by **Account Clearance**.

Select accounts to use by double-clicking above or clicking the check box next to the account.

When complete, click **Save Account Distrib.**

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

Selected Accounts

| Account Number | Amount | Percent |
|-----------------------------|--------|---------|
| 0100 E 1100000 6540 000 000 | 100.00 | 100.00 |

Remove
Remove All

Done Local intranet 100%

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Requisition Detail Lines/Accounting - FMVPUVRQRQ - 2220 - 05.12.10.00.00 - Windows Internet Explorer

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **14**
Requisition Number: **0000000121**
Group: **(200) MIDDLE SCHOOL**
Fiscal Year: **2012**
Vendor: **A & g computers ltdscr**

Accounting: **Account allocation by total requisition**
Amount: **100.00**
Ship To: **EMP 1 - Skyward Test School D**
Description: **Office Supplies**

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

To submit the requisition for approval, click **Submit for Approval**.

Requisition Accounts

Requisition Accounting

| Account Number ▲ | Account Amount | Account Percent | Over Budget |
|-----------------------------|----------------|-----------------|-------------|
| 0100 E 1100000 6540 000 000 | \$100.00 | 100.00% | |

[Update Account Distrib](#)
[View Requisition Detail Lines](#)
[Add Asset Detail](#)

1 records displayed

javascript:if (cbs('bSave')) {submitForApproval();} Local intranet 100%

Slide 8 - Slide 8

Requisitions - 05.12.10.00.00 - Windows Internet Explorer

Skyward School District

Edward Iwamotoscr

We value your feedback

Home Employee Information Time Off True Time FastTrack Open Positions Work Requests Account Master Budget Management Purchasing Inventory Requisitions Employee Review Expense Reimbursement Online Open Enrollment

Requisitions

| Requisition Number | App Sts | Today's Sts | Batch Number | Description | Vendor Name | Vnd St | Amount | Entered By |
|--------------------|---------|-------------|--------------|-----------------|------------------------|--------|--------|--------------------|
| 2001200001 | WFH | | 14 | Office Supplies | A & q computers ltdscr | | 100.00 | Iwamotoscr, Edward |

The requisition has been submitted and is in **WFH** status (Waiting for Higher Approval).
This concludes the tutorial.

Filter Options

- Print
- Add
- View
- Edit
- Delete
- Clone
- Notes
- Attach
- Submit
- Approve
- Deny
- Remove Approval
- Clone from Purchase Order
- Mass Approve Requisitions
- Assign Special Group

20 1 records displayed Requisition Number: []

Local intranet 100%