

Slide 1 - Slide 1

The screenshot displays the Skyward School District Web Financial Management interface within a Windows Internet Explorer browser window. The browser title bar shows "Web Financial Management - WF - 10636 - 05.12.10.00.06 - Windows Internet Explorer". The user is logged in as "Joanne Smith" with the account "Account". A "Print this tutorial" button is visible in the top right corner.

The interface features a top navigation bar with tabs: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, Bid Management, and Administration. The "Purchasing" tab is currently selected.

Below the navigation bar, there is a search bar and a "Financial Management Setup" link. The main content area is divided into three sections: "Purchasing", "My Requisition Processing", and "Purchase Order Receiving".

- 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
 - Requisition Approval History
- Purchase Order Receiving**:
 - Receiving

A yellow callout box titled "Cloning a Requisition" is overlaid on the "Requisitions" link in the "My Requisition Processing" section. The text inside the callout reads:

Cloning a Requisition

Click Financial Management, Purchasing, My Requisition Processing, Requisitions.

Who, What, When, Why?

Cloning of Requisitions allows the creation of a new requisition without having to re-enter all of the information from the original.

The user would simply edit the requisition, make changes where necessary, then submit for approval.

On the right side of the interface, there is a sidebar with links: "Employee Access Home", "W2 Information", "Reports", "Approve Invoices", "Submit", "Product Setup", and "Product Setup Home".

The footer of the page includes the copyright notice "© 2012 Skyward, Inc. All rights reserved." and the text "Windows NT / Internet Explorer 10". The browser status bar shows "100%".

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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 ☆

Requisitions

Requisition Number	App Sts	Today's 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	1,000.00	SMITH, MATT
▶ 0000039346	WFM		WEBREQ	test #2 - Web entered req	B & b athletic supply llc...	IL	50.00	SMITH, MATT
▶ 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	Alequins
▶ 0000040598	PEN		WEBREQ	test	D & g business machinessc...	IL	1.00	Rexrodes
▶ 0000040601	WFH		WEBREQ	To purchase party supplies for the homecoming festivities.	Glacier marketing network...	IL	1,925.00	smith, joanne

Filter Options

Print

Add

View

Edit

Delete

Clone

Notes

Attach

Submit

Approve

Deny

Remove Approval

Add from Online Catalog

Clone from Purchase Order

Mass Approve Requisitions

Assign Special Group

100 9 records displayed

Requisition Number:

100%

Slide 3 - Slide 3

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

Back

Requisition Information

* Description: To purchase party supplies for the graduation part and ceremony.
Verify that the colors are red and black.

* 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:

Asterisk (*) denotes a required field

Make any necessary changes to the new Requisition's Master Information, then click **Save**.

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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 Master Information

Batch Number: **WEBREQ**
Requisition Number: **0000040602**
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 graduation part and ceremony. Verify that the colors are red and black.**

[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		Decorations in Red and Black
110		Party Favors in Red and Black
120	Delivery	Please deliver items to the room in the district building.

To add more line items, click **Add**.

To modify an existing line item, highlight the item and click **Edit**.

Delete will remove the highlighted line item.

Add multiple line items at once by clicking **Mass Add Detail**.

Click **View Requisition Accounts**.

20 3 records displayed Line:

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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: **0000040602**

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 graduation part and ceremony. Verify that the colors are red and black.**

[Edit Master](#)

[Notes](#)

[Attachments](#)

[Submit For Approval](#)

[Save and Finish Later](#)

[Back](#)

Requisition Accounts

Requisition Accounting

Account Number ▲	Account Amount	Account Percent	Over Budget
10E000 1100 1300 00 499908	\$1,925.00	100.00%	

1 records displayed

[Update Account Distrib](#)

[View Requisition Detail Lines](#)

[Add Asset Detail](#)

Click Update Account Distribution.

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

Account Distribution

3. The Account Description will display here.

Available Accounts

Available Accounts for Clearance Group MR Accounts

Fnd	T	Loc	Func	Obj	Sj	Source	Funds Available	Selected
10	E	000	1110	1100	00	383002	\$0.00	☐
10	E	000	1110	1100	00	383501	\$0.00	☐
10	E	000	1110	1100	00	397006	\$0.00	☐
10	E	000	1110	1100	00	410004	\$0.00	☐
10	E	000	1110	1100	00	410005	\$0.00	☐
10	E	000	1110	1100	00	410006	\$0.00	☐
10	E	000	1110	1100	00	410007	\$0.00	☐
10	E	000	1110	1100	00	411002	\$0.00	☐
10	E	000	1110	1100	00	485009	\$0.00	☐
10	E	000	1110	1100	00	493204	\$2,363.09	☒
10	E	000	1110	1100	00	493205	\$0.00	☐

1. Select the appropriate account.

100 records displayed

Account Number:

Quick Key:

Account Level Description

Account Code

10	EDUCATION FUND
1110	ELEMENTARY INSTRUCTION
1100	REG TEACHER SALARIES
493204	TITLE II TEACH QUALITY 04

4. Click Save Account Distribution.

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 1110 1100 00 493204	1925.00	100.00

Remove
Remove All

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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: **0000040602**
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: **1,925.00**
Ship To: **Skyward school districts**
Blanket PO: **This is not a Blanket PO**
Description: **To purchase party supplies for the graduation part and ceremony. Verify that the colors are red and black.**

If the entry is complete, click **Submit for Approval**.
If the entry is not complete, click **Save and Finish Later**.

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

Requisition Accounts

Requisition Accounting

Account Number ▲	Account Amount	Account Percent	Over Budget
10E000 1110 1100 00 493204	\$1,925.00	100.00%	

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

1 records displayed

Slide 8 - Slide 8

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

Skyward School District

Joanne Smith A [We value your feedback](#)

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

Requisitions ☆

Requisitions

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▶ 0000040602	WIP		WEBREQ	To purchase party supplies for the graduation part and ceremony. Verify that the colors are red and black.	Glacier marketing network...	IL	1,925.00	smith, joanne
▶ 0000039345	WFM		24	test #1 - P		IL	1,000.00	SMITH, MATT
▶ 0000039346	WFM		WEBREQ	test #2 - W		IL	50.00	SMITH, MATT
▶ 0000040586	WFM		WEBREQ	communica		IL	50,000.00	Smith, Nancy
▶ 0000040589	WFM		WEBREQ	Master Rec		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
▶ 0000040601	WFH		WEBREQ	To purchase party supplies for the homecoming festivities.	Glacier marketing network...	IL	1,925.00	smith, joanne

The cloned requisition now displays in the Requisition browse.

This concludes the tutorial.

Filter Options

Print

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Clone

Notes

Attach

Submit

Approve

Deny

Remove Approval

Add from Online Catalog

Clone from Purchase Order

Mass Approve Requisitions

Assign Special Group

100 10 records displayed Requisition Number:

100%