



Skyward Financial Management

Requisition Entry

Financial Management – Purchasing

Requisitions are requests for purchases that go through an approval process before actually being ordered or purchased. Employees that enter requisitions will be responsible for entering information correctly and timely. Once requisitions are fully approved, they become Batch Status Purchase Orders.

1. Go to **Financial Management**
2. Click on the **Purchasing** tab
3. Click on **Requisitions**, under the My Requisition Processing section
4. Click **Add**

Financial Management Setup

- ▼ Purchasing - PU Setup
 - Purchase Order Entry - PO
 - Purchasing Activity - VA
 - View My Purchase Orders - VO
 - Accounting - PO Batch-to-Open - AB
 - Accounting - PO Open-to-History - AO
 - Update History - Purchasing - UH
 - User Preferences - UP
 - Reports - RP
- ▼ My Requisition Processing - MR
 - Requisitions - RG
 - Approve Requisitions - AR
 - My Requisition Approval History - MR
 - User Preferences - UP
- ▼ Purchase Order Receiving - PR
 - Receiving - RC
 - Reports - RE
- ▼ Purchasing Order Processing - ...
 - Email Purchase Orders - EP
 - eCommerce Ordering - EC
 - PowerTrack - PT

Views: All WIP Requisitions Filters: *Skyward Default

PO Number	Status	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By
▶ 3322000007	WIP	0	WEBREQ	PLAAFPs - C. Rossander	CURRICULUM ASSOC INC	MA	4,869.70	TOBIAS, CYNTHIA
▶ 3301900110	WIP	0	WEBREQ	Rigby for BES original PO 3301900104	HOUGHTON MIFFLIN HARCOUR	FL	8,183.77	CANTRELL, SHELLI
▶ 0000000671	WIP	0	WEBREQ	monthly stmt-all schools - Month of AUGUST 2019	SYSCO DALLAS, NUTRITION ON	TX	0.00	KNOWLES, BETHAN
▶ 0000000671	WIP	0	WEBREQ	monthly stmt-all schools - Month of	SYSCO DALLAS, NUTRITION ON	TX	0.00	KNOWLES, BETHAN
▶ 0000000630	WIP	0	WEBREQ	Tang Math Workshop on 10/24/2019 in Dallas for 10 teachers at Pve adm DES	TANG CO LLC	NV	2,690.00	CANTRELL, SHELLI



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5. Under the **Requisition Setup Information** section, choose:
 - a. Correct **Requisition Group**
 - b. Confirm **Fiscal Year**
 - c. Choose between **YMA** or **YDA**
6. Under the **Requisition Information** complete:
 - a. **Description**
 - b. Choose correct **Vendor**
 - c. Choose correct **Ship To**
 - d. Confirm **Attention Name**
 - e. Choose **Due Date** and **Ship Date**
 - f. If applicable choose a **Project/Grant**
 - g. If applicable choose a **Contract**

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Setup Information

Requisition Group: 101 - 101 PO Gililland

Fiscal Year: 2019 - 2020 September 1, 2019 - August 31, 2020

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:

* Vendor: GILILLAND ELEMENTARY

* Ship To: GILILLAND ELEMENTARY 701 WAGGOMAN RD SAGINAW TX 76131A

Attention: SARAH PARTAIN

* Due Date: 09/17/2019 Tuesday

Ship Date: 09/17/2019 Tuesday

Ship Via:

Project/Grant:

Contract:

Save and Add Detail

Save and Mass Add Detail

Save and Import Detail Lines

Back

7. Choose between one of the **Save and Add** options
 - a. **Add Detail** – to add **ONE** line of merchandise
 - b. **Mass Add Detail** – to add **MULTIPLE** lines of merchandise
 - c. **Import Detail Lines** – to **IMPORT** Detail Lines and Account Distributions
8. Choose the correct **Detail Line Type**:
 - a. If **Merchandise**, select the following details:
 - i. **Catalog**
 - ii. **Quantity**
 - iii. **Unit of Measure**



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- iv. **Unit Cost**
 - v. **Description**
 - vi. Click **Save**
 - vii. Click **Add**
- b. If **Narrative**, select:
- i. **Narrative type**
 - ii. **Description Details**
 - iii. Click **Save**

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Save and Add Detail

Requisition Master Information

Batch Number: WEBREQ	Accounting: Account allocation by each requisition detail line.
Requisition Number: 0000219075	Amount: 0.00
Group: (101) 101 PO Gililand	Ship To: GILILLAND ELEMENTARY
Fiscal Year: 2018 - 2019	Blanket PO: This is not a Blanket PO
Vendor: CINDY K TUCKER	Description: This is a test Req.
1048 WEST HILLS TERRACE	
SAGINAW TX 76179-3851	

Requisition Detail Lines

* Line Number:

Line Type: Merchandise

Narrative

Catalog:

* Quantity:

Unit of Measure:

* Unit Cost:

Total Amount:

* Description:

Commodity Code:

Commodity Code:

Asterisk (*) denotes a required field



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- c. If **Save and Import Detail**
 - i. Click drop-down arrow next to **Format** and select **Import Layout**
 - ii. Click **Format** link to review parameters of layout and view how import file must be set up
 - iii. Click **Browse** to select the file to be imported
 - iv. Click **Run**

Import Options - W:\PU\MR\REQ - 10740 - 05.19.06.00.07 - Google Chrome

web1.ems-isd.net/scripts/wsisa.dll/WService=wsFin/foreqimpt001.w?masterId=222779&isPopup=true

Import Options

* Format: Req DTL - Req DTL - Requisition Detail
Only Formats flagged as "Used for imports outside Skybuild" are able to be selected.

* File Location: Choose File No file chosen

Asterisk (*) denotes a required field

Save and Import Detail Lines

- 9. Click **Add Requisition Accounts** to select the accounts once **ALL** line items have been added
- 10. **Available Accounts Section:**
 - a. Select correct **Account(s)** to expense the order to

Account Distribution

Available Accounts

Fnd	T	Fc	Obj	So	Org	F	Pr	Ovn	Act	Funds Available	Selected
163	A	00	1110	00	000	0	00	000	000	\$185,030.30	<input type="checkbox"/>
163	A	00	1111	00	000	0	00	000	000	\$2,893,538.96	<input checked="" type="checkbox"/>
163	A	00	1269	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	A	00	1291	00	000	0	00	000	000	\$-1,672.47	<input type="checkbox"/>
163	A	00	1291	00	000	0	00	916	000	\$18.52	<input type="checkbox"/>
163	A	00	1299	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	A	00	6141	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	L	00	2110	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	L	00	2112	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	L	00	2113	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	L	00	2150	00	000	0	00	000	000	\$0.00	<input type="checkbox"/>
163	L	00	2151	00	000	0	00	000	000	\$-870,213.31	<input type="checkbox"/>
163	L	00	2152	00	000	0	00	000	000	\$-576,634.52	<input type="checkbox"/>
163	L	00	2153	00	000	0	00	000	000	\$272,007.22	<input type="checkbox"/>

100 records displayed

Account Number:

Quick Key:

Account Level Description

Account Number Information

Code	Description
163	PAYROLL CLEARING
00	GENERAL LEDGER
1111	CASH-INTERFUND TRANSFERS
00	DISTRICT WIDE
000	GENERAL LEDGER
0	FISCAL YR
00	DISTRICT-WIDE
000	DISTRICT WIDE
000	DISTRICT-WIDE

2019-2020 Available Funds By

Total Amount to Distribute: **\$1.00 100.00%**
 Total Distributed: **\$1.00 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
163 A 00 1110 00 000 0 00 000 000	1.00	100.00
163 A 00 1111 00 000 0 00 000 000	0.00	0.00

Remove
Remove All



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11. Selected Accounts Section:

- a. Account information selected at top, along with the distribution amount/percentages, will show in the **bottom window**
- b. The **Amount** or **Percent** for selected account(s) can be modified
- c. Click **Remove** or **Remove All** to de-select accounts

12. Click **Save Account Distribution** when done

13. When the entry is complete, choose:

- a. **Submit for Approval** or
- b. **Save and Finish Later** – this will create a **WIP** status requisition that can be edited and submitted at a later date