



Requisition Entry Guide

Overview

Adding a Requisition

Add Master Information

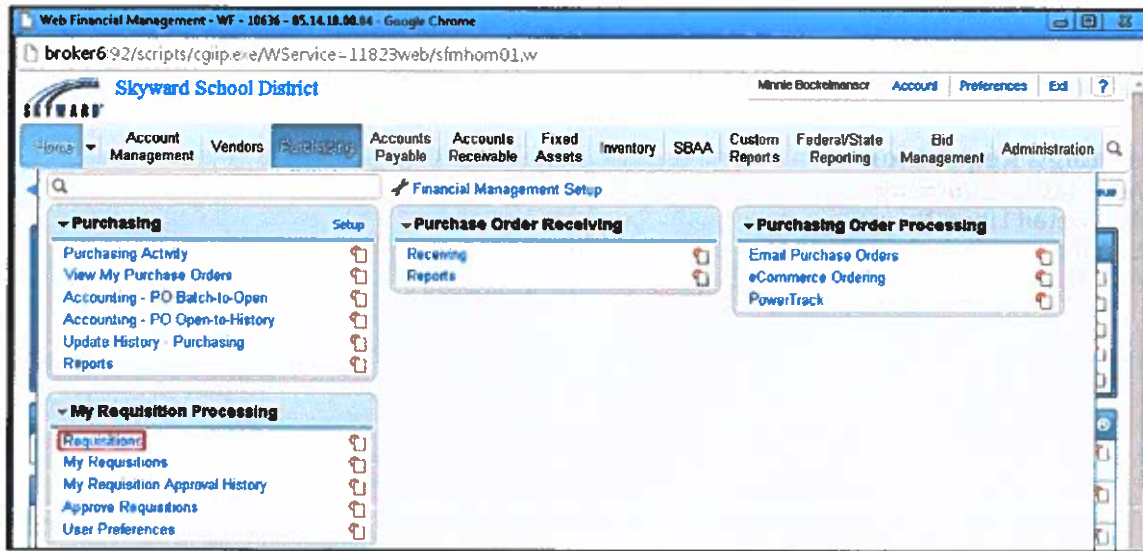
Add Detail Lines/Narratives

Summary Screen

Add Accounting

Overview

Purchase Order Requisitions are entered by employees and go through an approval process based on the Requisition/Purchase Order Group setup. Once requisitions are fully approved they are automatically changed to batch status purchase orders and are available for updating and printing. To find Requisitions navigate to Web Financial Management > Purchasing > My Requisition Processing > **Requisitions**.

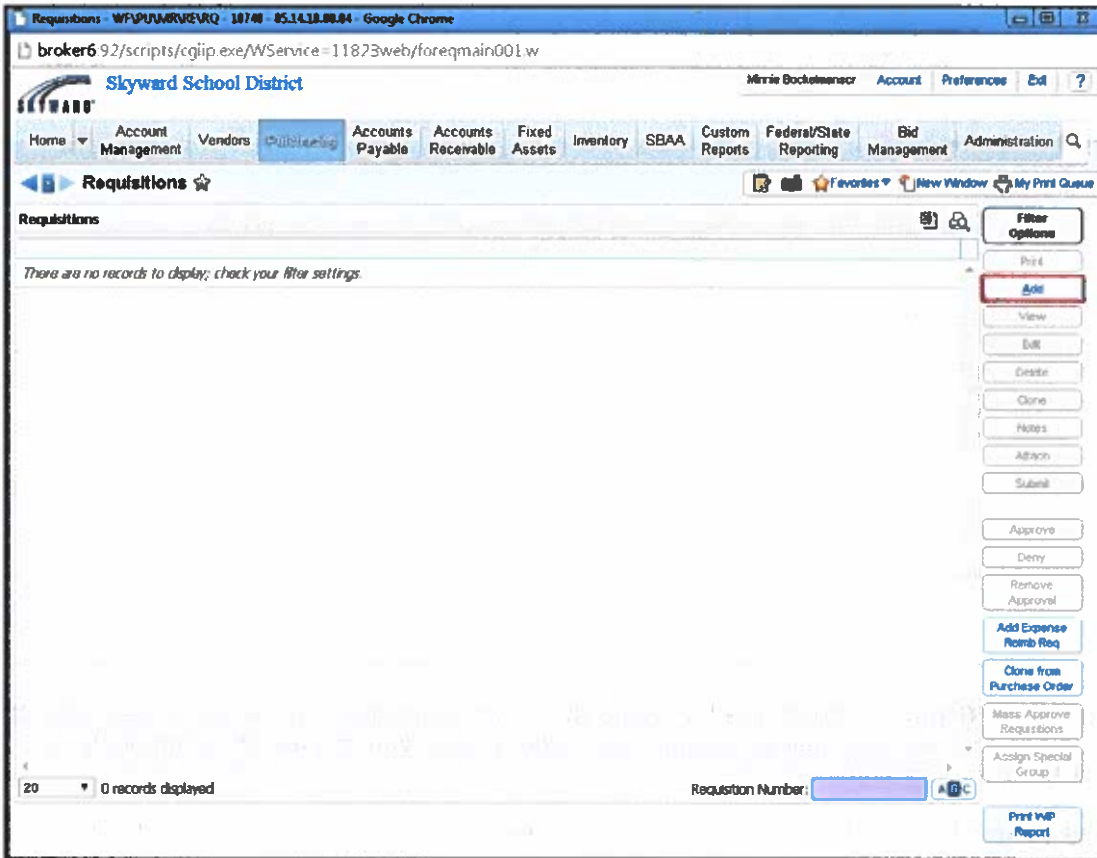


Adding a Requisition

- Add Master Information
- Add Detail Lines/Narratives
- Summary Screen
- Add Accounting

Add Master Information

To add a Requisition, click **Add**.



The Requisition Master Information screen will allow you to enter the general information for your requisition including the Description, Vendor and Ship To.

Requisition Group – Choose the PO Group that your requisition is to be associated with. If you belong to more than one active purchase order group, you can use the drop down to select the correct group.

Fiscal year – If more than one Fiscal Year is active, you can use the drop-down to choose the correct fiscal year for the requisition being entered.

Accounting Allocation - Choose whether you want to enter a YMA Requisition (accounting allocation by the master amount) or a YDA requisition (accounting allocation by each detail line). You also can choose if the purchase order is a Blanket Requisition (no detail lines), or if the requisition is used to stock a warehouse (this option is only used in the Inventory module). These options may be limited or not available depending on your configurations.

Batch Number – The system can default in a batch number; if the field is blank enter a batch number as it is a required field. The batch number allows Purchasing to group purchase orders together for updating and processing. Oftentimes, the date or employee initials are used as batch numbers.

Description – Enter an overall description of what is being requested for this Requisition. You will have a chance to enter a description on each detail line as well, so this should be a general description.

Vendor – Start typing the name of your vendor and select it from the list of vendors or use the Vendor link to access a listing of vendors to choose from.

Ship To – This field can be defaulted in with possible Ship To addresses based on configuration settings. If the field is blank, start typing the name of the location where the items being purchased should be shipped to and select it from the vendor listing. If it is not in the vendor listing, it must be added there first.

Invoice To – This typically defaults to your default invoice address. If you setup more than one Invoice To address in configurations, you will be able to choose from a drop-down list.

Attention – Enter the name of the employee that the requisition is for.

Due Date – The Due Date defaults in as today's date, but can be changed if needed. The Due Date should indicate the date the requisition is needed. This is typically left as the current date as an indication that it is required as soon as possible.

Ship Date – The Ship Date defaults in as today's date, but can be changed if needed. The Ship Date should indicate the date the requisition should be shipped by the vendor.

Ship Via – This field can be filled out with your preferred carrier if desired.

Project/Grant – If you are using project/grant codes and the requisition pertains to one, the project/grant can be selected here.

Contract – If you are tracking contracts you can enter a contract here, or based on your configurations one may default in if it is connected to the vendor used on the requisition.

User Defined Fields – Up to three different user defined fields may appear at the bottom of the screen. These fields allow you to associate information with the requisition when it cannot be tracked in any other location within the normal Requisition add process.

Once these fields are filled out, click either '**Save and Add Detail**' if you only have one line of detail, or '**Save and Mass Add Detail**' if you have more than one line of detail, or '**Save and Import Detail Lines**' if you have a file to import. The import file must be setup under Web Financial Management > Administration > Skybuild > Imports. In this example, I will Save and Mass Add Detail.

Add Detail Lines/Narratives

The Requisition Detail Lines/Accounting screen will display a summary of the information entered on the first screen in the Request Master Information section at the top of the screen. Five blank Requisition Detail Lines will follow, which can be filled out and saved.

Line Number – The first line number will default to 100 and will increment by 10 for each line. Detail lines will appear on the purchase order in numerical order. This number can be manipulated if you need to move a detail line up or down.

Line Type – There are two options available for Line Type. Use the merchandise line type to order items. Use the Narrative Line type to type a message to the vendor in the form of a narrative code or free form text in the Description field. (Adding a narrative line is covered later in this section.)

Catalog – If this vendor has a catalog loaded into Skyward, choose the item from the catalog listing. Even if you do not have a catalog loaded into Skyward, this field can be used to enter the part number of the item you are ordering. The availability of the catalog field is based on a configuration setting.

Quantity – Enter the quantity of the item you need to purchase.

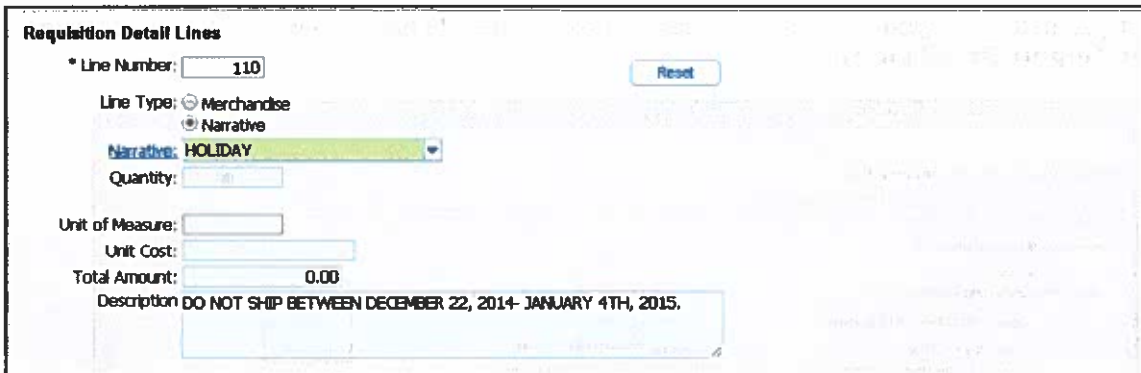
Unit of Measure – Either choose the Unit of Measure from the drop-down list or type a unit of measure into this field.

Unit Cost – Enter the cost of each unit being ordered.

Total Amount – The system will calculate the total cost of the line item.

Description – Enter a detailed description of the item you are ordering.

If mass adding, you can move on to the next detail line on the screen. If finished, click **Save**.



Regulation Detail Lines

* Line Number:

Line Type: Merchandise
 Narrative

Narrative:

Quantity:

Unit of Measure:

Unit Cost:

Total Amount:

Description

To add a **Narrative Line**, change the Line Type to Narrative. Narratives can be added into the system using the Narrative link. If they are currently set up in the system they can be selected by using the drop down box next to **Narrative**, or you can leave the Narrative code blank and free-form type your narrative in the Description Box of the detail line.

Summary Screen

After your detail lines have been saved, you will be brought to the **'Requisition Detail Lines/Accounting'** summary screen. You will be able to view your Requisition Master Information and edit it if necessary. You will also see a listing of your detail/narrative lines.

Click **Notes** or **Attachments** in order to add either internal notes or scanned attachments to the requisition.

If you need to **add, edit, delete, or mass add detail** line items, you can use the corresponding buttons on the right side of the screen to continue working with the detail lines.

If you setup a Skybuild import for your Requisition detail lines, you will also see the option to **Import Detail Lines**.

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 18
 Requisition Number: 0000022762
 Group: (101) Skyward Highschool
 Fiscal Year: 2014 - 2015
 Vendor: S & G TRAINING LTDSCR
 35 Scramble avenue
 Scramble WV 25555
 Invoice To: (Default) INVOICE TO: SKYWARD SCHOOL
 DISTRICT ACCOUNTS PAYABLE PO BID#
 999 ANYWHERE, USA 25555

Accounting: Account allocation by total requisition amount.
 Amount: 125.00
 Ship To: Skyward High School
 Blanket PO: This is not a Blanket PO
 Description: Textbooks

Requisition Detail Line Items

Line	Catalog Code	Description	Quantity	Unit	Unit Cost	Total Cost	Cost Code
100		OFFICE COPY OF PROCEEDINGS - JUDGE STILTZER	100	EA	1.250000	125.00	
110	HOLIDAY	DO NOT SHIP BETWEEN DECEMBER 22, 2014- JANUARY 4TH, 2015.	0		0.000000	0.00	

Add Accounting

To add accounting to the Requisition click **Add Requisition Accounts**.

Requisition Detail Lines/Accounting - WFPUMWREURQ - 10740 - 05.14.10.00.04 - Google Chrome
 broker6.92/scripts/cgiip.exe/WSservice=11823web/loreqdel001.w

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting
 Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: 10
 Requisition Number: 000022762
 Group: (101) Skyward Highschool
 Fiscal Year: 2014 - 2015
 Vendor: S & G TRAINING LTDCOR
 35 Scramble avenue
 Scramble WV 25355
 Invoice To: (Default) INVOICE TO: SKYWARD SCHOOL
 DISTRICT ACCOUNTS PAYABLE PO BOX
 999 ANYWHERE, USA 25355

Accounting: Account allocation by total requisition amount.
 Amount: 125.00
 Ship To: Skyward High School
 Blanket PO: This is not a Blanket PO
 Description: Textbooks

Buttons: 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		STEIN2039 -OF MICE AND MEN- JOHN STENBECK	50	Each	2.50000	125.00	
110	HOLLWAY	DO NOT SHIP BETWEEN CETS KEEP 22-2374 STANLEY ATPLS20			0.00000	0.00	

Buttons: Add, Edit, Delete, View Add Detail, Add Requisition Accounts, Report Detail Lines

The accounts displayed will be listed according to your account clearance, or the account clearance attached to the PO group. Type in the account you are looking for in the Account Number Field. You can type in a portion of the account and click enter on your keyboard to bring the screen to the closest account. Check the **Selected** box to choose an account.

Account Distribution

Available Accounts

Fnd	T	Loc	Obj	Func	Prj	Funds Available	Selected
10	E	096	243	254300	906	\$4,160.00	<input type="checkbox"/>
10	E	096	243	254500	906	\$52,550.00	<input type="checkbox"/>
10	E	096	246	254300	906	\$242,423.00	<input type="checkbox"/>
10	E	096	250	254300	906	\$68,430.00	<input type="checkbox"/>
10	E	096	250	254500	906	\$6,080.00	<input type="checkbox"/>
10	E	096	292	254500	906	\$18,984.00	<input type="checkbox"/>
10	E	096	320	254300	906	\$799.00	<input type="checkbox"/>
10	E	096	320	254500	906	\$400.00	<input type="checkbox"/>
10	E	096	449	120000	906	\$10,000.00	<input type="checkbox"/>
10	E	096	470	110000	906	\$75,800.00	<input checked="" type="checkbox"/>
10	E	096	490	120000	906	\$6,000.00	<input type="checkbox"/>
10	E	096	561	120000	906	\$700.00	<input type="checkbox"/>
10	E	096	563	253600	906	\$3,500.00	<input type="checkbox"/>
10	E	096	711	270000	906	\$5,538.81	<input type="checkbox"/>

Account Number: 10 E 096

Total Amount to Distribute: \$125.00 100.00%
 Total Distributed: \$125.00 100.00%
 Amount Remaining: \$0.00 0.00%

Account Number	Amount	Percent
10 E 096 470 110000 906	125.00	100.00

If more than one account is required, check each account and use the **Selected Accounts** area, at the bottom of the screen, to distribute your accounts by either amount or percentage. The system will not let you save the screen until there is 100% allocation. Click **Save Account Distrib** when finished.

Total Amount to Distribute: \$125.00 100.00%
 Total Distributed: \$125.00 100.00%
 Amount Remaining: \$0.00 0.00%

Account Number	Amount	Percent
10 E 096 470 110000 906	25.00	20.00
10 E 096 561 120000 906	65.00	52.00
10 E 097 222 110000 906	35.00	28.00

After saving your accounts, you will be brought back to the Summary Screen where you can review your account distribution or Requisition Detail Lines. Click either **"Submit for Approval"** if you would like to submit the requisition for approval at this time, or **"Save and Finish Later"** to continuing working on the Requisition at a later time.

Requisition Master Information

Batch Number: 18
 Requisition Number: 0000022762
 Group: (101) Skyward Highschool
 Fiscal Year: 2014 - 2015
 Vendor: S & G TRAINING LTDSCR
 35 Scramble avenue
 Scramble WV 55555
 Invoice To: (Default) INVOICE TO: SKYWARD SCHOOL DISTRICT ACCOUNTS PAYABLE PO BOX 999 ANYWHERE, USA 55555

Accounting: Account allocation by total requisition amount. [Edit Master](#)
 Amount: 125.00
 Ship To: Skyward High School
 Blanket PO: This is not a Blanket PO
 Description: Textbooks

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

Requisition Accounts

Requisition Accounting

Account Number	Account Amount	Account Percent	Over Budget
10 E 096 422 110000 906	\$25.00	20.00%	
10 E 096 561 120000 906	\$65.00	52.00%	
10 E 097 222 110000 906	\$35.00	28.00%	

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

The Requisition will appear in your browse screen with a status of either 'WFH'-Waiting for approval at a level above mine', or 'WIP'-Work in Progress' depending on which option you chose on the previous screen.

Requisitions

Requisitions

Requisition Number	App Site	Today's Site	A/D Level	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By
101520015	WFH			0112	Textbooks	S & G TRAINING LTDSCR	WV	125.00	8206781012

[Filter Options](#)
[Print](#)
[Add](#)
[View](#)
[Call](#)

Click on the arrow to the left of the Requisition number to expand the requisition and review the Requisition information and Approval status.

Requisitions

Requisition Number	App Sts	Today's Site	A/D Batch Level Number	Description	Vendor Name	Vnd St	Amount	Entered By
1011500010	WFF		019	TRAVEL	S&D TRAVEL	WU	125.00	BOUELMAN

Expand All Collapse All Modify Details (displaying 5 of 5) View Printable Details

Master

Line Items Add/Edit/Delete Requisition Line Item Add Narrative Add Inventory Items

Accounts Add/Edit/Delete Accounts

Approval

Date	Time	Status	Approval Level	Name/Note
		Awaiting Approval	Level 2	AMSLER, ROBIN G
		Awaiting Approval	Level 1	COLESON, MELANIE

Notes Add Notes

No Notes exist for this Requisition.