

Financial Management

Purchasing

The screenshot shows the Skyward Financial Management dashboard for Riverdale School District, WI. The dashboard includes a navigation bar with 'Home' and 'Purchasing' tabs. The main content area is titled 'Financial Management' and contains several widgets: 'Jump to Other Dashboards' with links for 'Skyward User' and 'Employee'; 'Recent Programs' with 'Financial Management Home WF' and 'Requisitions WF\PU\MR\RE\IRQ' (circled in red); 'Favorites' (no favorites available); 'District News' (no news to display); and 'My Print Queue' (no items available).

Requisitions

The screenshot shows the Skyward Requisitions page. The page title is 'Requisitions'. Below the title, there are 'Views: My Requisitions' and 'Filters: *Skyward Default' dropdowns. A table header is visible with columns: PO Number, Status, A/D Level, Batch Number, Description, Vendor Name, Vnd St, Amount, and Entered By. Below the table, a message states: 'There are no records to display; check your filter settings.' On the right side, there is a vertical toolbar with buttons: Print, Add (circled in red), View, Edit, Clone, Notes, Attach, Submit, and Add from Online Catalog.

Add-- to add a regular requisition

If you want to order from the online catalogs Click on the add from online catalog on the lower right hand side. This is for orders for School Specialty, Really Good Stuff, and Amazon. It will take you to their website.

Requisition Master Information

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Requisition Setup Information

Requisition Group: 200 - Elementary School

Fiscal Year: 2017 - 2018 July 1, 2017 - June 30, 2018

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

Requisition Information

* Description:

* Vendor:

* Ship To: RIVERDALE ELEM 800 N 6TH ST MUSCODA WI 53573

Attention: CHERI STODDARD

* Due Date: 05/04/2018 Friday

Ship Date: 05/04/2018 Friday

Ship Via:

Project/Grant:

Contract:

Asterisk (*) denotes a required field

Save and Add Detail
 Save and Mass Add Detail
 Save and Import Detail Lines
 Back

Pick Group

Fiscal Year—**Be sure to use the correct fiscal year**

Description

Vendor

Ship to:

Attention

Due Date-doesn't matter except for the same fiscal year

Ship Date

Then click on Save and add detail on the right

It will take you to the following:

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**
 Requisition Number: **000000437**
 Group: **(200) Elementary School**
 Fiscal Year: **2017 - 2018**
 Vendor: **TIME FOR KIDS**
PO BOX 61931
TAMPA FL 33661-1170

Accounting: **Account allocation by total requisition amount.**
 Amount: **0.00**
 Ship To: **RIVERDALE ELEM**
 Description: **test**

Requisition Detail Lines

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

Save
Back

Asterisk (*) denotes a required field

You can add catalog number
 Required places are Quantity, Unit Cost, and Description
 Click Save on the right

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**
 Requisition Number: **000000437**
 Group: **(200) Elementary School**
 Fiscal Year: **2017 - 2018**
 Vendor: **TIME FOR KIDS**
PO BOX 61931
TAMPA FL 33661-1170

Accounting: **Account allocation by total requisition amount.**
 Amount: **10.00**
 Ship To: **RIVERDALE ELEM**
 Description: **test**

Submit For Approval
 Save and Finish Later
 Back
 Edit Master
 Notes
 Attachments

Requisition Detail Line Items

Views: **General** Filters: ***Skyward Default**

Line	Catalog Code	Description	Quantity	U of M	Unit Cost	Total Cost	Comm Code	% Disc
100		book	1		10.00000	10.00		0

Add
 Edit
 Delete
 Mass Add Detail
 Add Requisition Accounts
 Import Detail Lines

This is where you put the account number

Click on add requisition accounts on bottom right

Account Distribution

Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Loc	Obj	Func	Prj	Funds Available	Selected
10	E	100	310	110000	000	\$4,568.00	<input type="checkbox"/>
10	E	100	310	120000	000	\$0.00	<input type="checkbox"/>
10	E	100	310	164000	000	\$3,845.00	<input type="checkbox"/>
10	E	100	310	240000	000	\$704.00	<input type="checkbox"/>
10	E	100	320	125500	000	\$0.00	<input type="checkbox"/>
10	E	100	320	253000	000	\$0.00	<input type="checkbox"/>
10	E	100	342	110000	000	\$3,838.85	<input type="checkbox"/>
10	E	100	342	124000	000	\$0.00	<input type="checkbox"/>
10	E	100	342	240000	000	-\$1,050.06	<input type="checkbox"/>
10	E	100	353	240000	000	\$0.00	<input type="checkbox"/>
10	E	100	354	240000	000	\$0.00	<input type="checkbox"/>
10	E	100	360	240000	000	\$0.00	<input type="checkbox"/>
10	E	100	381	255000	000	\$0.00	<input type="checkbox"/>
10	E	100	411	110000	000	-\$1,855.12	<input type="checkbox"/>

56 records displayed

Account Number:

Quick Key:

Account Level Description
PER/SER UNDIFF CURRICULUM

Account Number Information

Code	Description
10	GENERAL FUND
100	ELEM SCHOOL
310	PERSONAL SERVICES
110000	UNDIFFERENTIATED CURRICULUM
000	000

2017-2018 Available Funds By
Individual Account

Total Amount to Distribute: **\$10.00 100.00%**
 Total Distributed: **\$0.00 0.00%**
 Amount Remaining: **\$10.00 100.00%**

Selected Accounts

Account Number	Amount	Percent

Remove
Remove All

Beside the Quick Key put in your number

Account Distribution

Available Accounts (Accounts are displayed based on Account Clearance access)

Fnd	T	Loc	Obj	Func	Prj	Funds Available	Selected
10	E	100	381	255000	000	\$0.00	<input type="checkbox"/>
10	E	100	411	110000	000	-\$1,855.12	<input type="checkbox"/>
10	E	100	411	110101	000	-\$31.73	<input checked="" type="checkbox"/>
10	E	100	411	110102	000	\$331.95	<input type="checkbox"/>
10	E	100	411	110103	000	\$47.90	<input type="checkbox"/>
10	E	100	411	110104	000	\$118.59	<input type="checkbox"/>
10	E	100	411	110105	000	\$55.49	<input type="checkbox"/>
10	E	100	411	110106	000	\$86.13	<input type="checkbox"/>
10	E	100	411	110107	000	\$130.17	<input type="checkbox"/>
10	E	100	411	121000	000	\$46.17	<input type="checkbox"/>
10	E	100	411	125400	000	-\$63.75	<input type="checkbox"/>
10	E	100	411	140000	000	-\$11.68	<input type="checkbox"/>
10	E	100	411	213000	000	\$17.11	<input type="checkbox"/>
10	E	100	411	240000	000	\$650.07	<input type="checkbox"/>

44 records displayed

Account Number:

Quick Key:

Account Level Description
1ST GRADE SUPPLIES

Account Number Information

Code	Description
10	GENERAL FUND
100	ELEM SCHOOL
411	GENERAL SUPPLIES
110101	1ST GRADE SUPPLIES
000	000

2017-2018 Available Funds By
Individual Account

Save Account Distrib

Back

Total Amount to Distribute: **\$10.00 100.00%**
 Total Distributed: **\$10.00 100.00%**
 Amount Remaining: **\$0.00 0.00%**

Selected Accounts

Account Number	Amount	Percent
* 10 E 100 411 110101 000	10.00	100.00

Remove
Remove All

It will look like this -ABOVE
 On the right side you can check to make sure it's the correct account
 Click -Save Account Distrib on right side

Requisition Detail Lines/Accounting

Requisition Master Information | Requisition Detail Lines/Accounting

Requisition Master Information

Batch Number: **WEBREQ**

Requisition Number: **000000437**

Group: **(200) Elementary School**

Fiscal Year: **2017 - 2018**

Vendor: **TIME FOR KIDS**
PO BOX 61931
TAMPA FL 33661-1170

Accounting: **Account allocation by total requisition amount.**

Amount: **10.00**

Ship To: **RIVERDALE ELEM**

Description: **test**

Submit For Approval
Save and Finish Later
Back

Edit Master
Notes
Attachments

Requisition Accounts

Requisition Accounting

Account Number	Account Amount	Account Percent	Over Budget
10 E 100 411 110101 000	\$10.00	100.00%	yes

Update Account Distrib
View Requisition Detail Lines
Add Asset Detail

Click submit for approval – on right side