(WF) Web Financial Management
(PU) Purchasing
(RE) Requisitions

Purchasing on the Web - Processing Checklist

1. **Requisition Entry**
   - Go to Financial Management\Purchasing\Requisitions.
   - Add a Requisition.
     - Click Add.
     - Enter the Requisition Information.
     - Choose to Save and Add Detail or Save and Mass Add Detail.
     - Enter Requisition Detail Line Information.
     - Add Requisition Accounts.
     - Submit for Approval.
   - Add from Online Catalog.
     - Click Add from Online Catalog to create an eCommerce requisition.
     - Click the image of the site whose online catalog you want to order from.
     - Enter the Requisition Information.
     - Click Save and Add Detail.
     - Select Items to Add to Cart.
     - When all Items have been selected, Proceed to Cart.
     - Add Requisition Accounts.
     - Submit for Approval.
   - Clone from Purchase Order.
     - Click Clone from Purchase Order.
     - Select the PO to Clone.
     - Click Save and Add Detail
     - Enter Requisition Detail Line Information.
     - Add Requisition Accounts.
     - Submit for Approval

2. **Requisition Approval**
   - Go to Financial Management\Purchasing\Requisitions.
   - Click Filter Options.
     - Choose View Only Requisitions Awaiting My Approval.
   - Click View to view Requisition Detail Lines and Requisition Accounts.
   - Click Notes to view any Requisition Notes.
   - Click Attach to view any Requisition Attachments.
   - Click Approve or Deny.
     - Choose an Approval Option.
     - Enter Approval/Denial Notes.
   - Printing a Requisition.
     - Click Print.
     - The Requisition will go to the Print Queue and will remain a status Queued until the report completes.
     - Display the Report.

   Click Printer Icon to print the requisition

3. **My Requisition Approval History**
   - Go to Financial Management\Purchasing\My Requisition Approval History.
   - The Filter Options can be used to control what records will be displayed.
   - A listing of requisitions that have been approved/denied by this individual will display

in the browse.
- The current status of the requisition is also displayed.
- Click the + sign to expand the requisition.
- The user can view the requisition master information, detail line items, account distribution, approval history, receiving information, and notes by expanding the appropriate level.
- Copies of the requisitions can also be printed from this screen.

4. **View Purchasing Activity**
   - Go to Financial Management\Purchasing\View Purchasing Activity.
   - The View Purchasing Activity screen lists the Requisitions and Purchase Orders for the current Requisition Group.
   - Use the Filter Options to select a certain Requisition Group.
   - Requisitions and Purchase Orders display regardless of the employee who entered them or the status of the record.
   - Use the expand and collapse options to view and close details for a Purchase Order.
   - The Notes and Attach buttons will be flagged with an asterisk if there are notes or attachments on a selected Purchase Order.
   - Highlight a Purchase Order to Print
   - You can print with or without an eSign signature.
   - To print with a signature, enter the required password and click Submit.
   - To print without signature, click Back.
   - Click OK to "Do you wish to print the report without signatures?"
   - The Purchase Order is sent to the Print Queue.
   - Click Display Report or Back accordingly at the prompt.
   - An example Purchase Order will be show, either with signature or without.

5. **View My Purchase Orders**
   - Go to Financial Management\Purchasing\View My Purchase Orders.
   - Use Filter Options to choose to view Purchase Orders between certain dates, View by PO Number, or View by Requisition Number.
   - A listing of Approved Requisitions entered by the current user will display in the browse.
   - Click the + sign to expand the Purchase Order.
   - The user can view the PO Master information, detail line items, account distribution, approval history, receiving records, and notes by expanding the appropriate level.
   - If the user's security settings permit, a copy of the Purchase Order may be printed.
   - The electronic signature (eSign) will not appear unless the eSign password is entered.

6. **E-mail POs**
   - Go to Financial Management\Purchasing\E-mail POs.
   - Select the Filter to view.
     - All E-Mail Vendors.
     - Vendors with Open UnE-mailed/UnPrinted POs.
   - Click E-mail Setup
     - Enter E-mail From address and a default message and click Save.
   - Users can select one of two ways to e-mail a range of Purchase Orders.
     - Select POs to be E-Mailed to this Vendor.
     - Select POs to be E-mailed to ALL Vendors.
   - Enter the eSign Password and click Submit.
   - Check the Purchase Orders to be e-mailed.
     - Users can Select All POs or Unselect All POs.
   - Click Send E-mail(s) when selections are made.
   - A confirmation report will automatically display when the e-mail process is completed.

7. **Ecommerce Ordering**

- Go to Financial Management\Purchasing\ECommerce Ordering.
- Ecommerce Ordering is an area to electronically submit open Purchase Orders to Ecommerce vendors.
- The browse screen displays both ordered (Y) and unordered (N) Purchase Orders.
- Click the + sign to expand the view of a Purchase Order to view the Purchase Order detail, including if it has been printed or not.
- Click Print to print the Purchase Order.
- If needed, users can Change Ordered Status of the Purchase Order.
- To order the highlighted Purchase Order, Click Order.
- To order all unordered Purchase Orders, Click Order All.
- To begin the ordering process, Click Start Order.
- Click Close to back out and not order at this time.
- A warning message will appear indicating to not close this window until the process has finished.
- Click Print to print this page for your records.
- Click Close to ensure proper processing.

8. **PO Receiving**

- Go to Financial Management\Purchasing\PO Receiving.
- Adding a Receiving Record from a Purchase Order.
  - Click Add to Add a Receiving Record.
  - Search for PO by entering PO Number, Search by PO, or Search by Vendor.
  - Purchase Order must be in status of Open
    - Selecting a Batch Purchase Order will generate
  - Select PO to Receive.
- Receive the Items.
  - Enter Quantity Received or Receive All.
- Save the Received Record.
  - Click Save
  - Review the Received Date and Received Time.
  - Click Save
- Edit, Delete, and Attach.

9. **Reports**

- Go to Financial Management\Purchasing\Reports.
- PO Items Received Report.
  - This report allows users to create report templates to sort and list the items received on Purchase Orders within a selected time period.
  - Click Add to add a new report template.
  - Enter a template description.
  - Choose to share this template with other users in the district.
  - Checking the box will allow other users to use or clone your template, but will not be able to change it.
  - Select the type of report you want to create: All, Items Received, Items NOT Received.
  - Select the order you want to sort the fields on the report.
  - Ranges can be entered for the following: Date Received in Skyward, Due Date listed on the Purchase Order, and Purchase Order Number.
  - Narrow your ranges based on whether or not the Purchase Orders have been invoiced.
  - Save and Print the report.