



Texas Skyward User Group Conference

Purchasing Set-Up

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Purchasing Set-Up



Learn how to set up online purchasing which includes emailing purchase orders to vendors. This session includes setup for online approval for decentralized purchase order processing, account clearance groups and purchasing configurations where the choices will be explained.

- Requisition/PO Groups
- Approval Routes
- Narrative Codes
- Notification Options
- Email Purchase Orders

APPROVAL ROUTES

Req/PO Groups - Req/PO Group Information - WF\PU\PS\CF\RP - 8797 - 05.16.06.00.08 - Microsoft Edge

skyfin.rockwallisd.org/scripts/wsisa.dll/WService=wsFin/fpurcsetp001.w?isPopup=true

Req/PO Groups - Req/PO Group Information

Views: Req/PO Group Information Filters: *Skyward Default

Req/PO Group	Group Description	2015-2016 Next Req/PO #	2016-2017 Next Req/PO #	Account Clearance Group	Allow Chk Rqst
001	RHS		0011700115		

Expand All Collapse All Modify Details (displaying 9 of 9) View Printable Details

Req/PO Group Information

Req/PO Group	001
Group Description	RHS
Next Req/PO # for the Current Fiscal Year	
Next Req/PO # for the Next Fiscal Year	0011700115
Account Clearance Group	
Allow AP Check Requests to use this Req/PO Group	No
Allow this Req/PO Group to create Blanket POs	Yes
Status	Active

Next Req/PO # Add Next Req/PO #

Edit	Delete	Fiscal Year	Next Req/PO #	Status
		2016-2017	0011700115	Active

Approvers Add Approvers

Edit	Delete	Level	Approvers
		1	GOBER, COURTNEY CARSON
		2	BRYANT, BYRON LORAN
		3	HUNTER, JANA MICHELLE
			TOMALIN, JAMIE G

NARRATIVE CODES

Codes

- Go to Purchasing Configuration - CF
- Go to Purchasing Utilities - UT
- Codes - CO
 - Commodity Codes - CM
 - Contract Codes - CC
 - Narrative Codes - NC

Narrative Codes

* Narrative Code:

- Print on All Purchase Orders
- Italic Print (Non-Print Engine PO's Only)
- Bold Print (Non-Print Engine PO's Only)
- Use Full Print Line (Non-Print Engine PO's Only)
 - Condensed Print (Non-Print Engine PO's Only)
 - Underline the Text (Non-Print Engine PO's Only)





* Narrative Text:

NOTIFICATION OPTIONS



[Home](#) |
 [Account Management](#) |
 [Vendors](#) |
 [Purchasing](#) |
 [Accounts Payable](#) |
 [Fixed Assets](#) |
 [Inventory](#)

User Preferences

-  User Preferences - UP
 -  Requisition Browse Display Options
 -  Requisition Entry Options / Data Retention on Add
 -  Requisition Notification Options

Requisition Notify Options

- Receive an email notification when requisitions you entered are approved.
- Receive an email notification when requisitions you entered are denied.
- Receive an email notification when requisitions you entered are flagged as pending approval.
- Receive an email notification when items in the PO you entered are received.
- Receive an email notification when requisitions are awaiting your approval.
- Receive an email notification when requisitions you approved are denied.

EMAIL PURCHASE ORDERS

Web Financial Management - WF - 10636 - 05.16.06.00.08 - Microsoft Edge

skyfin.rockwallisd.org/scripts/wsisa.dll/WService=wsFin/sfmhom01.w



Home Account Management Vendors Purchasing Accounts Payable Fixed Assets Inventory

Financial Management

▼ Purchasing Order Processing -...

- Email Purchase Orders - EP
- eCommerce Ordering - EC
- PowerTrack - PT



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THANK YOU FOR ATTENDING!

