



Managing Open Purchase Orders

Texas City ISD



Why is it Important to be Sure POs Are Closed?

- POs encumber your available balance. If a PO is open that should not be open, you will not have an accurate account balance.
- If a PO is still open and you have submitted the paperwork to pay and close the PO, then there may be something wrong.
 - Does Accounts Payable have your OK to Pay?
 - Does Accounts Payable have the invoice from the Vendor?
 - Was the invoice paid without referencing or closing the PO?



To view your Open Purchase Orders in Skyward:

Financial Management

Purchasing

Purchasing Activity

Web Financial Management - WF - 10636 - 05.17.02.00.05 - Internet Explorer
https://stingarees02.tcisid.org/scripts/wsisa.dll/WService=wsFin/sfmhom01.w

SKYWARD TEXAS CITY ISD Jul

Home Account Management Vendors **Purchasing** Accounts Payable

Q|

Purchasing Setup

- Purchase Order Entry
- Purchasing Activity ←
- View My Purchase Orders
- Accounting - PO Batch-to-Open
- Accounting - PO Open-to-History
- Update History - Purchasing
- User Preferences
- Reports

Purchase Order Receiving

- Receiving

Purchasing Order Processing

- eCommerce Ordering

My Requisition Processing

- Requisitions
- Approve Requisitions
- My Requisition Approval History
- User Preferences



Select Filters to set up a filter for Open POs

TEXAS CITY ISD

SKYWARD

Home Account Management Vendors Purchasing Accounts Payable

Julie-Ann Howard Account Preferences Exit ?

Purchasing Activity

Views: Req. Group: 011 - MAINTENANCE Filters: OPEN PO

PO Number	Req Number	Status*	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By	% Disc	Approver/Date	**Notes	**Attach
▶ 0110170322	0000020109	APPO	11	2017 Ford Taurus	TOMMIE VAUGHN MOTORS INC	TX	22,183.20	LEE, KAREN S	0.00	05/11/2		
▶ 0110170321	0000020106	APPO	11	Replacement Graphics for Ford Explorer - Sheriff Vehicle	ALL AMERICA SALES CORPORA...	TX	90.00	LEE, KAREN S	0.00	05/11/2		
▶ 0110170320	0000020105	APPO	11	Repair work on Unit 4664	PREFERRED COLLISION CENTE...	TX	999.68	LEE, KAREN S	0.00	05/11/2		
▶ 0110170319	0000020095	APPO	11	Padlocks	IDN ACME INC	LA	408.80	LEE, KAREN S	0.00	05/11/2		
▶ 0110170318	0000020094	APPO	11	Quarterly Sprinkler Inspections for ITC	INTEGRATED SYSTEMS GROUP ...	TX	200.00	LEE, KAREN S	0.00	05/11/2		



Enter a Filter Name: (I used OPEN PO)

In the Status Row, enter a Low Value of APPO

In the Status Row, enter a High Value of APPO

Click **Save and Apply Filter**

Filter Information

Browse View: Req. Group: 011 - MAINTENANCE

* Filter Name: OPEN PO

Filter Details:

This is a temporary filter. When checked, this filter is deleted the next time you log into Skyward on the web.

Browse Options

Number of Locked Columns: 0

Display Totals Count Only

Column Display Options and Filters

Move	Label	Display	Width	Low Value	High Value	
	PO Number	<input checked="" type="checkbox"/>	100%	0000000000	9999999999	
↕	Req Number	<input checked="" type="checkbox"/>	100%	0000000000	9999999999	
↕	Status	<input checked="" type="checkbox"/>	100%	APPO	APPO	Reset
↕	Batch Number	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZZZ	
↕	Description	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZZZ	
↕	Vendor Name	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZZZ	
↕	Vnd St	<input checked="" type="checkbox"/>	100%		ZZZZZZZZZZZZZZZZZZZZ	
↕	Amount	<input checked="" type="checkbox"/>	100%	-999,999,999.99	999,999,999.99	



To view the PO details click the triangle to the left of the PO number.

TEXAS CITY ISD

Julie-Ann Howard Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable

Purchasing Activity

Views: Req. Group: 011 - MAINTENANCE Filters: OPEN PO

PO Number	Req Number	Status*	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By	% Disc	Approve Date	**Notes	**Attach
▶ 0110170322	0000020109	APPO	11	2017 Ford Taurus	TOMMIE VAUGHN MOTORS INC	TX	22,183.20	LEE, KAREN S	0.00	05/11/2		
▶ 0110170321	0000020106	APPO	11	Replacement Graphics for Ford Explorer - Sheriff Vehicle	ALL AMERICA SALES CORPORA...	TX	90.00	LEE, KAREN S	0.00	05/11/2		
▶ 0110170320	0000020105	APPO	11	Repair work on Unit 4664	PREFERRED COLLISION CENTE...	TX	999.68	LEE, KAREN S	0.00	05/11/2		
▶ 0110170319	0000020095	APPO	11	Padlocks	IDN ACME INC	LA	408.80	LEE, KAREN S	0.00	05/11/2		
▶ 0110170318	0000020094	APPO	11	Quarterly Sprinkler Inspections for ITC	INTEGRATED SYSTEMS GROUP ...	TX	200.00	LEE, KAREN S	0.00	05/11/2		
▶ 0110170316	0000020083	APPO	11	Asbestos Inspector Refresher Course Fee for M.	PROF ENVIRONMENTAL TRAINI...	TX	250.00	LEE, KAREN S	0.00	05/11/2		



To view the PO details click the triangle to the left of the PO number.

Click on the triangle to the left of any detail category for more information.

Invoices and Balance are most helpful when looking at Open POs.

TEXAS CITY ISD

SKYWARD

Home Account Management Vendors Purchasing Accounts Payable

Purchasing Activity

Views: Req. Group: 011 - MAINTENANCE Filters: OPEN PO

PO Number	Req Number	Status*	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By	% Disc	Approval Date
0110170322	0000020109	APPO	11	2017 Ford Taurus	TOMMIE VAUGHN MOTORS INC	TX	22,183.20	LEE, KAREN S	0.00	05/11/2

Expand All Collapse All Modify Details (displaying 12 of 12) View Printable Details

- Master
- Line Items
- Accounts
- Approvals
- Receiving Records
- Invoices
- Balance
- Notes Add Notes
- Attachments
- Print/Email History View Print/Email History
- Change History View Change History
- Encumbered Detail View Encumbered Detail



Invoices will show you if there have been any invoices paid and applied to the PO.

Balance will show how much is remaining on the PO.

TEXAS CITY ISD
SKYWARD

Julie-Ann Howard Account Preferences

Home Account Management Vendors Purchasing Accounts Payable

Purchasing Activity

Views: Req. Group: 011 - MAINTENANCE Filters: OPEN PO

PO Number	Req Number	Status*	Batch Number	Description	Vendor Name	Vnd St	Amount	Entered By	% Disc	Approve/Date
0110170322	0000020109	APPO	11	2017 Ford Taurus	TOMMIE VAUGHN MOTORS INC	TX	22,183.20	LEE, KAREN S	0.00	05/11/2

Expand All Collapse All Modify Details (displaying 12 of 12) View Printable Details

- Master
- Line Items
- Accounts
- Approvals
- Receiving Records
- Invoices
 - There are no Invoice records for this Purchase Order.
- Balance

Encumbered	Liquidated	Adjusted	Remaining
22,183.20	0.00	0.00	22,183.20
- Notes Add Notes
- Attachments
- Print/Email History View Print/Email History
- Change History View Change History
- Encumbered Detail View Encumbered Detail

Questions?

