I. I don't see the Financial MANAGEMENT menu.

This is generally a user that was able to order supplies from OASIS but has never issued purchase orders in Skyward?

**Solution:**

The user has to be added to the Inventory Security Group

**Process:**

i. Was the user able to order supplies from OASIS?
   
   **If yes** then they will be granted access once OASIS access is verified.
   
   Collect the name and cost center # of the user and forward the information to Cliff Owens (cowens) Cc Rosie Mitchell (rmitchell) and Johnny Nash (jnash).
   
   **If no** then they will need to have the manager of the cost center that access is requested for complete a security access form and submit to the Service Desk.

II. I have the Financial Menu but I do not see the Inventory Menu option.

This generally is the result of someone left out of the security group. By default all users that have access to the **Purchasing** menu will have access to the **Inventory** menu.

**Solution:**

The user has to be added to the Inventory Security Group

**Process:**

Verify that the user has the **Purchasing** menu option under the Financial Management menu.

1. **If yes**, Collect the name and cost center # of the user and email the information to Cliff Owens (cowens) Cc Rosie Mitchell (rmitchell) and Johnny Nash (jnash). They will be
added to the same cost center(s) that they current have access to issue purchase orders from.
2. **If no** then this is a user that has access to Financial Management but was not authorized to make purchases for their cost center

Was the user able to order supplies from OASIS?

**If yes** then they will be granted access once OASIS access is verified.

Collect the name and cost center # of the user and email the information to Cliff Owens (cowens) Cc Rosie Mitchell (rmitchell) and Johnny Nash (jnash).

**If no** then they will need to have the manager of the cost center that access is requested for complete a security access form and submit to the Service Desk.

III. **Error Message: “You have not been setup to approve or enter inventory requisitions in any requisition group....”**

This error message occurs when a user has the proper security profile but is not assigned to an active requisition group. See Screen print below.

![Screen print](image)

**Solution:**
The user has to be added to a Requisition Group

**Process:**
Collect the name and cost center # of the user and email the information to Cliff Owens (cowens) Cc Rosie Mitchell (rmitchell) and Johnny Nash (jnash). They will ensure that the user is added to the appropriate requisition group.

IV. **I can’t find my item in the list**
Users currently only have access to the Materials Warehouse. Items in the Materials warehouse start with number “01”. However some commonly ordered Maintenance items that begin with “02” and some Custodial items that begin with “03” have been moved to the Materials Warehouse. NOT ALL.

**Solution:**
Troubleshoot!!! See screen print below.

**Process:**
1. Verify that “Select Items by Item Code” is selected
2. Verify that the Filter is set to “Skyward Default”
3. Check the number of records displayed. May need to advance to next set of records.
4. Verify that the Item code is typed in correctly. You must type the leading “0” i.e. “01”. If the item starts with 02 or 03 it may be one of the items that was not moved to the Materials Warehouse.

If the item is still not found

Collect the name and cost center # of the user and email the information to Rosie Mitchell (rmitchell) Cc: Johnny Nash (jnash).
V. I don't see the account that I want to use to purchase from the Warehouse.

The only accounts that are available for use are the supply objects “510” for each cost center. You have access to all Funds, Functions and Projects within the Supplies object at the Cost Center.

See screen print below

Process:
Direct the caller to the Budgeting Office if the caller feels that they are not seeing an account that matches the above criteria, or it they want additional accounts to purchase from.

VI. I don’t have any money in the account

Direct the caller to the Budgeting Office