

QSS Customer Education



Welcome to the Fiscal Year Rollover For Purchasing and Stores Webinar

The **Fiscal Year Rollover for Purchasing and Stores** webinar, sponsored by the QSSUG Purchasing, Stores and Fixed Assets (PSFA) Committee, will demonstrate the processes involved in closing out one fiscal year and starting another from a Purchasing and Stores perspective.

When is it?

Thursday, **April 25, 2013** from **10:00 am** to **12 noon** (Pacific).

Who might be interested?

Purchasing Administrators and staff; Business and Accounts Payable Administrators and staff; Technical Support staff; other staff interested in learning more about Purchasing and Stores Fiscal Year Rollover.

Why attend?

The **Fiscal Year Rollover for Purchasing and Stores** webinar covers:

- Year-End Requisition Cancellation (POX086)
- Purchase Order/Requisitions Fiscal Year Control (POX000)
- Identifying and analyzing open purchase orders (POR110)
- Assigning payment action codes (POPYMT)
- Rolling Y1 PO's to Y2 PO's (POR510)
- Rolling Y1 PO's to Y2 payables (POR520)
- Closing out and liquidating open PO's (PCLXFR/PCL920)
- Starting Fiscal Year 2 – odometers for requisitions, PO's, estimated payables for Y2 (GOUPDT)
- Copying PO requisitions from Y1 to Y2 (POCOPY)
- Managing Queues for simultaneous Y1/Y2 activity
- Miscellaneous topics: Sales tax rate change (GOUPDT); tax rate differentials (VEUPDT)
- Preparing for Stores rollover in old FY
- Setting up master files and odometers in new FY
- Closing old FY and rolling stock balances
- Inputting pending transactions in new FY and process non-live issues (if applicable)
- Entering issues in new FY

What does it cost to attend this webinar?

- **Members** of the QSSUG PSFA Committee: no charge; **compliments** of the Committee.
- **Non-members** of the PSFA Committee: **\$250** per registration must be **pre-paid**. Mail a check to the **QSS** San Carlos office **prior** to the webinar.

If you don't know if your organization is a member of the **PSFA Committee**, please contact your technology support staff, or contact a **PSFA Committee co-chair** (Linda Crawford, LCrawford@stancoe.org or Rose Garcia, rosegarcia@berkeley.net).

How to register?

Participants must self-register. To self-register:

- The email you received from **QSS** includes a link for online registration. Please use the link to register. You can also find the link posted on the QSSUG listserv and at www.qss.com.
- **After registering**, you'll automatically be approved and you'll receive a confirmation email from the registration site once you complete the registration.
 - Please carefully check that you've provided your correct email address
 - If this is your first time registering for a **QSS** webinar, please verify with your email administrator that you're allowed to receive emails from these registration sites -- CitrixOnline.com and GoToMeeting.com
- **QSS** will give the PSFA Committee co-chairs a list of all webinar registrants to verify membership status. Co-chairs will contact any registrant who may have checked the wrong membership status.
- **Non-members of the PSFA Committee:** Mail a **\$250** check per registration, payable to:

**Quintessential School Systems
867 American Street, 2nd Floor
San Carlos, CA 94070**
- The **deadline for registrations** is **9:00 am** (Pacific), **Thursday, April 25, 2013**. Registrations won't be accepted after this time.

You can use **one registration** for a group of people who will view the webinar together on a single computer (either a stand-alone computer or one connected to projection equipment).

How to attend online?

Once you've registered, you'll receive a confirmation email with all the information you need. Leading up to the webinar, you'll also get reminder emails.

Webinar materials are available on the QSS/OASIS Webinars page of the Secure Support Area (SSA) around 24-48 hours prior. If you don't know how to access the **QSS** SSA, please check with your organization's technology support staff.

If you have additional questions about which equipment you need, or how to attend, please email Mike Smith at mike@qss.com.

Register now by clicking the link below:

<https://www1.gotomeeting.com/register/836606177>

Please be sure to check your email for your registration confirmation.