

# Contract Inquiry and Reports

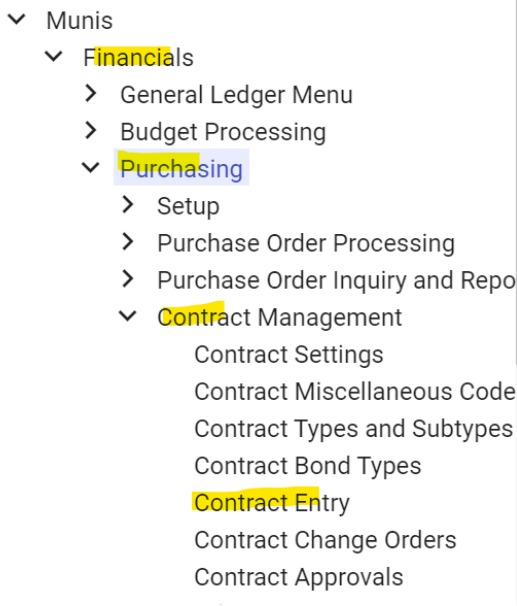
## Objective

This document provides step-by-step instructions on how to search for MUNIS contracts. It is intended for a basic MUNIS user who is familiar with the entry of contracts into the MUNIS system.

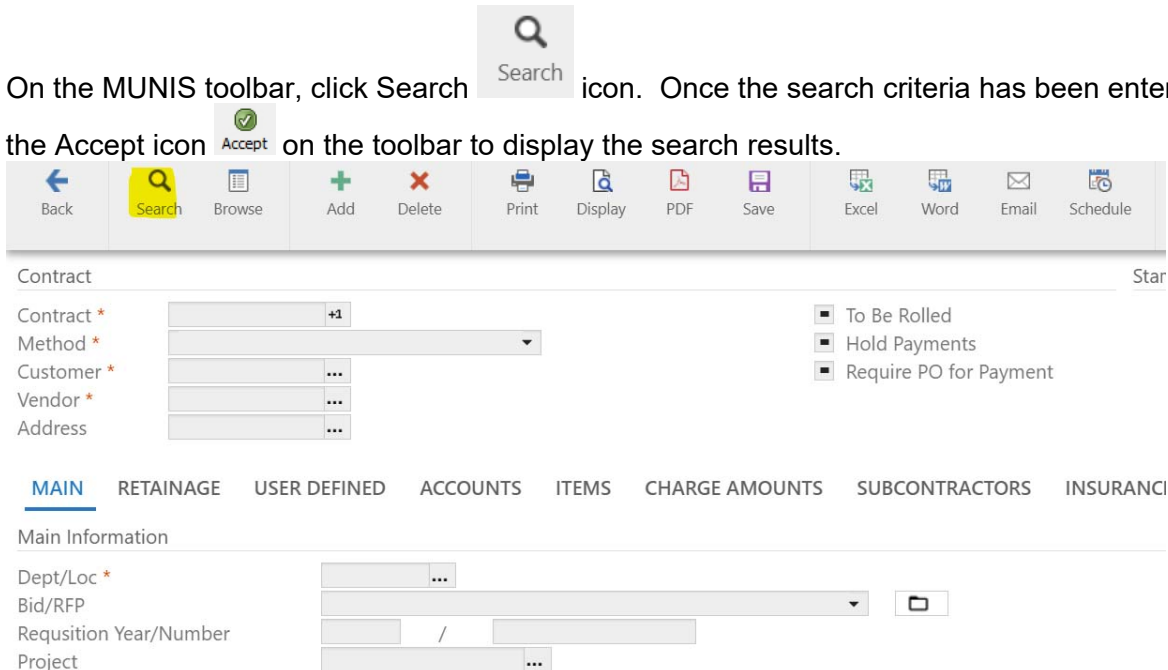
## Procedure

Use the following steps to search for and display contract records:

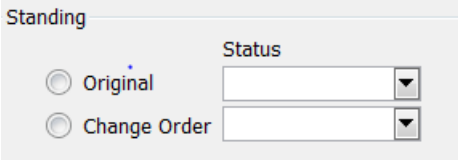
1. Open the Contract Maintenance program.  
*Financials > Purchasing > Contract Management > Contract Entry*





2. On the MUNIS toolbar, click Search icon. Once the search criteria has been entered, click the Accept icon on the toolbar to display the search results.



3. Any of the fields on the screen can be used to define your search criteria. Some of the more common fields used are described below:

Field	Action or Description
Contract	This field holds the contract number. This is most often used when you want to pull up a single contract. You can also use the search tools to find all contracts greater or less than a certain contract number.
Vendor	Entering a vendor number will show all contracts awarded to that vendor.
Status	<p>This dropdown menu can be used to show all contracts with a particular status. For example, if you want to see all contracts that have been rejected, select 0 – Rejected</p> <p>2-Created                      4-Released                      6-Approved                      8-Posted                      10-Closed</p> <p>Note: The status may be searched for the Main Contract or the Contract Change Order. You must select which one you are searching for.</p>  <p>The screenshot shows a search interface with a 'Standing' section containing two radio buttons: 'Original' (selected) and 'Change Order'. To the right, there is a 'Status' dropdown menu with a downward arrow.</p>
Dept/Loc	Enter a department or location code in this field to show only those contracts associated with that department/location.
Year	Entering a value in the Year field will show all contracts created in a particular fiscal year.
Contract type	This dropdown menu holds contract type codes. These codes are defined in Miscellaneous Codes FM, under the CNTR category. Contract type codes are user-defined, so you may use them as a sorting method unique to your site.

4. Once you have entered your search criteria, press Enter or click the  Accept button. The first matching contract is displayed on the screen. You can see the others by clicking the  Browse button, or using the navigation bar at the bottom of the screen. The navigation bar also tells you how many records matched your search.

For this example, we did a search for any contracts in Department 17 (Finance), which resulted in 120 contracts being found.

# Contract Processing Inquiry and Reports

Back
 Search
 Browse
 Add
 Print
 Display
 PDF
 Save
 Excel
 Word

Contract

Contract \*   To E

Method \*   Hol

Customer \*   Req

Vendor \*  MOORE IACOFANO GOLTSMAN INC

Address

---

**MAIN** RETAINAGE USER DEFINED ACCOUNTS ITEMS SUBCONTRACTORS IN:

Main Information

Dept/Loc \*   FINANCE

Bid/RFP

Requisition Year/Number  /

Project

Description

Year \*  Period

Type \*

Subtype

Review code

Percent complete  as of

<<
<
1 of 120
>
>>

## Exporting Reports

Once you have found some records, you may want to export them.

**Browse** - By selecting the Browse icon from the toolbar at the top of the page MUNIS displays all of the records in the active set in a list format.

Back
 Accept
 Cancel
 Search
 Output
 Print
 Display
 PDF
 Save
 Excel
 Word

Contract	Method	Status	Description	Year	Period	Revised Amount
5656	Non-Encumbered GL Accounts	POSTED	MEASURE U GROSS RECEIPTS TAX	2021	12	109,135.00
5689	Non-Encumbered GL Accounts	POSTED	TO PROVIDE OFF-SITE DOCUMENT STORAGE SERVICES	2022	1	150,000.00
5693	Non-Encumbered GL Accounts	POSTED	MULTI-DEPARTMENTAL OFF-SITE STORAGE SERVICES	2022	1	3.00
5749	Non-Encumbered GL Accounts	POSTED	WORDPRESS SITE FOR MEASURE U BUS. TAX CALCULATOR	2022	2	2,945.00
5785	Non-Encumbered GL Accounts	POSTED	CONSULTING SERVICES FOR THE FINANCE DEPARTMENT	2022	6	5.00
5786	Non-Encumbered GL Accounts	POSTED	ON-CALL PROFESSIONAL PLANNING CONSULTING SERVICES	2022	6	5.00
5787	Non-Encumbered GL Accounts	POSTED	CONSULTING SERVICES FOR THE FINANCE DEPARTMENT	2022	6	5.00
5784	Non-Encumbered GL Accounts	CREATED	**TEST** - ALTERNATIVE RETIREMENT SYSTEM	2022	5	25.00
5789	Non-Encumbered GL Accounts	CREATED		2022	6	
5790	Non-Encumbered GL Accounts	CREATED		2022	6	5.00
5791	Non-Encumbered GL Accounts	CREATED		2022	6	
5792	Non-Encumbered GL Accounts	CREATED		2022	6	5.00
5793	Non-Encumbered GL Accounts	CREATED	CONSULTING SERVICES FOR THE FINANCE DEPARTMENT	2022	6	500.00
5794	Non-Encumbered GL Accounts	CREATED		2022	6	
1000	Non-Encumbered GL Accounts	CLOSED	DESIGN CITY'S 5-YEAR STRATEGIC BUSINESS PLAN	2009	8	21,500.00
1004	Non-Encumbered GL Accounts	CLOSED	LEGAL SERVICES PROVIDED CONCERNING THE CITY'S	2009	10	17,000.00


Sort any of the columns by simply clicking on the column heading.

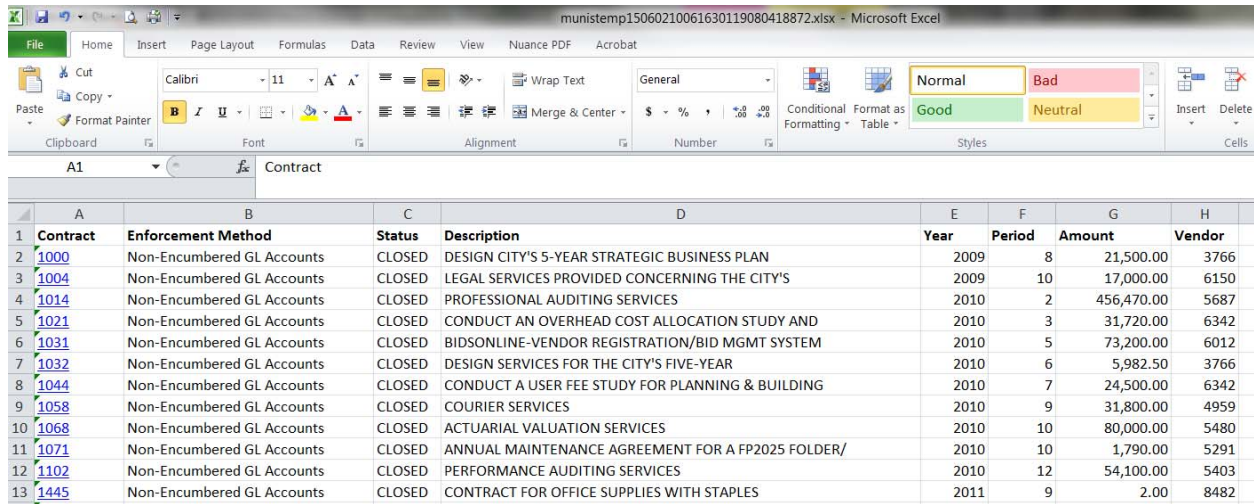
To add or remove columns from the display screen, right click in any of the column headings. Select the columns you wish to view, or clear those you wish to hide by clicking on the column title. The

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display will be reformatted according to your selections. When you create an output file or report from a browse screen, the output does not include columns that you have hidden on the screen display.

Select a record by double clicking on the record.

**Export to Excel** - From the browse window, click the Excel icon  on the toolbar to create an Excel spreadsheet of the active set of data. Only the columns that are displayed in the browse window will be exported.

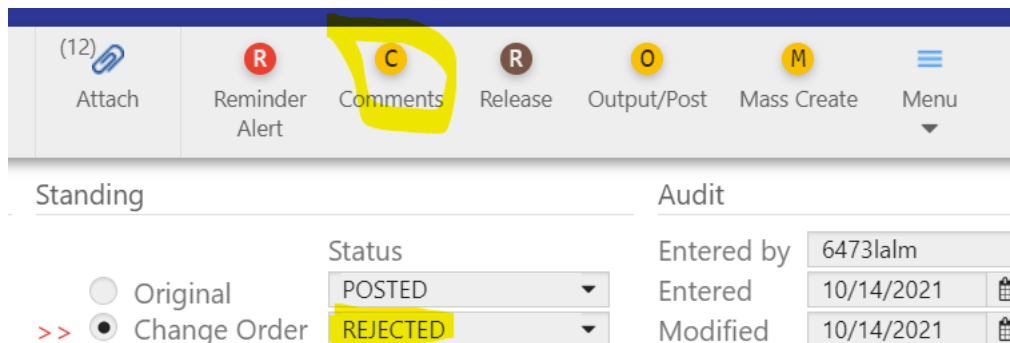


Contract	Enforcement Method	Status	Description	Year	Period	Amount	Vendor
1000	Non-Encumbered GL Accounts	CLOSED	DESIGN CITY'S 5-YEAR STRATEGIC BUSINESS PLAN	2009	8	21,500.00	3766
1004	Non-Encumbered GL Accounts	CLOSED	LEGAL SERVICES PROVIDED CONCERNING THE CITY'S	2009	10	17,000.00	6150
1014	Non-Encumbered GL Accounts	CLOSED	PROFESSIONAL AUDITING SERVICES	2010	2	456,470.00	5687
1021	Non-Encumbered GL Accounts	CLOSED	CONDUCT AN OVERHEAD COST ALLOCATION STUDY AND	2010	3	31,720.00	6342
1031	Non-Encumbered GL Accounts	CLOSED	BIDSONLINE-VENDOR REGISTRATION/BID MGMT SYSTEM	2010	5	73,200.00	6012
1032	Non-Encumbered GL Accounts	CLOSED	DESIGN SERVICES FOR THE CITY'S FIVE-YEAR	2010	6	5,982.50	3766
1044	Non-Encumbered GL Accounts	CLOSED	CONDUCT A USER FEE STUDY FOR PLANNING & BUILDING	2010	7	24,500.00	6342
1058	Non-Encumbered GL Accounts	CLOSED	COURIER SERVICES	2010	9	31,800.00	4959
1068	Non-Encumbered GL Accounts	CLOSED	ACTUARIAL VALUATION SERVICES	2010	10	80,000.00	5480
1071	Non-Encumbered GL Accounts	CLOSED	ANNUAL MAINTENANCE AGREEMENT FOR A FP2025 FOLDER/	2010	10	1,790.00	5291
1102	Non-Encumbered GL Accounts	CLOSED	PERFORMANCE AUDITING SERVICES	2010	12	54,100.00	5403
1445	Non-Encumbered GL Accounts	CLOSED	CONTRACT FOR OFFICE SUPPLIES WITH STAPLES	2011	9	2.00	8482

You can manipulate the data within Excel as you would with any other spreadsheet.

## Rejected Contracts

Rejected contracts will have a status of 0-Rejected. You can view the reason for rejection by clicking on the "COMMENTS" box on the top menu to view the reason for rejection.




(12) Attach **R** Reminder Alert **C** Comments **R** Release **O** Output/Post **M** Mass Create Menu

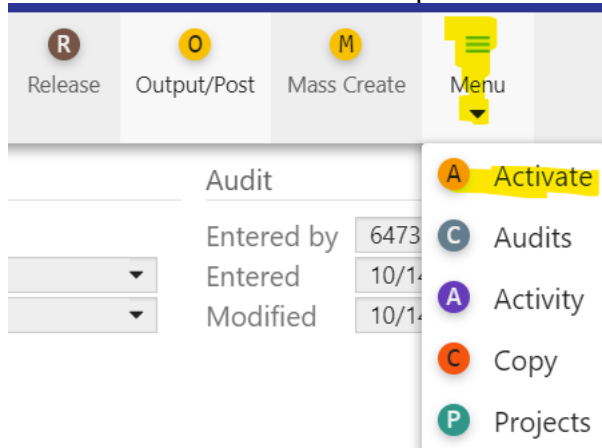
Standing Audit

Original  Change Order

Status: POSTED (dropdown) **REJECTED** (dropdown)

Entered by: 6473lalm  
Entered: 10/14/2021  
Modified: 10/14/2021

In order to edit/correct a rejected contract, click "ACTIVATE" from the Menu drop down screen, make the corrections & click the Accept icon . Then release the contract.



## Drill Down to Requisitions/Purchase Orders/Invoices/Attachments

You can drill down to the associated requisitions, purchase orders, invoices and attachments associated with the contract.

Tools	

Dept/Loc *	1/	FINANCE	E
Bid/RFP			E
Requisition Year/Number	/		B
Project			A
Description	WORDPRESS SITE FOR MEASURE U BUS. TAX CALCULATOR		Ir
Year *	2022	Period 2	R
Type *	OPR (OPERATING)		E
Subtype			
Review code			
Percent complete	0.00	as of	D
Administrator	6473aban	ANTONIO BANUELOS	C
Workflow	None	Notification Percentage 0.00	M R

### Totals

Original	2,945.00	Open Req	0.00	0.00	%	Requisitions (1)
Revised	2,945.00	Open PO	2,820.00	95.76	%	Purchase Orders (1)
Liquidated amt	2,945.00	Expended	125.00	4.24	%	Invoices (1)
Unrelieved	0.00	Available	0.00	0.00	%	

## Appendix A: Common Search Tools

Ranges and/or logical search characters can be used in your search. The following is a list of characters and an example of their use. Not all these characters can be used in all fields. For example, you cannot use the wildcard character (\*) in a date field. **NOTE:** MUNIS is case-sensitive. A name entered as John Doe in MUNIS would not be found if you type JOHN DOE in the name field when doing a search.

Symbol	Description	Example of Use
*	Wildcard. Use this with any combination of letters or numbers before or after the symbol.	Office* returns any names that begin with Office (Office Max, Office Depot) *Office* returns any names that contain the word Office (Staples Office Supply, ION Office Equipment, Office Max)
>	Greater Than	>1/16/07 returns all dates greater than the specified date.
>=	Greater Than or Equal To	>=1/16/07 returns the specified date and all dates greater than the date specified
<	Less Than	<\$10,000.00 returns all amounts less than the amount specified.
<=	Less Than or Equal To	<=1/16/22 returns the specified date and all dates less than or equal to the date specified
<> or !=	Not Equal To	<>135 or !=135 used in a Dept/Loc field returns all departments except 135
: or ..	Range	500:599 returns all amounts including the beginning and ending amounts
	Pipe symbol, used as "and".	Finds the named data items, regardless of the range. For example 1/1/22 1/10/22 1/31/22 returns only the three dates entered