

Purchase Order Inquiry & Reports

Objective

This document provides step-by-step instruction on how to inquire and report on existing MUNIS purchase orders. This document is intended for a purchase order user who is familiar with basic MUNIS navigation skills.

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 – Every search should be in ALL CAPS

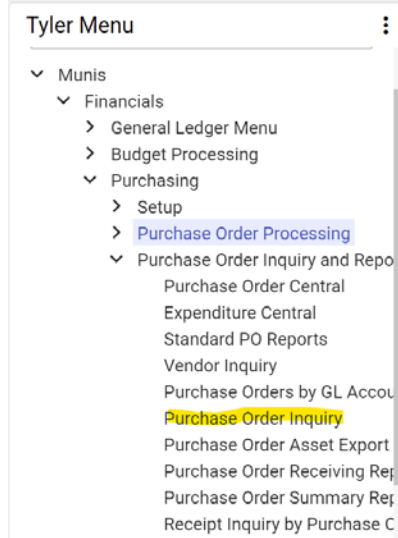
Symbol	Description	Example of Use
*	Wildcard. Use this with any combination of letters or numbers before or after the symbol.	OFFICE* returns any names that begin with OFFICE (OFFICE MAX, OFFICE DEPOT) *OFFICE* returns any names that contain the word OFFICE (STAPLES OFFICE SUPPLY, ION OFFICE EQUIPMENT, OFFICE MAX)
>	Greater Than	>1/16/22 returns all dates greater than the specified date.
>=	Greater Than or Equal To	>=1/16/22 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 Dept/Loc 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

Purchase Order Inquiry

1. Open Purchase Order Inquiry

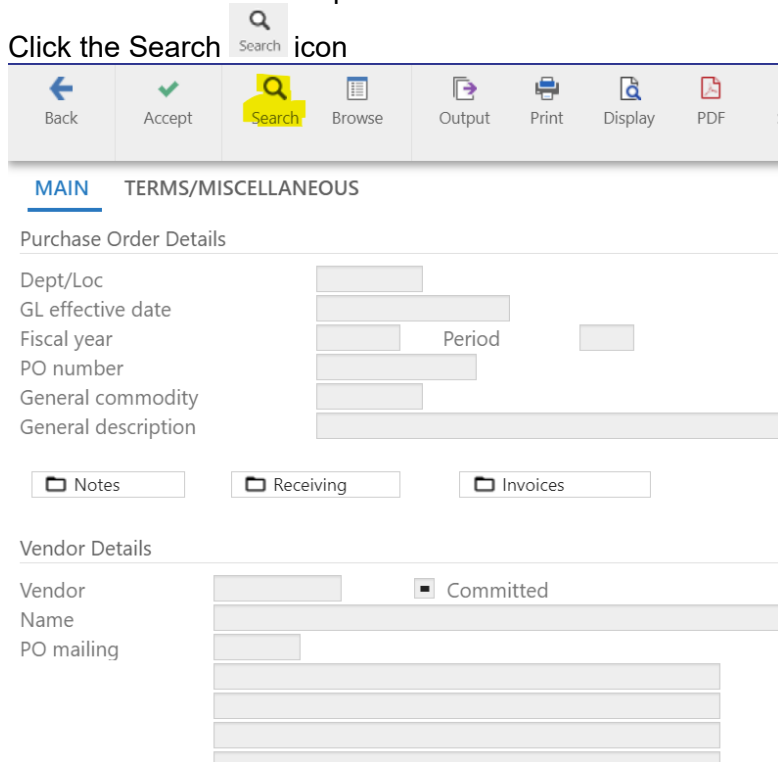
Financials > Purchasing > Purchase Order Inquiry and Reports Menu > Purchase Order Inquiry

Note: Purchase Order Inquiry can also be found on the Departmental Functions Menu



2. Find a record or multiple records


Click the Search icon



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Once you click the Search icon, you can do a search on one or more of the available fields on the Purchase Order Find screen.


Field	Description
Dept/Loc	Enter the Dept/Loc code of the purchasing department.
Fiscal Year	Enter the fiscal year in which the purchase order was created.
PO Number	System generated number assigned to the purchase order.
Gen Commodity	Classifies purchased items into categories or groups. Defined in Category FM. Type a commodity code.
Entry Date	The date the purchase order was created.
Needed by	Date the services or goods are needed by
Status	0 = Closed 6 = Posted 8 = Printed
Requisition Number	The system generated number of the requisition that was converted into the purchase order.
Contract	The system generated number of the contract that is associated with a purchase order.
General Description	The General Description that was entered in Purchase Order Entry,
Vendor	The vendor number as set up in the Accounts Payable and Purchasing modules.
Name	The name of the vendor

Once the search criteria have been entered, click the OK/Accept icon  on the toolbar to display the search results. For this example, we did a search for any purchase orders for Department 17 (Finance), which resulted in 539 items being found.

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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.


Record Number	Year	PO#	Vendor Name	PO Date	Order Amount
1	2009	20900098	PLANETBIDS INC	01/26/2009	24,400.00
2	2009	20900100	CITY OF BERKELEY	01/28/2009	1,106.49
3	2009	20900183	ROBERT HALF INTERNATIONAL INC	03/03/2009	1,254.24
4	2009	20900195	SAFECHECKS	03/06/2009	1,291.34
5	2009	20900238	MOORE IACOFANO GOLTSMAN INC	03/17/2009	21,500.00
6	2009	20900247	ASSOCIATED BUSINESS MACHINES	03/20/2009	9,993.75
7	2009	20900250	CHIMES PRINTING LLC	03/25/2009	1,196.25
8	2009	20900348	TYLER TECHNOLOGIES, INC.	04/29/2009	7,500.00
9	2009	20900369	SIDEMAN & BANCROFT LLP	05/12/2009	19,528.98
10	2009	20900455	PRESCIENT SOFTWARE JRD INC	06/18/2009	16,000.00
11	2009	45020170	SYMPRO INC	12/15/2008	42,439.24
12	2009	45020776	GOVERNMENT FINANCE OFFICERS ASSOC	12/17/2008	90,328.75
13	2009	45020814	CORODATA RECORDS MANAGEMENT INC	01/09/2009	3,577.50
14	2009	45022243	SIDEMAN & BANCROFT LLP	11/23/2008	1.20
15	2009	45022587	XEROX CORPORATION	11/23/2008	20,098.09
16	2009	45022614	RICOH USA INC	12/15/2008	1,922.87

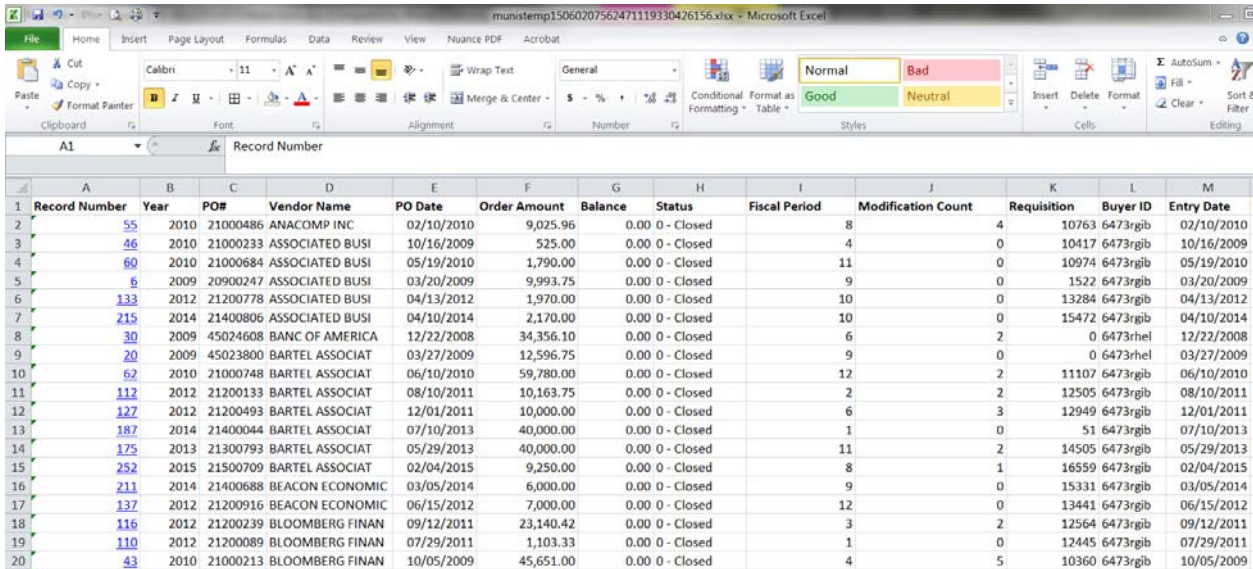
Sort any of the columns by simply clicking on the column heading.

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 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.

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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.



Record Number	Year	PO#	Vendor Name	PO Date	Order Amount	Balance	Status	Fiscal Period	Modification Count	Requisition	Buyer ID	Entry Date
55	2010	21000486	ANACOMP INC	02/10/2010	9,025.96	0.00	0 - Closed		8	4	10763 6473rgb	02/10/2010
46	2010	21000233	ASSOCIATED BUSI	10/16/2009	525.00	0.00	0 - Closed		4	0	10417 6473rgb	10/16/2009
60	2010	21000684	ASSOCIATED BUSI	05/19/2010	1,790.00	0.00	0 - Closed		11	0	10974 6473rgb	05/19/2010
6	2009	20900247	ASSOCIATED BUSI	03/20/2009	9,993.75	0.00	0 - Closed		9	0	1522 6473rgb	03/20/2009
133	2012	21200778	ASSOCIATED BUSI	04/13/2012	1,970.00	0.00	0 - Closed		10	0	13284 6473rgb	04/13/2012
215	2014	21400806	ASSOCIATED BUSI	04/10/2014	2,170.00	0.00	0 - Closed		10	0	15472 6473rgb	04/10/2014
30	2009	45024608	BANC OF AMERICA	12/22/2008	34,356.10	0.00	0 - Closed		6	2	0 6473rhel	12/22/2008
20	2009	45023800	BARTEL ASSOCIAT	03/27/2009	12,596.75	0.00	0 - Closed		9	0	0 6473rhel	03/27/2009
62	2010	21000748	BARTEL ASSOCIAT	06/10/2010	59,780.00	0.00	0 - Closed		12	2	11107 6473rgb	06/10/2010
112	2012	21200133	BARTEL ASSOCIAT	08/10/2011	10,163.75	0.00	0 - Closed		2	2	12505 6473rgb	08/10/2011
127	2012	21200493	BARTEL ASSOCIAT	12/01/2011	10,000.00	0.00	0 - Closed		6	3	12949 6473rgb	12/01/2011
187	2014	21400044	BARTEL ASSOCIAT	07/10/2013	40,000.00	0.00	0 - Closed		1	0	51 6473rgb	07/10/2013
175	2013	21300793	BARTEL ASSOCIAT	05/29/2013	40,000.00	0.00	0 - Closed		11	2	14505 6473rgb	05/29/2013
252	2015	21500709	BARTEL ASSOCIAT	02/04/2015	9,250.00	0.00	0 - Closed		8	1	16559 6473rgb	02/04/2015
211	2014	21400688	BEACON ECONOMIC	03/05/2014	6,000.00	0.00	0 - Closed		9	0	15331 6473rgb	03/05/2014
137	2012	21200916	BEACON ECONOMIC	06/15/2012	7,000.00	0.00	0 - Closed		12	0	13441 6473rgb	06/15/2012
116	2012	21200239	BLOOMBERG FINAN	09/12/2011	23,140.42	0.00	0 - Closed		3	2	12564 6473rgb	09/12/2011
110	2012	21200089	BLOOMBERG FINAN	07/29/2011	1,103.33	0.00	0 - Closed		1	0	12445 6473rgb	07/29/2011
43	2010	21000213	BLOOMBERG FINAN	10/05/2009	45,651.00	0.00	0 - Closed		4	5	10360 6473rgb	10/05/2009

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

To View if Payment Has Been Made

You can view if payment has been made and if the check has been issued by clicking on the "INVOICES" box in the Purchase Order Inquiry screen.

MAIN TERMS/MISCELLANEOUS

Purchase Order Details

Dept/Loc: 17 FINANCE
 GL effective date: 01/26/2009
 Fiscal year: 2009 Period: 07
 PO number: 20900098
 General commodity: 946
 General description: PLANETBIDS BIDSONLINE SYSTEM

Notes
 Receiving
 Invoices

Vendor Details

Vendor: 6012 Committed
 Name: PLANETBIDS INC
 PO mailing: 0
 13263 VENTURA BLVD. SUITE #101

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If we click on the “INVOICES” box, we can see when each invoice was paid and when the check was issued.

Invoices

Document	Invoice	Year	Inv Date	Invoice Amount	Liquidated Amount	Status	Check	Check Date	Vendor	Check Cle
318886	20227	2022	05/28/2020	370.96	370.96	Paid	10184330	09/29/2021	11229	10/18/2021
318887	21005	2022	01/08/2021	927.38	927.38	Paid	10184330	09/29/2021	11229	10/18/2021
318888	20919	2022	12/16/2020	1483.82	1483.82	Paid	10184330	09/29/2021	11229	10/18/2021
318889	20589	2022	09/24/2020	370.96	370.96	Paid	10184330	09/29/2021	11229	10/18/2021