

MUNIS QSG

QUICK START GUIDE

Activity: **Open Purchase Orders**
Munis > Financials > Purchasing > Purchase Order Inquiry and Reports > Standard PO Reports

To pull a list of open Purchase Orders for a cost center:

1. In **Report Options**, click Encumbrance by PO Number
2. Click **Define**
3. Select **Summary** in the General section
 - a. Selecting **Detail** will provide line detail and produces a longer report
4. Check **Initially Sort by Dept/Loc**
5. PO Fiscal Year is **Current**
 - a. As long as Current year is defined, the year will change as the fiscal year changes
6. Input **PO's range** from **00000000 to 99999999**
 - a. This will pull everything outstanding for the range of PO numbers
7. Check **Include zero balance PO's** and **Include carry forward PO's**
8. Tab to **Dept/Loc** and enter the range of Cost Centers for the report
 - a. Both the From and To fields need to be filled in even if they are the same (e.g. cost center 0021 to 0021)
 - b. Searching only the **Dept/Loc segment** will pull in those open Purchase Orders entered by the cost center
9. Click **Accept**, when the records are found (e.g. displays the number record (s) located in the bottom left corner of the page), click the **PDF** icon in the ribbon to view the report



If this is the first time the report is generated, some report options may default. Remove unnecessary data and define the report options as instructed above. The report options are saved for the next time the report is opened.



Run this report on a regular basis to insure purchase order information is up to date.