# Contents

## Using Wildcard Characters in Data Searches

Ranges and/or logical search characters can be used when you are searching for records. The following is a list of wildcard characters and examples 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, so a name entered as John Doe in Munis would not be found if you enter 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). <br><br> *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 | <=1/16/07 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". <br><br> (Located above the backslash) | Finds the named data items, regardless of the range. For example 1/1/06\|1/10/06\|1/31/06 returns only the three dates. |

# Purchase Order Inquiry

To display purchase orders in inquiry-only mode:

1.  Open the Purchase Order Inquiry program.
    *Financials > Purchasing > Purchase Order Processing >Purchase Order Inquiry and Reports > Purchase Order Inquiry*
    *-or-*
     *Departmental Functions > Purchase Order Inquiry*

2. Click  .
   The program displays the PO Inquiry Search screen.



3. Complete the fields with the appropriate PO details. Refer to the following table for field descriptions.

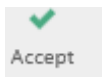| Field | Description | Mid Del Schools |
|---|---|---|
| **Purchase Order** | | |
| Dept/Loc | This box contains the department/location code for the ordering department/location. | Enter the department for which the purchase order was entered or leave this field blank to include all departments in your search. |
| Fiscal Year | This box contains the four-digit fiscal year in which the purchase order was created. | Enter the fiscal year the purchase order was created or leave this field blank to include all fiscal years. |
| Period | This box contains the one- or two-digit fiscal period in which the purchase order was created. | Enter the period the purchase order was created or leave this field blank to include all periods. |
| PO Number | This box contains the purchase order number for which you are searching. | Enter the purchase order number for which you are searching. |
| Gen Commodity | This box contains the general commodity class code.<br>This is the general commodity that houses detail commodities. An example of a general commodity would be 10100, which may represent office supplies, a class of detail commodities that consists of pens, pencils, paper, and so on.<br>Commodity codes are assigned in the Commodity Codes program. | Enter the general commodity class code for which you would like to view purchase orders.<br><br>**We do not currently use Commodity Codes** |

| Field | Description | Mid Del Schools |
|---|---|---|
| Entry Date | This box contains the date the purchase order was created. Enter the date in the MM/DD/YYYY format. | Enter the date the purchase order was created. |
| Needed by Date | This box contains the date by which the items are needed. | Enter the date the item was needed by. |
| Status | This box contains the status of the purchase order.<br>Status options are:<br>• 1 - Rejected<br>• 2- Created without the general ledger detail complete<br>• 4 - Allocated (The expense accounts have been completely entered and the purchase order is ready for posting.)<br>• 5 - Released but not output posted<br>• 6 - Posted.<br>The following status codes do not appear in Purchase Order Entry but do appear in Purchase Order Inquiry and Purchase Order Change Orders.<br>• 0 - Closed<br>• 8 - Printed<br>• 9 - Carryforward purchase order | Enter the status of the PO for a list of all POs with that status. |
| Type | The type of purchase order:<br>• Normal (N) - Purchase order for specific goods or services<br>• Blanket (B) (Authorized Fiscal Year POs) - A purchase order that is intended to be used over a long period of time.<br>• Dept/Emergency (D) - Purchase order that must be rushed.<br>• RFP/Bid (R) - A request for proposal or bid.<br>• Exported (E) - An exported purchase order. | Enter the type of the purchase order for a list of all purchase order of this type. |
| Requisition Number | This box contains the requisition number, if the purchase order was originally a requisition. | Enter the requisition number that the purchase order was created from. |
| General Description | This box contains the general description for the purchase order. | Type in the full description of the item on the purchase order or use a wildcard. |

| Vendor | | |
|---|---|---|
| Vendor Number | This box contains the vendor number for the purchase order. | Enter a vendor number for a list of all POs for that vendor. |
| Status | This is the vendor status: active or inactive. One-time pay vendors are not included in purchase order inquiry searches. | Enter a vendor status for a list of POs for vendors with that status. |
| Name | This box contains the vendor's alpha name. You must type the name exactly as it is entered Munis® Accounts Payable Vendors. You can use wildcards as search criteria in this box. (For example, you can type M* for all vendors names beginning with M.) | Enter a vendor's name for a list of POs for this vendor. |
| Type | This box contains a code identifying the service the vendor provides, such as office supplies, computer sales, or rentals. Type codes are established in Miscellaneous Codes in Munis® Accounts Payable. | Enter a vendor type for a list of POs for vendors of this type. |
| Class Code | This box contains a code identifying a particular business class with which the vendor is associated, such as minority, small business, or tax exempt. Class codes are established in Miscellaneous Codes in Munis® Accounts Payable. | Select a class code from the field help or leave this field blank to see all class codes. |
| Geographic Code | This box contains a code identifying in what region of the country the vendor resides or serves. Geographic codes are established in Miscellaneous Codes in Munis® Accounts Payable. | Mid Del Schools will not be using geographic codes. Leave this field blank. |

4. Click ✔ Accept to display the search results.

Notice the number of Purchase Orders that the search pulled. This is called an <u>active set</u> of records.

### GL Find

To find purchase orders by general ledger account details you must begin with an <u>active set</u> of records (like above):

1.  Click GL Find in the menu ribbon.
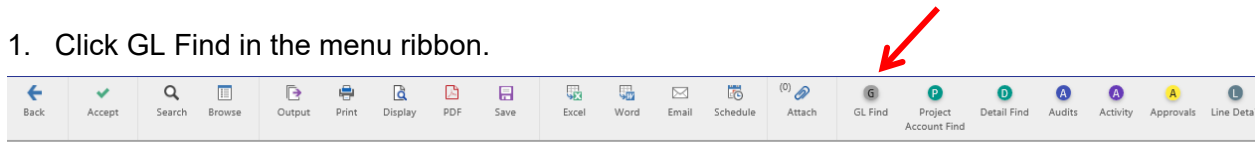


The program displays the GL Segment Find screen.



2.  Complete one or more of the account-related fields.

3.  Click [Accept] to execute the search.

**Detail Find**

To find purchase order records by detail you must begin with an <u>active set</u> of records (like above):

1. Click Detail Find.
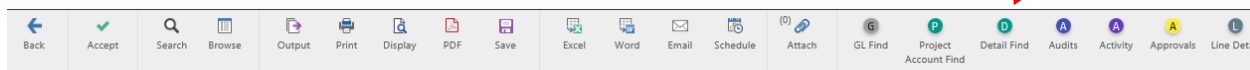


The program displays the PO Inquiry Detail Find screen.



2. Complete the fields with the purchase order details. Refer to the following table for field descriptions.

| Field | Description | Mid Del Schools |
|---|---|---|
| Commodity | This is the commodity associated with the purchase order. Commodities classify purchased items into categories or groups; they are defined in the Commodity Codes program. Type a commodity code that was entered at the purchase order detail level. | Enter the commodity code for a list of all POs with this commodity code.<br><br>**We do not currently use Commodity Codes |
| Inventory Item | This is the associated inventory item, if applicable. Inventory items classify purchased items into groups; they are defined within the Inventory Items program in | Leave this field blank. |

| Field | Description | Mid Del Schools |
|---|---|---|
| | Munis Inventory. Type an inventory item number that was entered at the purchase order detail level | |
| Line Total Amount | This is the total amount of the purchased items per line. | Enter a line total amount for a list of POs with this amount. |
| Description | This is the detail description that was entered in Purchase Order Entry at the detail level (per line item). | Enter a description for a list of POs with this line item description. |
| 1099 Box | This box indicates that the item requires a 1099 record. To find those purchase orders with line items that are identified as requiring a 1099 entry, enter Y in this box. | Check this box for a list of all POs with line items that are identified as requiring a 1099 entry. |
| Fixed Asset | This box indicates if the purchased item is a fixed asset. To find those purchase orders with line items that are identified as fixed assets, enter Y in this box. | Check this box for a list of POs for fixed assets. |
| Bid | This is the bid number associated with the purchase order line item, if applicable. | Enter a bid number associated with the PO, if applicable. |
| Work Order | This is the work order number, if applicable. | Mid Del Schools will not be using work orders. Leave this field blank. |

3. Click ✔ Accept on the toolbar to execute the search.

## Output

Once you have an active set of records, there are several output options within the Purchase Orders Inquiry program: Browse, Display, Print, Save, Export to Microsoft Word, Export to Microsoft Excel, and Send an Email.

### Browse

Click **Browse** from the menu ribbon to displays all of the records in the active set in a list format.

| Record Number | Year | PO# | Vendor Name | PO Date | Order Amount | Balance | Status |
|---|---|---|---|---|---|---|---|
| 1 | 2020 | 20000005 | A & D Supply | 07/01/2019 | 500.00 | 500.00 | 8 - Printed |
| 2 | 2020 | 20000006 | A Weldors Supply | 07/01/2019 | 800.00 | 800.00 | 8 - Printed |
| 3 | 2020 | 20000007 | ABC Supply Co., Inc. | 07/01/2019 | 2,000.00 | 1,509.44 | 8 - Printed |
| 4 | 2020 | 20000009 | Acme Fence of Oklahoma City Inc | 07/01/2019 | 2,900.00 | 1,618.75 | 8 - Printed |
| 5 | 2020 | 20000010 | Re-Man Shack Inc. IV | 07/01/2019 | 1,000.00 | 1,000.00 | 8 - Printed |
| 6 | 2020 | 20000012 | Re-Man Shack Inc. IV | 07/01/2019 | 400.00 | 400.00 | 8 - Printed |
| 7 | 2020 | 20000013 | All Sheet Metal | 07/01/2019 | 1,000.00 | 775.00 | 8 - Printed |
| 8 | 2020 | 20000015 | Anchor Paint Mfg. Co. | 07/01/2019 | 1,000.00 | 1,000.00 | 8 - Printed |
| 9 | 2020 | 20000017 | Bank of America, N.A. | 07/01/2019 | 1,500.00 | 1,083.59 | 8 - Printed |
| 10 | 2020 | 20000018 | Bank of America, N.A. | 07/01/2019 | 1,500.00 | 1,500.00 | 8 - Printed |
| 11 | 2020 | 20000019 | Bank of America, N.A. | 07/01/2019 | 1,500.00 | 1,331.45 | 8 - Printed |
| 12 | 2020 | 20000021 | HD Supply Facilities Maintenance LTD | 07/01/2019 | 300.00 | 300.00 | 8 - Printed |
| 13 | 2020 | 20000023 | Bradford Industrial Supply Corporation | 07/01/2019 | 2,900.00 | 2,654.16 | 8 - Printed |
| 14 | 2020 | 20000024 | Capitol Electric Motor Repair, Inc. | 07/01/2019 | 2,900.00 | 2,900.00 | 8 - Printed |
| 15 | 2020 | 20000025 | Archie I. Card Jr | 07/01/2019 | 300.00 | 300.00 | 8 - Printed |
| 16 | 2020 | 20000027 | Carrier Sales & Distribution | 07/01/2019 | 2,000.00 | 2,000.00 | 8 - Printed |
| 17 | 2020 | 20000028 | Central New Holland, Inc. | 07/01/2019 | 300.00 | 300.00 | 8 - Printed |
| 18 | 2020 | 20000029 | Cherokee Building Materials | 07/01/2019 | 1,000.00 | 876.38 | 8 - Printed |
| 19 | 2020 | 20000031 | Contractors Supply Co. & Builders Rental Co. | 07/01/2019 | 1,000.00 | 978.88 | 8 - Printed |
| 20 | 2020 | 20000033 | Contractors Supply Co. & Builders Rental Co. | 07/01/2019 | 300.00 | 300.00 | 8 - Printed |
| 21 | 2020 | 20000034 | Cope Plastics, Inc. | 07/01/2019 | 1,000.00 | 1,000.00 | 8 - Printed |
| 22 | 2020 | 20000035 | Crossland's A & A Rent-All & Sales Co. | 07/01/2019 | 800.00 | 340.00 | 8 - Printed |
| 23 | 2020 | 20000036 | Oklahoma Department Of Labor | 07/01/2019 | 1,750.00 | 1,750.00 | 8 - Printed |
| 24 | 2020 | 20000037 | Oklahoma Dept. Of Environmental Quality | 07/01/2019 | 4,500.00 | 4,500.00 | 8 - Printed |
| 25 | 2020 | 20000039 | DeepReach Oxidation LLC | 07/01/2019 | 2,900.00 | 2,900.00 | 8 - Printed |
| 26 | 2020 | 20000041 | Digi Security Systems LLC | 07/01/2019 | 1,500.00 | 80.00 | 8 - Printed |
| 27 | 2020 | 20000043 | Digi Security Systems LLC | 07/01/2019 | 1,500.00 | 873.00 | 8 - Printed |
| 28 | 2020 | 20000044 | Eckroat Seed Company | 07/01/2019 | 1,800.00 | 1,800.00 | 8 - Printed |

Search / Filter          Record          1 of 227

Sort any of the columns by clicking on the column heading; select a record by double-clicking the record line.

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 is 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.
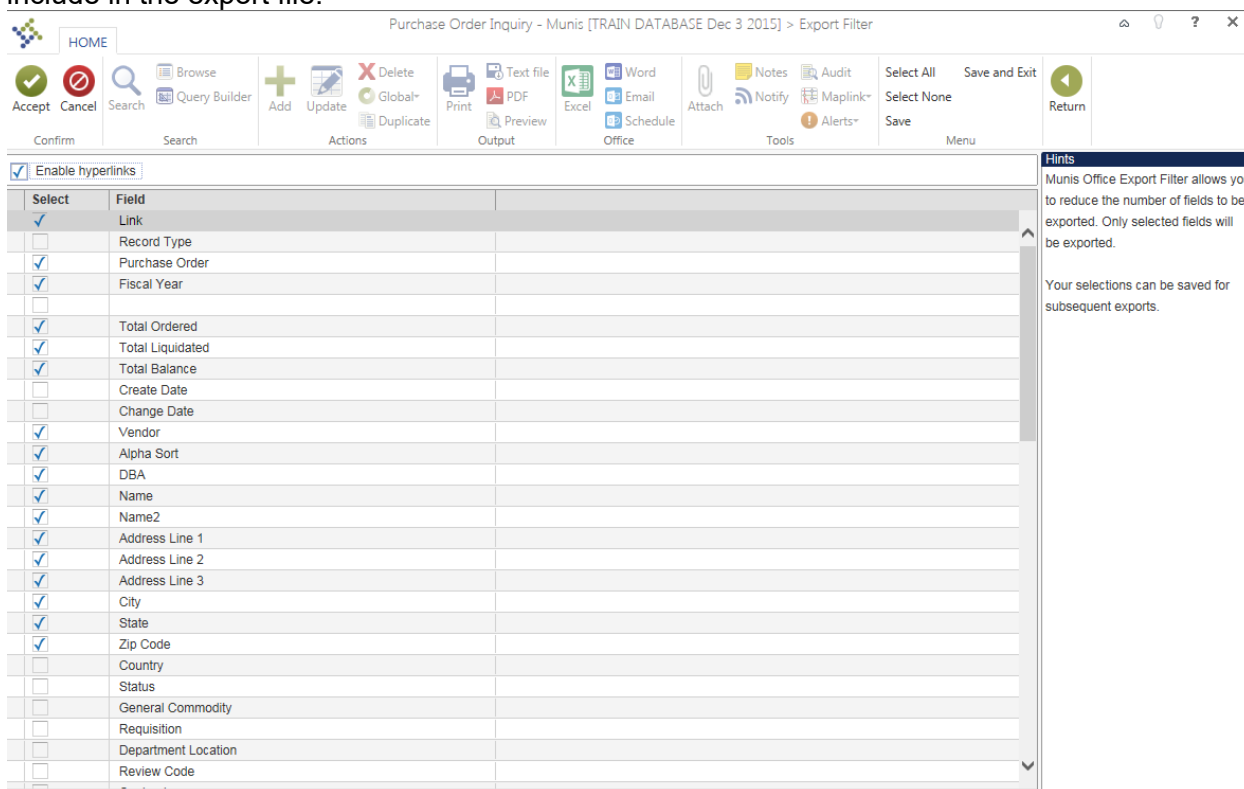
## Export to Excel

The Export to Excel option is available from the main screen and from a browse screen. In each case, the program exports the data to a Microsoft Excel spreadsheet that includes hyperlinks that display the purchase order record in Munis. You can manipulate the data within Excel as you would with any other spreadsheet.

From the main screen:

1. Click [Excel] on the menu ribbon to create a Microsoft Excel spreadsheet of the active set of data.
   The program displays the Export Filter screen from which you can select the details to include in the export file.



2. Select or clear the Select check boxes, as appropriate, to include fields.

3. Click [Accept] to create the file.

From a browse screen:

Click  on the toolbar to create a Microsoft Excel spreadsheet of the active set of data.
The program creates a spreadsheet according to the field selected on the browse screen.

### Preview

1. Click 🔍 Preview to view a report of the records on the screen.
   The program displays the Report Type Select message.
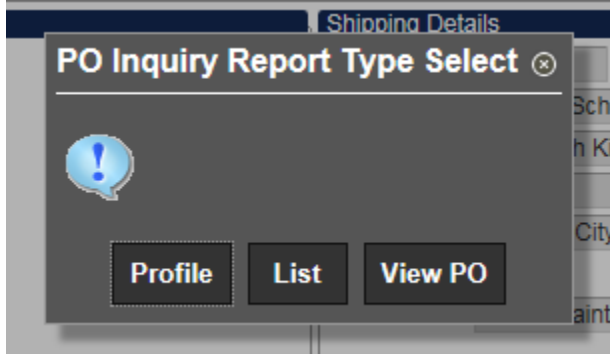


2. Select Profile, List or View PO:

   - Profile – Displays a profile report for the current record in Purchase Order Inquiry on a Munis display page. You can also display this report in PDF format.
   - List – Displays the PO List Report for all records in the active set on the Munis display page. You can also display this report in PDF format.
   - View PO – Displays the purchase order for the current record in Purchase Order Inquiry on a Munis display page. You can also display this report in PDF format.

### Print

Click Print 🖳 for the File Output option. It provides you with several options to output a report. These are the same options as provided by using the output toolbar buttons, but the File Output option allows you to select a printer, print to a local printer, print more than one copy, or to rename your saved reports.

1. Select Print from the menu ribbon.
   The program displays the Report Type Select message.
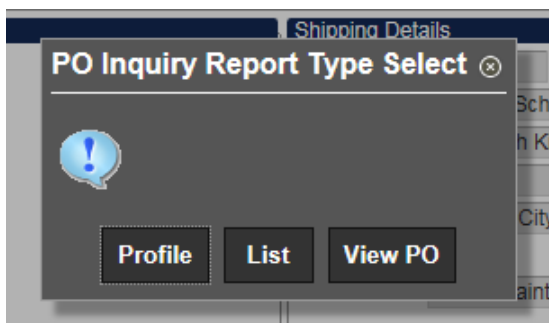
2. Select Profile, List, or View PO:
   Profile – Prints a profile report for the current record that is displayed n Purchase Order Inquiry.

   - List – Prints the PO List Report for all records in the active set.
   - View PO – Prints the purchase order for the current record that is displayed within Purchase Order Inquiry.

3. You will then be prompted to select and Output type.

| Output type | |
|---|---|
| ⦿ Munis printer | Printer name: LOCAL  ...  Properties |
| ○ Save | Status: Available |
| ○ PDF | ID: lo |
| ○ Display | Type: Command/script |
| | Comment: Outputs to a printer available to the Munis server. You may accept the default or select a different printer from the list. |

**Report title**
PURCHASE ORDER INQUIRY PROFILE REPORT

| Output style | Output options |
|---|---|
| ○ Presentation | ☐ Enable hyperlinks if present   Copies   1 ▲ ▼ |
| ⦿ Standard | |

OK    Cancel

4. Select the appropriate output type:

   - Munis Printer – Allows you to select any networked printer in Munis by completing the Printer Name box. You can also select the number of copies to print.
   - Local Printer – Opens the print dialog box for your PC, which allows you to choose a printer available, as well as the number of copies printed.
   - Save – Creates a Munis electronic file. This file can be viewed, printed or deleted at any time through the Saved Reports program. The filename will automatically default but it can be changed.
   - PDF – Creates a PDF view of the output.
   - Display – Provides a display-only text view of the output using the Munis pager.

5. Update the report title, if necessary.

6. Select the number of copies to print. This option is not available for the Local Printer, Save, PDF, or Display options.

7. Click OK.

### Save

Click Save  Text file to save a report to the Munis Spool directory. These files can be viewed, printed, or deleted at any time and are accessible through the Saved Reports program, which you can access from the Departmental Functions menu or by clicking Reports on the My menu in a program

When you click Save, the program displays the Report Type Select message.
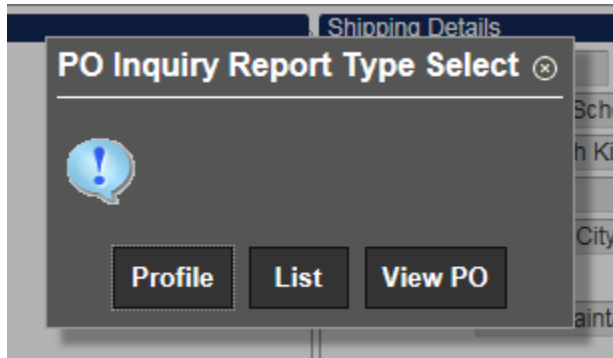


Select Profile, List, or View PO:

- Profile – Save a profile report for the current record that is displayed in Purchase Order Inquiry.
- List – Saves the PO List Report for all records in the active set.
- View PO – Saves the purchase order for the current record that is displayed within Purchase Order Inquiry.

Your report is saved as an electronic file; the program displays the report name in the program status bar.
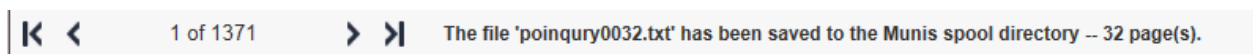
## Send an Email

Click  to send an email with a direct link to the record you are viewing.

When you click Send, the program creates an e-mail within your default e-mail program. Complete the To box with recipients' names, add any additional comments, and click Send.
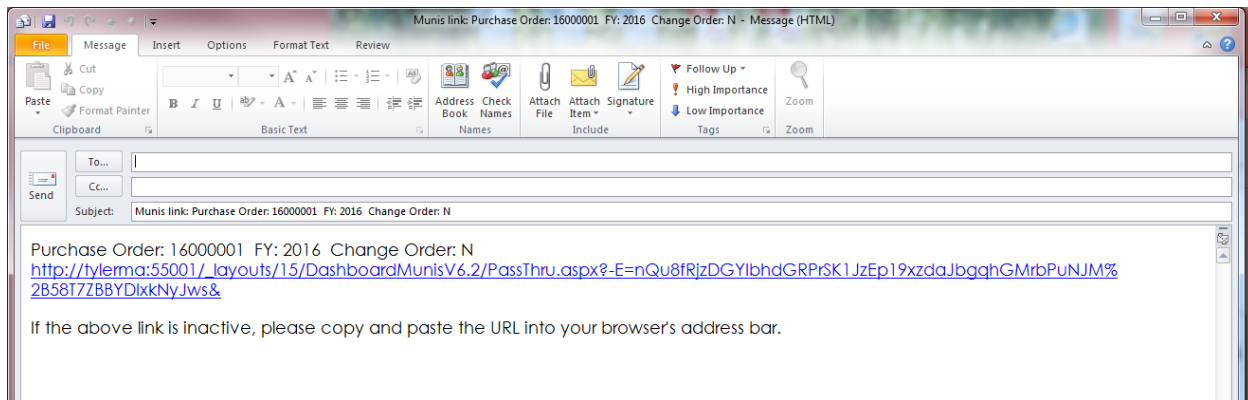
## Viewing Attachments to the Purchase Order Record

An image of the purchase order is available for viewing, printing or e-mailing in Tyler Content

Manager (TCM) by clicking the Attach button in the menu ribbon in the Purchase Order Inquiry program.



Select View Documents

From here you are able to Print, Save, or Email the file. You are also able to select related documents, such as Requisition attachments.
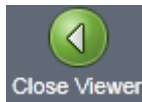
Once you are finished, you my click on [Close Viewer] to return to the PO inquiry screen.