Instructions to Print Open P.O. Report
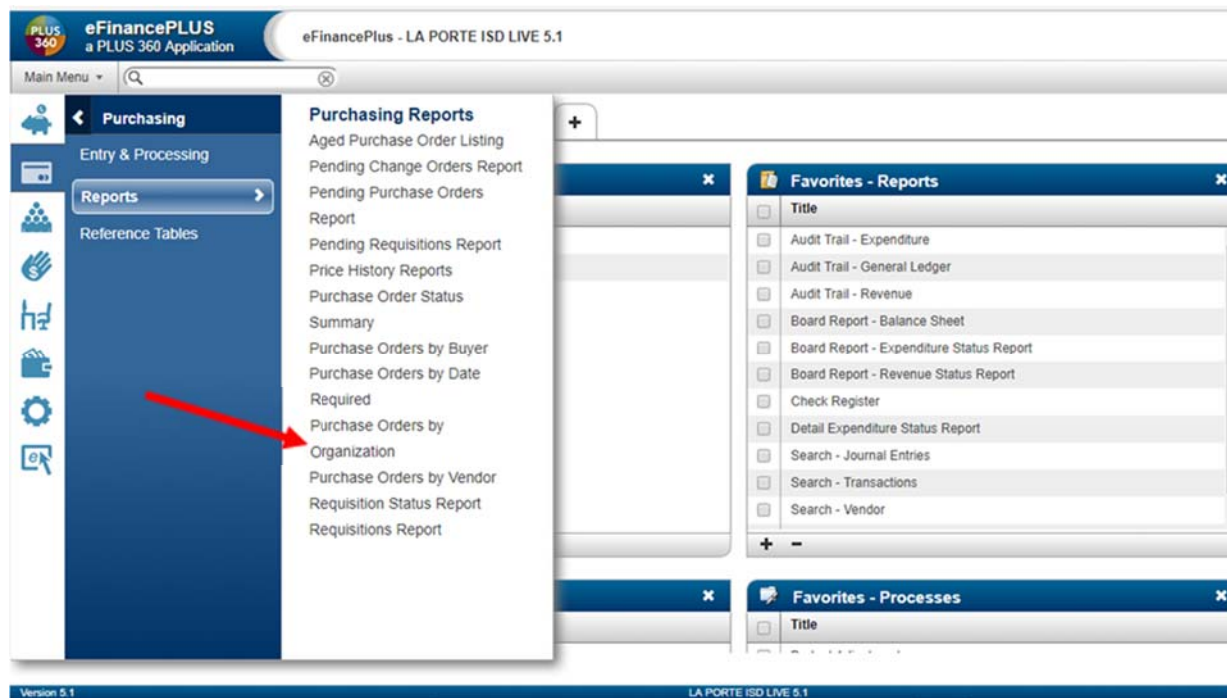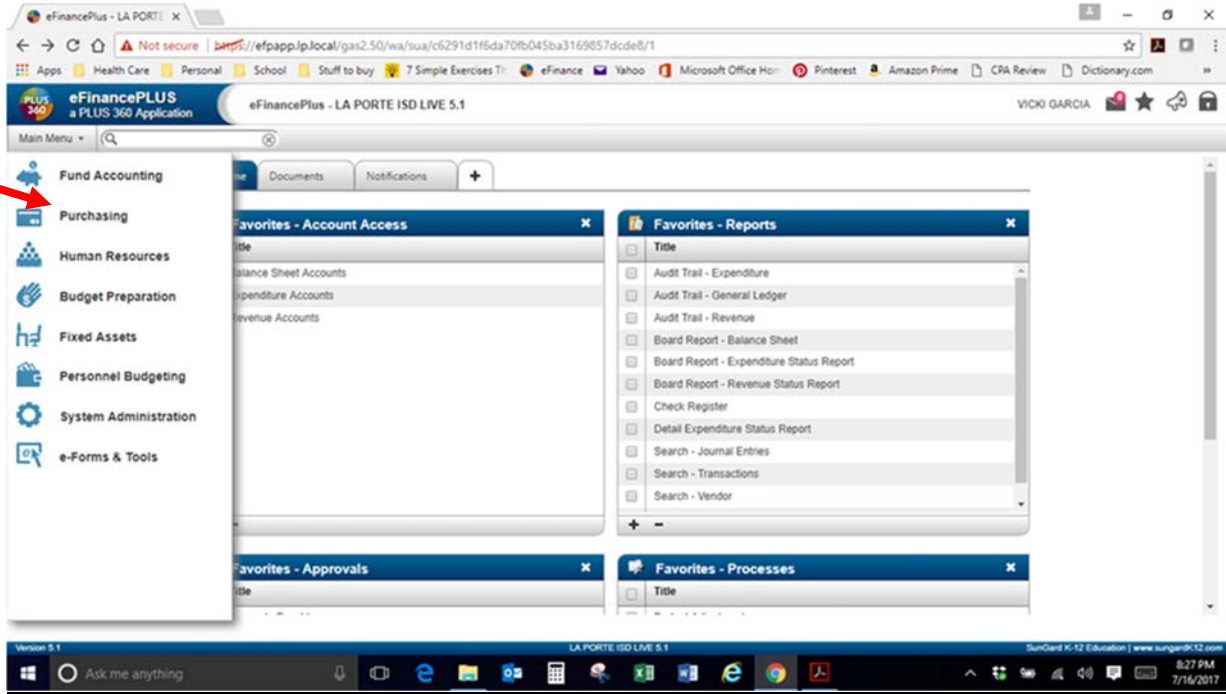
Menu Path: Main Menu, Purchasing, Reports, Purchase Orders by Organization
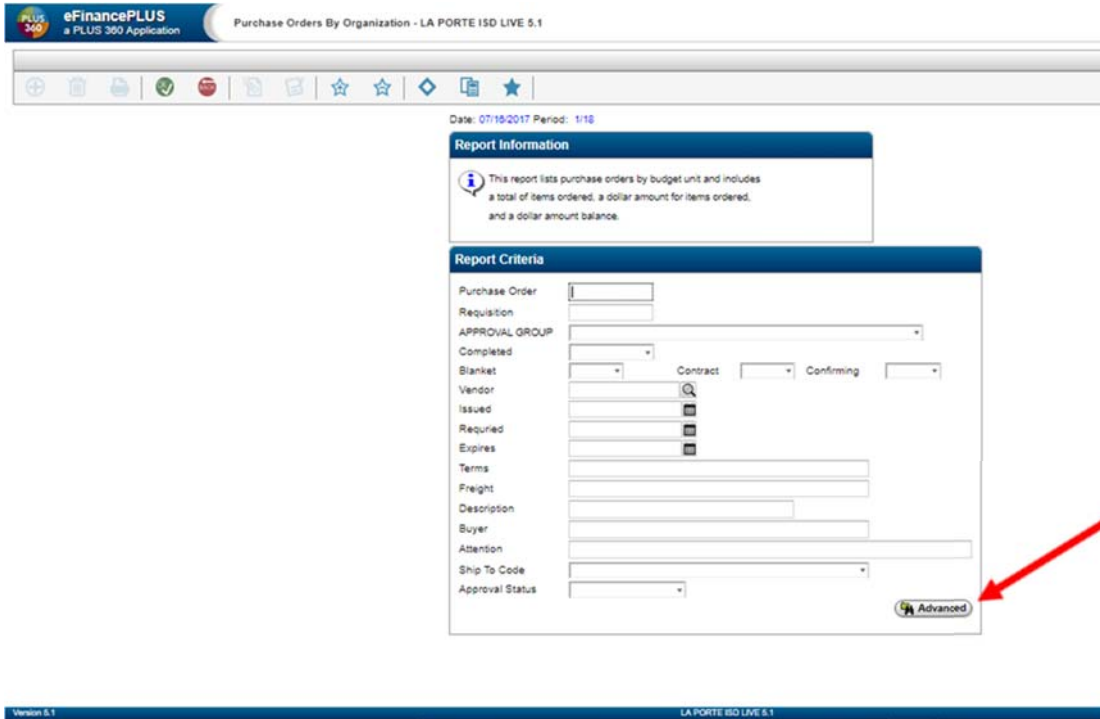
Click the "Advanced" button

Click the "Load" button.

Select "Open POs by App Grp" then click "OK".

Select your approval group by clicking the down arrow next to the empty box. (Third row, fourth box)

Select your approval group then click "OK".
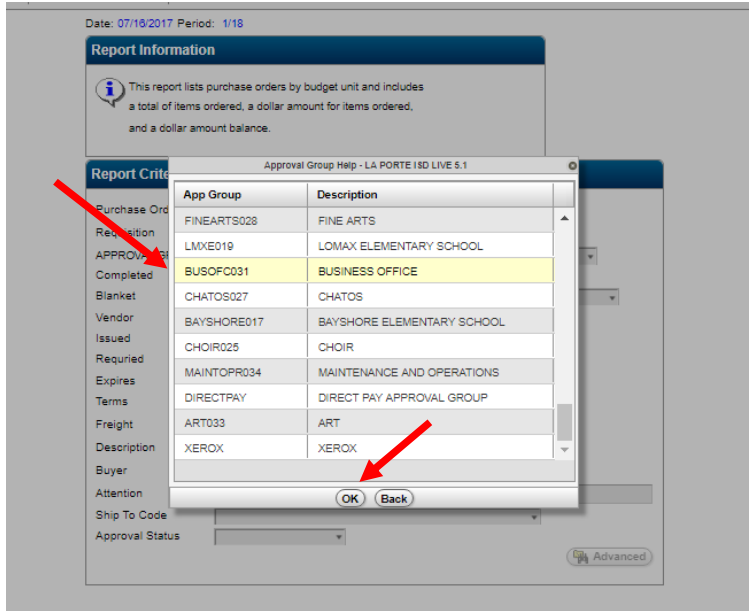
Check to see that your approval group is displayed. Then click "OK".
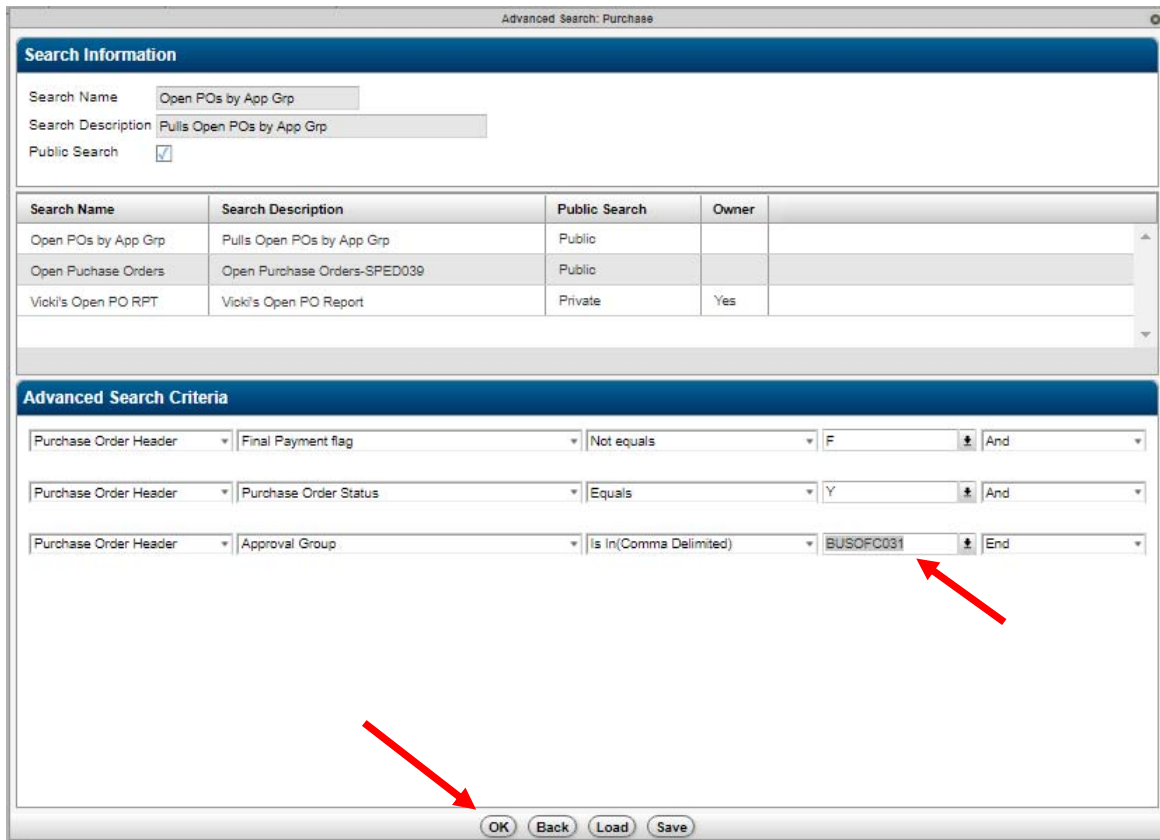
Click "OK".
Your report will generate and you will have to Save and Open to print to the screen.

Example Report

Things to consider when reviewing all open purchase orders:

1. You should know the <u>status</u> of every purchase order on your report.

2. Have the items been received?
   a. Yes? Contact Accounts Payable
   b. No? Contact Vendor to determine shipping status

3. Can the P.O. be closed?
   a. Yes? Email Accounts Payable to let them know to "Close the Purchase Order"

4. Do you need to add additional funds to a Blanket P.O.?
   a. Yes? Enter a change order to add funds.
      NOTE: The last day to enter fiscal year orders/requisitions using general funds (199) in eFinance is **close of business mid-April, official date will be provided in the March and April newsletters**. All budget amendments, budget managers/executive director approvals, correct coding and any supporting documentation (quotes, etc.) must be completed by this date.
5. Don't forget to review the report for your Federal Funds purchase orders.
   You will need to select your "FedFund" approval group code.