Opening the Purchase Orders display form

The Purchase Orders Display form is opened by selecting the Purchase Orders menu item under the Purchasing menu or by using the shortcut key for your operating system; Command-O on a Mac or Control-O on a Windows PC.

When the form opens you will see a list of all "Active" POs for your department. The POs will be sorted by date ordered. Items which have been entered but not ordered will be at the top of the list. All other POs will be sorted in descending order with the newest order dates toward the top of the list.

Note: A POs is 'Active' if its order status is not "Complete" or 'Billing Complete' has not been checked for all of it's funding sources.

A PO can be made inactive by changing the order status to "Complete" and checking the "Billing Complete" boxes. It can also be made inactive by changing the order status to "Canceled".

POs which cross fiscal years can be manually marked as 'Inactive' even though 'Billing Complete' is not checked for all of the fiscal years. This is done inside the PO form.
Manually making a PO Inactive

Open the PO in question.
At the lower left of the input form there is a check box labeled 'PO Active'.

Uncheck this box.
This checkbox will be functional only for POs which cross fiscal years.

Using the Purchase Orders display form

The Purchase Orders display form has three main areas: quick searches at the top of
the form, data display in the middle of the form, and the button options at the bottom
of the form.

Searching for specific POs

The boxed Quick Search area at the top of the form allows you to quickly search for
POs which meet specific criteria such as Project, PO Number, Vendor, etc. You
select the criteria either by entering data in the available fields or by selecting options
from a pull-down menu.

For all of the search fields which are not dates or dollar amounts you can use the '@'
symbol as a 'wildcard' in your search. (see examples below)

If you do not enter the wildcard symbol, GUS assumes that you want to find any
record which contains what you have entered.

Examples: I want to search for any POs which are associated with a project.
"Contains" searching:

Entering the letter "M" in the project field and hitting the tab key will find any PO in which the Project Code contains the letter 'M'.

You could find the same records by typing '@M@'.

"Begins with" searching:

Entering 'M@' in the project field and hitting the tab key will find all of the POs in which the Project Code begins with the letter 'M'.

"Ends with" searching:

Entering '@2' in the project field and hitting the tab key will find all of the POs in which the Project Code ends with the letter '2'.
"Multiple criteria searching:"

You may enter multiple criteria at the same time and GUS will search for POs which match all of your criteria.

In this example I want to find all Active POs which are against a 'CS' project and to a vendor whose name contains 'fisher'.

![Purchase Orders Form](image)

**Clearing the searches**

Clicking on the 'Clear' button near the upper left of the form will restore all of your search and display options to their initial values.

Clicking on the 'Show All' button will display all PO records.

**Viewing POs**

All of the POs which meet your search criteria are displayed in the central area of the form.

If an order is displayed in red double-click on it to see the reason. It generally means that there is something about this order which requires your attention.

**Explanation of displayed data.**

**Proj/FY column** - the Project Code(s) to which a PO has been charged.

If the Project has a fiscal year it will be displayed.

If the order is a split-funded order (more than one funding source) and both funding sources have the same Project Code an '*' will be appended to the Project Code.
If the order is split funded and both funding sources have the same project code, but the projects are in different fiscal years, the displayed Project Code will have '*' appended and the fiscal year will say 'Multi'.

If the order is split funded and the project codes are different, the Project Code will be displayed as 'SPLIT'.

All split-funded orders will display two numbers after the Project Code. The first is the number of funding sources. The second is the number of invoices which have been posted against this PO.

<table>
<thead>
<tr>
<th>Proj/FY</th>
<th>Ordered</th>
<th>PO Number</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDF07* 2 49</td>
<td>01/21/04</td>
<td>KK4111</td>
<td>&lt;- 1 proj code, 2 splits, 49 invoices</td>
</tr>
<tr>
<td>SPLIT 2 2</td>
<td>06/08/06</td>
<td>SB40548-0</td>
<td>&lt;- 2 different proj codes, 2 invoices</td>
</tr>
<tr>
<td>CS300* / Multi</td>
<td>04/26/07</td>
<td>SB43548-0</td>
<td>&lt;- 1 proj code, multiple fiscal yrs</td>
</tr>
<tr>
<td>CS120 / 07-08</td>
<td>09/18/07</td>
<td>034005-81119</td>
<td>&lt;- 1 proj code, with fiscal year</td>
</tr>
<tr>
<td>SMN03</td>
<td>11/30/07</td>
<td>008444-81132</td>
<td>&lt;- 1 proj code, no fiscal year</td>
</tr>
</tbody>
</table>

**Ordered** - the date this PO had its order status changed to 'Ordered'.

**PO Number** - the purchase order number for this PO

**Vendor** - the name of the Vendor for this PO.

**Description** - the general description associated with this PO.

**Total Cost** - the sum of invoices posted against this PO.

**Type column** - the order type of this PO.
- 'LV' = Low Value POs - order placed by the department.
- 'SB' = high value SBPO - order must be placed by Campus purchasing.
- 'VB' = Vendor Blanket PO - VB must be set up by Campus purchasing, but subsequent orders may be placed by the department.

"O" column - refers to the Order Status for this PO.
- "E" = Entered
- "V" = Reviewed
- "O" = Ordered
- "P" = Partial
- "C" = Complete
- "X" = Canceled

"B" column - refers to the Billing Status for this PO.
- "C" = Complete - all of the funding sources for this PO have 'Billing Complete' checked.
- "I" = Incomplete - all of the funding sources for this PO do not have 'Billing Complete' checked.
Sorting POs

You may sort the displayed POs by clicking on the column headers. A click will sort in ascending order. A shift-click will sort in descending order.

If you desire to sort by multiple criteria, click on the 'Order By' button near the bottom of the form.

Note: When you do a click on the 'Ordered' column, the POs which have no Ordered date will show at the top, then all other POs will be in order of descending date (most recent first).

Editing POs

To edit a PO, double-click on it.

Creating New POs

New PO

To create a new PO, click on the 'New' button near the bottom of the form. You may also use the keyboard shortcuts, Command-N on a Mac or Control-N on a Windows PC.

Duplicate PO

You may also create a new PO by selecting an existing PO and then clicking the 'Duplicate' button near the bottom of the form. This will duplicate most of the information in the selected order, including the line items. You will need to enter new information in some fields.